MAURITIUS RESEARCH COUNCIL

INNOVATION FOR TECHNOLOGY

CAN LOCAL MARKET SUSTAIN THE EXISTING LOCALLY ORIENTED GARMENT PRODUCTION CAPACITY

Final Report

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StraConsult

" CAN THE LOCAL MARKET SUSTAIN THE EXISTING LOCALLY ORIENTED GARMENT PRODUCTION CAPACITY "

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TO THE MAURITIUS RESEARCH COUNCIL

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ACRONYMS

bn	billion
CIF	Cost Insurance Freight
COICOP	Classification of Individual Consumption According to Purpose
CMT	Cut Made and Trim
EPZ	Export Processing Zone
GDP	Gross Domestic Product
EU	European Union
HBS	Household Budget Survey
HS	Harmonising System
KZN	Kwazulu Natal
MFA	Multi Fibre Agreement
MIDA	Mauritius Industrial Development Authority
UK	United Kingdom
T&C	Textile & Clothing
VAT	Value Added Tax

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CHAPTER 1: EXECUTIVE SUMMARY

1.0 EXECUTIVE SUMMARY

Understanding the profile of garment consumption in Mauritius is what this study is primarily about. As such it will provide an invaluable source of information on the market both for the retailers of clothing items and more importantly to those enterprises whose production is essentially oriented onto the domestic market.

The conditions under which the domestically oriented component of the textiles and garment sector has operated has dramatically changed between 2001 and 2005. Tariff protection which was as high as 80% up to April 2005 has now been greatly reduced to a fixed Rs 50 to Rs 250 depending on items concerned. The campaign for enforcement of intellectual property has wiped out a market for fake brands which at one time was a booming business. The value of imported garment on the domestic mauritian market has increased by 110% between 2001 and 2005. However the estimated value of local consumption for the same period has doubled. The average monthly household expenditure on clothing has increased by 9.7% in value terms when comparing years 96/97 and 2001/2002[1]. However, the average household expenditure on clothing has decreased among all income classes for the same period. It is estimated that the total local consumption[2] of garments was at Rs 3.31 billion in 2005.

Most comforting is the fact that import penetration is estimated to have remained relatively almost at the same level at 30.5% in 2000 and 36.0% in 2005. Selected import data allowing for comparison for 2003 and 2005 indicate a dramatic five fold import increase in unit terms of pants and briefs, and a two fold increase in imports of skirts, the increase in imports has been more modest for other items such as shirts, dresses, nightdresses and pyjamas, and even a fall in imports in the case of swimwear.

This first ever comprehensive study on garment consumption in Mauritius has been carried out through a survey of 25 production units, 39 retailers, 41 hawkers and 1,200 individuals aged between 15 and 65.

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[1] Unfortunately more recent data from Household Budget Survey is not available.
[2] The addition of value of imports and total sector output less value of export.

The study reveals the following findings:

Locally produced shorts/Bermuda, trousers/pants/jeans, T-Shirts, shirts, jackets and female swimwear dominated sales of all retail outlets and hawkers surveyed. On the one hand this indicates that in the narrow range of products the domestic production capacity is focused on, the producers are managing to give customers satisfaction on their price and quality exigency.

However, existing enterprises and new entrepreneurs may be well advised to consider the fast increasing demand for certain items which are little produced locally. These concern men's pants and briefs where the imported value for the year 2005 has jumped to Rs 19.05 million from Rs 2.1 million in 2004.

Similarly, ladies' wear is an important market which is being little supplied to by the domestic production, namely concerning skirts where imports has increased from Rs 13.6 million in 2004 to Rs 38.2 million in 2005, dresses where the increase is from Rs 21.5 million to Rs 29.9 million for the same respective years and underwear representing a Rs 28.2 million market in 2005.

It is also shown that the factors determining the purchase decision of the younger segment of the population, those between 15 and 24 are more towards quality and style.

As from the age of 25 quality and price factors are the most important determinants.

- Average per capita consumption of apparel for the year of the survey amounted to 23 items of clothing that is a monthly average of 1.9 item of clothing per respondent. (Pg 73)
- On the overall, there is no significant difference in the apparel consumption for young people and older people in terms of number of units [pg 79]
- Respondents buying less than 20 items yearly (42.4%) are mostly housewives, labourers, baby sitters, security officers.
- Respondents buying more than 50 items of clothing yearly [12.4%] (above average consumers) are mostly Technicians and Associate Professionals, and Clerks. (Pg 74)

- Contrary to perception, semi urban and rural consumers have a higher monthly household expenditure on clothing than urban ones.
- Majority of respondents (80.3%) did not spend more than Rs 4000 on apparel for the last 6 months. They are predominantly from craft and related trade workers, housewives, clerks, technicians and associate professionals.
- Clerks, craft and related trade workers, technicians and associate professionals as well as students are those who have monthly shopping trips for garments whereas the average frequency is more in terms of once every 2 to 3 months.
- The more frequent shoppers are more the urban ones.
- Interestingly only a small minority of consumers indicate buying only imported garments. A clear majority of 75% buy either exclusively or predominantly local items.
- However, respondents purchasing more locally produced apparel are price sensitive, while those purchasing more of imported apparel are more fashion and quality driven. [pg 83]
- Shops remain by far (61.4%) the preferred retail channel for consumers. "La Foire" is the next preferred place with street hawkers the third choice for only 6.3%. Hyper markets is definitely not considered as a place of preference. Tailor made clothing has lost ground completely. Majority of respondents prefer to go apparel shopping in shops because they have a wider choice of quality garments. Most of them go shopping for clothes with the intention of purchase every 2-3 months or every 6 months. [pg 86/88]
- Both men and women have purchased more underwear than any other apparel items. [pg 80]
- In fact the top five items bought by men are in order: slips/boxer shorts, socks, T-Shirts, Trousers and shirts. For women these are: panties/knickers, bra, blouses, tops, and skirts.
- Women tend to have a wider range of clothes, and seem to replace their garments at a faster pace. (Pg 75)
- The survey of retailers, hawkers and consumers confirm that Mauritians are more inclined for casual wear.
- It was found in the survey for retailers and hawkers that women take out their purse mostly for panties/ knickers and bras than any other apparel item. Percentages for panties/knickers (81.5%) and bras (78.4%) in the consumer survey illustrate this trend. [Pg 76]

- Female respondents purchasing underskirts are mostly housewives and clerks from rural area [Pg 76]
- As for the purchase of bras married female respondents are those who tend to purchase fewer bras as compared to other categories of female respondents (single, divorced…). It has also been noted that propensity to purchase bras reduces as age increases. [pg77]
- Women in the urban regions tend to purchase more trousers/pants/jeans than women in rural regions.
- Single men purchase more slips/boxer shorts than other male respondents do. Those are from the rural area and earn an average monthly income of Rs 4,000 – Rs 10,000.
- Along with quality and style, the one major factor influencing people in the choice of garment is price. [pg 83]
- Younger segment shop more frequently then elder segment.
- Urban dwellers and females seem to go shopping more frequently than their rural and male counterparts respectively.
- The survey of hawkers and retailers showed a reverse trend in the sales of garments. Sales of imported apparel exceeded those of a local origin for retail outlets; as for hawkers, it was sales of garments of a local origin that exceeded sales of those of an imported origin. This finding goes against common perception that hawkers are selling imported garments in competition with locally produced ones.
- There is a reverse relationship between genders with respect to the origin of garments they buy. Sales of locally manufactured garments for men was greater than that of imported garments; as for women, the sales of garments of imported origin exceeded that of garments of local origin.
- Hawkers sell a massive quantity of locally produced garments for men – 121, 015 units compared to only 262 units of imported garments. On the other hand, hawkers' sales of local women apparel is only 4, 300 units compared to 38, 438 units of imported garments.
- Work Wear (e.g. overalls) sold were exclusively from the local production while Bathrobes, Swimsuits and Body Shirts were exclusively of imported origin.

It is estimated that there are about 125 small garment producing units and about 60 medium size ones. The former almost exclusively rely on the domestic market for their sustainability. The sample surveyed for this study was in conformity with this pattern. 40% were in this category and 60% produced both for domestic and export market. However in the latter category, export market represented only 25% of production.

- The overall total production of garments of the production units surveyed amounted to 1, 368, 051 units, out of which 863, 193 units of garments for men and 453, 007 units for women. In addition, a relatively low 1,851 units were outsourced for production.
- Most enterprises surveyed produce T-shirts (270, 805 units), followed by Shirts (244, 153 units), Undershirts (115, 000 units), and Trousers/Pants/Jeans (52, 161 units).
- 40% of the enterprises surveyed produce exclusively for the domestic market while the remaining 60% produce both for the local and export market.
- Most of the enterprises surveyed have recourse to Shops/Retailers (66.7%) for the dissemination of their garments, with hawkers being the second most preferred channel as compared to supermarkets/hypermarkets (38.1% to 9.5%).
- 40% of enterprises surveyed have experienced an increase in sales on the local market over the last 3 years. 32% have experienced no change in sales whatsoever, while 24% have found their sales for the local market to be on the decline.
- However it is worth noting that even if a greater number of enterprises have witnessed an increase in local sales, the decrease in local sales in terms of units of garments is more significant, a total of 25,080 decrease in units as compared to 22, 596 increase in units.

CONCLUSION

In conclusion, this study gives very interesting insights into the pattern of garments consumption in Mauritius and some of its sociological underpinnings. The study is broadly comforting for producers of garments focused on the domestic market in as much as import penetration is still not dominant and consumers in their majority still support the purchase of locally made garments.

However, the producers would be well advised to work more closely with the retail channels to capture changing trends and to consider ways and means to maintain their competitiveness based on quality and price but also to supply more fashion oriented items as in demand from the younger generations.

Finally, producers and new entrepreneurs in the sector could look at the broader range of items in demand which are yet to be adequately provided for by local supply.

CHAPTER 2: ABOUT THE STUDY

2.0 INTRODUCTION

This study has been undertaken following the award by the Mauritius Research Council of an Unsolicited Research Grant Scheme.

2.1 BACKGROUND TO THE STUDY

Being one of the oldest sectors in the history of industrial development, the textile and clothing industry is often referred to as a 'traditional industry', as a sector belonging to the so-called 'old economy'. According to Stengg (2001), the textile and clothing industry (T/C industry) is a very diverse and heterogeneous industry, with its products being used by virtually everybody – private households and business alike. Its activities range from the production of raw materials (i.e. natural as well as man-made fibres) to the manufacture of a wide variety of semi-finished and finished products. Every private household regularly buys garments, bed linen or carpets. Downstream parts of the T/C industry – such as the clothing industry – consume the output of more upstream parts (such as fabrics of all types and colours).

In Mauritius, the clothing production sector involved as at March 2006 about 207 companies (CSO). The twenty biggest ones employing each above 1,000 persons are all export oriented. They employ collectively an approximate 42,000 persons and make up 80% of total clothing exports. About 60 medium size companies employ between 100 to 1,000 persons each. These companies are involved in either CMT work for the larger companies, part supply to local market and export. The third group about 125 small companies employing up to a hundred workers are predominantly producing for the domestic market. The small and medium companies provide for 13,000 jobs.

It has been abundantly said by policy makers, and all other stakeholders that the garment industry in Mauritius is going through a critical crisis. The focus of the issues has been the capacity of the industry to meet challenges of the new competitive environment created by the phasing out of the Multifibre Agreement (MFA) in 2005.

The garment production industry of Mauritius can be disaggregated in two components with respect to their geographical target markets:

1. Those who produce mainly or exclusively for export markets (EPZ enterprises)
2. Those who produce mainly or exclusively for the domestic market

While the focus has been mainly the export oriented component of the garment industry, the policy implication of the phasing out of the MFA has to date not been addressed for the local market. The main issue here is not about quota since Mauritius never had any such restriction on garment import from any origin, but about tariff level. Although there was no contractual obligation to remove or reduce tariffs as from 2005, government made a policy decision to suddenly bring them down to zero. This was subsequently raised with some tariffs level introduced albeit lower than the pre-June 2005.

The issue therefore for the domestically oriented garment industry is whether they have the necessary capability to withstand their ground against competition from imports. It is also whether the domestic demand is adequately understood and production geared to meet such demand appropriately and competitively.

Demand for garments is a relatively complex matter and need to be properly defined. Demand is first defined in terms of quantity, which itself is a function of level of development of a society, climatic conditions, culture, purchasing capacity and priority.

In 1967 the per capita consumption of outwear of the American consumer was 14.3 units of clothing. In 1995, the American consumer purchased on average 28.7 units of outwear garments per capita; in China the estimated per capita consumption for the same period was 2 units, and in higher income developing countries it is estimated to be 8 units.

Demand is also defined in terms of three categories whose demand is in itself a function of the level of development and sophistication of a society as well as purchasing power.

These three categories are:

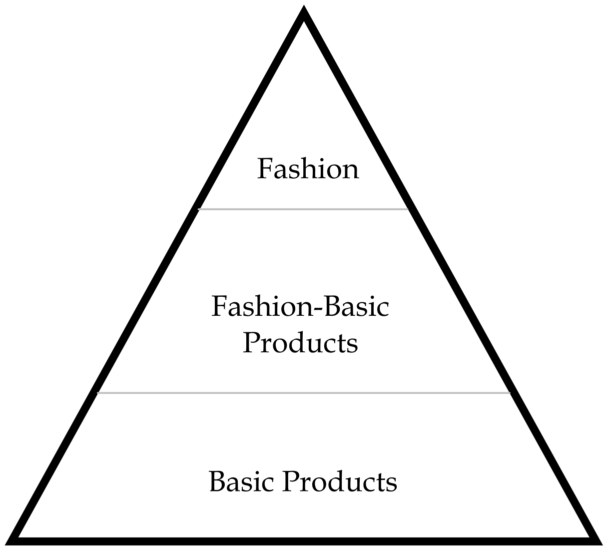


Figure 1The Fashion Triangle

The state of demand for clothing in Mauritius is as yet undefined. This is to our knowledge the very first study ever done to determine the level and profile of clothing consumption in Mauritius.

The clothing market in Mauritius has been essentially supply driven. In such a market situation, producers manufacture to supply products as they perceive the needs. The products are pushed to retailers who take from what supply is available, and consumers buy what retailers offer. Except for very few cases, empirical evidence indicates that most operators in the industry have not studied the market. In more developed markets, it is now retailers that drive the supply since they are closer to consumers.

A better understanding of existing and potential demand will clarify whether locally oriented production capacity and supply pattern can be sustained, or need to be reengineered or whether one is likely to see in the near future a downsizing of the sector with loss of employment.

2.2 PURPOSE OF THE STUDY

The research is centered on the issue as to whether the local market has the potential to sustain the existing local production capacity, and whether there is potential for expansion of this local production capacity of firms for supply to the domestic market.

The research is premised on the assumption that the local market is supply-driven rather than demand-driven. It is believed that production is being carried out without taking into consideration what actually is the demand. If market needs are considered for production purposes, the local market might offer opportunities to local market-oriented firms.

The research will be the very first attempt to clarify the quantum and specifics of the clothing market in Mauritius. It is an attempt to reveal both the present state of demand and the unexpressed demand which is often a feature of the clothing market, particularly in a situation where the supply chain, producers – retailers – consumers, is not well coordinated and provides little feedback.

2.3 OBJECTIVES OF THE STUDY

The aim of this proposed research will be:

1. Determine the characteristics of the garment industry in Mauritius in terms of the types of products and quantity produced for the local market
2. Evaluate the size of the clothing market in Mauritius
3. Identify the real expressed and unexpressed needs of consumers on the domestic market.
4. Analyse the opportunities and future development prospects of the domestic-oriented firms in relation to the local market.

More specifically, the research will cater for the following:

- The types of garments produced locally
- The quantity disseminated on the market
- The yearly total production for the local consumption
- The channels of distribution
- The types of garments purchased per year
- The quantity of garments purchased per inhabitant per year
- The frequency of purchase whether monthly, occasionally (…)
- Assess the possible unexpressed demand for clothing

CHAPTER 3: LITERATURE REVIEW

3.0 INTRODUCTION

The textile industry has always been rhythm with trends and the evolution of lifestyle and culture. Textiles and clothing are also among the sectors where developing countries have the most to gain from multilateral trade liberalization. In fact, the prospect of liberalization of the textiles and clothing sectors was one of the reasons why developing countries accepted to include services and intellectual property rights – areas to which they were sceptical at the outset – in the Uruguay Round (Reinert, 2000).

The clothing industry is labour-intensive and it offers entry-level jobs for unskilled labour in developed as well as developing countries. Job creation in the sector has been particularly strong for women in poor countries, who previously had no income opportunities other than the household or the informal sector. Moreover, it is a sector where relatively modern technology can be adopted even in poor countries at relatively low investment costs. These technological features of the industry have made it suitable as the first rung on the industrialization ladder in poor countries, some of which have experienced a very high output growth rate in the sector (e.g. Bangladesh, Sri Lanka, Viet Nam and Mauritius). These characteristics, however, have also made it a footloose industry that is able to adjust to changing market conditions quickly.

PART 1: DETERMINANTS OF DEMAND FOR CLOTHING

3.1 CONSUMPTION PATTERNS AND TRENDS

“Understanding the consumer demand for clothing categories, shoes and other non durable commodities is important not only to apparel and retail business, but also to public policy makers in such an area as international textile and apparel trade where such consumer expenditure and demand patterns are important information in guiding the decisions policy makers. Most of today’s clothing firms are challenged by market driven demand” (American Apparel Manufacturers Association [AAMA], 1995).

The AAMA (1984) also added that managers of apparel manufacturing and retail firms recognize that demographic changes influence the present and future demand for different categories of clothing and the sales of clothing.

Demand for clothing is determined by factors like demographics, life style, types of products, and attitudes towards fashion, price and quality ratio. Other factors are income and spending power, priorities in consumer choices, developments in fashion, brand awareness and preferences, climate and environment.

How consumers allocate their limited budgets to clothing categories and shoes and other non-durable goods when relative prices for purchased goods and consumer’s income change, and how demand of clothing categories and shoes change when demographic or economic variables change are the essential questions to understand.

3.1.1 How patterns and trends are determined?

The general criteria for market segmentation of outerwear are done using certain specific factors. According to the EU Market Survey 2004 on outwear, the general criteria for market segmentation can be summarized as follows:

3.1.1.1 Demographical Factors

The size and age structure of the population is one of the basic determinants of how much will be spent on clothing. Although this may appear to be a rough method of categorising the market, it is interesting because:

- generally speaking, different age categories have different clothing behaviour, and
- developments within the various age categories can be followed, by comparing results with projections

3.1.1.2 Attitude towards fashion and life-style

Elements of fashion are: colour, design, exclusivity and style. Character, ideas and attitude to life will be emphasized by the way a person dresses. Clothing serves as a means of expression of personality. Combination fashion is eminently suited to expressing a personal style.

Consumers set priorities in their pattern of expenditure according to their life style. The increasingly individualistic nature of society will bring about a rise in demand for goods with an expensive value. People do not mind spending their money on such goods, while for products with a lower priority, a low price is the main criterion. The varieties in life styles and sub-cultures have led to an increase in the fragmentation of the clothing market. It has also become rather difficult to predict the buying behaviour of the clothing consumer.

The consequence of the above is that the consumer expects retailers to have a clear image. In order to meet these consumer demands, many clothing stores are going in for an upgrading and, on the other side, value retailers and clothing discounters start or maintain their operations on low-price level. With fashion a less important concept these days, but life style a more important one, many suppliers are likely to broaden their non- clothing products ranges in particular adding by accessories, shoes, sunglasses and similar products, either directly or via licensing.

3.1.1.3 Price/quality ratio

Quality is an essential requirement for the higher segments of the clothing market. There are several aspects about it; quality must be reliable, may not change in time, is closely connected with service and products have their own brand and design. Quality requirements are also that the clothing fits well and must be comfortable. The trend towards looking for higher quality and more expensive products has increased in recent years but an even more important trend is the price-conscious consumer looking for fashionable trends as well as good quality materials. Value for money is still the most important purchase criterion for most consumers.

3.1.1.4 Brands

In a world of change and insecurity, brands provide an ideological home. All humans face a fundamental conflict between wanting to be different and needing to belong. Belonging to a group or a community of some kind provides us with an identity that says something about how we perceive ourselves and how others should perceive us.

3.1.1.5 Climate

Generally spoken, weather has an impact on the timing of expenditure, which tends to be highly seasonal. Unexpected weather changes influence consumers in their purchasing decisions. Consumers in warm, dry climates tend to purchase less durable, cheaper clothing, which influences the share of clothing expenditure.

3.2 THE CHALLENGES OF THE TEXTILE AND CLOTHING INDUSTRY

In 2002, Euratex reported that already today, many companies in the textile and clothing industry no longer fit the classical mould. They may have become importers or distributors as well as manufacturers; or they may have extended their activities, be it vertically or horizontally. The objective behind these changes in the textile and clothing industry are influenced by the following five key trends:

1. The change in the age structure in mature markets with an ageing population and rising income levels;
2. The growth of single households versus the classical family households model in mature markets;
3. Fast improvements in the living standards for a new middle class in the fast growing markets of the most advanced of the developing countries
4. The growing importance of the "intangible sphere" in consumer behaviour that will favour "ethical consumption" in a world dominated by "urban life"
5. To those changes one should add the fact that there would be rising media coverage & consumer awareness of environment, health and social issues. It is already evident that even if the magnitude of this phenomenon is hard to access, the authorities and the consumer may

have to choose in certain areas between human health and safety as such and the environment as a whole, imposing new and costly technical standards to EU industry. (e.g. fireproofing)

On a global scale one can speak of a three-tier market development:

1. In developed (high income) countries, consumer demand is likely to grow, however at a lower rate than spending at large, and growth in value will be stronger than in volume.

    - There is no doubt that consumers will require prompt responses from producers and distributors as market segmentation will increase strongly and may be accompanied buy new ways of consuming.
    - On the whole EU consumption is likely to increase significantly overall, although there would be areas of substantial growth; including technical and "intelligent" textiles
    - There would be rising demand for high value functional, healthy, environmental friendly and personalised textile products requiring from companies the ability to work with smaller batches, greater flexibility and quick response (mass customisation and industrial made to measure).

2. In emerging (middle income) countries consumer demand will develop substantially both in volume and value. Consumption will tend to grow increasingly in the middle range of the market.

    - On the whole consumption growth in those countries will create pressure on availability of fibres. This is likely to create and upward pressure on prices for materials.

3. In developing (low income) countries consumption growth will be small and informal forms of distributions will prevail.

All the above applies mainly to clothing and interior textiles for private consumption, which to date represent the lion's share of textile production. With more and more textile products destined for commercial use (industrial and service sectors) market trends will also follow the patterns of industrial cycles and global development of industry and service activity.

PART 2: DEMAND FOR CLOTHING IN SPECIFIC COUNTRIES

3.3 THE EUROPEAN UNION MARKET

The EU clothing industry is dominated by a large number of small and medium-sized enterprises, the average company having 19 employees in 1997. (Euratex – European Apparel and Textile Organisation).

As Stengg said in 2001, globalisation and ongoing liberalisation expose EU industry to ever more competition from a large number of low-labour cost countries (especially from Asia), for which the sector constitutes one of the most important sources of income and employment. As a result, the degree of import penetration has increased considerably, from 12% in 1990 to 23% in 1999 for textiles, and from 30% in 1990 to 46% in 1999 for clothing. In the light of the huge labour cost differential between many third countries and Europe, EU industry strives to remain competitive by means of higher productivity, and through competitive strengths such as innovation, quality, creativity, design and fashion.

