THE FASHION MARKET IN GERMANY

CONTENTS

1. MARKET AND ECONOMIC TREND IN THE CLOTHING SECTOR

1.1. CONSUMER INDICATORS

Germany is Europe's largest textile market (1/3 of the European market).

- Turnover in clothing sector : DM 22.4 billion in 1996
  trend 95/96 : -4.5%
  trend **90/96 : -25%**

  - ➔ Women's Wear : DM 10.4 billion (1996)
    trend 95/96 : -4.7%
  - ➔ Men's Wear : DM 4.5 billion (1996)
    trend 95/96 : +6.7%
  - ➔ Children's Wear : DM 1.2 billion (1995)
    trend 90/95 : **-22.5%**
  - ➔ Lingerie : DM 3.3 billion (of which 75% from imports !)

- Annual expenditure on clothing : FF 4500 per citizen/p.a. or 5% of the household budget

1.2. PRODUCTION INDICATORS

- Number of companies operating in the clothing industry: around 1,100
- Workforce : 93.600
  trend **:-50% between 91 and 96**
  -12% p.a. since 1994
- 39% of the national production is exported
- Germany's largest manufacturers include:

Steilmann:	DM 1,597 m	Joop:	DM 350 m
Escada:	DM 1,200 m	Hucke:	DM 350 m
Hugo Boss:	DM 630 m	Falke:	DM 300 m
Kunert:	DM 550 m	Gerry Weber:	DM 300 m
Schiesser:	DM 534 m	Delmod:	DM 300 m
Triumph:	DM 500 m	Trumpf:	DM 300 m
Betty Barclay:	DM 500 m	S.Oliver:	DM 300 m
Vatter:	DM 440 m	Mustang:	DM 280 m
Mondi:	DM 400 m	Street One:	DM 270 m
Ahlers:	DM 400 m	Bäumler:	DM 260 m
Brinkmann:	DM 380 m	Fink:	DM 240 m
Le-Go:	DM 350 m	Schulten:	DM 230 m

- The main suppliers for Germany originate from China, Poland, Turkey, Italy and Hong-Kong

- Main trends and characteristics:

  - ➔low in turnover and waves of restructuring over the past years
  - ➔90% relocation
  - ➔low in number of employees in the industry
  - ➔tendency toward integrating distribution (own shops) toward a ever closer collaboration with distribution (shop in shop)
  - ➔very good organisation
  - ➔fashion and style: reserved

1.3. CURRENT MARKET TRENDS

- strong international competition

- reorientation of consumers toward prêt-à-porter, budget allocated to clothing has been reduced

- low prices

- supply-side of market is saturated

1.4. PRODUCTS: DETAILS WORTH KNOWING…

STANDARDS

- Prohibition since April 01, 1996 to import any textiles containing **azo dyes** => foreign manufacturers must therefore submit to German client the proof that the products to be sold do not contain any azo dyes.

SIZES

- Being able to offer **larger sizes** is an asset

- Correspondence of sizes:

  - ⇨ Clothing : go down two French sizes => a French 36 corresponds to a German 34

  - ⇨ lingerie : bra : go down by 15 from French sizes, the letter for the cup size remains the same => a French 95B thus corresponds to a German 80B

    slip/underpants: go down two sizes from a French size => a French 38/40 thus corresponds to a German 36/38

• **Men's Wear**

Jackets

France	46	48	50	52	54	56	58
USA	36	38	40	42	44	46	48
GB	36	38	40	42	44	46	48
Italy	44	46	48	50	52	54	56
Spain	46	48	50	52	54	56	58
Germany	**44**	**46**	**48**	**50**	**52**	**54**	**56**

Trousers

France	38	40	42	44	46	48	50
USA	28	31	33	34	36	38	39
GB	31	32	33	34	35	36	38
Italy	38	40	42	44	46	48	50
Spain	38	40	42	44	46	48	50
Germany	**36**	**38**	**40**	**42**	**44**	**46**	**48**

• **Women's Wear**

Ready-to-wear

France	36	38	40	42	44	46	48	50
USA	6	8	10	12	14	16	18	20
GB	8	10	12	14	16	18	20	22
Italy	40	42	44	46	48	50	52	54
Spain	36	38	40	42	44	46	48	50
Germany	**34**	**36**	**38**	**40**	**42**	**44**	**46**	**48**

FABRIC

• Germany is as market for **natural fabric**

FINISHING

• The **quality of the finishing** is a determining criterion in Germany. Careful: even the most insignificant defects will be noted.

• The sample collections <u>will have to be finished with the greatest of care</u>: identical dyes and fabric for those intended for delivery

BRANDS

If your brand is not yet registered in Germany, you will have to:

• carry out preceding research in Germany: either via specialised consultants or the CFACI whose charges are not that high.

- depositing a brand: to be filed directly in Germany at Deutsches Patentamt (German agency for patents and brands), or via the intermediary of the CFACI or any other specialised consultants.

- CAUTION: depositing a community brand at the INPI notably excludes Germany.

2. GEOGRAPHICAL APPROACH

The German market is very regional.