During 2001-2003, as reported by the EU Market Survey 2004, the consumption of clothing in the EU (15) represented a growth of 2.5 percent and amounted to € 259 billion in 2003, of which 82 percent or € 212 billion was outerwear. The trend of the clothing consumption in the ten new EU countries (since 1 May 2004) showed a much stronger increase in clothing consumption: 21.1 percent during the same period but total consumption remained rather low as did the per capita consumption.

Germany is still the most important country in clothing consumption in the EU, despite the continuing decrease, as can be derived from Table 1. The gap between Germany and the UK and Italy has become smaller. Moreover, the five countries (Germany, UK, Italy, France and Spain) account for almost 80 % of EU clothing consumption.

Table 1 Consumer expenditure on clothing (including VAT) and outerwear in Euro million in the EU and some other selected countries, 2001-2003 (ranked by 2003 spending)

	2001 (000,000' €)	**2002** (000,000' €)	**2003** (000,000' €)	**Per Head consumption in 2003 (€)**	**Outerwear Consumption in 2003** (000,000' €)
Germany	63,046	61,570	58,550	710	48,158
United Kingdom	45,580	46,845	48,196	806	39,568
Italy	40,335	41,055	41,920	723	33,464
France	33,056	34,094	35,174	591	28,858
Spain	19,895	21,249	21,890	521	18,070
The Netherlands	9,655	9,985	10,088	627	8,926
Belgium	8,914	9,195	9,223	895	7,470
Austria	6,746	6,873	7,002	875	5,644
Sweden	5,417	5,597	5,710	642	4,690
Greece	5,578	5,570	5,608	525	4,482
Portugal	4,857	5,250	5,400	505	4,436
Denmark	3,394	3,455	3,584	666	3,002
Finland	2,510	2,620	2,753	529	2,258
Ireland	2,941	3,070	3,187	787	2,618
Luxembourg	311	362	370	829	302
EU(15)	**252,235**	**256,790**	**258,655**	**681**	**211,946**
Poland	4,019	4,411	4,836	124	3,898
Czech Republic	1,498	1,640	1,756	170	1,420
Hungary	1,104	1,259	1,421	139	1,109
Slovakia	585	677	812	150	720
Slovenia	478	519	571	271	453
Baltic States	941	1,000	1,074	147	863
Other Countries (2)*	298	319	336	305	276
New EU countries (10)	**8,923**	**9,825**	**10,806**	**144**	**8,739**
Switzerland	5,555	5,690	5,773	780	4,627
Norway	3,890	4,110	4,385	963	3,636
Major EFTA countries	**9,445**	**9,800**	**10,158**	**854**	**8,263**

**estimated*
Source: Retail Intelligence and several national statistics in EU Market Survey 2004 - Outerwear including leather garments

In contrast, it is noted that Belgian and Austrian consumers are the biggest spenders on clothing in the EU, with € 895 and € 875 respectively. Looking at the major EU counties, UK consumption per capita was the highest (€ 806) followed by Italy (€723) and Germany (€710). The Netherlands, French and Spanish consumption was less than the EU average consumption of clothing.

The consumption of clothing per capita ranges from € 124 (Poland) to € 307 (Cyprus) among new countries under the state of the European Union. Moreover, consumer expenditure in the prosperous non-EU countries Norway and Switzerland is far above the EU average.

In terms of future potential, it is clear that the new EU member states, in particular Czech Republic, Hungary, Slovenia and Poland, offer greater scope for market growth as incomes and spending patterns approach European norms, although this may still be some years away. Also of interest are Portugal, Greece, Finland, Spain and France, which have surprisingly low levels of clothing spending per capita. Despite rapid modernisation, Portugal and Greece are economically poorer than the other countries mentioned. Finland is a highly rural market.

In all markets surveyed, women's outerwear is the leading sector of the clothing market. In 2003, the share of the total value of outerwear sales ranged from 51.8% in France to 57.2% in Germany. Women are considered to be more sensitive to fashion and buy more impulsively than men. In many EU countries the demand for traditional wear is declining in favour of casual and leisurewear, which implies higher increasing sales in terms of volume rather than in terms of value. Table 2 below display some figures about a survey of Value sales of outerwear of year 2003 in the five major EU countries divided in three segments: women' s outerwear; Men's outerwear and Children outerwear.

Table 2 Value sales of outerwear) by sector in major countries, 2003 (in %)*

	Women's outerwear	**Men's Outerwear**	**Children's outerwear**
Germany	57.2	29.1	13.7
United Kingdom	54.0	31.0	15.0
Italy	52.2	33.6	14.2
France	51.8	30.1	18.1
Spain	52.2	33.1	14.7
The Netherlands	53.3	32.4	14.3
EU (15)	**54.0**	**31.1**	**14.9**

Source: Several national statistics in EU Market Survey - Outerwear including leather garments

3.3.1 GERMANY

Germany is the largest clothing market in the EU, because of its large population (82.2 million), which accounted for a total consumption of outerwear of € 44.6 billion.

Women's and men's outerwear expenditure showed the same pattern: a decrease of respectively 2.4 and 2.9 percent in 2001 and a slight recovery in 2002. The German market for babies and children's wear remained stable in the period 2000-2002, but in the last five years the market declined by 6.5%.

For many years, German citizens belonged to the bigger spenders per capita on clothing in the EU; however, they still devote a share of spending on clothing above the EU average. The German market is dominated by imported clothing, as domestic production has declined in the face of the low prices maintained by products from outside the EU.

Value market shares for women's outerwear were trousers and jeans (22%), shirts and blouses (13%), dresses (8%) and skirts (5%). Market shares for men accounted for 32% for trousers and jeans and 18% for shirts. Other market shares were suits (13%), jackets and blazers (18%) and knitwear (12%). Jeans for men and women accounted for 19 %(in terms of volume) of total trousers.

Despite the slight recovery (in value) in 2002, the German market for clothing remained weak. The market is forecast to grow by just over 10% during the period 2002-2005 to reach a value of € 49 billion in 2005. Women's outerwear will remain the largest market sector, accounting for € 27.6 billion.

3.3.2 FRANCE

Total spending on clothing amounted to (an estimated) €34.3 billion in 2002, of which 82% concerned outerwear. Average spending per person is lower than the major EU markets (Germany, Italy, and UK), but higher than South European countries, like Spain, Portugal or Greece. Consumer clothing expenditure has grown for the last 3 years, up 1.9% in 2000, 4.6% in 2001 and an estimated 0.3% in 2002. In general, women's wear is performing better than men's wear.

France has a high consumption of children's wear in the EU with 3.6 billion in 2002, of which 10/14 years was the largest sector in value terms by over 32%, reaching around 1.1 billion. In 2001, the per capita spending on children's clothing including sportswear and clothing accessories, amounted to an average of € 530 per child aged 0-2 years and 450 per child aged to 3-14 years.

Sales of trousers and shorts for both sexes and made of cotton as well as man-made fibres increased, so did cotton dresses and cotton and synthetic skirts, cotton blouses and cotton and synthetic ensembles for women.

As for the market shares (in terms of value), women accounted for 18% for trousers, shorts and jeans and suits/co-ordinates (13%). Other market shares were as follows:

- Blouses and tops (6%)
- Coats and raincoats (7%)
- Outdoor jackets (6%)
- Dresses (8%)
- Skirts (7%)
- Knitwear (15%)

Jeans for men increased 5% since 1999 to 26.5 million pairs in 2001, while jeans for women reached 15.8million pairs in 2001. The market for outerwear is forecast to grow annually by 2% from 2002 to 2005 to reach a value of almost € 30.0 billion.

3.3.3 ITALY

Italy ranked third in clothing consumption after Germany and the UK. The consumption per capita is far above the EU average. Price is generally not an issue for Italians when it comes to fashion apparel. Consumption of clothing increased 4.7% in value to 31.0 billion in the period 1999-2002, of which 80% outerwear.

Italy ranked fourth in children's outerwear consumption after Germany, UK and France. Girl's wear by far the most important group in this sector amounted for 48% of total expenditure.

The regional variations reflect differences in income per head and climate differences. Lighter and cheaper clothing can be worn in the warmer climate of southern Italy. Expenditure on clothing in the South of the country and in the Islands is much less than in the north.

Trousers and jeans constitute by far the largest product category in the men's outerwear market with a market share (in terms of value) of almost 30%. The growth in sales of trousers and jeans indicate the popularity of casual and leisure wear. As for the consumption of shirts, it represents 13% of outerwear. Knitwear, another protagonist of the casual look, grew to 24%.

As for the consumption of clothing for women, the purchases of dresses and skirts increased in 2001 and accounted for 16% in terms of value, followed by coats and rain- coats (8%), outdoor jackets (9%). Knitwear grew to 22% in the same year.

The market for outerwear in Italy is forecasted to grow by 7.5% from 2002-2005 to reach a value of € 33.3 billion.

3.3.4 UNITED KINGDOM

The total consumption of clothing in 2001 in the UK amounted to 40.6 billion while for 2002 a growth of 3.2 % is expected. The UK remained the second biggest clothing market in the EU behind Germany. UK consumers, just as Belgian and Austrian citizens, belonged to the bigger spenders per capita on clothing in the EU.

The UK market for women's wear grew by 5.4% in the period 1999-20001, to reach a value of 17.7 billion while men's wear sales grew to 11.6 billion in the same period. UK spending on outerwear has continued increasing but at a reduced rate compared to previous years; this is due to structural changes in the types of clothing being purchased. There has been a market movement away from formal wear towards casual an outdoor/fitness clothing. Per capita spending on children's wear has regularly increased throughout the review period. This sector s increasingly shaped by a greater fashion awareness, which adds value to the market.

Childrenswear represents a fast-growing sector of the UK clothing industry. Since 1991, the retail market has grown by over 60%, and in 2001, there was an increase of 5.1%, to £5.57bn.

Childrenswear has evolved from being a homogenous product to a diverse part of the fashion industry, offering premium-priced products and catering for every sector of the market, from budget-priced basics to the latest designer labels.

Market growth over the past 2 or 3 years to 2002 has been attributed mainly to the continued influence of fashion, with almost every designer and top fashion retailer launching their own children's couture. The main buying force is from 9 to 14 year-olds, or `teenagers', who are more financially independent and fashion conscious, and are heavily influenced by pop celebrities and sports personalities.

3.3.5 SPAIN

Clothing took a moderate position in expenditure by the traditional Spanish household. Globally spoken, the Spanish clothing market can be characterised by two types of consumers: an older traditional consumer mainly active in agriculture in western Spain with an expenditure on clothing of €275 per capita as opposed to a modern fashionable consumer living in big cities like Madrid, Barcelona or Valencia etc. Or regions like Catalonia and Basqueland with an average of €700 expenditure per capita.

Spanish women prefer natural fibres above man made fibres like polyesters. For many years, market shares in consumption of ensembles and dresses were rather high for Spanish women, but stabilised in the period under review. Men prefer combinations of indoor jacket and trousers above suits. The general trend to more casual wear is illustrated by growing expenditure on market shares of cotton and to a lesser degree man made fibres T-Shirts, jerseys and sweaters ,etc. of various materials and weight classes, cotton trousers including jeans and shorts for both sexes, track suits, outdoor jackets and cotton shirts and blouses.

3.3.6 CHANGES IN MARKET DEMAND / CONSUMPTION PATTERNS

Baden, 2002, reported in Trade Policy, Retail Markets and Value Chain Restructuring in the EU Clothing Sector, that the overall size of the EU clothing retail market was €213.9bn in 1998 (including sales tax). The largest markets are: Germany (€ 48 bn), the UK (€ 40 bn), Italy (€ 35 bn) and France (€ 32 bn) (see Table 3), with these four markets plus Spain constituting more than 75 percent of the total. No other member state has more than 5 percent of the total market.

In the EU market generally, and the larger markets particularly, even though the absolute level of spending on clothing may be increasing slowly, its relative growth is low compared to other retail sectors and clothing's share of consumer spending and non-food retail spending is in decline across Europe (with the exception of Ireland). This is, in part, due to competition with an ever-widening range of commodities, especially household, leisure and electronic goods and services (Retail Intelligence, 2000). For example, in Germany, spending on clothes as a percentage of total consumption spending fell from 6.3 percent in 1990 to 4.9 percent in 1998. The comparable figures for France were 5.5 percent and 4.2 percent respectively (Just-style, 23-11-00).

According to a briefing paper on the Scottish Textile and Clothing Industry (2000), the proportion of disposable income that the UK consumer is spending on clothing is falling. In 1960, clothing and footwear represented 10 % of total household expenditure; in 2000 it represented only 6%. There are now many other new goods and services competing for disposable income – computers, mobile, access to internet etc – and expenditure on clothing has increased at a slower rate than consumer expenditure as a whole.

In real terms, consumer expenditure has increased by less than 3% per annum on average since 1985, whilst expenditure on clothing and footwear has increased at a much slower rate of 1.6% per annum. Between 1997 and 1998, expenditure on clothing and footwear fell by 1.9% in real terms, despite an overall growth in consumer expenditure of 1.8%. The fall was most marked in menswear, whilst sales of womenswear (including girlswear and infant wear) were flat. To some extent, this fall reflects heavy discounting by retailers in an increasingly competitive market.

Beyond aggregate changes in demand, and national level performance, are also broader trends in the structure of demand for clothing, reflecting socio-economic change, including employment and socio-cultural trends. While in the 1970s, the middle market segment expanded rapidly, recessions followed by booms and widening inequalities in the 1980s and early 1990s led to the collapse of this market and the expansion of market segments at both upper and lower ends of the price range.

In the most recent period (1995 onwards), the market has again changed shape, with the largest segment by far being the 'value' market, topped by a diminished middle and upper end market. In this context, competition between retailers is most intense in the overlap between the middle and the value markets.

3.3.7 PROFILE OF THE EU CLOTHING RETAIL SECTOR

There are significant differences in consumption habits in the varying EU countries, due to differences in culture, traditions and tastes. According to Retail Forward, a growing trend for ageing consumers to spend cash on homes, personal care, savings or leisure time, means apparel retailing in the EU is going through major structural change.

Aspinall (1997) provides a snapshot of the EU textile and clothing retail industry in the mid-1990s.It comprised (in 1996) approximately 600,000 enterprises, employing 2 million people. This represented 18% of total retail sector enterprises, 15 percent of retail employment and 10% of retail turnover. He identifies six main types of retail channel: independent stores, specialist multiples, department and variety stores, hyper- and supermarkets and mail order. Aspinall has defined the six main types of retail channel as follows:

Independents are defined as retailers whose market is geographically limited, and which tend to source from favoured suppliers on the wholesale market. The pattern varies considerably however, across Europe, with Germany and the Netherlands having a dominance of 'buying groups,' with long term favourable relations with manufacturers. These stores vary in their degree of specialisation in clothing, and cover the whole range of quality and price.

Department and variety stores sell clothing as part of a range of goods, covering all categories in the case of department stores, and a limited range for variety stores. These stores tend to sell own-branded collections, sometimes combined with 'national brands'. Department stores sell clothes in 'shops within shops,' offering outlets to medium to high quality and price manufacturers. Hyper- and supermarkets usually offer low price and quality clothing, often focusing on specific product ranges (e.g. underwear and hosiery, children's clothes, basics).

‘Mail order’ is a well-established segment of the clothing retail structure, which has tended to offer low to medium prices. It has several sub-channels, including direct sales through agents and catalogues, and, increasingly, e-commerce and TV sales. New technologies greatly favour the expansion of this sector, although there are some structural constraints, such as the high costs of distribution and returns, sizing difficulties, and the preference of consumers to ‘feel’ clothing products.

3.4 SOUTH AFRICA’S TEXTILE AND CLOTHING SECTOR

According to Rogerson, the making of clothes in South Africa was initially a skilled craft that was performed by tailors who had immigrated to the country from Eastern Europe. Nonetheless, whilst this tradition of producing clothes by tailors and dressmakers has a long history as in other parts of the world, it is evident that “the manufacture of ready-made garments in large factories is comparatively recent: (Rogerson, 2004). Clothing factories made their apparition in South Africa at the beginning of the 20th century with the first factory starting operation at Salt River, Cape Town in 1907. The main hindrance to local clothing manufacture was the very low cost of imported clothing of all but the best quality.

The South African market is characterized by a strong demand for variety that has remained unmatched by consumption, which has remained relatively low. According to the Textile Federation, consumption totals no more than a third of production, significantly less than that of developed countries. Currently local per capita consumption of all textile fabrics is less than 7 kg, represented by all end usage.

According to the Textile Federation, the textile industry in South Africa is the country’s sixth largest employer in the manufacturing sector and the eleventh largest exporter of manufactured goods. After the mining industry, it is the second largest user of electricity and the second largest payer of rates and taxes in towns and cities across South Africa in which it is located. The industry currently employs some 56,000 workers in the textile sector and 11,000 in the knitting sector, while a further 200,000 workers are employed in dependent industries. The industry’s local sales for 2000 were R10,2 billion and exports totaled R2,9 billion. The industry’s contribution to the Balance of Payments is some R13 billion annually. The industry represented 1,5% of GDP in 2000. 1 The clothing sector contributes an additional 0.8% to GDP. Employing some 136,000 people, the clothing industry recorded sales of R10,6 billion in 2000 with exports accounting for $US 1,4 billion of this figure.

3.4.1 PRODUCTION AND CONSUMPTION

South Africa is a large producer of raw wool and cotton, and also manufactures textiles and clothing. Within manufacturing, T&C constitutes the sixth largest industry constituting about 10% of enterprises, 15% of (formal) manufacturing employment and 7% of net output (OETH, 1997: 83). Between 1972 and 1993, T&C accounted for 8.3% of South Africa's manufacturing exports, 4.7% t of imports and 4 of merchandise exports (1% clothing, 3% textiles (Salinger et al, 2000: 42).

Dunne (2000) observed that the contemporary South African clothing economy is dominated by a small number of large retail groups, each comprising a number of chains focusing on different consumer groups whilst operating in various sub-sectors of clothing, textiles and footwear markets.

The manufacture of garments in South Africa, like much of other industries in the country, is oriented largely towards the domestic market. The market operates as a buyer-driven commodity chain with the major clothing retailers assuming a critical role in terms of the apparel chain. South Africa's clothing industry caters to a wide range of retail customers needs and products as follows:

1. High income end: quality styled garments, fashion products, boutique clothing and products for high fashion claims
2. Middle market: Semi-styled garments, often with frequent style changes
3. Low income end: mass volume production which has experienced, post-liberalisation, intense competition from imported clothing

Moreover, with the rapid shift in market conditions, particularly in the context of political and economic changes, "a massive black aspirant market that is increasingly demanding and sophisticated" has emerged. Clothing markets are becoming increasingly volatile, segmented and complex with the number of seasons growing from two (summer-winter), to four (winter-spring-summer-autumn).

The industry is geographically concentrated, with the main T&C producing centres located in the Western Cape around Cape Town and in Kwazulu Natal (KZN) around Durban (October, 1996; Prinsloo, 1996). Production capacity is also found, and increasingly being located to lower wage areas, such as the Eastern Cape.

The clothing sector in these areas has distinct characteristics. In the Western Cape, there are strong links between manufacturers and formal retail sector, with most major retailers having their headquarters in Cape Town. Production is oriented towards the domestic fashion market and exports. The Western Cape has a relatively high share of technologically advanced, larger enterprises 177 and a corporate orientation, as well as a significant, much less developed or organised, small enterprise sector, and a growing trend towards informalisation.

By contrast, in KZN/Durban, production tends to be mostly focused on the lower value end of the domestic market – although with pressures from imports this is now shifting – and on 'commodity' (low value) exports to the US and elsewhere in Africa. There are a large number of smaller and many informal firms, particularly Cut Made and Trim (CMT) businesses, with a high degree of vertical disintegration. The entrepreneurial base is more diverse and organised, and strong links to informal retail channels in this region. Because of its strong focus on the domestic market, production is also highly seasonal (House and Williams, 2000.)

The overall size of the domestic clothing market in 1995 was US $4.1 billion, of which half was in women's wear, 30% in men's with the latter rising faster. In 1995, 5 % of consumption (by value - 15% by volume) was imported, with a trend towards rising imports. Domestic demand is stagnating particularly in the lower value end of the market, so that retailers and producers are being forced to move up-market and there is increasing struggle over retail market share. The clothing retail sector is highly concentrated and wields considerable power over manufacturers.

There is a major process of restructuring and regional consolidation of the clothing value chain underway in Southern Africa, as a consequence of changes in the trade regime at international and regional levels, as well as in both domestic and global retail markets.

Clothing firms in South Africa have faced major competitive pressures in the last decade, with some similarities to the pressures on the EU industry, as well as some distinct features. Key factors include (Altman, 1994; House and Williams, op cit.): the Stagnation in domestic demand, linked to poor overall economic performance and the lack of growth in spending on clothing; and a massive increase in both legal and illegal imports (mainly from East Asia), related in part to tariff reduction, but also to poor enforcement of existing trade regulations, especially in the early 1990s, leading to a collapse in domestic demand in the low value segment.

3.5 UNITED STATES MARKET

With only 5% of the world's population and 14% of the world's textile mill output, the U.S., because of its high standard of living, consumes about 20% of the world's textiles and receives more than 21% of the world's textile and apparel imports. Moreover, in 1996, U.S. consumers spent more than $260 billion on apparel and over $250 billion on home furnishing products. Americans purchased 1.3 billion pairs of trousers, 3.2 billion shirts and blouses, 500 million sweaters, and 675 million active-wear garments. Moreover, California leads all states in apparel manufacturing. The value of its annual clothing production stands at more than 13 billion dollars. Los Angeles and San Francisco are the state's main manufacturing centers. New York and Texas are the second and third largest manufacturers of clothing. The clothing and textile demand in U.S is huge and is considered to be a very lucrative segment. The domestic demand is so huge that the local is in difficulty to cater for their demand and that why so many countries' export is oriented towards the U.S market.

3.6 CHINA

According to Li Yi-you (2004), in the years since its isolation from the rest of the world was ended, the People's Republic of China been the recipient of massive foreign investment, and exports have grown dramatically. Foreign investors are drawn to China by the combination of a booming economy, low-cost labour, and access to a potentially enormous market. China's market is becoming increasingly important in the world and now China is dominating the world market in the segment of the textile and apparel product.

The importance of China's textile and apparel industry to the development of the economy is growing. During the past two decades, as the most important textile and apparel production site, China has captured the attention of apparel firms and retailers from the developed countries of Europe, North America, and Japan due to their competitive low-labour cost. In the 1990s, manufacturers and marketers in many countries took a keen interest in the consumer market in China. The size of the market (1.2 billion potential customers), plus the increasing spending power of Chinese consumers, has attracted the attention of industry executives elsewhere, who are eager to sell their product.

Li Yi-you , in his description of China as an enormous consumer market, states that it offers potential opportunities; however, he adds that certain important challenges also exist. China's apparel retail market has turned from being product-oriented to becoming consumer-oriented, and so the idea of consumer service has grown more important. However, the difficult step in tapping into the Chinese market is to gain a good understanding of consumers locally. The ability profitably to enter China's apparel market hinges greatly on a better awareness of the Chinese consumer's needs and wants, of their perceptions of foreign brands, and of their perceived price and quality of those foreign brands. Therefore, it is essential to do research on consumer behaviour, especially the brand effect on consumer behaviour in China.

3.6.1 REVIEW OF CONSUMER BEHAVIOUR IN CHINA

Li Yi-you also provides a snapshot of the consumer's expectations of product quality In general, expectations have been steadily rising, owning to the increase in income and sociological forces, which have prompted high expectations of a better lifestyle. Chinese consumers today are looking for aesthetic and social value instead of just focusing on the basic needs of warmth and the protective function of products. Department stores are now crowded with people, but few of the shoppers are serious buyers. He further adds that Chinese consumers are eager to see what is available, especially from among foreign products since they have a lot of time to browse, and therefore are disinclined to convenience or impulse buying.

As for the younger consumers in China, as laid out by a review of different research in Dickson et al. (2004), they seemed to prefer purchasing imported apparel as they were more influenced by fashion, liked to try new products, preferred fashionable and branded foreign products, considered symbolism important, and were less sensitive to higher prices.

3.6.1.1 Brand effect on the Chinese Consumers

During the immature stage of consumer behaviour, consumers' limited experience with modern marketing makes them depend on reputable brands and track records. Sometimes consumers rely on price as a mark of quality. Therefore the brand effect is very important in China; brands accounted for one-third to one-half of all consumers' expressions of intent to purchase. As one indicator of brand importance, many Chinese consumers in the past usually left the makers' tags on the sleeves of their suits and the brand stickers on their sunglasses, even though they understood these should been taken off as suggested by Western habit.

However, according to the results of recent research into consumer behaviour in China, Chinese consumers now regard the brand as a less important factor than factors such as style, quality, cutting & fitting, colour, ease of maintenance, the service of the salespeople, price, and shop image. This implies that consumers in China are becoming more advanced in their buying requirements, and can no longer be deceived by superficial factors such as brand and advertisement.

The maturing of consumer behaviour does not mean the failing of the brand effect. In fact, consumers' emphasis on style, quality, and workmanship (etc.) brings an opportunity to expand the brand effect, because a successful brand should be the synonym of a popular product with good style, high quality, good workmanship (…).

3.6.1.2 Brand effect on the potential of specialty stores

Compared to shopping malls, boutiques, department stores, and street stores, specialty stores are the most popular apparel retail form appreciated and accepted by Chinese people. In contrast to other retail forms, which are specialised by product, most specialty stores are supplied by specific brands; specialty stores sell only one label or brand. Strong brand information makes specialty stores effective channels in attracting early sympathisers. It does not matter if a product is not positioned in a fancy display; the Chinese consumer will look for it if they have heard about it. They want to see complete information, and even specification details, next to the product. They read this information carefully to improve their understanding and to gain a feeling of security about the product, even for a garment fashion brand, its origin, how it arose as an international brand, and its worldwide market status.

The Chinese consumer's interest in specialty stores indicates that branded apparel have great potential in China. Very often these specialize store are family-owned or form part of the Small and Medium enterprise. Moreover, Chinese consumers speak more highly of China-made apparel than of that made in Japan, Europe or America. As reported by an expert, the styles and fittings of Western clothing are less suitable for Chinese consumers as both the body build and the taste of Asian consumers is quite different from those of Westerners.

3.7 INDIA

India is second far after China in their dominance of the world market in the textile and apparel segment. But now with the Turkey, Poland, Bulgaria (…), which are supplying the EU market, the position of the Indian textile and apparel product is threatened. Moreover, with China that has clutched the American market, India may be in great difficulty as the competition is forcing them to reconsider their strategy and position on the global market.

According to Carver, He and Hister (2004), the total apparel market in India, including tailored and ready-made goods, is estimated to be U.S. $20 billion. More than 50% of the Indian market is for traditional wear (sari, dhoti, salwar, etc.), which does not go into fabrication or is tailored at home. The western apparel sector market is around U.S. $9 billion, of which exports accounted for more than U.S. $5.5 billion in 2000-01. The $3.5 billion domestic market is essentially in urban areas, where the consumption of ready-made apparel has risen significantly in recent years. Carver et al. also stated that given the low penetration of ready-mades, most of non-urban India still depends on custom tailoring as the major source of apparel. However, brands account for nearly two-thirds of the ready-made apparel segment.

In a recent statement given by a Senior Textile Ministry official on October 2005, who "*urge the textile manufacturers to shed China fixation and rather capitalize on the growing domestic market and develop it further*." The Joint Textile Commissioner Mrs. Shashi Sigh supports this idea by stating that manufacturers should not just look at export market for growth, but instead he affirmed that the Indian domestic market is robust enough to provide growth opportunities. It is true regarding the total size of the Indian textile market with an annually turnover of $ 36 billion and a projected figure of $85 billion in 2010. The export market represents roughly $13 billion and would be in 2010 around $50 billions.

Mrs Singh also explained that the domestic market has been growing at a rate of 8 % and that this growth will get a further push from the growing organized retail market, which has a 3% share in the $330 billion retail market. Furthermore, this share is likely to grow at 20-25% in the future. Finally this gives an ideal cushion for the textile manufacturers to fall back upon. This is a great opportunity for the Indian to strengthen their hold on the domestic market.

3.8 MAURITIUS

Mauritius is small developing country located in the Indian Ocean with a population around 1.2 million for a surface of 1,865 sq. km with a low population growth rate of 0.9% in 2005.

With a GDP accounting Rs 163, 860 million at basic prices and a growth rate of 2.7% in year 2005, the Republic of Mauritius is going through a regression period with the increase number of unemployment which has nearly doubled in past five years.

The textile and clothing sector appeared in the government's agenda for the first time in Mauritius in the Meade's report in the 1960's. James Meade conducted a study on the Mauritian Economy to find a solution for diversifying the sugar based mono-crop economy. The setting up of the textile and clothing industry was a successful one in terms of creation of employment, income generation and capacity building for local entrepreneurs.

Mauritius has known through the past 3 decades a series of positive conditions which have helped to trigger a solid textile and clothing industry with significant foreign and local investment. The sector was one of the main providers of employment within the Mauritian economy and contributed about 12% to the GDP.

With the dismantling of the Multi Fibre Agreement and the new challenges of an extremely competitive world market, has left the industry in a weakened state. The positive conditions which once have boosted the industry have almost faded. The time is now for a complete rethinking of the Textile and clothing sector in Mauritius.

The Mauritian clothing industry has gradually evolved from a conventional labour intensive production technique to a state-of-art production technique in order to achieve quality consistency and produce high quality fancy garment with higher value added.

The Mauritian clothing industry is grouped under the umbrella of the Mauritian Export Processing zone (EPZ) and accounts for 85% of its current annual revenue. EPZ companies involved in the textile vary considerably in size, ranging from microenterprise level to very large companies. The table below gives an indication of the range of products manufactured as well as the number of manufacturers for each category.

Table 3 Range of apparel products manufactured in Mauritius

HS	Product Description	No. of Manufacturers
61	**Knitted or crocheted garment**	
	Men's suits, ensemble, jackets, blazers, troussers	32
	Women's suits, ensemble, jackets, dresses	28
	Women's blouses and shirts	49
	Tee-shirt, polos, singlets, tank tops, and similar garments	98
	Sweater-pullovers	37
	Babies garment & clothing accessories	15
	Track suits, ski-suit & swimwear	44
62	**Not Knitted or crocheted garment**	
	Men's or boy's suits, ensembles suits -type jackets	32
	Women's suits, ensemble, suits	28
	Men's shirts, women's or girl's blouses, shirts	70
	Jeans wear, denim wear	21
	Ties, bow ties and cravat	9
	Children garments	15

Source: Supply survey on Textiles and Clothing in Mauritius, (2001).

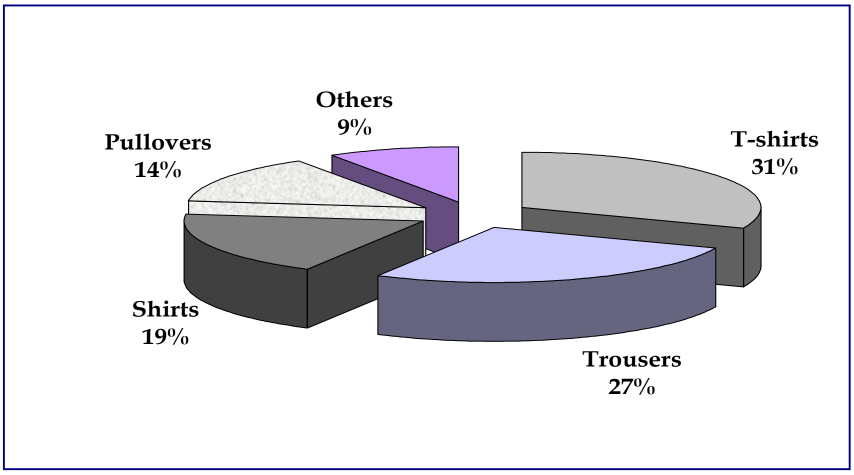
3.8.1 DOMESTIC APPAREL PRODUCTION V/S IMPORTS OF APPAREL

Most of the clothing production in Mauritius is exported. Theoretically, EPZ firms are now able to sell their whole stock of apparel on the local market just like non-EPZ firms on the foreign market. The only difference is that non-EPZ firms will not benefit from the duty free advantages which EPZ firms were enjoying before due to the standardisation of taxes. In that respect, only a few local producers, mainly small factories and the informal sector, produce for the local market. These producers normally retail their products in their own factory shops.

The garment industry is dominated by the production of cotton garments, concentrated into 4 main categories namely cotton shorts & trousers, t-shirts, woven shirts & blouses, pullovers & cardigans. The local production of household textiles, such as linen and curtains, is relatively small and is mostly aimed at the local market.

Mauritius produces 29 different types of garments but only 4 types of products dominate the industry which are the T-Shirts, men's –shirts, trousers and pullovers. Figure 1 depicts this reality and shows the main export categories of apparel produced in Mauritius. This represents 90% of the total garment exports from the country.

Figure 2 Main export categories of Mauritian Apparel Production (Year 2000)



Source: Supply survey on Textiles and Clothing in Mauritius, (2001)

The remaining products are available in small quantity and the product varies from ties, jacket, dresses, children wear, underwear, baby wear, swimwear, suits, design lingerie and etc.

The clothing sector in Mauritius can be split in three categories of garments, which are knitted garments, woollen knitwear, and woven garments.

Information on consumer behaviour with respect to purchase of clothing in Mauritius is quasi - inexistent. In addition, there is currently no data available on production for the local market. It is only now that Enterprise Mauritius is undertaking to collect data in relation to production of apparel for domestic consumption.

Consumer behaviour on apparel in Mauriritus is taken up in only one study carried out by Jugroop in 2003. According to its main findings, most people in Mauritius buy their clothes in shops, and primarily look for comfort in a garment when purchasing it.

3.8.2 IMPORTS OF APPAREL

According to a report published by the Mauritius Industrial Development Authority in 2001, the level of garments import into Mauritius was approximately 3.8 kg per capita of population.

The direct imports for knitted and non-knitted garments are shown in the Table below:

Table 4 ***Value of imports of knitted and non-knitted garments (Rs Million CIF)***

Types of Garments	YEAR								
	1996	**1997**	**1998**	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**
Knitted garments	58	85	85	115	116	134	167	171	186
Non-knitted garments	249	330	312	310	327	353	518	534	607
Total	**307**	**415**	**397**	**425**	**443**	**487**	**685**	**705**	**793**

Source: Central Statistical Office and MIDA

Table 6 shows the progression of value of imports of knitted and non-knitted garments. As depicted by the table, the total value of imports between 1996 and 2004 has taken an increasing trend except for Year 1998. Between 2001 and 2002, value of imports increased by 41%, which is the highest increase between 1996 and 2004.

3.8.3 IMPORTS OF APPAREL PER CATEGORY

*Table 5 Imports of Selected Apparel by value and quantity, Jan-Sept 2005**

Apparel Item	Approx Value of Imports (Rs CIF)	Approx Quantity (Units)	Approx Quantity (kg)
MEN/BOYS			
Overcoats/Anoraks, etc.	2,771,352	26,674	-
Suits	5,469,362	11,225	-
Ensembles	32,859,823	414,420	-
Jackets/ Blazers	9,652,748	101,456	-
Trousers / Shorts	25,789,263	446,364	-
Shirts	26,093,977	304,128	-
Nightshirts/pyjamas	2,364,191	38,218	-
Bathrobes, dressing gowns, etc.	12,842,095	423,511	-
Underpants & brief	2,503,993	386,166	-
Swimwear	-	-	-

Table 6 Imports of Selected Apparel by value and quantity, Jan-Sept 2005(Cont'd)*

WOMEN/GIRLS			
Overcoats/ Anoraks, etc.	1,575,036	16,205	-
Suits	3,247,201	38,290	-
Ensembles	48,594,675	481,157	-
Jackets/ Blazers	1,075172	12,980	-
Dresses	19,667,426	366,712	-
Skirts	22,343,534	487,995	-
Trousers / Shorts	25,779,851	400,450	-
Blouses/Shirts	39,477,454	1,026,638	-
Nightdresses/ pyjamas	7,919,453	279,812	-
Bathrobes, dressing gowns, etc	1,475,929	32,847	-
Slips, Petticoat, Brief, panties etc.	28,197,605	1,171,934	115,596
Swimwear	4,241,386	33,749	-
Sarees	86,169,675	-	214,965
BABIES' GARMENT	22,356,967	-	159,315

Source: Central Statistical Office, 2005
**Imports of apparel*

The table above provides with data computed between January and September 2005 for apparel imported in Mauritius both for men and women. The domestic market is highly dependent on imported garments and nearly all items of clothing are imported for domestic use.

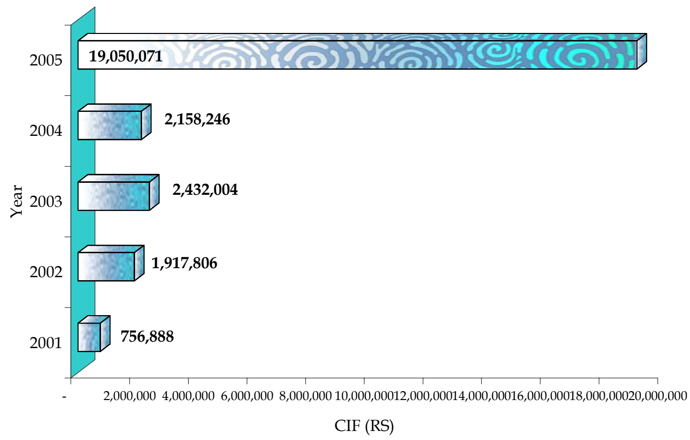
3.8.3.1 Imports of apparel per category - Men

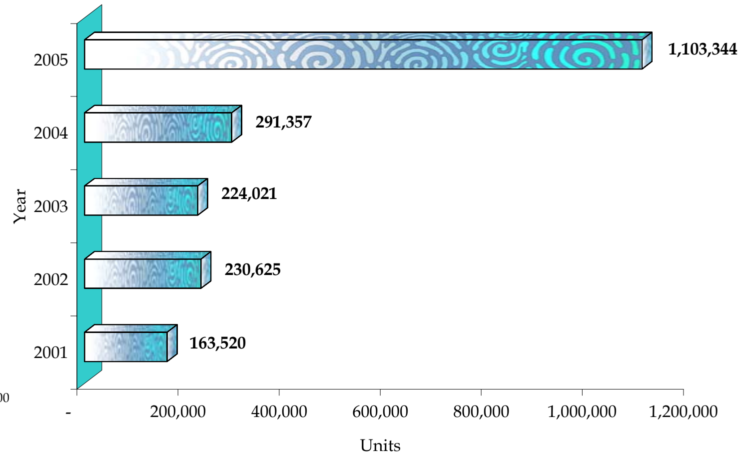
More than 300,000 units of trousers/ shorts and shirts have been imported for men during the period Jan – Sep 2005, worth an approximate Rs 25 million (CIf). As for intimate apparel, nightshirts/pyjamas, bathrobes (…), underpants and briefs account for more than Rs 17 million (CIF) import, representing about 847,000 units. As for suits, imports amount to Rs 5,469,362 for 11,225 units, while the figure for ensembles (matching garments) rise up to Rs 32,859,823 (414,420 units).

3.8.3.1.1 Imports of selected apparel

Imports of pants and briefs

Figure 3 Imports o f pants and briefs from 2001 to 2005 – CIF value (Rs) and Units

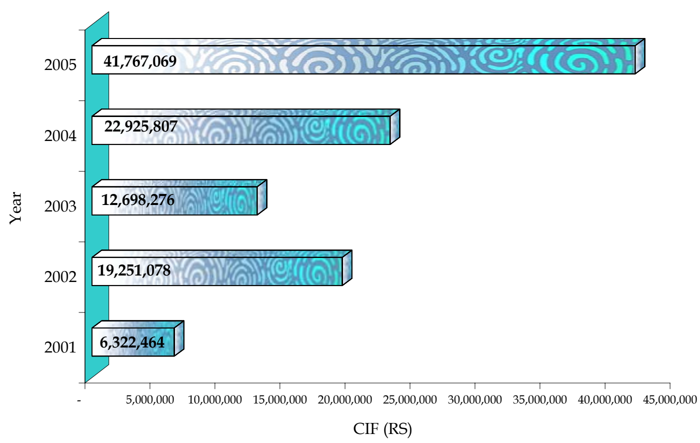


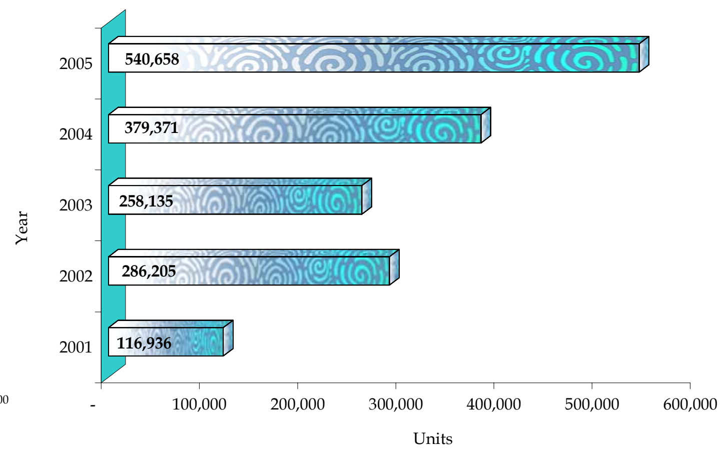


Pants and briefs for men imported under HS 6107 and 6207 have been computed for years 2001 to 2005. As depicted by the figures above, the imports of men's underpants and briefs have known a very significant increase in 5 years. In fact in the 4 years between 2001 and 2004 quantity imported for this category remained below 300,000 units yearly, while CIF value did not achieve Rs 3,000,000. It is noticeable that year 2005 is the year in which imports witnessed a high rise both in terms of value and quantity (1,103,344 units imported worth Rs 19,050,071).

Imports of shirts

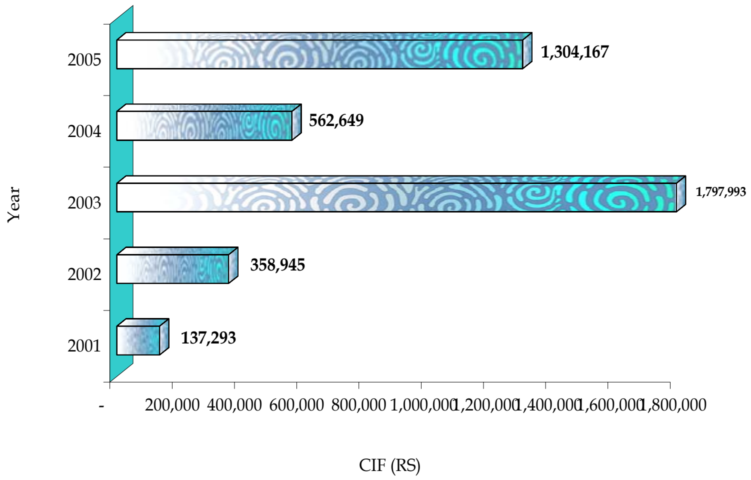
Figure 4 Imports of shirts from 2001 to 2005 – CIF value (Rs) and Units

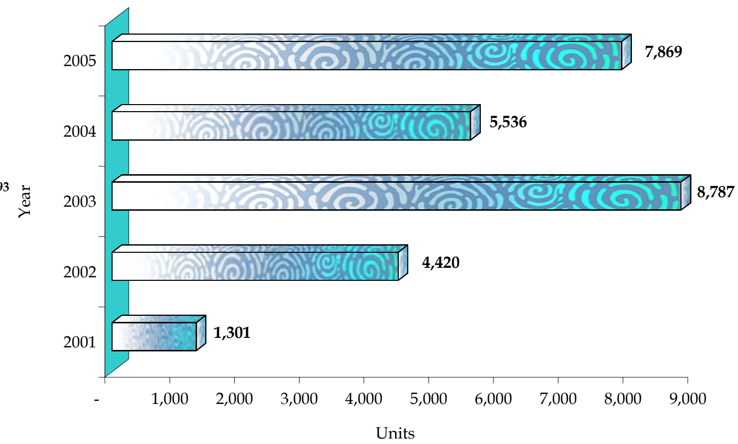




Imports of swimwear

Figure 5 Imports of swimwear from 2001 to 2005 – CIF value (Rs) and Units





As depicted by figures 4 and 5, imports of shirts and swimwear have been through an increase between 2001 and 2005. As for shirts, imports in terms of CIF value (Rs) and units have followed the same trend, i.e constant rise. Likewise, imports of swimwear has also known an increase.

3.8.3.2 *Imports of apparel per category – Women*

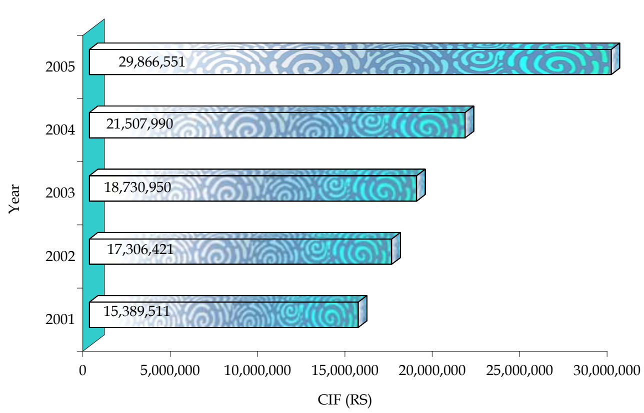
During the period Jan-Sep 2005, nearly as much trousers/shorts have been imported for women as for men (> 400,000 units). As for intimate apparel (nightdresses, slips, brief, bathrobes…), more than 1 million units have been imported amounting to about Rs 38 million. As for dresses and skirts, more than Rs 19 million imports can be denoted, equivalent to more than 365,000 units for each category of women outerwear.