One of the German distribution characteristics is that it is geographically homogenous. The usual structure of the German fashion sector is illustrated by the following table (by order of priority) :

Region	*Länder*	*Area. km²*	*Population*	*Main cities*
North Rhine Westphalia	North Rhine Westphalia	**34,070**	**18,000,000**	Cologne Düsseldorf Essen Dortmund Münster
Bavaria	Bavaria	**70,555**	**11,000,000**	Munich Nuremberg
North		**64,232**	**12,082,000**	
	Hamburg	755	1,600,000	Hamburg
	Bremen	404	682,000	Bremen
	Schleswig-Holstein	15,729	2,600,000	Kiel
	Lower Saxony	47,344	7,200,000	Hanover
Baden-Württemberg	Baden-Württemberg	**35,751**	**9,400,000**	Stuttgart Karlsruhe Freiburg
Centre		**57,754**	**10,400,000**	
	Hesse	21,114	5,600,000	Frankfurt
	Rhineland Palatinate	34,070	3,700,000	Coblence Mainz
	Saarland	2,570	1,100,000	Saarbrücken
East / Berlin		**106,542**	**18,600,000**	
	Berlin	833	3,400,000	Berlin
	Brandenburg	26,000	2,700,000	Potsdam
	Mecklenburg	22,500	2,100,000	Schwerin
	Saxony	17,000	4,900,000	Dresden
	Saxen-Anhalt	25,000	3,000,000	Magdeburg
	Thuringia	15,209	2,500,000	Erfurt

THE TARGET AREAS

- 3 reference regions regarding turnover:

➔ **North Rhine Westphalia**: 29.7% of the turnover of the industry

➔ **Bavaria**: 25.7% of the turnover of the industry

➔ **Baden- Württemberg**: 24.3% of the turnover of the industry

BUT a highly saturated market and difficult to conquer => not to be given top priority as a target area

- East Germany: apart from Berlin and possibly the area of Brandenburg, the potential in this sector is close to zero:

  ➔ weak purchasing power outside Berlin
  ➔ higher risk of insolvency of clients

- CAUTION: these geographical priorities are to be handled with care…

  ➔ always remember that is it always better to have a good agent for an area of weak potential than a bad agent for an area of strong potential !

  ➔ the approach varies according to the price level of the collection: for an up-market collection, choose a national approach (select an agency or a distributor which covers the entire territory).

3. DISTRIBUTION

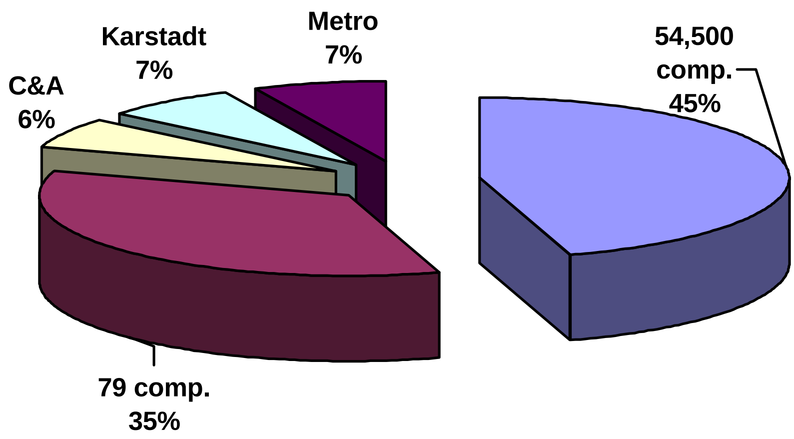
3.1. GENERAL ORGANISATION OF DISTRIBUTION SYSTEM

• **Highly organised distribution** :

➔ 3 major groups (Metro, Karstadt, C&A) make 20% of the turnover

➔ 54 companies make 32% of the turnover in textiles
82 companies make 55% of the turnover in textiles
54,500 companies make 45% of the turnover

Market structure in the textile industry



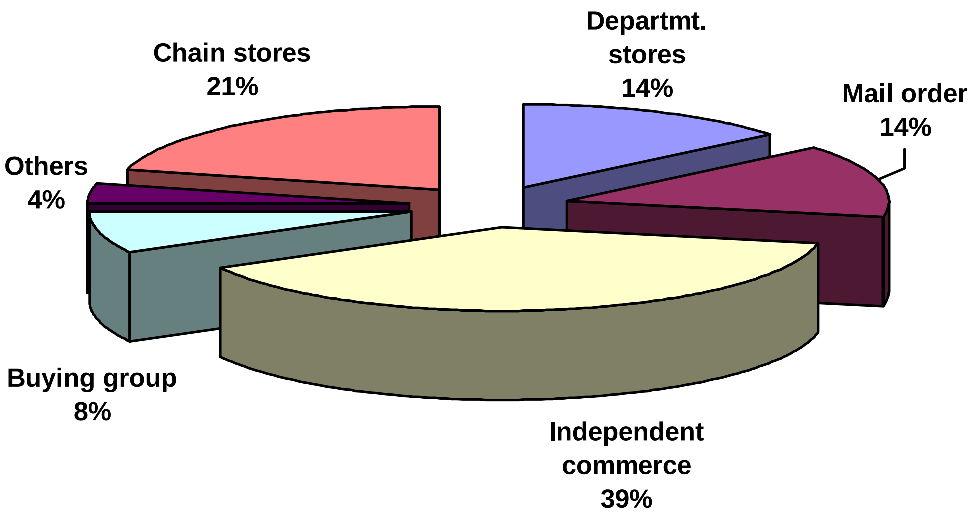
Source : Textil Wirtschaft n°45, 7 Nov. 96