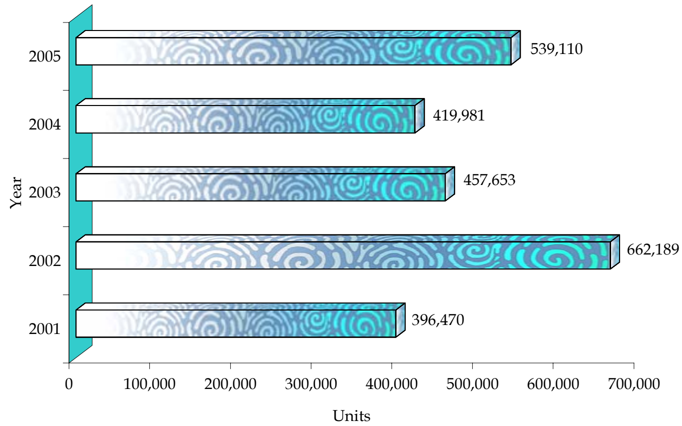
As for men, ensembles are the most imported items for women, with 48,594,675 units for the period. 33,749 units of swimwear have been imported worth Rs 4,241,386. Unlike imports for men, traditional garments for women (the saree here), is imported in greater significant quantity with 214,965 kg imported for Rs 86,169,675.
Imports of dresses and skirts falling under HS 6104 and 6204 have been compiled for the last five years, i.e 2001 to 2005.

3.8.3.2.1 Imports of selected apparel

Imports of dresses

Figure 6 Imports of dresses from 2001 to 2005 – CIF value (Rs) and Units



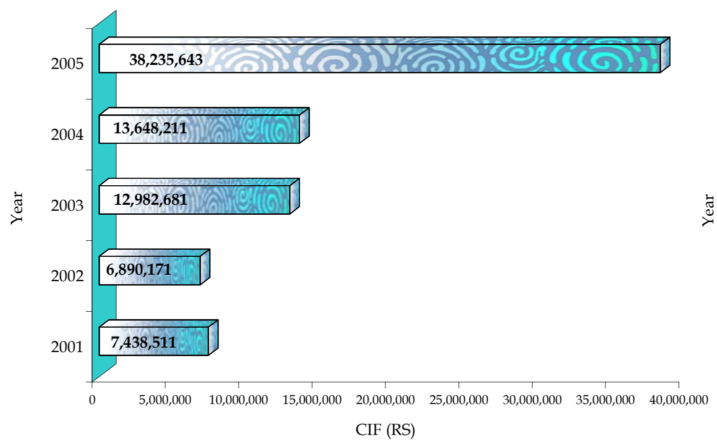


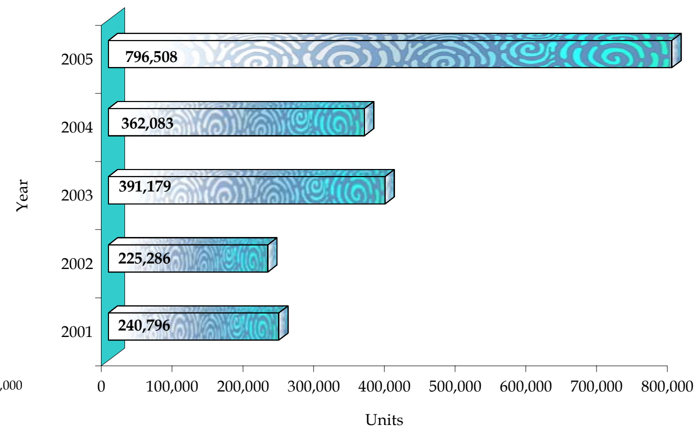
Considering the amount of imports in units for dresses, as clearly shown in the figure above, 2002 was the year in which more dresses have been imported (662,189 units) as compared to other years. In 2003 and 2004, the amount of dresses imported decreased by 30.9% in 2003 and further decreased by 9% in 2004 to increase again in 2005 by 28.4 %(from 419,981 to 539,110).

In monetary terms however, the scenario is rather different. The value of imports in rupees has been constantly increasing since 2001. This shows that the unit price per dress has been increasing for the years under study. We might even infer that there has been a shift towards up market products in this category.

Imports of skirts

Figure 7 Imports of skirts from 2001 to 2005 – CIF value (Rs) and Units

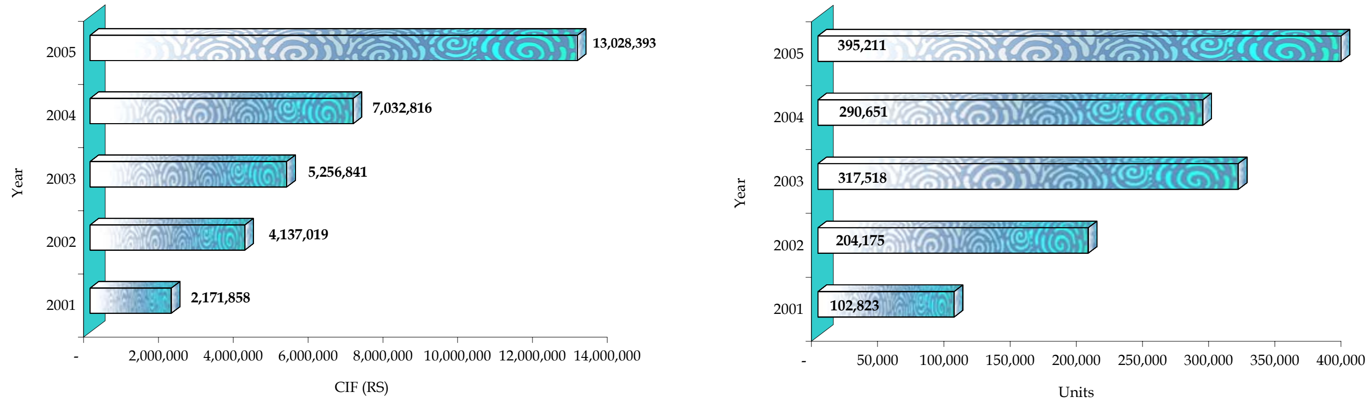




Imports of skirts have been through a major increase as from 2003. In fact, in monetary terms, the value of imports has nearly doubled between 2002 and 2003 (from Rs 6,890,171 to Rs 12,982,681). Moreover, year 2005 has seen a major increase both in monetary terms and in quantity. However the percentage change in value is greater than in quantity, which may lead to the conclusion that as for dresses, there has been a shift towards up market products for skirts.

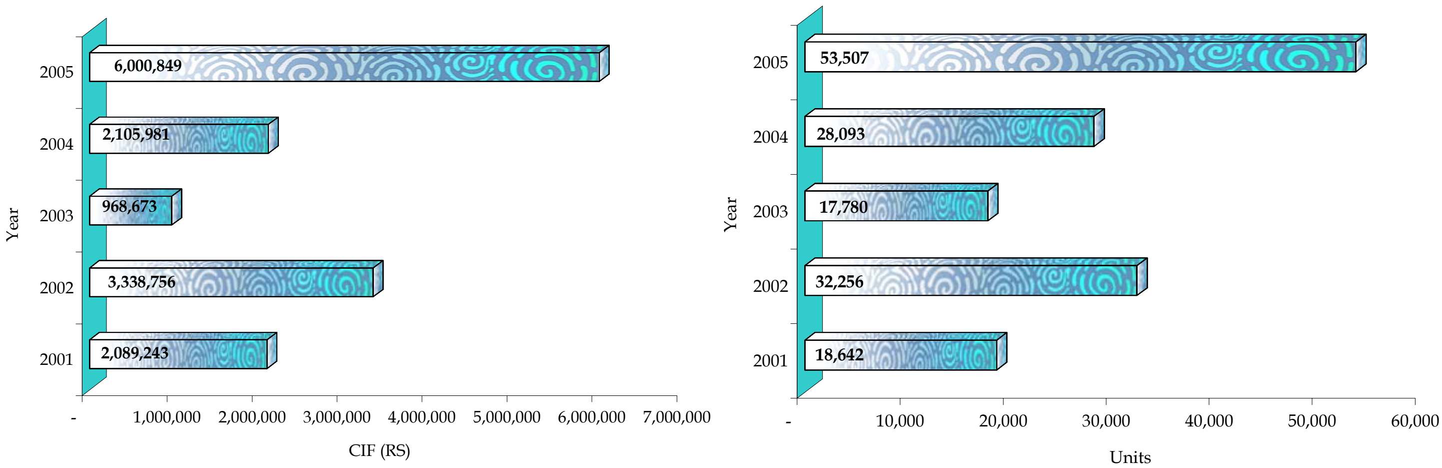
Imports of nightdresses and pyjamas

Figure 8 Imports of nightdresses and pyjamas from 2001 to 2005 – CIF value (Rs) and Units



Imports of swimwear

Figure 9 Imports of swimwear from 2001 to 2005 – CIF value (Rs) and Units



It is noticeable that as from 2001 onwards, imports for nightdresses and pyjamas and swimwear has witnessed a rapid rise, except for swimwear in 2003. In relation to price per unit for imports of nightdresses and pyjamas, there has been a shift towards up market products for this item, since the average import cost per unit has been on constant rise.

3.8.4 HOUSEHOLD CONSUMPTION EXPENDITURE

Household consumption expenditure refers to all money expenditure by households on goods and services for consumption as well as the value of goods received as income in kind and consumed by the households.

Table 7 Adjusted average monthly household consumption expenditure by COICOP division, 2001/02 HBS

Item	1996/97 HBS		2001/02 HBS	
	Rs	%	Rs	%
Food and non-alcoholic beverages	2,758	33.7	3,412	31.6
Alcoholic beverages and tobacco	727	8.9	980	9.1
Clothing and Footwear	**633 (Of which Rs 473 for Clothing)**	**7.7**	**687 (Of which Rs 519 for Clothing)**	**6.4**
Housing, water, electricity, gas and other fuels	783	9.6	1,007	9.3
Furnishings, household equipment and routine household maintenance	636	7.8	650	6.0
Health	276	3.4	270	2.5
Transport	942	11.5	1,363	12.6
Communication	172	2.1	359	3.3
Recreation and Culture	329	4.0	501	4.6
Education	214	2.6	399	3.7
Restaurants and hotels	388	4.7	664	6.1
Miscellaneous goods and services	314	3.8	520	4.8
All items	**8,172**	**100.0**	**10,812**	**100**

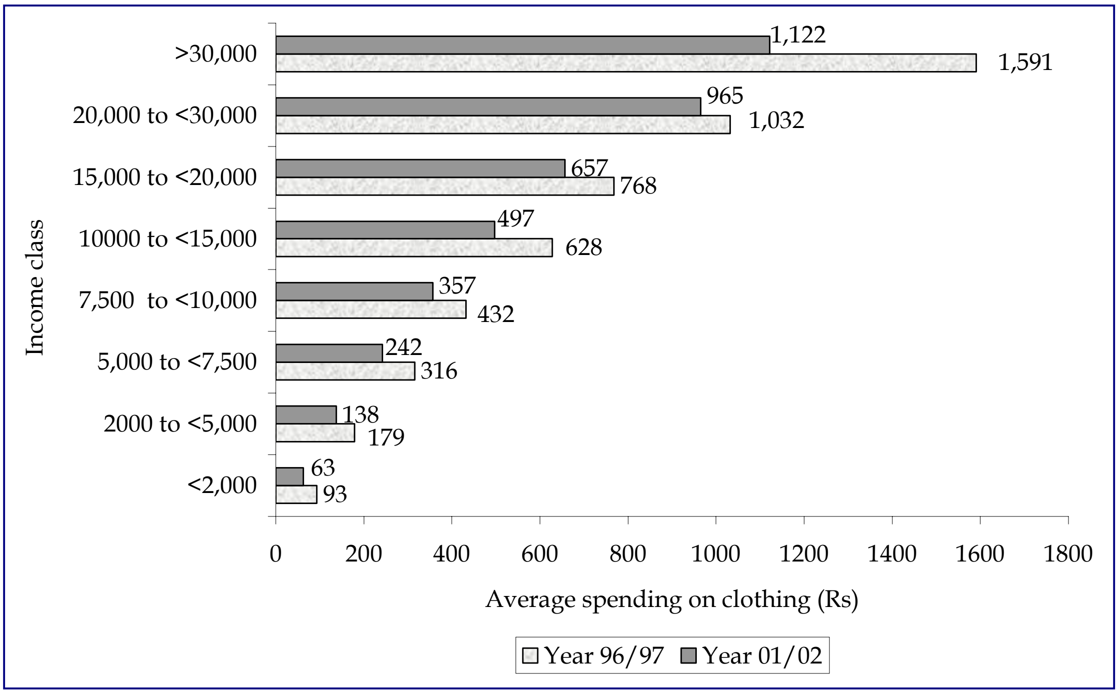
Source- Household Budget Survey 96/97 and 2001/2002; Central Statistical Office

The table above gives in details the average household expenditure for various items. Clothing and Footwear account for 7.7% and 6.4% for years 1996/97 and 2001/02 respectively. This shows that less of household expenditure is dedicated to clothing & footwear.

In real terms, average household spending on clothing amounted to Rs 473 in 1996/97 and Rs 519 in 2001/02, reflecting a 10% increase in average household clothing expenditure in 4 years. According to the 1996/97 HBS, Clothing and Footwear ranked 6th on the household expenditure division, while it ranked 5th in the 2001/02 HBS.

Figure 3 shows the comparison between the average monthly expenditure by income class on clothing for the years 1996/1997 and 2001/2002. The income classes range from less than Rs 2000 monthly to Rs 30,000.

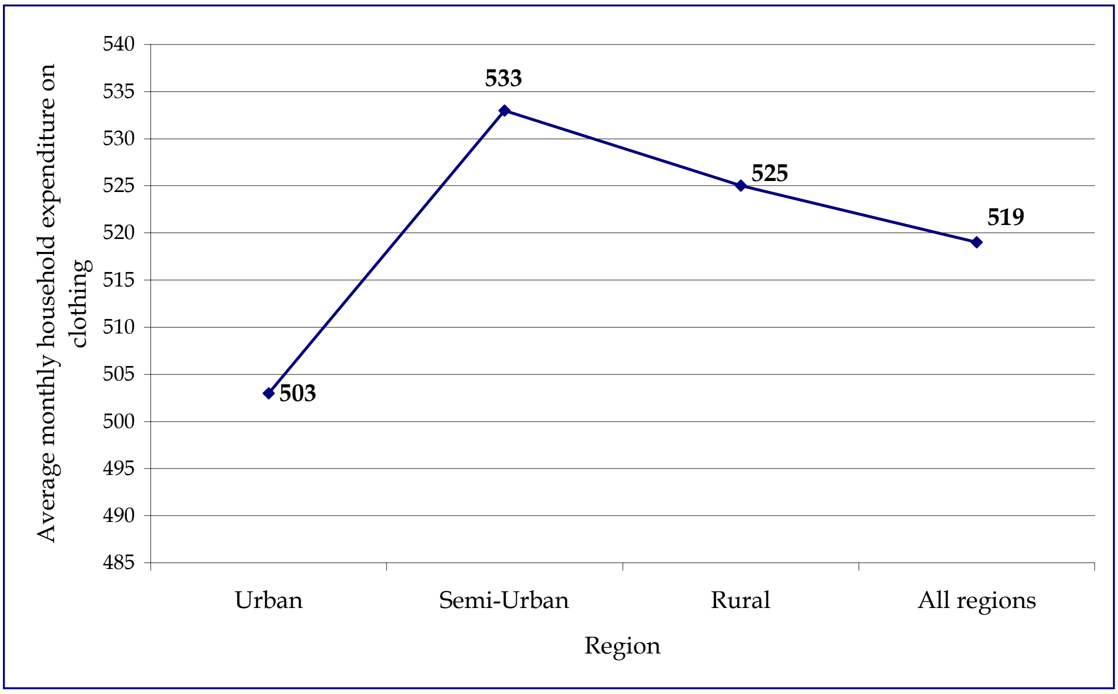
Figure 10 Average Monthly Household Expenditure on Clothing by Income Class



Source- Household Budget Survey 96/97 and 2001/2002; Central Statistical Office

Spending on clothing has dropped down in 2001/2002 as compared to 1996/1997. The segment of consumers who spend more on clothing are the higher income earning households with Rs 1,122 spent on average by month.

Figure 11 Average Monthly Household Expenditure on Clothing by Region 2001/2002(Rs)



Source- Household Budget Survey 2001/2002; Central Statistical Office

Figure 4 shows that households in the semi-urban regions have the highest average monthly spending dedicated to clothing (Rs533). Interestingly, households found in the urban regions have the lowest average monthly expenditure for clothing (Rs 503).

Table 8 Distribution of monthly household consumption expenditure, 2001/02 HBS

Item	Per capita monthly household consumption expenditure	Percentage distribution of monthly household consumption expenditure
Food and non-alcoholic beverages	878	33.4
Alcoholic beverages and tobacco	126	4.8
Clothing and Footwear	**177**	**6.7**
Housing, water, electricity, gas and other fuels	259	9.9
Furnishings, household equipment and routine household maintenance	167	6.4
Health	70	2.6
Transport	351	13.3
Communication	92	3.5
Recreation and Culture	129	4.9
Education	103	3.9
Restaurants and hotels	145	5.5
Miscellaneous goods and services	134	5.1
All items	**2,631**	**100.0**

Source- Household Budget Survey 2001/2002; Central Statistical Office

Table 9 Clothing expenditure as a percentage of GDP for Mauritius

	Rs	USD**
Yearly average household expenditure on clothing items (Rs 519x 12)	Rs 6,228	204.53
Per capita expenditure on clothing items for an average household size of 3.9	Rs 1,596.9	52.44
Clothing expenditure as % of GDP in 2001	-	0.53

***1 US$ = Rs 30.45 in 2001 - Source: Household budget survey 01/02*

CHAPTER 4: METHODOLOGY

4.1 INTRODUCTION

To achieve the objectives of the study, both secondary and primary data collection were used.

The exercise covered the island of Mauritius; the target population for this survey was divided into three distinct groups:

1. Local enterprises producing mainly for the local market
2. Retail outlets and hawkers
3. Individuals aged between 18 and 65 living in private households

The following sections explain how all the above were achieved.

4.2 RESEARCH DESIGN

This study employed a descriptive research design, the goal of which was to take a look at the current state of the local apparel sector in Mauritius. More specifically, the aim of the research was to determine the extent to which, with respect to the domestic Mauritian market, there is alignment between demand and supply and the supply chain. The issues here are whether our local market can sustain the existing locally oriented garment production capacity, and whether the production supply side is supply side sensitive.

As per the objectives of the survey, a quantitative survey was chosen, namely a questionnaire to be administered by a mail survey and another questionnaire to be administered by face to face interviews for the specific target groups mentioned. The questionnaires would collect information on quantifiable variables and would allow profiling the local apparel industry.

Moreover, in order to help develop a good understanding and insight into previous research and trends that have emerged, a review of the literature was conducted. An extensive desk research has been carried out, considering existing research, published statistics, annual reports, and literatures made of the textile and clothing industry. Case studies of selected countries which produce mainly for their domestic markets was also taken into account. Trends in international apparel consumption has extensively been studied. Literature search was also carried out to include previous research carried out in Mauritius pertaining to the textile and clothing sector. These include official statistics from the Central Statistical Office, papers and surveys carried out by local institutions, academic works (…).

4.3 SAMPLING METHODOLOGY

4.3.1 Sample Design

The quantitative survey has considered three main perspectives in relation to the apparel sector, namely **production, distribution, and consumption**.

4.3.1.1 Survey of local enterprises – Mail Survey

The '*production part*' of the survey considered the local enterprises producing mainly for the local market. The sample for enterprises was drawn from lists of local enterprises from:

1. SME Directory from the Small & Medium Industries Development Organisation (SMIDO)
2. List of Enterprises from the Ministry of Industry and Commerce
3. List of enterprises from the Mauritius Industrial Development Authority (MIDA)

The sample size for this survey consisted of 64 local Non-EPZ enterprises. The list of enterprises surveyed is found at Annex VIII.

4.3.1.2 Survey of retail outlets & hawkers – Mail Survey

The '*distribution part'* of the survey catered for the retail outlets and hawkers in the towns and big villages of Mauritius. Outlets and hawkers were selected according to the clothing item that they were disseminating on the market. A total of 39 retailers and 41 hawkers were surveyed across the island.

4.3.1.3 Survey of consumers – Face to face Interviews

As for the '*consumption part*', a survey on the consumption profile of Mauritians has been carried with individuals aged between 15 and 65 living in private households. The sample selected for the survey consists of the same proportions of individuals with relevant characteristics as are present for the population of Mauritius. While choosing the sample, important characteristics taken into account were gender, age, region (*For detailed sample breakdown please see Annex VI*). A total 1200 individuals have been interviewed based on a stratified quota sampling.

4.4 PILOT TEST

Several pilot surveys were carried out to test and ensure the adequacy of the questionnaire, its face validity, its design and thereon identify improvements that need to be made.

4.5 DATA COLLECTION TOOLS – QUESTIONNAIRE

In order to collect the primary data in the context of the research, three different questionnaires have been designed for the following:

1. Local enterprises producing mainly for the local market *(Please see Annex I for Questionnaire sample)*
2. Retail outlets and hawkers *(Please see Annex II for Questionnaire sample)*
3. Individuals aged between 18 and 65 living in private households*(Please see Annex III for Questionnaire sample)*

4.6 DATA COLLECTION & FIELDWORK ORGANISATION

4.6.1 Survey of local enterprises

A total number of 64 enterprises from different regions of the island were identified. A questionnaire was sent by post to each of them. A covering letter was attached to the questionnaire explaining the purpose of the survey. Follow-up calls were carried out for the 64 enterprises in order to make sure that respondents did receive their questionnaire and understood all the questions.

Follow-up had to be done thoroughly with the enterprises, resulting to approximately 10 telephone calls per contact. Replacements were done in situations of non-response. It was noticed that most of respondents contacted were, what is commonly termed as, “slow responders”.

4.6.2 Survey of retail outlets & hawkers

Retail outlets and hawkers targeted were situated in the towns and the main big villages of Mauritius. An approximate number of 15 retailers were targeted per region for the survey of retailers, whilst an approximate number of 7 hawkers per region were targeted for the survey of hawkers. Retailers and hawkers were chosen based on the apparel items they were selling. Interviewers were asked to cover a range of standard apparels per region (shirts, t-shirts, dresses, trousers, jeans, underwear for both genders…). Both retail outlets and hawkers were approached by an interviewer who explained the purpose of the survey and how the results of this survey would help. A questionnaire adapted from the one used for retail outlets was prepared for the specific needs of the hawkers survey.

A total of 39 retailers have answered the questionnaires. *(Please see Annex IV for breakdown of sample)*, whilst the response for hawkers was higher since 41 hawkers have willingly answered the questions. *(Please see Annex V for breakdown of sample)* The retailers were provided with a questionnaire and were asked to return the questionnaire once completed, since most of them did not have the information required readily available. Completed questionnaires were either returned by post or collected by the interviewer. A face-to-face interview was carried out with hawkers (mainly the “marchands la foire” and “marchands lor simé”). During fieldwork, the interviewers had to fill in the questionnaire.

4.6.3 Survey of Consumers

The field workers (Enumerators) selected for the study have a wide experience in conducting interviews for social surveys and censuses. The whole fieldwork exercise was controlled by one supervisor from the research team. The following criteria were used to recruit staff for this particular study:

- Enumerators who held the best ratings from the previous surveys
- Proximity of enumerator’s residence to the selected regions

The field force consisted of 23 enumerators recruited on a part time basis for the administration of the questionnaires with the 1200 respondents. A male and a female surveyor were each attributed a particular district or town. Male surveyors had to survey male respondents and female surveyors had to survey female respondents. This approach was used as due to the very personal nature of some questions respondents might not be at ease if surveyor was from the opposite sex.

4.7 QUALITY ASSURANCE TO ENSURE RELIABILITY OF SURVEY ESTIMATES

4.7.1 Sampling Error

Estimates worked from the quantitative survey will inevitably be subject to random sampling error since they are based on information collected from only a selection of the whole target population. The term "error" in this context does not mean mistake; it means that the estimates may differ from the results that would be obtained if all individuals in the target population was surveyed.

4.7.2 Non-Sampling Error

Inaccuracies may also have occurred due to imperfections in reporting by respondents, errors made in recording, coding and processing of data. Such errors, termed non-sampling error occur in any type of survey and are non-quantifiable.

Every effort was therefore made to reduce these errors to a minimum by careful-design of questionnaires, intensive training and close supervision of the field works as explained below.

Interviewers were briefed concerning the aims and objectives of the research. They were trained to become fully conversant with the purpose of the enquiry and the flow of questions in the questionnaire. Two briefing sessions were conducted on Friday 12th and Saturday 13th of May 2006 at StraConsult Ltd. The briefing sessions were conducted in a way to ensure that interviewers ask questions objectively and record answers in a standardized way. Enumerators were provided with a letter of appointment for a definite period. Log books were used to collect names and contact details of respondents, which were later used as a crosschecking tool.

The supervisor was required to exercise close monitoring and control during data collection and accompanied the surveyors during some interviews. Control was also done by telephone checks at random based on the log books entries.

4.8 DATA COLLECTION

The data collection exercise was carried out between the 13th May 2006 and the 8th June 2006. Fieldwork was concentrated after working hours and during week-end to minimize call backs.

4.9 PROBLEMS ENCOUNTERED

4.8.1 National Budget 2005

The projected time allocated to the survey of local producers had to be extended since the presentation of the National Budget on the 4th of April 2005 had a negative impact on the overall administration of the survey for local producers. The refusal rate climbed after the announcement of the removal of customs tariffs on readymade garments. The biggest impact was on the survey for enterprises, as entrepreneurs were frustrated with this announcement. Many enterprises had no time as they were rethinking of their strategies.

4.8.2 General Elections 2005

With the general elections held on the 3rd July 2005, the administration of the survey on consumption profile had to be postponed to a later date after the proclamation of results, since researchers and surveyors felt that people (our target audience) are focused on the general elections since quite some time now. Moreover, it was felt that the trustworthiness of the surveyors would be questioned, as during elections period, an atmosphere of uneasiness usually prevails. This event impeded heavily on the running of the consumer survey, which, in normal circumstances would have started after the survey for local producers.

CHAPTER 5: RESULTS & ANALYSIS

5.1 INTRODUCTION

This analysis aims to determine the extent to which, with respect to the domestic Mauritian market, there is alignment between demand and supply and the supply chain. The issues here are whether our local market can sustain the existing locally oriented garment production capacity, and whether the production supply side is supply side sensitive. This study considers three main perspectives, namely production, distribution, and consumption.

While the production aspect was investigated through a survey drawing up the profiles of several Mauritian enterprises, the distribution aspect on its part was addressed through a survey of retail outlets and hawkers in Mauritius.

For the purpose of this report, all sales were compiled to reflect a **yearly** figure. While garments produced by the enterprises were either sold on the local market or exported, sales by retail outlets and hawkers were meant only for the local consumption.

5.2 SURVEY OF ENTERPRISES

Enterprises targeted for the survey were those which produced garments mainly for the local market. An approximate 60 enterprises were identified for the purpose of the survey. Enterprises were identified from the following:

1. SME Directory from the Small & Medium Industries Development Organisation (SMIDO)
2. List of Enterprises from the Ministry of Industry and Commerce
3. List of enterprises from the Mauritius Industrial Development Authority (MIDA)

Out of a total of 64 questionnaires that were sent to several enterprises in different regions across Mauritius, 25 enterprises responded to the survey - implying a 39.1% response rate. Even after an average of 10 reminder calls made per contact, the response rate did not go up. Analyses thus have been computed on 25 questionnaires only.

Question 1

Which of the following items are manufactured in your enterprise? (Please state number in units produced per year. Including from local outsourced production).

The overall total production of garments of the 25 enterprises surveyed amounted to 1, 368, 051 units, out of which 863, 193 units of garments for men and 453, 007 units for women. In addition, a relatively low 1,851 units were outsourced for production.

Analysis could not be done on the overall 1, 368, 051 units produced by the enterprises surveyed since no detailed breakdown (neither on gender nor on items of clothing) were provided for 50,000 units of garments manufactured in one enterprise. Moreover, details on the type of apparel produced were not obtained for a significant 180,000 units of garments for men and 120,520 units of garments for women.

Table 1 below gives a detailed breakdown of the total production figure, excluding however the following:

(i) the 50,000 units of garments on which no details could be obtained, and

(ii) 180,000 units of garments for men and 120, 520 units of garments for women on which no details on types of apparel produced was obtained.

Table 10 Production of Garments by enterprises surveyed

ITEMS OF CLOTHING	MEN	WOMEN	OUTSOURCING	TOTAL
Shorts/Bermudas	14,546	9,365	-	23,911
Trousers/Pants/Jeans	39,540	12,371	250	52,161
T-Shirts	146,118	124,687	-	270,805
Polo Shirts	53,013	14,812	-	67,825
Shirts	191,203	51,849	1,101	244,153
Jackets/Blazers	5,086	5,627	-	10,713
Slips/ Boxer Shorts	56,000	-	-	56,000
Undershirt	115,000	-	-	115,000
Ties	2,400	-	-	2,400
Work Wear (e.g. overalls)	1,000	-	-	1,000
Dungarees (Salopettes)	144	276	-	420
Tracksuits	1,778	1,777	-	3,555
Cardigans/ Pullovers	12,169	24,131	-	36,300
Swim Suits/ Bikini	-	919	-	919
Socks	40,810	-	-	40,810
Dresses	-	38,240	-	38,240
Skirts	-	9,663	-	9,663
Blouses	-	15,500	500	16,000
Body Shirts	4,386	Nil	Nil	4,386
Tops	-	23,270	Nil	23,270

As shown in Table 8, with 270, 805 units, most enterprises surveyed are involved in the manufacture of T-shirts, followed by Shirts (244, 153 units), Undershirts (115, 000 units), and Trousers/Pants/Jeans (52, 161 units).

It is interesting to note at this point that the enterprises surveyed were more or less engaged in the same production line as the enterprises operating within the EPZ which produce 4 main product categories namely t-shirts, shirts, pullovers, and trousers/jeans (*L'Express*, 25 January 2006).

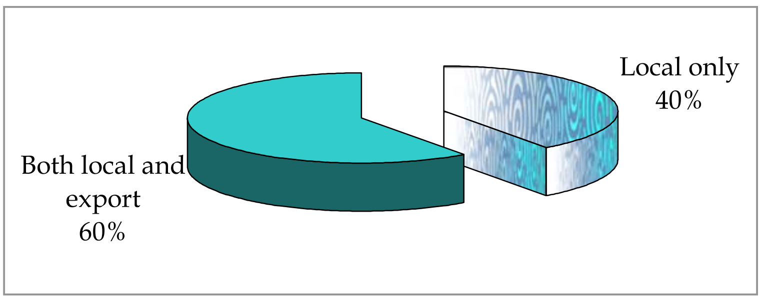
The results from Table 1 shows the trend that t-shirt production is the most popular activity among enterprises surveyed. This goes in line with the analysis in *L'Express* (25 January, 2006) that T-shirt is the most important segment of the Mauritian garment industry. The production of T-shirts is the most competitive activity in garment production owing to the short production time which consequently reduces labour cost and thus impacting on the final cost of producing the t-shirt.

Question 2

For what market do you produce?

As illustrated in Figure 1, 10 enterprises (representing 40% of those surveyed) have reported that they produce exclusively for the domestic market while 15 enterprises (representing 60%) produce both for the local and export market.

Figure 12 Production by type of market



Question 3

What percentage does that represent if you produce both for local and export markets?

Enterprises were asked to state the ratio of production between production for local market and export market. For the 15 enterprises producing for both markets, the level of production for local market exceeds that for export market in most of the cases. Actually 12 enterprises produce a greater amount of garments for the domestic market.

On average, the percentage of production for the local market is 71.6% while that for the export market is 28.4%. The ratio of apparel produced for the local market to that for the export market is 18:7, i.e. for every 25 apparel produced, 18 are for the local market and 7 for the export market.

Question 4

What is your main distribution channel on the local market? (State in units and percentage per channel)

[Note that 21 enterprises answered this question.]

For the purpose of this question, five types of distribution channels have been identified:

(i) Wholesalers/Distributors

(ii) Shops/Retailers

(iii) Hawkers

(iv) Hypermarkets/Supermarkets

(v) Others (Firms and Hotels), as identified by respondents

Table 11 Proportion of enterprises making use of the different distribution channels to sell apparel on the Local Market

DISTRIBUTION CHANNELS	%
Wholesalers/Distributors	23.8
Shops/Retailers	66.7
Hawkers	38.1
Hypermarkets/Supermarkets	9.5
Others (Firms and Hotels)	9.5

Table 9 gives a snapshot of the distribution channels used for the dissemination of apparel on the local market. It is conspicuous that most of the enterprises have recourse to Shops/Retailers (66.7%) for the dissemination of their garments, while hawkers are most preferred channels as compared to supermarkets/hypermarkets (38.1% to 9.5%).

Table 12 Average Percentage of apparel sold to the different Distribution Channels

DISTRIBUTION CHANNELS	AVERAGE % OF APPAREL SOLD
Wholesalers/Distributors	53.1
Shops/Retailers	81.1
Hawkers	43.8
Hypermarkets/Supermarkets	60
Others (Firms and Hotels)	65

As depicted by the table above, Shops/Retailers have the greatest share concerning the clothing retail channel with 81.1%.

It is interesting to note that although majority of enterprises prefer to distribute their garments through wholesalers/distributors and hawkers, the average percentage of apparel sold through these channels follows a reverse trend. The volume of apparel sold through Hypermarkets / Supermarkets and other channels (firms and hotels…) (60% and 65%respectively) is more significant as compared to the volume of apparel sales through wholesalers/distributors and hawkers (53.1% and 43.8% respectively).

Question 5

In case your enterprise produces only for export but occasionally sells excess production, rejects or stock outs on the local market, please specify quantity in units that are sold locally.

Only one enterprise responded to this question. This enterprise sold excess Slips/Boxer shorts on the local market. An approximate 2000 units of slips/boxer shorts are sold yearly on the local market yearly this enterprise. This shows that the practice of selling excess production, rejects or stock outs on the local market is not a common practice among the enterprises surveyed.

Question 6a

How was your sales performance for the local market over the last 3 years?

Table 13 Sales performance for the local market over last 3 years

SALES PERFORMANCE	%
Has increased	40.0
Has decreased	24.0
Stayed the same	32.0
No answer	4.0

n=25

As shown in Table 4 above, a greater percentage of enterprises (40%) have experienced an increase in sales on the local market over the last 3 years. 32% have experienced no change in sales whatsoever, while 24% have found their sales for the local market to be on the decline.

Question 6b

Please indicate quantity in units for the past 3 years.

This question applied only to those enterprises that have witnessed an increase or decrease in sales for the local market over the last 3 years. Only 6 enterprises provided the information required for this question with figures for years 2003 and 2004. It was found that that the average increase in sales amounted to 3,766 units per annum.

The average decrease in sales was also computed on the last 2 years, i.e. year 2003 and year 2004. Out of the 6 enterprises falling in this category, only 4 have provided figures for the decrease in sales. The average decrease in local sales for these 4 enterprises was thus estimated at 6, 270 units.

It is worth noting that even if a greater number of enterprises have witnessed an increase in local sales, the decrease in local sales in terms of units of clothing is more significant, a total of 25,080 decrease in units as compared to 22, 596 increase in units.

Question 6c

To what factors do you attribute that sales performance?

The majority of respondents have attributed the increase in sales due to brand building. They stated that many enterprises having their own factory shops have now created their own brands. With the shutting down of shops selling exclusively some particular brands, such as Ralph Lauren®, many enterprises have invested in building their own brands. Such an investment, according to respondents, contributes in improving local market share.

Respondents also believe that many locally produced garments are now of better quality and that consumers are shifting to such products.

A smaller proportion of respondents have evoked the increase in tourists coming to Mauritius and buying locally produced apparel, and tighter customs control on imports as factors that have contributed to the increase in local sales.

On the other hand, decrease in sales was mostly attributed to a constraint on local demand related to competition from imports. Competition comes mainly from the Asian countries, especially China. Customers tend to fancy more imported garments [“*supposedly* superior garments” (Coughlin, Rubin & Darga, 2001)] than local garments, and some even tend to go in Asian countries to purchase their garments. Such fierce competition therefore decreases the market share of the enterprises producing for the local market.

There are also many EPZ factories that are selling their products on the local market. Since these factories produce in huge quantities (therefore benefiting from economies of scale) their garments may be sold at a cheaper price.

Moreover, rises in the prices of raw materials and labour cost have increased the cost of production. The selling price is consequently higher, and since enterprises also claim that they do not receive any facilities from the Government, it therefore becomes very difficult for them to compete with imported garments. This especially applies to garments imported from China, because China has a labour intensive production (therefore the cost of labour is very cheap), and its products are relatively much cheaper.

For those enterprises whose sales have stayed the same over the past three years, all of them evoked quality and/or price as determining factors. In spite of dumping of imported goods and sales from EPZ factories, turnover was maintained by varying the order and keeping a good quality level. One entrepreneur stated that even though fabric and dyeing costs have considerably gone up, customers do not accept increases in price- they expect to pay the same price. This entrepreneur therefore found himself constrained to keep prices at the same level so that sales is not affected.

5.3 SURVEY OF RETAIL OUTLETS & HAWKERS

Retail outlets and hawkers targeted were situated in the towns and the main big villages of Mauritius. A total of 39 retailers were surveyed. The breakdown of respondents per region is provided below:

- 8 from Rose-Hill
- 8 from Curepipe
- 8 from Vacoas/Quatre-Bornes
- 7 from Port-Louis
- 6 from Flacq
- 2 from Goodlands

Total number of hawkers surveyed equalled to 41, and the sample is broken down as follows:

- 6 from 'La Foire Martial' in the suburb of Port-Louis
- 7 from different locations in the centre of Port-Louis
- 7 from the Mahebourg fair
- 5 from the Flacq fair
- 7 from Quatre-Bornes
- 2 from Arab Town in Rose-Hill
- and 7 from the Goodlands fair

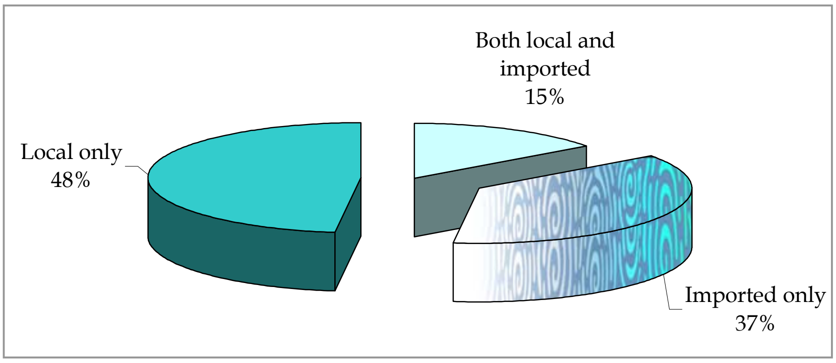
Please note: For questions concerning the origin of the items of clothing (local / imported/ both local and imported) for survey of retail outlets and hawkers, respondents have been provided with a "Both" as alternative answer (meaning both local and imported items of clothing) since some of the respondents could not make a distinction between the local and the imported garments they have sold.

Question 1

Please state the average sales in units, either on a Weekly, Monthly <u>OR</u> Yearly basis, for the items that are sold in your outlet.

At the outset, it clearly stood out that the sales of garments of a solely local nature exceeded those of a solely imported nature (Figure 7).

Figure 13 Origin of garments sold by retail outlets and hawkers surveyed



As depicted by the chart above, sales of garments of local origin amounted to 253,963 units (representing 48%), as compared to sales of garments of an exclusively imported nature which amounted to only 186,534 units (representing 37%).

A breakdown of these sales however showed a significant discrepancy between the sales of retail outlets and hawkers. As shown in Table 12, sales of garments of an imported origin only exceeded that of local origin only for the retail outlets; as for hawkers, it was sales of garments of a local origin that exceeded sales of those of an imported origin only.

*Table 14 Yearly Sales of Garments (Units) * Origin and Distributors*

	Garments of local origin	Garments of imported origin	Garments of both origin (local and imported)
Retail Outlets	110,648	147,834	24,545
Hawkers	125,315	38,700	50,690
Total	**235,963**	**186,534**	**75,235**

Another interesting point that stood out was the reverse relationship that existed between genders with respect to the origin of garments sold. As shown in Table 13 while sales of locally manufactured garments was greater than that of imported garments for men; for women, it was sales of garments of imported origin that exceeded sales of garments of a local origin.

*Table 15 Yearly sales of Garments * Origin and Gender – Retail Outlets and Hawkers (Units)*

ORIGIN OF GARMENTS	MEN			WOMEN		
	Retail Outlets	Hawkers	Total	Retail Outlets	Hawkers	Total
Local	69,662	121,015	**190,677**	40,986	4,300	**45,286**
Imported	63,686	262	**63,948**	84,148	38,438	**122,586**
Local and imported	12,916	10,067	**22,983**	11,629	40,623	**52,252**

This result consolidates the widespread feeling that women are generally more meticulous about the origin and quality of their clothes. This is not to say that locally produced clothes are not fashionable or of good quality, but the common perception is that what comes from abroad is better - and this apparently holds more for women.

The difference between men and women is more conspicuous in the case of sales made by hawkers. The latter sell a massive quantity of locally produced garments for men – 121, 015 units compared to only 262 units of imported garments. For women though, the sales of local garments is only 4, 300 units compared to 38, 438 units of imported garments.

Table 14 gives a clearer idea of the types and quantity of clothes sold for men. The item of clothing having the maximum sales was T-shirt (108, 230 units), followed by Shirts (40, 808 units), and Trousers/Pants/Jeans (37, 038 units). It can therefore be deduced that the sales of casual wear for men is fairly substantial.

It is also worth noting that Work Wear (e.g. overalls) sold were exclusively from the local production while Bathrobes, Swimsuits and Body Shirts were exclusively of imported origin.

Table 16 Yearly sales of Garments for Men – Retail Outlets and Hawkers (Units)

ITEMS OF CLOTHING	LOCAL		IMPORTED		BOTH		TOTAL
	Retail Outlets	Hawkers	Retail Outlets	Hawkers	Retail Outlets	Hawkers	
Shorts/Bermudas	4,242	17,500	2,604	202	104	1,478	26,130
Trousers/Pants/Jeans	15,330	7,986	13,194	60	468	Nil	37,038
T-Shirts	12,228	79,800	11,056	Nil	4,171	975	108,230
Polo Shirts	2,440	Nil	6,774	Nil	1,456	Nil	10,670
Shirts	19,382	10,105	9,813	Nil	1,508	Nil	40,808
Kurtas	1,800	Nil	1,610	Nil	572	Nil	3,982
Jackets/Blazers	1,860	Nil	364	Nil	38	Nil	2,262
Slips/ Boxer Shorts	1,924	5,074	2,254	Nil	1,248	7,614	18,114
Undershirt	1,360	550	Nil	Nil	2,080	Nil	3,990
Suits	1,589	Nil	2,052	Nil	385	Nil	4,026
Ties	1,828	Nil	3,881	Nil	Nil	Nil	5,709
Work Wear (e.g. overalls)	2,040	Nil	Nil	Nil	Nil	Nil	2,040
Dungarees (Salopettes)	900	Nil	673	Nil	Nil	Nil	1,573
Raincoats	Nil	Nil	Nil	Nil	10	Nil	10
Tracksuits	434	Nil	92	Nil	156	Nil	682
Cardigans/Pullovers	167	Nil	52	Nil	Nil	Nil	219
Shawls	88	Nil	1,300	Nil	Nil	Nil	1,388
Pyjamas	138	Nil	676	Nil	Nil	Nil	814
Bathrobes	Nil	Nil	520	Nil	Nil	Nil	520
Swimsuits	Nil	Nil	623	Nil	Nil	Nil	623
Socks	1,912	Nil	4,617	Nil	720	Nil	7,249
Body Shirts	Nil	Nil	1,531	Nil	Nil	Nil	1,531

Where clothing items for women are concerned, Table 4 demonstrates that Blouses had the maximum sales with 40, 859 units, followed by Panties/Knickers (36, 835 units) and Bra (23, 098 units). Contrary to men's wear therefore, women's wear was more geared to the sales of underwear.

Here also, some items of clothing sold namely Boxer shots, Ties and Work Wear (e.g. overalls) were of local origin solely, while others such as Cardigans/Pullovers and Pyjamas were of imported origin only.

The fact that Work Wear (e.g. overalls) – be it for men or women – are exclusively of local nature merits observation.

Table 17 Yearly sales of Garments for Women – Retail Outlets and Hawkers (Units)

ITEMS OF CLOTHING	LOCAL		IMPORTED		BOTH		TOTAL
	Retail Outlets	Hawkers	Retail Outlets	Hawkers	Retail Outlets	Hawkers	
Shorts/Bermudas	3,380	Nil	2,577	2,500	2,600	Nil	11,057
Trousers/Pants/Jeans	6,432	Nil	7,235	1,356	Nil	Nil	15,023
T-Shirts	2,372	Nil	2,046	Nil	Nil	Nil	4,418
Polo Shirts	1,625	Nil	780	Nil	Nil	Nil	2,405
Shirts	1,656	Nil	1,560	Nil	Nil	Nil	3,216
Kurtas	3,060	Nil	5,040	Nil	Nil	Nil	8,100
Jackets/Blazers	824	Nil	260	Nil	Nil	Nil	1,084
Boxer Shorts	2,020	Nil	Nil	Nil	Nil	Nil	2,020
Undershirt	780	Nil	Nil	Nil	3,120	Nil	3,900
Suits	720	Nil	3,000	Nil	Nil	Nil	3,720
Ties	720	Nil	Nil	Nil	Nil	Nil	720
Work Wear (e.g. overalls)	720	Nil	Nil	Nil	Nil	Nil	720
Dungarees (Salopettes)	720	Nil	824	Nil	Nil	Nil	1,544
Raincoats	156	Nil	Nil	Nil	10	Nil	166
Tracksuits	Nil	Nil	Nil	Nil	260	Nil	260
Cardigans/Pullovers	Nil	Nil	114	Nil	Nil	Nil	114
Shawls	1,644	Nil	125	Nil	Nil	Nil	1,769
Pyjamas	Nil	Nil	574	Nil	Nil	Nil	574
Bathrobes / Nightdresses	224	Nil	1,107	Nil	Nil	Nil	1,331
Swimsuits / Bikini	1,040	Nil	670	Nil	Nil	Nil	1,710
Bra	304	Nil	2,818	12,216	Nil	7,760	23,098
Panties/Knickers	1,092	Nil	Nil	19,276	Nil	16,467	36,835
Underskirt	175	Nil	260	Nil	125	Nil	560
Socks	200	Nil	937	Nil	Nil	Nil	1,137
Dresses	3,604	Nil	6,592	312	188	Nil	10,696
Skirts	400	Nil	9,136	1,974	1,228	7,364	20,102
Blouses	2,526	4,300	22,107	804	2,090	9,032	40,859
Tops/ Body Shirts	3,592	Nil	14,846	Nil	2,008	Nil	20,446
Churidar/Saree/Choli	1,000	Nil	1,540	Nil	Nil	Nil	2,540

Question 2

Do customers look for specific items of clothing that are not available on the market?