The 20 largest buyers in the German textile distribution sector

	Company	*Type*	*Domicile*	*branch es*	*Turnover in textile 1997 (in million DM)*
1	Metro	Department store, GMS, wholesaler	Düsseldorf	1900	8500
2	Karstadt	Department store	Essen	436	8258
3	Otto	Mail order	Hamburg	68	7500
4	Quelle	Mail order	Fürth	285	6791
5	C&A Mode	Chain store	Düsseldorf	194	6259
6	Peek & Cloppenburg	Chain store	Düsseldorf	67	2400
7	Hennes & Mauritz	Chain store	Hamburg	123	1500
8	Klingel	Mail order	Pforzheim	4	1450
9	Aldi	Discount store	Mülheim/Essen	2775	1400
10	Tengelmann	GMS	Mülheim	827	1200
11	Tchibo	« Kaffee Röster »	Hamburg	1250	1100
12	Woolworth	Chain store	Frankfurt/Main	357	932
13	NKD	Branches	Bindlach	950	810
14	Bader	Mail order	Pforzheim	1	750
15	Breuninger	Chain store	Stuttgart	15	701
16	Peek & Cloppenburg	Chain store	Hamburg	27	680
17	Wöhrl	Chain store	Nuremberg	36	672
18	K+L Ruppert	Chain store	Weilheim	31	660
19	Douglas	Branches	Hagen	206	652
20	Rewe	Discount store	Cologne	322	628

Source : TW n° 39, Sept. 1998

Market share for textiles by type of distribution



Source : Textil Wirtschaft n°45, 7 Nov. 96

3.2. MAJOR DISTRIBUTION PARTIES

MAIN CHARACTERISTICS

- **Concentration / search for synergies.** The return of companies and mergers constitute an acceleration criterion of the concentration. The large ones no longer only “swallow” the small ones: since 1990, “monster” alliances are the order of the day.

example: Metro *owns Kaufhof/Horten, Adler, Massa, Real, Extra, Kaufhalle, Wenz, Mac Fash, Kerber, Mode & Sport, Kriegbaum, has just bought back Allkauf...*

Quelle Schikedanz *owns Quelle, Sinn, Leffers, WHG, Schöpflin, Peter Hahn, Madeleine, Elegance*

Otto Versand *owns Schwab Versand, Witt, Heine, Sport-Scheck, Alba-Moda*

Douglas *owns Appelrath & Cüpper, Faconnable, Biba, Voswinkel, Werdin, Pohland, Douglas Dessous*

Karstadt *owns Hertie, Neckermann, Wehmeyer, Walz, Runners Point...*

Katag, Sütex and ABZ *announced their amalgamation in 1999*

- **Increase in market share to the disadvantage of the classic specialised retail trade**

- **An ever wider collaboration with a more restrictive number of suppliers**

example: Strategy by Quelle: only keep suppliers on term basis with an annual purchase volume in excess of DM 1 million

- **More pressure on prices**

- **Own production and import from third-world**

- **New arrivals (foreigners and new arrivals)** propose selling concepts which are more flexible and modern

example: The Gap, Pimkie, Oasis, Mango...

SELLING BY LARGE-SCALE DISTRIBUTION = EVER MORE DIFFICULT

3.2.1. BUYING GROUPS

Definition : These groups are like “co-operatives” which integrate the retailers whose philosophy can be summarised as “co-operation against concentration”. This is a type of distribution found in particular in Germany.

Buying groups offer various services to their clients:

- ⇨ “registering” brand products for their members (grouped purchase of significant volume). For boutiques “of small size”, the buying group often represents the only opportunity to obtain favourable terms of purchase.
- ⇨ manufacturers with their own brand collections offered to their members
- ⇨ at times the role of a wholesaler (sold from stock) – this activity is nonetheless undergoing a distinct decline
- ⇨ consultation and assistance services to further competencies of their member in management techniques (example : information organisation)
- ⇨ assistance oriented toward sales and marketing in view of advancing the competitive situation of their members (example : sales seminars, merchandising advice)

Conditions for affiliation :

- ⇨ formal affiliation agreement: affiliation to a group prerequisites the observation of precisely defined conditions
- ⇨ affiliation is subject to contribution fees
- ⇨ affiliation is subject to minimum rate of procurement and may vary between 10% and 50%

There are buying groups which represent multiple products as well as buying groups specialised in precisely defined target groups (for example textile)

It happens that members of buying groups are also department stores specialised in multiple products, as well as chain stores.

Internal organisation of purchases :

- ⇨ For most important names : a head of a department (home textiles, women's wear, men's wear, children's wear, lingerie, hosiery…) oversees buyers specialised by type of product (skirts, shirts and blouses, trousers, suits / co-ordinates…)

- ⇨ For less important names: the head of the department himself often ensures directly the purchase of the products which concern him.

Purchase :

- ⇨ direct manufacturer / in charge of key accounts
- ⇨ major distribution sales representatives or own sales force
- ⇨ trade fairs
- ⇨ fashion centres: may be the case for smaller groups

Mode of delivery : according to name

Some multi-product buying groups (figures 1996)

	Global rate of turnover in DM m	*No. of affiliates*	*Strengths of assortment*
Kaufring	2,928	1,336	Complete range
KMT	2,000	250	Complete range
Katag	820	300	Complete range
Sütegro	371	157	Complete range
Sütex	307	1,318	Complete range
ABZ	143	104	Complete range
Unitex	122	570	Complete range

** Sütex, ABZ and Katag merged at the beginning of 1999.*

3.2.2. MAIL ORDER

German mail order is the first in Europe.

Mail order is very important in Germany :

- ⇨ **200 million catalogues sent** to around **20 million households** which allows to reach nearly **40 million consumers**

- ⇨ **72 %** of households buy via mail order houses

The share of textiles in their turnover totals around **50%**

Prospects and development : for this type of sales activities, there is a constant development and the will to gear oneself toward new possibilities offered by technology, such as the Internet.

Internal organisation of purchases :

⇨ the purchases are effected by the purchase HQ of the name.

One exception : Otto Versand owns 3 Suisses, a French manufacturer could introduce himself in the Otto catalogue via the buyers from 3 Suisses...

- ⇨ a departmental head (home textiles, women's wear, men's wear, children's wear, lingerie, hosiery…) oversees buyers specialised by type of product (skirts, shirts and blouses, trousers, suits / co-ordinates…)

Purchase :

- ⇨ direct manufacturer
- ⇨ major distribution sales representatives or own sales force
- ⇨ trade fairs

Date of purchase : Spring/Summer : May-June
Autumn/Winter : Nov-Dec

Date of delivery : Spring/Summer 99 : starts end Nov. 98
Autumn/Winter 99 : starts end of May 99

General mark-up of mail order : coeff. 3

Mode of delivery : according to name

General Mail Order Houses in Germany

	Turnover in clothing in DM million
Otto	**3,793**
Quelle	**3,685**
Neckermann (owned by Karstadt)	**1,620**
Klingel/ Wenz	**1,400**
Schwab (owned by Otto)	**1,054**
Heine (owned by Otto)	**1,028**
Bader	**742**
Baur (co-operation with Otto)	**561**
Schöpflin (owned by Quelle)	**558**
Sport-Scheck (owned by Otto)	**471**
Wenz (owned by Metro)	**381**

Statistics 1996 (TextilWirtschaft-Interselection)

Mail Order Houses for Textiles in Germany

	Turnover in clothing in DM million
Witt (owned by Otto)	**632**
Peter Hahn	**426**
Walz Gruppe (owned by Karstadt)	**275**
Walbusch	**254**
Atelier Goldner Schnitt	**245**
Alba Moda (Quelle)	**222**
Madeleine(Quelle)	**205**
Erwin Müller	**195**
Elégance	**161**

Statistics 1996 (research Textil Wirtschaft / Interséléction)

3.2.3. BRANCHES / CHAIN STORES

Definition : Distribution company with several points of sales at great distance from one another (in different towns), selling a range of relatively similar items. The purchase, the inventory and the logistical transport are generally centralised.

Chain stores are a very familiar sight in Germany, especially in the clothing sector :

→ department stores specialised in clothing
→ stores for jeans wear / young fashion
→ specialists for home wear and interior textiles

They can be categorised by the following structure :

- C&A : case of its own

- “Bekleidungshäuser“ or “specialised fashion houses“ : shops specialised in fashion, present in high street of main cities, cover several floors, often full range of assortment for women’s wear/men’s wear/children’s wear/Sportswear, price level often raised. To be named : Boecker (25 shops), Peek & Cloppenburg (59 shops), Appelrath-Cüpper (12 shops), Dyckhoff (31 shops), Enhelhorn & Sturm, Wöhrl (6 shops), Hettlage (48 shops), Pohland (9 shops), Leffers (10 shops), Sinn (30 shops), Ludwig Beck (12 shops), Hennes & Mauritz (101 shops), Uli Knecht, Breuninger (turnover DM 945 m)

- Boutique chains : size of shop often not very large, but a more complete coverage with in general presence in secondary cities, and a sector-based specialisation more targeted in terms of target group and price.

  Examples to be named here :

  Women’s wear : Zero (61 shops), Ulla Popken (120 shops), Biba Mode (86 shops), Bonita, Orsay, Pimkie, Hersa, Buddelei, Jean Pascale
  Men’s wear : Liberty
  Sportswear : Jeans Fritz (240 shops), Werdin, New-Yorkers
  Lingerie : Jäger&Mirow, Peter Palmers (45 shops), Douglas

- Discount stores and down-market chain stores : growing distribution channel. Often situated in the urban periphery or in commercial centres, specialised in down-market fashion targeting families. Some names here : Wehmeyer, Adessa, Bruno Kleine, Mac Fash, K+L Ruppert, Woolworth, G+W Wahler, Adler, Strauss Innovation, Eisel, Kaufhalle

Internal organisation of purchases :

- ⇨ In most cases the purchase is effected by central HQ
- ⇨ For most important names : a head of a department (home textiles, women's wear, men's wear, children's wear, lingerie, hosiery…) oversees buyers specialised by type of product (skirts, shirts and blouses, trousers, suits / co-ordinates…)
- ⇨ For less important names: the head of the department himself often ensures directly the purchase of the products which concern him.