Table 18 Customers seeking items of clothing not available on the market

	RETAILERS		HAWKERS		TOTAL	
	Count	**%**	**Count**	**%**	**Count**	**%**
Yes	5	12.8	Nil	Nil	5	6.25
No	33	84.6	41	100	74	92.5
No Answer	1	2.6	Nil	Nil	1	1.25

As shown in the table above, the huge majority of distributors (92.5%) do not believe that customers look for specific items of clothing that are not available on the market. This belief is particularly strong among hawkers as 100% of them have responded 'No' to this question.

For those owners of retail outlets who think otherwise though, they believe that fashionable and branded clothes are the ones that are most sought after. Women especially, as retailers have specified, like to wear the same type of dresses or jeans that film stars wear.

One retailer in Curepipe stated that tracksuits and pullovers are also in demand, while another one has claimed that customers look for clothing items that differentiate themselves by the special look and design.

On the other hand, a shop owner in Rose-Hill has stated that there is a demand for more clothes for men. This retailer added that in general men look for "quality" garments, which are not readily available on the market.

Question 3

Are there demands for second-hand clothing? (E.g. suits)

Table 19 Demand for Second-Hand Clothing

	RETAILERS		HAWKERS		TOTAL	
	Count	%	Count	%	Count	%
Yes	2	5.1	1	2.4	3	3.75
No	36	92.3	40	97.6	76	95
No Answer	1	2.6	Nil	Nil	1	1.25

Here again, a greater percentage of distributors (95%) do not believe that there are demands for second-hand clothing on the local market (Table 17).

Only two retailers and one hawker have responded positively to this question. While one retailer has stated that both men and women look for second-hand clothes even with slight rejects, the other one has specified that the market for such clothes is not on a commercial ground but more of a ”marché aux puces” nature, i.e. for jumble sales. As for the hawker he stated that he knows other hawkers near 'Lagare du Nord' who sell second-hand jeans, so according to him there must be a demand for such clothes.

5.4 SURVEY OF CONSUMERS

5.4.1 Profile of Respondents

P1 Age Group

Table 20 Profile of respondents - Age Group

Age group	Count	%
15 - 18	109	9.1
19 - 24	180	15.0
25 - 29	130	10.8
30 - 39	275	22.9
40 - 49	228	19.0
50 - 60	142	11.8
60+	136	11.3
Total	**1200**	**100.0**

P2 Ethnic Origin

Table 21 Profile of respondents – Ethnic Origin

Ethnic Origin	Count	%
Hindu	582	48.5
General Population	363	30.3
Muslim	211	17.6
Chinese	36	3.0
Franco-Mauritian	8	0.7
Total	**1200**	**100.0**

P3 Marital Status

Table 22 Profile of respondents – Marital Status

Marital Status	Count	%
Single	376	31.3
Married	764	63.7
Divorced/separated	24	2.0
Living in a union	8	0.7
Widow/widower	28	2.3
Total	**1200**	**100.0**

P4 Region

Table 23 Profile of respondents - Region

	District		Count	%
URBAN (43.1%)	Plaine Wilhems	Beau Bassin/ Rose Hill	110	9.2
		Quatre Bornes	81	6.8
		Vacoas / Phoenix	107	8.9
		Curepipe	86	7.2
	Port Louis		133	11.1
RURAL (56.9%)	Pamplemousses		127	10.6
	Rivière du Rempart		103	8.6
	Flacq		131	10.9
	Moka		80	6.7
	Grand Port		110	9.2
	Savanne		69	5.8
	Black River		63	5.3
	Total		**1200**	**100.0**

P5 Gender

Table 24 Profile of respondents - Gender

Gender	Count	%
Male	588	49.0
Female	612	51.0
Total	**1200**	**100.0**

P6 Income

Table 25 Profile of respondents - Income

Income group	Count	%
0 to 500	101	8.4
500 to < 1,000	111	9.3
1000 to < 1,500	43	3.6
1500 to < 2,000	45	3.8
2000 to < 4,000	157	13.1
4000 to < 6,000	190	15.8
6000 to < 8,000	154	12.8
8000 to < 10,000	132	11.0
10,000 to < 14,000	131	10.9
14000 to < 16,000	54	4.5
16 000 to < 18,000	34	2.8
18 000 to < 20,000	12	1.0
20000 to < 22,000	16	1.3
22 000 - < 24 000	3	0.3
24,000 & over	17	1.4
Total	**1200**	**100.0**

P7 Professional Classification

Table 26 Profile of respondents – Professional Classification

Professional Classification	Count	%
Legislators, Senior officials and Managers	69	5.8
Professionals	30	2.5
Technicians and Associate Professionals	143	11.9
Clerks	123	10.3
Service Workers and Shop Sales Workers	106	8.8
Skilled Agricultural and Fishery Workers	18	1.5
Craft and related trade workers	152	12.7
Plant and Machine Operators and Assemblers	39	3.3
Elementary Occupations	142	11.8
Students	115	9.6
Unemployed	24	2.0
Retired	107	8.9
Housewives	132	11.0
Total	**1200**	**100.0**

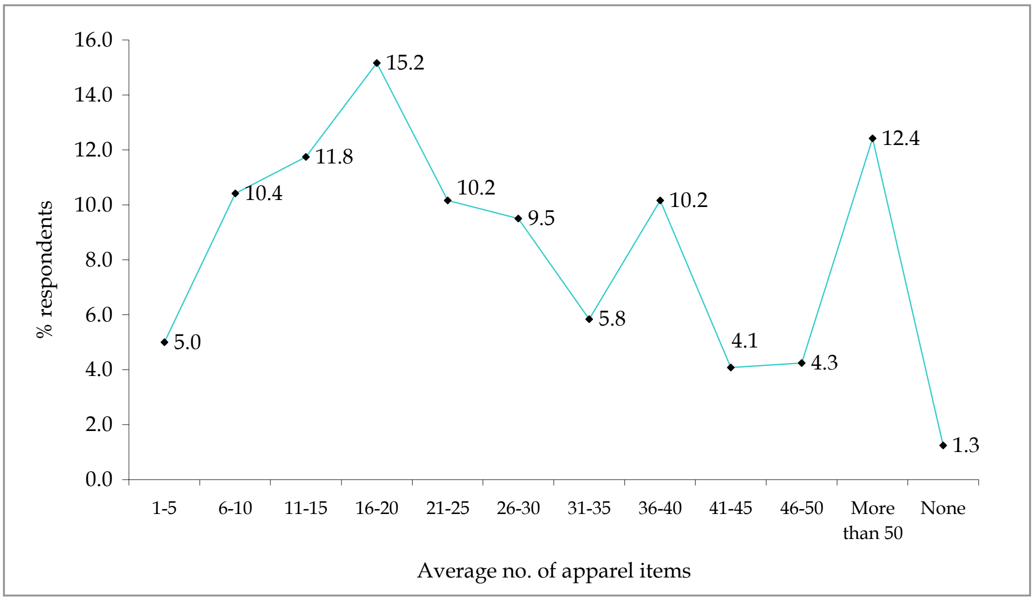
5.4.2 Apparel Wearing Habits & Purchase Behaviour

Please note that respondents have been asked to quantify items on an average and not on absolute figures since during the pre-test phase it was noticed that respondents were more at ease with ranges rather than open ended questions asking for absolute figures.

Question 1

This first question which is rather broad in approach attempts at two objectives, that of bringing the respondent to think globally, that is for the past year, of the number of apparel items purchased and in this process triggering the answer to question 2, which requires more details. As depicted by the Figure 8 below, 15.2% of respondents have purchased 16-20 items of clothing for the past year. Interestingly, 12.4% of respondents stated that they purchased on average more than 50 items of clothing for the past year.

Figure 14 Average number of apparel items bought per respondent during the past year



The only marked difference observed with respect to the annual purchase of clothing items relates to the respective respondents' professional classification. As shown in the Table below, the majority of those buying 11-15 and 16-20 (under 20) items of clothing yearly are either ''Housewives'' or work as labourer, baby sitter, security officer…(Elementary Occupations) respectively.

On the other hand, the majority of respondents who buy more than 50 clothing items yearly are mostly Technicians and Associate Professionals, and Clerks. Since there was not any significant discrepancy noted among income group, one can therefore suppose that it is rather a question of status more than a question of level of income that goads people to buy more clothes.

Table 27 ***Items of clothing purchased yearly (Units)*Professional Classification***

PROFESSIONAL CLASSIFICATION	Items of clothing purchased yearly (Units)		
	11-15	16-20	>50
	%	%	%
Legislators, Senior officials and Managers	5.0	7.1	7.4
Professionals	2.1	3.9	2.0
Technicians and Associate Professionals	9.9	8.2	17.4
Clerks	9.2	9.9	17.4
Service Workers and Shop Sales Workers	7.8	7.1	14.8
Skilled Agricultural and Fishery Workers	2.1	1.6	2.0
Craft and related trade workers	9.9	13.2	7.4
Plant and Machine Operators and Assemblers	4.3	1.1	3.4
Elementary Occupations	9.9	14.8	9.4
Students	9.2	8.2	11.4
Unemployed	2.9	1.6	2.0
Retired	7.8	12.6	Nil
Housewives	19.9	10.4	5.4
Total	**100.0**	**99.7**	**100.0**

Question 2

This question gives an illustration of the consumption of clothing per category and specific items for the past 6 months. Data was gathered on the last 6 months for this question on the assumption that respondents would not be able to recall detailed apparel purchase back to a year ago. The general trend is that women tend to have a wider range of clothes, and seem to replace their garments at a faster pace.

Table 28 Percentage "consumption" clothing per category and apparel items

APPAREL ITEM	1 - 3	4 - 6	7 - 9	10 -12	13 - 15	16 - 18	19 -21	22 - 24	None
UNISEX WEAR									
Shorts/Bermudas	28.8	8.5	1.6	0.9	0.1	-	-	0.1	60.1
Trousers/Pants/ Jeans	43.7	18.0	2.0	1.3	0.3	-	-	0.1	34.7
T shirts	28.6	18.2	3.7	2.9	0.8	0.3	0.3	0.3	45.1
Polo shirts	10.9	2.6	0.2	0.3	0.1			0.2	85.8
Kurtas	16.6	2.6	0.3	0.3	0.1	-	-	-	80.2
Jackets/ Blazers	11.3	0.3	0.1	-	-	-	-	-	88.3
Undershirts (Singlets)	5.8	3.1	0.5	1.5	0.1	-	-	-	89.1
Track Suits	9.6	0.8	0.1	-	-	-	-	-	89.5
Overalls	0.7	-	-	-	-	-	-	-	99.3
Salopettes	0.8	-	-	-	-	-	-	-	99.3
Raincoats	1.8	0.1	-	-	-	-	-	-	98.2
Cardigans/ Pullovers	8.0	0.6	-	-	-	-	-	-	91.4
Swim suits/ Bikinis	7.7	0.4	0.1	-	-	-	-	-	91.8
WOMEN'S OUTERWEAR									
Dresses	32.4	9.5	1.1	0.5	0.2	-	0.2	-	56.2
Blouses	40.5	17.5	2.1	1.5	0.2	0.2	0.2	-	37.9
Skirts	39.1	12.9	1.0	0.8	0.2	0.2	-	-	45.9
Tops	24.7	11.9	2.5	2.6	0.7	0.2	-	0.5	57.0
Suits	1.6	-	-	-	-	-	-	-	98.4
WOMEN'S UNDERWEAR (& Hosiery)									
Bra	28.8	36.1	5.2	7.2	0.3	0.5	-	0.3	21.6
Panties/knickers	10.1	39.9	6.4	21.4	1.3	0.7	0.3	1.5	18.5
Underskirt (Jupon)	9.5	3.6		0.7	-	-	-	-	86.3
Bathrobes / Nightdresses	17.8	4.6	0.3	0.7	0.3	-	0.2	-	76.1
Socks	4.1	4.2	0.7	0.2	-	-	-	0.2	90.7
MEN'S OUTERWEAR									
Shirts	45.6	20.7	2.9	2.9	0.2	0.2	0.3	-	27.2
Suits	9.2	1.0	-	-	-	-	-	-	89.8
MEN'S UNDERWEAR (& Hosiery)									
Slips/ Boxer Shorts	10.5	32.7	9.4	22.8	0.7	0.5	0.5	2.4	20.6
Socks	25.0	31.3	7.0	9.5	1.2	0.2	0.3	1.0	24.5

For breakdown in terms of gender concerning Unisex wear, please see Annex VII.

Table 26 gives an idea of the average consumption of clothing per category and per items for the last 6 months. From the table, the following can be observed for clothes worn by both genders (unisex clothing):

- 54.9% of respondents have purchased T-shirts and 65.3% have purchased trousers/pants/jeans, revealing that Mauritians are more inclined for casual wear since the survey of retailers and hawkers has also shown such a trend.
- The consumption for polo shirts can be considered as relatively low as compared to t-shirts
- As for women's outerwear, women also spend their money on blouses (62.1%) and skirts (54.1%) [Findings confirmed by survey for retail outlets and hawkers, Table 15, pg 64. Less than 50% of women surveyed, purchased tops (43%) and dresses (43.8%).
- Consumption of underwear for women follows a significant trend. In fact, it was earlier found in the survey for retailers and hawkers that women purchase more of panties/ knickers and bras than any other apparel item. Percentages for panties/knickers (81.5%) and bras (78.4%) illustrate this trend.

DEMOGRAPHIC ANALYSIS FOR SELECTED ITEMS OF CLOTHING

Underskirt (Jupon)

13.7 % of female respondents have purchased at least one underskirt for the past 6 months. These are mostly housewives and clerks with 75% from rural area. 69.1% of those who have purchased an underskirt for the last 6 months have more than 30 years old. The breakdown for the age groups is as follows:

*Table 29 Percentage of women who have bought underskirts for the last 6 months*Age group*

Age group	%
15 - 18	2.4
19 - 24	15.5
25 - 29	13.1
30 - 39	19.0
40 - 49	17.9
50 - 60	17.9
60+	14.3

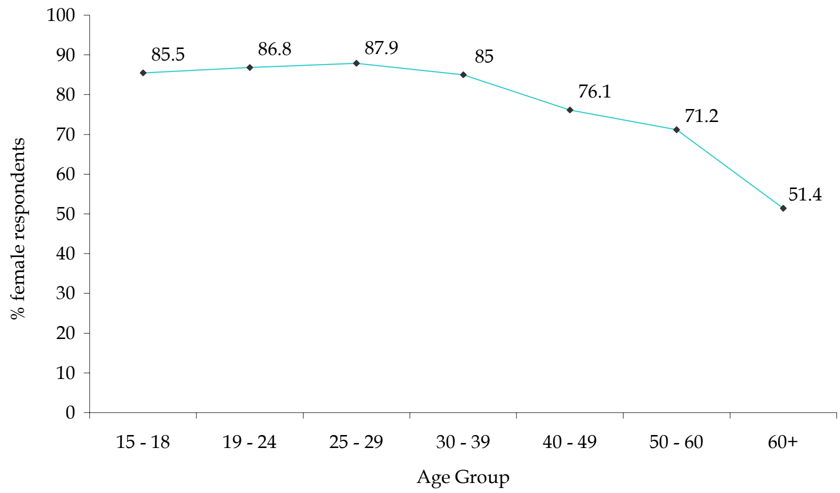
Panties/ knickers

A large majority (81.5%) of the female respondents have purchased panties/knickers for the last 6 months.

Bra

78.4% of the female respondents have purchased bras for the last 6 months (45.2% from rural and 33.2% from urban region). Married female respondents are those who tend to purchase fewer bras as compared to other categories of female respondents (single, divorced…).

Figure 15Propensity to purchase bras Age group*



As depicted by the figure above, propensity to purchase bras reduces as age increases.

Trousers/Pants (Women)

*Table 30 Percentage of women who have consumed trousers/pants/jeans*Region*

Items of clothing	Urban	Rural
	%	%
Trousers/Pants/Jeans	61.0	42.5
Dresses	36.0	49.7

The above table shows that women in the urban regions have bought more trousers/pants/jeans than women in rural regions during the past 6 months. The situation is however reversed in the case of dresses. This may therefore to an extent explain why the percentages of women who wear underskirts come mostly from the rural regions.

This is confirmed since 66.7% of the women who live in the rural regions and who have bought underskirts during the last 6 months have bought dresses, as compared to only 33.3% who have bought trousers/pants/jeans.

Slips/ Boxer Shorts

As found earlier, 79.4% of male respondents has purchased at least one slip/boxer short for the last 6 months. Those who purchase more slips/boxer shorts fall mainly within the following age groups:

1. 25 – 29
2. 15-18
3. 30-39
4. 40-49

Moreover, it has been found that more singles have purchased slips/boxer shorts for the last 6 months, 55% of them are from the rural area and earn an average monthly income of Rs 4,000 – Rs 10,000.

Shirts

As for the purchase of shirts for the last 6 months, 72.8% of male respondents have taken out their wallet to purchase shirts and those aged between 40-49 tend to purchase more shirts than any other age groups. On a geographical basis, men from rural areas have purchased more shirts for the last 6 months (76.7%).

Socks

75.5%of the male respondents have purchased socks for the last 6 months. As for female respondents, the consumption of socks for the last 6 months is relatively low, with 9.3%, unsurprisingly most of them being in the 15-18 age group. Majority of the male respondents who have purchased socks fall in the 19 – 49 years group (67.8%) and are married. Moreover, men from urban area purchase more socks than men from rural area.

Casual Wear

Table 31 Consumption of apparel by category for the last 6 months Young v/s Elderly*

Items of clothing	Young	Elderly
	%	%
Casual Wear	88.6	90.6
Underwear	3.5	4.3
Sportswear	1.4	Nil
Work Wear	6.6	5.0

With respect to the category of clothing on which more money is usually spent, it is interesting to note from the table above that the percentage of elderly (aged 50 to above) is higher in both cases, i.e casual wear and underwear as compared to the percentage of the young (aged 15 to 24).

The table below provides a detailed comparative breakdown on the items of clothing bought by the young and the elderly during the last 6 months. Interestingly, both a majority of young people and elderly have reported buying trousers/pants/jeans and t-shirts.

Table 32 Comparative breakdown on the items of clothing bought by the young and the elderly during the last 6 months

Items of clothing	Young	Elderly
	%	%
Shorts/Bermudas	49.8	27.7
Trousers/Pants/Jeans	81.7	45.3
T Shirts	70.6	38.5
Polo Shirts	21.1	7.6
Shirts	34.3	34.2
Kurtas	29.1	7.2
Jackets/Blazers	20.4	3.6
Suits	8.7	5.4
Ties	4.8	4.7
Raincoats	2.1	1.1
Cardigans/Pullovers	14.9	5.0
Dresses	21.1	18.3
Blouses	32.9	24.5
Skirts	32.2	20.1
Tops	33.9	7.6
Slips/Boxer Shorts	39.8	33.1
Undershirt (Singlet)	12.8	8.6
Pyjamas	5.5	1.8
Bathrobes/Nightdresses	12.1	10.8

Bra	43.6	31.7
Panties/Knickers	44.3	35.3
Underskirt/Jupon	5.2	9.7
Socks	53.3	36.3
Tracksuits	14.9	4.0
Overalls	2.1	Nil
Salopettes	2.1	Nil
Swimsuits/bikinis	12.1	4.3

Note that for items "Raincoats" and "Cardigans & pullovers", consumption has not been analysed since consumption for those items is seasonal and the administration of the survey was done during the period May – June 2006. Consumers are now starting to purchase winter clothes.

The following table provides us with a list of the average ten largest apparel item purchased by respondents for the last 6 months (*For complete list, see Annex VII)*

Table 33 Ten largest apparel item purchases for the last 6 months (Units)

WOMEN'S APPAREL	Minimum Value	Maximum Value	Average Value	MEN'S APPAREL	Minimum Value	Maximum Value	Average Value
Panties/knickers	3025	4023	3524	Slips/ Boxer Shorts	3020	3954	3487
Bra	1842	2802	2322	Socks	2007	2895	2451
Blouses	905	1665	1285	T shirts	1553	2391	1972
Tops	842	1368	1105	Trousers / Pants / Jeans	1189	2139	1664
Skirts	679	1341	1010	Shirts	1112	1968	1540
Dresses	541	1077	809	Polo shirts	606	570	588
Other 1 (Mostly Churidars & Sarees)	525	975	750	Undershirts (Singlets)	427	645	536
Underskirt (Jupon)	186	354	270	Kurtas	103	231	167
Shorts/Bermudas	195	465	330	Track Suits	128	330	229
Socks	189	303	246	Jacklets/ Blazers	113	321	217

As Table 27 shows, "consumption" of apparel for the last 6 months follows more or less the same trend irrespective of gender. Both men and women have purchased more underwear than any other apparel items. Panties/knickers rank top in women's apparel followed by Bra, while on the other side slips/boxer shorts rank top in men's apparel.

By extrapolation, we can reach the following conclusion based on information from Table 25:

- One woman purchases 4.9 – 6.5 panties/knickers every 6 months, i.e on average 5.7 every 6 months
- One man purchases 5.1 – 6.7 slips/boxer shorts every 6 months, i.e on average 5.9 every 6 months
- One woman purchases 2.9 – 5.0 blouses/tops every 6 months, i.e on average 3.9 every 6 months
- One man purchases 2.6 – 4.1 t-shirts every 6 months, i.e on average 3.4 every 6 months
- One woman purchases 1.1 – 2.2 skirts every 6 months, i.e on average 1.7 every 6 months
- One man purchases 2.0 – 3.6 pants every 6 months, i.e on average 2.8 every 6 months
- One man purchases 3.4 – 4.9 pair of socks every 6 months, i.e on average 4.2 every 6 months

Hence, as far as a woman is concerned, for every 1 unit skirt purchased, 2.3 units tops/blouses is purchased. As for a man, for 1 unit pant purchased, 1.2 unit t-shirt is purchased.

Question 3

While this question tries to discriminate between consumers who normally buy domestic apparel only as opposed to those who purchase imported garments only, it also caters for those who buy both imported and domestic apparel.

The analysis of the responses to this question is quite reassuring at a first glance since a low 6.1% have stated buying only imported clothes, while 26.1% purchase only local clothes.

However, a highly relative 36.2% have stated buying more of imported than locally produced garment. This is however not very alarming since a quite high 31.7% also purchases more of locally produced than imported apparel.

Table 34 ***Purchase of Domestic v/s Imported Apparel***

Purchase of Domestic v/s Import ed Apparel	%
I buy only imported clothes	6.1
I buy only local clothes	26.1
I buy more of imported than locally produced	36.2
I buy more of locally produced than imported	31.7
Total	**100.0**

Going by the findings therefore, Mauritius is not yet at the stage where the majority of its people think in terms of what comes from foreign is necessarily better than what is being produced in the country.