Purchase :

- ⇨ direct manufacturer / in charge of key accounts
- ⇨ major distribution sales representatives or own sales force
- ⇨ trade fairs
- ⇨ fashion centres: may be the case for smaller names

Date of purchase : Spring/Summer : June-July
Autumn/Winter : Dec-January

Date of delivery : Spring/Summer 99 : starts end of Nov. 98
Autumn/Winter 99 : starts end of May 99

General mark-up of branches : coeff. 2.8

Mode of delivery : according to name

3.2.4. MULTI SPECIALIZED DEPARTMENT STORES

Definition : Large commercial retail enterprises which offer very versatile assortments (sometimes more than 100,000 articles) under a single roof and on a substantial surface area (4 to 6 floors), and which in general focus on :

→ clothing and textiles,
→ household articles,
→ all types of home products.

Each product line has its own department at times managed by specialists.

The original concept aimed at offering a service of great quality to customers. More recently, they are more and more oriented toward self-service.

The multi-specialists are structured like chain stores located on the high street of principal conurbation areas.

Following a wave of concentration in 1992, 2 main parties dominate the market :

→ Karstadt (has taken over Hertie)
→ Kaufhof (has taken over Horten)

Department stores in Germany

	Gross turnover in clothing (in million DM)	*No. of POS*
Karstadt	4.366	186
Kaufhof	4.175	145
Hertie (Karstadt)	1.746	48

Statistics 1996 (BTE)

<u>Prospects and development</u> :

⇨ « trading up » = increase of price level

example : replacing the name Horten by “ Galeria Kaufhof “, more up-market

example : ever more significant presence of costly brands and image carriers

example : trend toward « shop in shop »

- ⇨ initiated new concepts which aim at regrouping products by theme (« Kaufhof your store for life »)
- ⇨ heading toward higher service (granting loan, gift wrapping service...)

Internal organisation of purchases :

- ⇨ Purchases are organised by HQ
- ⇨ For certain names, the most important regional stores have their own buyers who are totally free to buy all of the products registered at the HQ
- ⇨ A head of a department (home textiles, women's wear, men's wear, children's wear, lingerie, hosiery…) oversees buyers specialised by type of product (skirts, shirts and blouses, trousers, suits / co-ordinates…)

Purchase :

- ⇨ direct manufacturer
- ⇨ major distribution sales representatives or own sales force
- ⇨ trade fairs

Date of purchase : Spring/Summer : June-July
Autumn/Winter : December-January

Date of delivery : Spring/Summer 99 : starts end of Nov. '98
Autumn/Winter 99 : starts end of May 99

General mark-up by department stores : coeff. 2.8

Mode of delivery : according to name

3.2.5. "KAFFEE RÖSTER" OR "COFFEE ROASTERS"

Definition : With an extensive geographical presence of small outlets, these shops sell coffee either for take-away or drink-in, as well as an entire range of small hardware accessories and small items of clothing and lingerie at a reasonable price.

This, again, is a distribution structure found exclusively in Germany.

The two parties here are **Tchibo** and **Eduscho**.

Internal organisation of purchases : purchases are made by a central HQ, with specialised buyers

Purchase :

- ⇨ direct manufacturer
- ⇨ major distribution sales representatives or own sales force
- ⇨ trade fairs

Mode of delivery : according to name

3.2.6. HYPERMARKETS / SUPERMARKETS

This distribution channel is much less developed in Germany than in France and mainly refers to textile products at the bottom of the range. Names here include : Globus, Wertkauf, Kriegbaum, Schlecker, Lidl & Schwarz, REWE, Allkauf, Max Lüning, Massa, Real… The hypermarket / supermarket is currently gaining importance.

Internal organisation of purchases :

- ⇨ Purchases are organised by HQ
- ⇨ For certain names, the most important regional stores have their own buyers who are totally free to buy all of the products registered at the HQ
- ⇨ A head of a department (home textiles, women's wear, men's wear, children's wear, lingerie, hosiery…) oversees buyers specialised by type of product (skirts, shirts and blouses, trousers, suits / co-ordinates…)

Purchase :

- ⇨ direct manufacturer
- ⇨ major distribution sales representatives or own sales force
- ⇨ trade fairs

Mode of delivery : according to name

3.2.7. OTHER FORMS OF MAJOR DISTRIBUTION

➲ Factory outlets and discount stores: emerging strongly

➲ Franchises, integrated distribution, shop in shop: growing type of distribution, integrates manufacturers in distribution process (Esprit, Escada…)

3.3. RETAIL TRADE

Main characteristics :