One may hence tend to think that there exists element of national loyalty with respect to the purchase of clothing. This may be true to a certain extent but findings from *Question 4* where respondents have been asked to rank the three most important factors that influence them in the purchase of apparel should not be overlooked. As will be detailed below, along with quality and style, the one major factor influencing people in the choice of garment is price. It is understood that a better price means a cheaper price for the consumers and as our locally produced apparel is relatively cheaper than imported apparel, that may explain why our people buy a considerable quantity of locally produced apparel.

*Table 35 First factor **influencing purchase of garments***

Origin of garments bought	First factor influencing purchase of garments		
	Quality	Price	Style
	%	%	%
I buy only imported clothes	65.8	15.1	8.2
I buy only local clothes	36.1	44.1	6.7
I buy more of imported than locally produced	22.1	15.7	15.9
I buy more of locally produced than imported	48.7	25.0	14.7

This aspect notion is backed by figures from the above table. A relatively higher percentage, i.e. 44.1% and 25.0% of respondents who buy only locally produced and more locally produced than imported clothes respectively are influenced by the price of garments when shopping.

On the other hand, a relatively higher percentage of respondents who have stated buying only imported and more imported than locally produced garments are influenced by the quality and style of the garments when shopping.

Interestingly, when disaggregated with respect to gender, it has been found that there is a greater percentage of males who buy only locally produced garments as well as more locally produced than imported garments than women. The percentage of males and females buying only imported garments is almost the same. However, where the purchase of more imported than locally produced garments is concerned, the percentage of women by far exceeds that of men. (See table 30)

*Table 36 Purchase of Domestic v/s Imported Apparel*Gender*

Purchase of Domestic v/s Import ed Apparel	Male	Female
	%	%
I buy only imported clothes	6.1	6.0
I buy only local clothes	35.2	17.3
I buy more of imported than locally produced	18.4	53.3
I buy more of locally produced than imported	40.3	23.4
Total	**100.0**	**100.0**

Question 4

As consumers often evaluate products differently we have tried to look at consumer choice when it comes to apparel in Mauritius. Respondents have been provided with a list of seven factors and were asked to rank the 3 most important factors that influence them in the purchase of garments.

From the results of the survey, it is crystal clear that respondents are influenced by three main factors. Mauritians are quality conscious, price conscious and fashion conscious when it comes to their purchase decision for apparel. Reasons put forward by the respondents illustrate clearly this tendency.

Table 37 Three most important factors that influence respondents in the purchase of garments

First reason	%
The quality of the garment	48.8
The price of the garment	26.0
The style of the garment (Fashion driven)	12.7
Second reason	%
The quality of the garment	29.9
The price of the garment	28.5
The style of the garment (Fashion driven)	15.5
Third reason	%
Durability of the garment	27.5
The price of the garment	25.9
The style of the garment (Fashion driven)	14.4

Generally speaking, different age categories have different clothing behaviour. As depicted by the table below, significant differences in age groups were found. Quality is an essential requirement for the higher age groups (from 30 to 60 years of age).

Price too is a factor to which the elder generation gives importance. On the other hand, as expected, the influence of fashion has gripped the younger age group (15-24) which places more importance on the style of the garments they buy.

Table 38 ***First factor influencing purchase of garments*Age group***

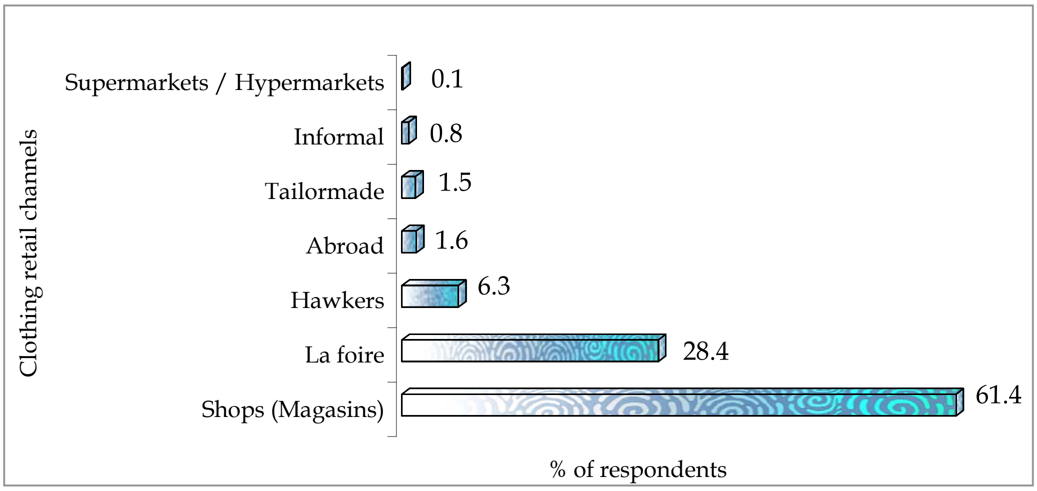
AGE	First factor influencing purchase of garments		
	Quality	Price	Style
	%	%	%
15-18	35.8	10.1	33.9
19-24	47.2	18.3	21.7
25-29	50.0	23.1	13.8
30-39	51.6	24.4	13.8
40-49	54.4	28.5	4.8
50-60	54.9	28.9	4.9
60+	38.2	47.8	1.5

Findings from *Question 3* also demonstrates that a greater percentage of those aged between 15-18 and 19-24 (45.0% and 41.7% respectively) buy more of imported than locally produced goods. The findings of this study are therefore supported by the findings of previous studies (as discussed earlier in the review of the literature) relating to the fact that younger consumers seem more favourable to purchase imported apparel since they were more influenced by fashion and were less sensitive to higher prices.

Question 5a

When it comes to choice of clothing retail channels, the analysis shows that the majority of respondents (61.4%) prefer to buy their clothes in shops, therefore substantiating the findings of Jugroop (2003). Unlike other countries where supermarkets and hypermarkets have taken the lead as clothing retail channels, in Mauritius the tendency is still to go apparel shopping in shops.

Figure 16 Choice of clothing retail channels



The trend in choice of outlet for apparel shopping aligns with the findings for the enterprises survey since 66.7% of the enterprises that were surveyed disseminate their apparel production on the local market through shops.

As shown in Table 31, a higher percentage of respondents in the different income categories buy their clothes in shops as opposed to la foire. The biggest gaps between percentages were however found among the highest income groups i.e. from Rs.10, 000 to over Rs.24, 000. It is also interesting to note that 100% of those earning from Rs.22 000 to < Rs.24 000 buy their clothes in shops only.

*Table 39 Choice of clothing retail channels*Shops v/s La foire*Monthly Income*

Monthly Income	Shops	La foire
	%	%
0 to 500	58.4	36.6
500 to < 1,000	60.4	35.1
1000 to < 1,500	60.5	25.6
1500 to < 2,000	46.7	44.4
2000 to < 4,000	46.5	40.8
4000 to < 6,000	58.9	26.3
6000 to < 8,000	61.0	29.9
8000 to < 10,000	64.4	25.8
10,000 to < 14,000	73.3	17.6
14000 to < 16,000	77.8	11.1
16 000 to < 18,000	73.5	11.8
18 000 to < 20,000	75.0	16.7
20000 to < 22,000	75.0	25.0
22 000 - < 24 000	100.0	Nil
24,000 & over	76.5	5.9

With respect to professional classification also, the percentage of those who buy their clothes in shops exceeds the percentage of those who buy their clothes in la foire, except in the case of retired where the percentage of those who buy in shops and la foire is similar. The widest gap between percentages is however noted among the higher level jobs and students.

*Table 40 Choice of clothing retail channels*Shops v/s La foire* Professional Classification*

Professional Classification	Shops	La Foire
	%	%
Legislators, Senior officials and Managers	65.2	21.7
Professionals	70.0	20.0
Technicians and Associate Professionals	74.1	15.4
Clerks	75.6	15.4
Service Workers and Shop Sales Workers	67.9	24.5
Skilled Agricultural and Fishery Workers	55.6	38.9
Craft and related trade workers	60.5	25.0
Plant and Machine Operators and Assemblers	53.8	28.2
Elementary Occupations	48.6	43.7
Students	74.8	19.1
Unemployed	58.3	37.5
Retired	44.9	44.9
Housewives	45.5	42.4

Question 5b

This question is directly linked with question 5a since it tries to uncover the reason behind the specific choice of retail channel for apparel shopping. Respondents were given 5 reasons and were also allowed for an open answer.

Table 41 ***Motivation behind choice of outlet***

Motivation behind choice of outlet	Yes (%)	No (%)
Wide selection of garments	81.3	18.8
Availability of latest styles of garments	58.7	41.3
Quality of garments	84.5	15.5
Prices of garments	74.2	25.8
Location/ Accessibility	63.6	36.4
Other	6.3	93.7

As depicted by the table above, majority of respondents are motivated in their purchase by the following factors:

- Quality of garments (84.5%)
- Wider choice of garments (81.3%)
- A lesser majority (74.2%) are influenced by the price of garments in shops.

A disaggregated analysis with respect to the two retail outlets that are mostly used by the respondents shows that the majority of respondents, i.e. 56.3%, have stated buying their clothes in shops because of the quality of the garments. On the other hand, the main reason that seems to motivate respondents to buy their clothes in la foire is the prices of the garments sold there.

Table 42 ***Motivation behind choice of outlet*Shops v/s La foire***

Motivation behind choice of outlet	Shops %	La Foire %
Wide selection of garments	50.5	23.8
Availability of latest styles of garments	41.9	12.0
Quality of garments	56.3	20.3
Prices of garments	39.0	27.1
Location/ Accessibility	39.0	18.4

Question 6

As for the frequency of shopping with the intention of acquiring garments, responses show that pre-set answers given in the form of closed ended questions did not fit the frequency of purchase of most respondents since majority of them (63.8%) have stated "other" as answer while 29.2% go shopping once a month. Respondents falling in the "other" category go shopping every 2 -3 months or every 6 months.

Table 43 Frequency of purchase of apparel

Frequency of purchase	%
Everyday	0.3
Twice a week	0.7
Every week	1.7
Every fortnight	4.2
Once a month	29.2
Other	63.8
Never	0.2

Every 2 months	13
Every 3 months	18.4
Every 4 months	9.3
Every 6 months	13.3
Once a year	6.5

An analysis of the frequency of shopping with respect to age confirms that younger segment shop more frequently then elder segment. As shown in table 38, the category 15 – 29 forms the majority of those who shop once a month with 51.4

Table 44 Frequency of apparel purchase Age group*

AGE	Once a month	Every 2-3 months	Every 6 months
	%	%	%
15-18	13.4	8.2	3.8
19-24	23.4	14.1	7.5
25-29	14.6	9.0	10.0
30-39	21.7	25.2	20.6
40-49	16.9	22.3	19.4
50-60	6.0	13.5	15.0
60+	4.0	7.7	23.8
Total	**100.0**	**100.0**	**100.1**

Similar interesting observations are made gender-wise and region-wise. As depicted in tables 39 & 40 below, urban dwellers and females seem to go shopping more frequently than their rural and male counterparts respectively.

Table 45 Frequency of apparel purchase Region*

	Once a month	Every 2-3 months	Every 6 months
	%	%	%
Urban	53.4	37.1	38.1
Rural	46.6	62.9	61.9
Total	**100.0**	**100.0**	**100.0**

Table 46 Frequency of apparel purchase Gender*

	Once a month	Every 2-3 months	Every 6 months
	%	%	%
Male	42.0	52.3	58.1
Female	58.0	47.7	41.9
Total	**100.0**	**100.0**	**100.0**

As far as professional status is concerned, ''Technicians and Associate Professionals'', ''Clerks'', ''Craft and related trade workers'', and ''Students'' form the majority (58.2%) of those who go shopping once a month. Those in elementary occupations come to add up to this tendency among those who shop every 2-3 months.

As the shopping trips become scarcer, i.e every 6 months, the status of respondents also change. ''Retired'', ''Housewives'', ''Craft and related trade workers'' and ''Elementary occupations'' make up the greatest percentage (63.6%) of those who shop every 6 months.

Table 47 Frequency of apparel purchase Professional Classification*

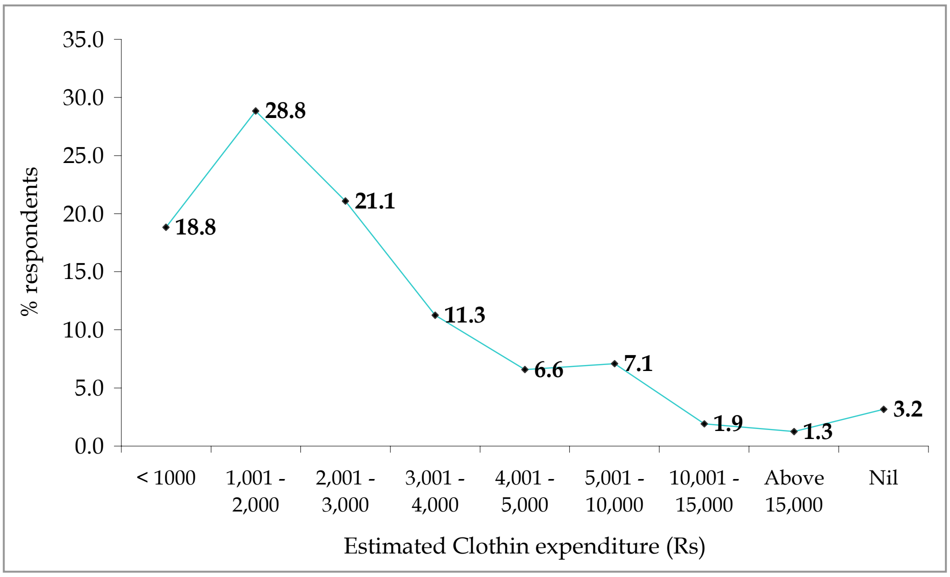
PROFESSIONAL CLASSIFICATION	Once a month	Every 2-3 months	Every 6 months
	%	%	%
Legislators, Senior officials and Managers	4.6	5.6	7.5
Professionals	2.0	3.2	3.1
Technicians and Associate Professionals	14.0	13.3	8.1
Clerks	17.1	7.7	4.4
Service Workers and Shop Sales Workers	8.3	9.5	6.3
Skilled Agricultural and Fishery Workers	0.3	1.6	1.9
Craft and related trade workers	14.0	13.0	13.8
Plant and Machine Operators and Assemblers	3.1	4.2	3.1
Elementary Occupations	7.4	13.8	13.8
Students	13.1	11.1	1.9
Unemployed	2.6	2.1	0.6
Retired	4.3	5.0	19.4
Housewives	9.1	9.8	16.3
Total	**99.9**	**99.9**	**100.2**

Question 7a

As for the estimated clothing expenditure over the last six months, it is clear that the majority of respondents (80.3%) did not spend more than Rs 4000 on apparel for the last 6 months, with the following breakdown:

- 18.8% spending less than Rs 1000
- 28.8% spending between Rs 1001 and Rs 2000
- 21.1% spending between Rs 2001 and Rs 3000
- 11.3% spending between Rs 3001 and Rs 4000

Figure 17 Estimated clothing expenditure



Those respondents who spent less than Rs 4000 on clothing expenditure (80.3%) fall within the following professional classification:

- 13.9% Craft and related trade workers
- 12.6% Elementary Occupations
- 12.5% Housewives
- 9.6% Clerks
- 9.3% Technicians and Associate Professionals

As for their **income** status, respondents have the following profile:

- 17.3% earn Rs 4,000 to < 6,000
- 13.6% earn Rs 2,000 to < 4,000
- 13.0% earn Rs 6,000 to < 8,000
- 10.4% earn Rs 8,000 to < 10,000

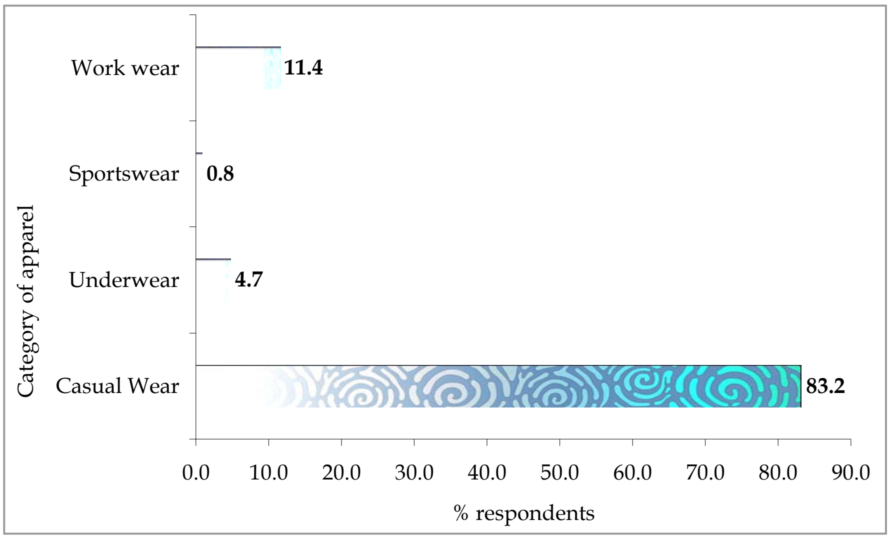
In contrast , respondents that spent more than Rs 4,000 (16.9%) on apparel for the last six months, 26.2 % are Technicians and Professionals, 15.3% are clerks and 10.4% are students and 10.4% work as service workers and shop sales workers who fall in the middle income earning range (19.3% Rs 10,000 - < 14,000, 15.8% Rs 8,000 - < Rs 10,000, 11.9% Rs 6,000 - < 8,000).

Question 7b

Respondents were also asked to state on which category of clothing they usually spend more money. Responses were quite predictable since majority of respondents spend their money on Casual wear as it had been found earlier in the survey for enterprises, retail outlets and hawkers. The trend identified in the survey is that Causal Wear (T-shirts, shorts/bermudas and trousers/pants/ jeans) is the category of apparel mostly "consumed".

Furthermore, it is good to note that the second category of apparel on which respondents spend more money is Workwear.

Figure 18 Category of clothing on which more money is spent



Profiling respondents who spend more on Casual Wear, the following information has been observed:

- 58.3% of those who spend more on casual wear spent between Rs 0 - 3,000 for the last 6 months

- Irrespective of the level of income, majority of respondents will not spend more than Rs 3000 on the last 6 months for casual wear.

Of those who stated that they spend more money on work wear:

- 65.7% are women
- 56.2% are aged between 30 to 49 years of age.

Of those who stated that they spend more money on underwear:

- 51.8% are aged between 30 to 49 years of age.
- 78.6% are women with 77.3% of them being married.

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ANNEX I: QUESTIONNAIRE FOR LOCAL ENTERPRISES

Q. No. [ ]
For office use only

ENTERPRISE IDENTIFICATION

DATE: ____/____/ 05

NAME OF ENTERPRISE :

ADDRESS :

TEL:

FAX:

E-MAIL:

CONTACT PERSON / TITLE:

SURVEY SHEET

Q 1. Which of the following items are manufactured in your enterprise? *(Please state number in units produced per year. Including from local outsourced production)*

	ITEM OF CLOTHING	MEN(1) (Units)	WOMEN(2) (Units)	Outsourcing(3)			MEN(1) (Units)	WOMEN(2) (Units)	Outsourcing(3)
1	**Shorts/Bermudas**				15	**Track Suits**			
2	**Trousers/Pants/Jeans**				16	**Cardigans/ Pullovers**			
3	**T-Shirts**				17	**Shawls**			
4	**Polo Shirts**				18	**Pyjamas**			
5	**Shirts**				19	**Bathrobes/ Nightdresses**			
6	**Kurtas**				20	**Swim Suits/ Bikini**			
7	**Jackets / Blazers**				21	**Bra**			
8	**Slips / Boxer shorts**				22	**Panties/knickers**			
9	**Undershirt**				23	**Underskirt (Jupon)**			
10	**Suits**				24	**Socks**			
11	**Ties**				25	**Dresses**			
12	**Work Wear(e.g overalls)**				26	**Skirts**			
13	**Dungarees (Salopettes)**				27	**Blouses**			
14	**Raincoats**				28	**Tops**			

Others, please specify:

Item of clothing	**Units**

Q 2. For what market do you produce? *(Insert a "Y" for a "Yes" where appropriate)*

1	Only Export		**If only export market, go to question 5**
2	Only Local		***If only local market, go to question 4***
3	Both local and export		***If both markets, go to question 3***

Q 3. What percentage does that represent if you produce both for local and export markets?

(a) Export Market		**%**
(b) Local Market		**%**

Total must add up to 100 %

Q4. What is your main distribution channel on the local market? *(State in units and percentage per channel)*

	Distribution Channel	Units	%
1	Wholesalers / Distributors		
2	Shops / Retailers		
3	Hawkers		
4	Hypermarkets / supermarkets		
5	Other, please specify ( )		

Total must add up to 100 %

Q5. In case your enterprise produces only for export but occasionally sells excess production, rejects or stock outs on the local market, please specify quantity in units.

	ITEM OF CLOTHING	MEN(1) (Units)	WOMEN(2) (Units)		ITEM OF CLOTHING	MEN(1) (Units)	WOMEN(2) (Units)
1	Shorts/Bermudas			15	Track Suits		
2	Trousers/Pants/Jeans			16	Cardigans/ Pullovers		
3	T-Shirts			17	Shawls		
4	Polo Shirts			18	Pyjamas		
5	Shirts			19	Bathrobes/ Nightdresses		
6	Kurtas			20	Swim Suits/ Bikini		
7	Jackets / Blazers			21	Bra		
8	Slips / Boxer shorts			22	Panties/knickers		
9	Undershirt			23	Underskirt (Jupon)		
10	Suits			24	Socks		
11	Ties			25	Dresses		
12	Work Wear (e.g Overalls…)			26	Skirts		
13	Dungarees (Salopettes)			27	Blouses		
14	Raincoats			28	Tops		

Q6a. How was your sales performance for the local market over the last 3 years? *(Insert a "Y" for "Yes" where appropriate)*

1	Has increased	
2	Has decreased	
3	Stayed the same	

Q6b Please indicate quantity in units for the past 3 years:

	For 2002
	For 2003
	For 2004

Q6 c. To what factors do you attribute that sales performance?

____

____

End of questionnaire
Thank you for your participation
***

ANNEX II: QUESTIONNAIRE FOR RETAIL OUTLETS & HAWKERS

Q. No.

PROFILE OF RETAIL OUTLET

DATE: ____/____/ 05

NAME OF SHOP:

NAME OF RETAILER:

ADDRESS :

TEL:

FAX:

E-MAIL:

CONTACT PERSON / TITLE:

SURVEY SHEET

Q1 Please state the average sales in units, either on a Weekly, Monthly OR Yearly basis, for the items that are sold in your outlet.

For each items, please state whether garments sold are imported or locally produced, where " I " stands for "Imported" and " L " stands for " Locally produced".

	ITEM OF CLOTHING	MEN(1) (Units)					WOMEN(2) (Units)				
		Weekly	Monthly	Yearly	Source		Weekly	Monthly	Yearly	Source	
1	Shorts/Bermudas				I	L				I	L
2	Trousers/Pants/Jeans				I	L				I	L
3	T-Shirts				I	L				I	L
4	Polo Shirts				I	L				I	L
5	Shirts				I	L				I	L
6	Kurtas				I	L				I	L
7	Jackets / Blazers				I	L				I	L
8	Slips / Boxer shorts				I	L				I	L
9	Undershirt				I	L				I	L
10	Suits				I	L				I	L
11	Ties				I	L				I	L
12	Work Wear (e.g overalls)				I	L				I	L
13	Dungarees (Salopettes)				I	L				I	L

	ITEM OF CLOTHING	MEN(1) (Units)	WOMEN(2) (Units)

		Weekly	Monthly	Yearly	Source		Weekly	Monthly	Yearly	Source	
14	Raincoats				I	L				I	L
15	Track Suits				I	L				I	L
16	Cardigans/ Pullovers				I	L				I	L
17	Shawls				I	L				I	L
18	Pyjamas				I	L				I	L
19	Bathrobes/ Nightdresses				I	L				I	L
20	Swim Suits/ Bikini				I	L				I	L
21	Bra				I	L				I	L
22	Panties/knickers				I	L				I	L
23	Underskirt (Jupon)				I	L				I	L
24	Socks				I	L				I	L
25	Dresses				I	L				I	L
26	Skirts				I	L				I	L
27	Blouses				I	L				I	L
28	Tops				I	L				I	L
29	Churidar / Saree / Choli				I	L				I	L

OTHERS, PLEASE SPECIFY

	ITEM OF CLOTHING	MEN(1) (Units)					WOMEN(2) (Units)				
		Weekly	Monthly	Yearly	Source		Weekly	Monthly	Yearly	Source	
					I	L				I	L
					I	L				I	L

Q2. Do customers look for specific items of clothing that are not available on the market?

1	Yes	
2	No	

If, "Yes", state what type of clothes: __________

(State whether for men or women) __________

Q3. Are there demands for second-hand clothing? (e.g suits)

1	Yes	
2	No	

If, "Yes", state what type of clothes: __________

(State whether for men or women) __________

End of questionnaire
Thank you for your participation
***

ANNEX III: QUESTIONNAIRE FOR CONSUMERS

StraConsult

CLOTHING SURVEY IN MAURITIUS

Supervisor Code		Interviewer Code				Questionnaire Code				

DATE					2	0	0	6	START TIME		END TIME	

Dear Sir / Madam,

The purpose of this survey is to collect data concerning the clothing market in Mauritius and more specifically to analyse the opportunities and future development prospects of the domestic oriented firms in relation to the local market Please take a few minutes to answer the following questions about your clothing habits.

PROFILE OF RESPONDENTS

P1 AGE GROUP

15 - 18	**1**
19 - 24	**2**
25 - 29	**3**
30 - 39	**4**
40 - 49	**5**
50 - 60	**6**
60 +	**7**

P2 ETHNIC ORIGIN

Hindu	**1**
General population	**2**
Muslim	**3**
Chinese	**4**
Franco- mauritian	**5**

P3 MARITAL STATUS

Single	**1**
Married	**2**
Divorced/Separated	**3**
Living in a union	**4**

P4 REGION

URBAN	
Port Louis	**1**
Beau Bassin / Rose Hill	**2**
Quatre Bornes	**3**
Vacoas / Phoenix	**4**
Curepipe	**5**

RURAL	
Pamplemousses	**6**
Rivière Du Rempart	**7**
Flacq	**8**
Moka	**9**
Grand Port	**10**
Savanne	**11**
Black River	**12**

P5 GENDER

Male	**1**
Female	**2**

P6 INCOME [Monthly Income (Rs)]

0 to < 500	**1**
500 to < 1,000	**2**
1,000 to < 1,500	**3**
1,500 to < 2,000	**4**
2,000 to < 4,000	**5**
4,000 to < 6,000	**6**
6,000 to < 8,000	**7**
8,000 to < 10,000	**8**
10,000 to < 14,000	**9**
14,000 to < 16,000	**10**
16,000 to < 18,000	**11**
18,000 to < 20,000	**12**
20,000 to < 22,000	**13**
22,000 to < 24,000	**14**
24,000 & over	**15**

P7 PROFESSIONAL CLASSIFICATION: ***Please note the profession of the respondent***……………………………

Legislators, Senior officials and Managers	**1**
Professionals	**2**
Technicians and Associate Professionals	**3**
Clerks	**4**
Service Workers and Shop Sales Workers	**5**
Skilled Agricultural and Fishery Workers	**6**
Craft and Related Trades Workers	**7**
Plant and Machine Operators and Assemblers	**8**
Elementary Occupations	**9**
Students	**10**
Unemployed	**11**
Retired	**12**
Housewives	**13**
Other	**14**

APPAREL WEARING HABITS & PURCHASE BEHAVIOUR

Q 1 Could you state on average how many items of clothing you bought during this past year?

1-5	**1**	21-25	**5**	41-45	**9**
6-10	**2**	26-30	**6**	46- 50	**10**
11-15	**3**	31-35	**7**	More than 50	**11**
16-20	**4**	36-40	**8**	None	**12**

Q2 From the items provided below, please state the number bought for each clothing item (where applicable) over the last 6 months?

CATEGORY OF CLOTHING		ITEM OF CLOTHING	Number of items bought during the last 6 months								
			1-3	**4-6**	**7-9**	**10-12**	**13-15**	**16-18**	**19-21**	**22–24**	**None**
(A) Outerwear	1	Shorts/Bermudas	1	2	3	4	5	6	7	8	9
	2	Trousers/Pants/Jeans	1	2	3	4	5	6	7	8	9
	3	T-shirts	1	2	3	4	5	6	7	8	9
	4	Polo Shirts	1	2	3	4	5	6	7	8	9
	5	Shirts	1	2	3	4	5	6	7	8	9
	6	Kurtas	1	2	3	4	5	6	7	8	9
	7	Jackets/ Blazers	1	2	3	4	5	6	7	8	9
	8	Suits	1	2	3	4	5	6	7	8	9
	9	Ties	1	2	3	4	5	6	7	8	9
	10	Raincoats	1	2	3	4	5	6	7	8	9
	11	Cardigans / Pullovers	1	2	3	4	5	6	7	8	9
	12	Dresses	1	2	3	4	5	6	7	8	9
	13	Blouses	1	2	3	4	5	6	7	8	9
	14	Skirts	1	2	3	4	5	6	7	8	9
	15	Tops	1	2	3	4	5	6	7	8	9
(B) Underwear	16	Slips/ Boxer shorts	1	2	3	4	5	6	7	8	9
	17	Undershirt (Singlet)	1	2	3	4	5	6	7	8	9
	18	Pyjamas	1	2	3	4	5	6	7	8	9
	19	Bathrobes/ Nightdresses	1	2	3	4	5	6	7	8	9
	20	Bra	1	2	3	4	5	6	7	8	9
	21	Panties / knickers	1	2	3	4	5	6	7	8	9
	22	Underskirt (Jupon)	1	2	3	4	5	6	7	8	9
	23	Socks	1	2	3	4	5	6	7	8	9
(C) Sportswear	24	Track suits	1	2	3	4	5	6	7	8	9
(D) Work wear	25	Overalls	1	2	3	4	5	6	7	8	9
	26	Salopettes	1	2	3	4	5	6	7	8	9
(E) Beachwear/ Swimwear	27	Swim suits/ Bikinis	1	2	3	4	5	6	7	8	9
(F) Other (please specify)	28		1	2	3	4	5	6	7	8	9
	29		1	2	3	4	5	6	7	8	9
	30		1	2	3	4	5	6	7	8	9

Q3 Please read the statements below and state the most appropriate. *(Only one answer possible)*

I buy only imported clothes	**1**
I buy only local clothes	**2**
I buy more of imported than locally produced	**3**
I buy more of locally produced than imported	**4**

Q4	What are the 3 factors that influence you in the purchase of garments? *Please state in order if importance starting with "1" as Most Important, "2" as" Important" and "3" as" Least Important".*

1	The quality of the garment	
2	The style of the garment (Fashion driven)	
3	The price of the garment	
4	Vetements de marque (Well-known designer labels)	
5	Practicality of the garment	
6	Durability of the garment	
7	The origin of the garment (Be it local or imported)	

Q5a	Where do you buy your clothes more often? *(Only one answer possible)*

La foire	**1**
Street Hawkers	**2**
Shops (Magasins)	**3**
Supermarkets / Hypermarkets	**4**
Abroad	**5**
Tailormade	**6**
Informal	**7**

Q5b	What could explain that choice of outlet for apparel purchase?

		Yes	**No**
a	Wide selection of garments	**1**	**2**
b	Availability of latest styles of garments	**1**	**2**
c	Quality of garments	**1**	**2**
d	Prices of garments	**1**	**2**
e	Location / Accessibility	**1**	**2**

f Other, please specify……………………………………………………..

Q6	How often do you go shopping with the intention to purchase clothing?

Everyday	**1**
Twice a week	**2**
Every week	**3**
Every fortnight	**4**
Once a month	**5**

Other (please specify)……………………………. **6**

Q7a	What is your estimated clothing expenditure over the last 6 months?

<Rs1,000	**1**
Rs 1,001 – Rs 2,000	**2**
Rs 2,001 – Rs 3,000	**3**
Rs 3,001 - Rs 4,000	**4**
Rs 4,001 - Rs 5,000	**5**
Rs 5,001 - Rs 10,000	**6**
Rs 10,001 – Rs 15,000	**7**
Above Rs 15,000, *specify* Rs…………………………..	**8**

Q7b	On which category of clothing do you usually spend more money? *(Only one answer possible)*

Casual Wear	**1**
Underwear	**2**
Sportswear	**3**
Work wear	**4**
Beachwear	**5**

ANNEX IV: SAMPLE BREAKDOWN FOR RETAIL OUTLETS

The table below summarises the number of retail outlets StraConsult has contacted and the resulting response.

Regions	Number of outlets contacted	No of questionnaires completed (Response)
Port Louis	15	7
Vacoas/ Quatre-Bornes	17	8
Rose Hill	13	8
Curepipe	15	8
Flacq	13	6
Goodlands	11	2
TOTAL	**84**	**39**

ANNEX V: SAMPLE BREAKDOWN FOR HAWKERS

The table below shows the number of questionnaires completed successfully for the survey of hawkers.

Regions	Targeted number of respondents	No of questionnaires completed (Response)
La Foire Martial	7	6
Port-Louis	7	7
La foire Mahébourg	7	7
Flacq	7	5
La foire Quatre-Bornes	7	7
Arab Town- Rose Hill	7	2
Goodlands	7	7
TOTAL	**49**	**41**

ANNEX VI: SAMPLE BREAKDOWN FOR CONSUMERS

➤ GENDER DISTRIBUTION, ISLAND OF MAURITIUS

Age	Both sexes	Male	Female
15 and above	856 872	421 488	435 384
%	100	**49**	**51**

Source: Census 2000, CSO *Base : Total Population (15 and above)*

➤ POPULATION OF ISLAND OF MAURITIUS BY DISTRICT

DISTRICT	Total	%	Sample disaggregated
Port Louis	**95 081**	11.1	133
Pamplemousses	**90 653**	10.6	127
Rivière du Rempart	**73 691**	8.6	103
Flacq	**93 484**	10.9	131
Grand Port	**78 991**	9.2	110
Savanne	**49 436**	5.8	69
Plaines Wilhems	**274 638**	32.1	384
Black River	**44 181**	5.2	63
Moka	**56 717**	6.6	80
TOTAL	**856 872**	**100**	**1200**

Source: Census 2000, CSO *Base : Total Population (15 and above)*

➤ POPULATION OF ISLAND OF MAURITIUS BY GENDER

			GENDER	
			MALE	FEMALE
DISTRICT	**Total**	**Sample disaggregated**	**49%**	**51%**
Port Louis	95 081	133	65	68
Pamplemousses	90 653	127	62	65
Rivière du Rempart	73 691	103	51	52
Flacq	93 484	131	64	67
Grand Port	78 991	110	54	56
Savanne	49 436	69	34	35
Plaines Wilhems	274 638	384	188	196
Black River	44 181	63	31	32
Moka	56 717	80	39	41
TOTAL	**856872**	**1200**	**588**	**612**

Source: Census 2000, CSO *Base: Total Population (15 and above)*

- **POPULATION OF ISLAND OF MAURITIUS BY AGE GROUP**

DISTRICT	15-18	19-24	25-29	30-39	40-49	50-60	60+	Total
Port Louis	8 514	13 358	9 349	21 167	18 106	11 630	12 957	**95 081**
Pamplemousses	8 590	14 489	10 374	21 203	17 549	10 196	8 252	**90 653**
Rivière du Rempart	6 512	11 616	8 750	17 296	13 972	8 779	6 766	**73 691**
Flacq	8 658	15 565	11 016	21 632	17 710	10 226	8 677	**93 484**
Grand Port	7 246	12 385	8 797	18 677	14 542	8 893	8 451	**78 991**
Savanne	4 300	7 605	5 065	12 282	8 936	5 731	5 517	**49 436**
Plaine Wilhems	22 606	37 953	26 305	60 804	54 657	35 337	36 976	**274 638**
Black River	4 436	6 990	4 971	10 461	8 503	4 724	4 096	**44 181**
Moka	5 100	8 968	6 419	13 178	10 741	6 616	5 695	**56 717**
GROUP TOTAL	**75 962**	**128 929**	**91 046**	**196 700**	**164 716**	**102 132**	**97 387**	**856 872**
%	**9**	**15**	**11**	**23**	**19**	**12**	**11**	**100**

Raw Data: Estimated Resident population by geographical distribution and sex- Island of Mauritius; Census 2000, CSO

- **SAMPLE POPULATION BY AGE, GENDER, REGION**

		Gender Distribution and Age Distribution by District		AGE						
				15-18	19-24	25-29	30-39	40-49	50-60	60+
DISTRICT	**Sample disaggregated**			**9**	**15**	**11**	**23**	**19**	**12**	**11**
Port Louis	133	Male	65	6	10	7	15	12	8	7
		Female	68	6	10	7	16	13	8	8
Pamplemousses	127	Male	62	6	9	7	14	12	7	7
		Female	65	6	10	7	15	12	8	7
Rivière du Rempart	103	Male	51	4	8	5	12	10	6	6
		Female	52	5	8	5	12	10	6	6
Flacq	131	Male	64	6	10	7	15	12	7	7
		Female	67	6	10	7	15	13	8	8
Grand Port	110	Male	54	5	8	6	13	10	6	6
		Female	56	5	8	6	13	11	7	6
Savanne	69	Male	34	3	5	4	8	6	4	4
		Female	35	3	5	4	8	7	4	4
Plaines Wilhems	384	Male	188	17	28	20	43	36	22	22
		Female	196	17	30	21	45	38	23	22
Black River	63	Male	31	3	5	3	7	6	4	3
		Female	32	3	5	3	7	6	4	4
Moka	80	Male	39	4	6	4	9	7	5	4
		Female	41	4	6	4	9	8	5	5
TOTAL	**1200**		**1200**	109	181	127	276	229	142	136

Base: Sample Population

ANNEX VII: APPAREL ITEMS PURCHASED

Apparel item purchased by respondents for the last 6 months:

	Minimum Value	Max imum Value	Average Value
Panties/knickers	3025	4023	3524
Slips/ Boxer Shorts	3020	3954	3487
Socks	2196	3198	2697
T shirts	2183	3501	2842
Bra	1842	2802	2322
Trousers / Pants / Jeans	1777	3345	2561
Shirts	1112	1968	1540
Shorts/Bermudas	1031	1989	1510
Blouses	905	1665	1285
Tops	842	1368	1105
Skirts	679	1341	1010
Polo shirts	676	708	692
Dresses	541	1077	809
Other 1	525	975	750
Undershirts (Singlets)	452	714	583
Kurtas	394	870	632
Bathrobes / Nightdresses	320	612	466
Underskir (Jupon)	186	354	270
Track Suits	162	414	288
Jacklets/ Blazers	155	435	295
Cardigans/ Pullovers	124	330	227
Swim suits/ Bikinis	119	315	217
Pyjamas	101	219	160
Other 2	98	198	148
Ties	92	198	145
Suits	88	228	158
Raincoats	25	69	47
Salopettes	9	27	18
Overalls	8	24	16
Other 3	5	9	7
TOTAL	22,692	36,930	29,811

WOMEN'S APPAREL	Minimum Value	Max imum Value	Average Value
Panties/knickers	3025	4023	3524
Bra	1842	2802	2322
Blouses	905	1665	1285
Tops	842	1368	1105
Skirts	679	1341	1010
Dresses	541	1077	809
Other 1 (Mostly Churidars & Sarees	525	975	750
Underskirt (Jupon)	186	354	270
Shorts/Bermudas	195	465	330
Socks	189	303	246
T shirts	630	1110	870
Trousers / Pants / Jeans	588	1206	897
Polo shirts	70	138	104
Undershirts (Singlets)	25	69	47
Kurtas	291	639	465
Bathrobes / Nightdresses	320	612	466
Track Suits	34	84	59
Jacklets/ Blazers	42	114	78
Cardigans/ Pullovers	74	204	139
Swim suits/ Bikinis	87	243	165
Pyjamas	90	186	138
Salopettes	9	27	18
Overalls	4	12	8
Suits	10	30	20
Raincoats	5	15	10

MEN'S APPAREL	Minimum Value	Max imum Value	Average Value
Slips/ Boxer Shorts	3020	3954	3487
Socks	2007	2895	2451
T shirts	1553	2391	1972
Trousers / Pants / Jeans	1189	2139	1664
Shirts	1112	1968	1540
Polo shirts	606	570	588
Undershirts (Singlets)	427	645	536
Kurtas	103	231	167
Track Suits	128	330	229
Jacklets/ Blazers	113	321	217
Cardigans/ Pullovers	50	126	88
Swim suits	32	72	52
Pyjamas	11	33	22
Ties	92	198	145
Overalls	4	12	8
Suits	78	208	128
Raincoats	20	54	37

ANNEX VIII: LIST OF ENTERPRISES SURVEYED

Targeted number of non-EPZ enterprises: 64
Number of responses: **25** (***All respondents are in bold italic***)

SN	Name Of Organisation	Address 1	Address 2
1	A.V.M. & Co Ltd	239, Palma Road	Quatre Bornes
2	Alishaan Ltd	Candos Road	Vacoas
3	Arvani Ltd	Royal Road	Mare D'albert
4	Aurdally Bros	Corner L. Kitchnener Str	Port Louis
5	Belami Co Ltd	Dugarreau St	Port Louis
6	Billabong (Surfers Paradise Ltd)	2nd Floor , Billabong. Coromandel Industrial Zone	Coromandel
7	Camel Textile Manufacturing Co	2nd Floor , 51 La Bourdonnais Street	Port Louis
8	Chemiserie Bellville	Royal Road	Coromandel
9	Chez Josique	Rue La Passe	Mahebourg
10	Chummun Garments	70, Calcutta Street	Port Louis
11	Chung Yeung Wa Leung Soon Mrs	59, Raoul Rivet Street	Port Louis
12	Citimode	79, Royal Road	Beau Bassin
13	Creation Ng & Co.Ltd	63, Colonel Maingard	Beaubassin
14	Dora Fashion	16, Poivre Avenue	Quatre Bornes
15	Fast Forward Limited	Old Moka Road	Belle Village
16	Fit-U Garment Ltd	Royal Road . Morc Raffray	St Pierre
17	Five R.K Garments Ltd	Issop Mamodekan Street	Pamplemousses
18	Fix It Co Ltd/ Liquid Techno Lab	6, Hitchcock Ave	Quatre Bornes
19	G & T Action Wear Ltd.	11 Tanner Street, Les Salines	Port Louis
20	Ganga Textile Ltd/K.B.G Textile	3, Solferino	Vacoas
21	Gebutex Ltd	Dallas Bldg, Royal Road	Fond Du Sac
22	Gnp Wear Co. Ltd	Css Building L'esperance	Quartier Militaire
23	Habit & Co. Ltd	8th Mile	Triolet
24	Iffat's Baby Wear Ltd	15, Robert Edward Hart Street	Beau Bassin
25	IV Play Garment Co Ltd	24 Phillip Rousset St Plaine Lauzun/Gazel Lndustrial Estate	Plaine Lauzun
26	Jade Vanessa Ltd	Hirondelle Street	Baie Du Tombeau
27	Korek Ltd	1st Floor, Ramchurn Bldg.8, Queen Street	Rose Hill
28	La Chance Ltd	Glen Park	Vacoas
29	Le Dakar Ltee	Kurjibhai Ramji - Industrial Zone	Le Hochet , Terre Rouge
30	L'Innattendu	Royal Road	St Julien D'hotman
31	L'oiseau Des Iles Ltee	103, Mgr. Leen Street	Quatre Bornes
32	Magnolia Fashion	57 Railway Road	Mont Roches
33	Mek Import And Export	25, Royal Road	Montagne Ory, Moka
34	Minouchic	10, Avenue Orchidée	Quatre-Bornes
35	Mode De Neige	Royal Road	Grand Bois
36	Monabella Garments Ltd (Bourgeon Garments)	C/O Po Box 677	Bell Village
37	Nobee Ltd	Opposite Telecom	Terre Rouge
38	Oswell & Belaro (Mrs)	14, A.L Dore Street	Port Louis
39	Peace Angels Ltd	12, Maupin Street	Port Louis
40	Peace Garments	72, La Paix Street	Port Louis
41	Péché Mignon. C/O Mr Poussin Gérard	Orchard Centre.	Quatre Bornes

SN	Name Of Organisation	Address 1	Address 2
42	Rip Curl Ltd	Cnr Sir William Newton And Rue Desforges Streets	Port Louis
43	Riverwalk Investment Ltd	Royal Road	Eau Coulee
44	Rohiman Heelam Mr (Ste Rohiman & Co Corner)	16, Corner E.Pellereau St& Sir Virgile Naz Street	Port Louis
45	Rosco Limited	Palmar	Poste De Flacq
46	Seskel Enterprises Ltd	St Michel Street Road	Riche Terre
47	Solem Sportswear Co Ltd	Chapman Hill	Beau Bassin
48	Summer Splash	School Lane	Grand-Bay
49	Suzannah Knitwear Co Ltd	Tombeau Bay	
50	Tamak Ltd	Draper Avenue	Quatre Bornes
51	Thai Mode Ltd	Sans Souci Rd,	Montagne Blanche
52	The Equator Ltd	Vel Industrial Building, Royal Road Mapou Leclezio	Goodlands
53	The Mess Age Ltd	44, Stevenson Avenue	Quatre Bornes
54	The Sparrow/ Aliage Garments Wear Ltd	Camp Benoit	Petite Rivière
55	Tohooloo V. Mrs	Hollyrood No 1 ,Avenue Bestel	Vacoas
56	Top Teens	Parsuramen Bldg, St Jean	Quatrebornes
57	Uniforms Limited	Derby Street	Forest Side
58	Victory Garments Ltd	37, Labourdonnais St	Port-Louis
59	Vieo Industries Ltd	Vel Industries Complex, Royal Road	Mapou
60	W.D.R Limited	Terrasson Road	Pointe Aux Sables
61	Wave Line Limited	Robinson Road	Floreal
62	Z & K Enterprise	Royal Road	Montagne Blanche
63	Zafitailor	Avenue Petrel, Medine	Camp De Masque
64	Mr Kishore Madhub	St Ursule St	Flacq