- **are losing impetus in the face of large-scale distribution organisations**

  - ⇨ 65,907 names in 1994, 57,301 names in 1996…
  - ⇨ 54,500 companies making 45% of the turnover…

- **more pressure on prices**

- **decrease in payment moral**

  - ⇨ increase in the number of bad debts
  - ⇨ longer terms of payment

- **more and more reserved to short-term procurement at small volumes :** the preference is to buy 6 or 8 times per year rather than twice

  - ⇨ allows for spread of financial risk
  - ⇨ allows more easily to adapt to the trends which always evolve quickly

Purchase : the retail trade can be divided into 3 groups :

➔ the **SPECIALISED INDEPENDENT RETAILER** who obtains :

- ⇨ directly from the manufacturers (through sales force / agents)
- ⇨ at fashion centres (see 1.4) from wholesalers

➔ the **COOPERATIVE RETAILER** who is affiliated to a buying group

- ⇨ part of its procurement is made by a buying group
- ⇨ the other part is carried out through classic channels (see independent retailer)

Date of purchase : Spring/Summer : beginning of January
Autumn/Winter : beginning of July

Date of delivery : Spring/Summer : mid-January to March
Autumn/Winter : mid-July to September

General mark-up by independent retailer : coeff. 2.3 / 2.4

Mode of delivery : according to name

3.4. SUMMARY STATEMENT

	Major distribution exc. mail order	*Mail order*	*Independent retailer*
Sold	Spring/Summer : June-July Autumn/Winter : December-January	Spring/Summer : May-June Autumn/Winter : November-December	Spring/Summer : beginning of Jan. Autumn/Winter : beginning of July
Delivery	Spring/Summer 99 : starts end of Nov. 98 Autumn/Winter 99 : starts end of May 99	Spring/Summer 99 : starts end of Nov. 98 Autumn/Winter 99 : starts end of May 99	Spring/Summer : mid-January to March Autumn/Winter : mid-July to September
Distrib. margin	* 2.8 the purchase price	* 2.8 the purchase price	* 2.3 the purchase price

4. TIMESCHEDULE OF PURCHASE AND DELIVERY

4.1. DATE OF PURCHASE

• Long-term:

Spring/Summer: for long-term collections, the German season starts earlier than the French season (the fashion trade fairs take place at the beginning of August). The collections must be ready by no later than mid-July / end of July for the retail trade, and end of June for certain types of clients such as for example mail order.

Autumn/Winter: same dates as French dates (from the beginning of mid-January)

The purchase period usually takes 3 to 4 months.

• Short-term and latest fashion:

In the meantime, for some years now, the trend is toward short-term (le pronto moda is going at full force) and multiplication of the latest collections (it is an asset to offer 4 to 6 collections per year, certain important companies even offer between 10 to 12 collections per year).

Buyers have the tendency to leave their decision to purchase to the very last minute. The trade fairs are therefore no longer the place where orders are placed, but rather where information is obtained.

All in all, it is becoming more and more difficult to determine precisely the purchasing period by type of distribution, since each name has its own purchasing policy.

• For specifications by type of distribution: please refer to item 5.2. or to the following summary

4.2. DATE OF DELIVERY

• Long-term / medium-term:

Spring/Summer: from January to March

Autumn/Winter: from July to September

• Short-term:

Orientated to order intervals.

• For specifications by type of distribution: please refer to item 5.2. or to the following summary

• Period of delivery: beware of late delivery which is easily used as an excused to refuse acceptance of a delivery

5. WHICH TYPES OF REPRESENTATION ?

5.1. DIRECT SELLING

- Direct selling can be relevant for products which address large-scale distribution (highly personal negotiations, margins to be defended at close range…).

  ⇨ in fact, buyers often prefer dealing directly with the manufacturers in order to negotiate details. Moreover, they have the feeling of buying at less expensive rates by saving on commission and on importers.

- For all other cases, they prefer local intermediaries.

- Working with large-scale distributors:

⇨ obtain sufficient information regarding the purchasing methods of each name. With the Konzerne, for example, certain important shops are free to buy without going through HQ, it is therefore important to contact their buyers rather than the HQ: **follow the established procedure with regard to the acceptance of a product; in doing so, verify carefully where to find the decision-making powers and what the selection criteria are**.

⇨ selection of products : some buyers refuse to see more than 20-25 items : **know how to present yourself**

⇨ the samples in question will be tried on models, of size M or 38 : **have a range of products adapted to the taste and German standards ready, and know how to present it.**

⇨ **present a clear price policy**: price negotiations are hard and a clear offer includes the cost of transport and is stipulated in DM.

⇨ **offer to render services comparable to those offered by local suppliers:**
  - be able to show what you can offer in terms of logistics and at which price, with a specialised haulier
  - anticipate and respect terms of delivery
  - offer promotion campaigns: allocated budgets and deliveries, communication support

⇨ often there is a first trial order of small volume, and a large order one year later if things are positive: **display a co-operation strategy laid out on a long-term basis for a strict and precise commercial rapport, do not refuse to deliver small quantities during the first orders…**

5.2. IMPORTERS ET WHOLESALERS

5.2.1. IMPORTERS

● Importers purchase your product in order to resell them to their own clients, subject to territorial exclusivity, with the support of their own sales team or commercial agents. They are registered as a company, act at **national** level, and have a warehouse, a billing system.... => generally these are relatively important organisations, less familiar in Germany than simple sales representatives.

● General reduction for importers: between 18 to 40%, depending on the services rendered

- <u>Advantages</u> :

⇨ a single partner who is in charge of managing the clients => you deal with a single client and save on administrative work compared to managing a portfolio of various clients.

⇨ security in terms of payment: you invoice the importer who invoices his client directly and thus assumes the risk of non-payment

⇨ simplified and less costly logistics : 1 or 2 large orders per season, delivered directly to the importer => you save on transport instead of sending several smaller consignments to clients

- <u>Disadvantages</u> :

⇨ no market transparency : neither the clients nor the market is known; if the collaboration is discontinued, you are back to square one

⇨ no control over the image of your products : the importer sells to whoever and however he wants

⇨ there is only a minor risk of non-payment, yet of a more concentrated nature: obtain reliable information on the financial solidity of your partner

5.2.2. WHOLESALERS

• Wholesalers are importers operating at **local, at the most regional level**. Wholesalers sell in general directly to their clients in boutiques without intermediary sales force, from a **showroom / warehouse**, often located at a fashion centre. Contrary to importers, as a rule they do not claim territorial exclusivity.

• The advantages and disadvantages are about the same as for importers

> ⇨ nonetheless it must be noted that wholesalers are much more volatile and must not necessarily be considered like a regular distribution partner, but instead like a real client who is more likely to buy “what he likes” with no long-term commitment

• There are numerous wholesalers in each area in Germany, however distribution via wholesalers is very often only for down-market products.

5.3. AGENTS

German agents operate at a rate of remuneration ranging between 8% and 18% depending on the volumes considered and the suggested service.

- Advantages :

⇨ market transparency : clients and geographical spread are known… if the collaboration ceases you maintain your portfolio of clients and can transfer them to another agent

- Disadvantages :

⇨ you invoice each client directly and as a result assume the risk of non-payment on behalf of such clients

⇨ it is your task to handle each order and the logistical process which follows (management of order receipts, transport, management of returns, reminders…)

Depending on the level of the range or the type of distribution, different agents might be taken into consideration:

5.3.1. AGENTS GRANDE DISTRIBUTION

• They visit buyers from large-scale distribution, ensure that your products are registered, and sell them. Generally this is a rather small-sized structure (1-2 persons)

This type of agency can be counted on **the fingers of one's hand in Germany.**

• Commission : organised distribution being available in the whole of Germany, the fees requested by an agent are high and the rate of commission called for is close to between 8% and 10% on the turnover made for a new launch. For an already well established line, the rate of commission can fall to 5-6 %.

• Important :

- ⇨ it must be noted that buyers from major distribution organisations do not like working with agents, who in general do not know the companies sufficiently which they represent to be able to do the necessary work (procurement of fabric, product capacities, terms, marketing, negotiation margin...)
- ⇨ the trend goes toward the concentration of a number of suppliers, even specialised agencies will have major difficulties to introduce new collections to major distribution

UNLESS ONE IS ALREADY WELL ESTABLISHED IN GERMAN MAJOR DISTRIBUTION, WORKING WITH SUCH AENTS MAY LEAD TO A DISAPPOINTMENT

• To ensure the best chances of succeeding, specialists from French large-scale distribution wishing to enter the German market should:

- ⇨ either attack the market with regional agents who are generally established within large-scale distribution of their area and in small regional chains with around 3 to 15 boutiques ("medium-sized distribution") and who will represent in the beginning the one real target potential with hopes for definite results at short term. CAUTION: working with such names requires on behalf the manufacturers a reduction due to the classic working procedure and great flexibility, notably regarding the minimum order volumes (must be able to delivery as of 10-15 items)
- ⇨ or try to approach large-scale distribution directly, by making an appointment with the buyer to present the collection. CAUTION: such a step prerequisites a follow-up capacity on behalf of the manufacturer (samples, being able to communicate in German...).

5.3.2. REGIONAL AGENTS

• Regional agents operate on the basis of **regional exclusivity**. This is the most frequently referred to sales structure for collections which addreses the retail trade and medium-range distribution.

The regional agent often owns a showroom in a fashion centre (cf. 1.3).

He may operate in three different ways – the ideal is a balance between the three ways of selling :

➔visiting clients
➔showroom sales (fashion centre)
➔sales at regional trade fairs (cf. 1.5.2)

• Commission: between 10 and 15%

Remember : Regional agents generally demand from companies which they represent a small financial contribution ranging between DM 500 and DM 1,000, as well as providing PR materials or decoration (posters, displays, decorative accessories)

• Geographical coverage: to cover the entire German territory requires at least 5 agents in the following regions, be order of priority (see map in chapter 2: *Geographical Approach*)

1- North Rhine Westphalia
2- Bavaria
3- North
4- Baden-Württemberg
5- Hesse/Rhineland Palatinate/Saarland
6- Berlin + Brandenburg

CAUTION: the respective target zones also depend on the product.

5.3.3. GENERAL AGENT

- Operates on a basis of national exclusivity,:

    ⇨ either with a network of sub-agents covering the entire territory. It centralises the orders of these sub-agents and submits them to you. This type of organisation applies to all <u>medium-priced to up-market collections</u>.

    ⇨ or by moving from city to city and presenting the collections at clients or at hotels, with the help of one or two showrooms located for example in Düsseldorf and in Munich. This type of organisation rather applies to all <u>upmarket and designer/luxury collections</u>.

- <u>Commission</u>: around 15%

- For a medium-priced collection so far not established, it will be difficult to drive out this type of agency since it is relatively rare and difficult to convince (very high starting investments compared with the guarantee for success). On the other hand, it is possible for example, after some seasons of being present in the market, to upgrade ones regional agent to the position of a national agent. (check contents).

- <u>Advantage</u> :

    ⇨ this kind of structure allows you to forego the management and operations of an entire network of agents (relatively difficult): you work with a single contact on the market, all while preserving ownership of your clientele

- <u>Disadvantages</u> :

    ⇨ if the general agent abandons you, there is the great possibility that the network of agents will also leave you
    ⇨ less transparency with regard to local market trends
    ⇨ difficult to intervene directly in the event of problems occurring in a particular area
    ⇨ risk of losing information about your products (the general agent acts as intermediary between regional agents and yourself)

5.4. OTHER TYPES OF ESTABLISHMENT

Other possible forms of establishment are related to companies which are already making steady business in Germany, which are sure of the potential of their products and which have relatively significant resources, and known brands with a strong image.

These might include :

- transfer of licences
- selling via franchises
- shop-in-shop: more and more names from major distribution are opening this type of co-operation
- establishing own boutiques : good test ground for collection
- creating a commercial branch:

Details worth knowing in the event of incorporating a company:

- Company capital : minimum DM 50,000 for a GmbH (Ltd.)
  minimum DM 100.000 for an AG (PLC)

- Corporate taxes :

  ⇨ Corporate taxes: 45% on retained earnings, and 33.3 % on allocated earnings.

  ⇨ Solidarity taxes: taxes aimed at financing the reconstruction in the former East Germany, amounting to 5.5% of profits. Theoretically speaking a provisional tax which was introduced in 1995.

  ⇨ Gewerbesteuer : trade tax depending on profit and on total of share capital

- Personnel expenses :

  ⇨ Social charges taken over by the employer are nearly half in Germany (20-25%) of what they are in France (40%)

  ⇨ For the same amount which the employer must invest, the German employee earns a gross salary of 20% more than a French employee

  ⇨ On the other hand, taxes on revenue are higher in Germany than in France, which reduces the difference in net revenue

6. TRADE FAIRS

6.1. NATIONAL AND INTERNATIONAL TRADE FAIRS

Trade fair	*Dates*	*Topic*
CPD, Düsseldorf	beginning of February/ beginning of August	Women's wear
Igedo-Dessous, Düsseldorf	beginning of February/ beginning of August	Lingerie
CPD Follow Up, Düsseldorf	beginning of March/ beginning of September	Women's wear
Herren-Mode-Woche, Cologne	beginning of February/ beginning of August	Men's wear
Interjeans, Cologne	beginning of February/ beginning of August	Jeans, sportswear, street wear
ISPO, Munich	beginning of February/ beginning of August	Sports
Kind & Jugend, Cologne	mid-February/mid-August	children's wear
Leipziger Modemesse, Leipzig	mid-February/mid-August	women's wear/men's wear/children's wear (contracting)
Country München, Munich	mid-February/ end of August	folklore fashion
Fur & Fashion, Frankfurt	mid-March	Leather and fur
OutDoor, Friedrichshafen	mid-August	Clothing, outdoor equipment

6.2. REGIONAL TRADE FAIRS

Highly frequented, the regional trade fairs in Germany are indispensable for those working with regional agents.

- Speciality: they are organised by agents and for agents who rent stands in their own name to exhibit their different collections

- Location: often take place at the fashion centres.

- Sector: always specialised in a particular sector: women's wear, men's wear, children's wear, lingerie... of more or less significance => your agents will tell you which fairs are the most interesting in their area

- Cost: the agents generally demand from companies which they represent a small financial contribution ranging between DM 500 and DM 1,000, as well as providing PR materials or decoration (posters, displays, decorative accessories)

Some regional trade fairs in the domain of fashion (not complete, there are numerous others!) :

Trade fair	*Dates*	*topic*
ABC Trade fair, Munich	February/August	Evening wear, cocktail, bridal
Hamburger Orderpremiere, Hamburg	mid-February/August	Prêt-à-porters + country
Dessous-Messe, Sindelfingen	March/September	Lingerie
Accenta Hamburg, Hamburg	October	Fashion accessories
Accessoires München, Munich	November	Fashion accessories

7. TRADE JOURNALS

In the following a table of the main titles and their respective target groups:

Title	*Target*	*Circulation and issued*
Textil Wirtschaft	Textiles in general. **THE** journal of the sector, very complete on all area, equivalent to French Journal du Textile. Special shops children's wear, Sport…	weekly, 40,000 copies.
Textil Mitteilungen	Textiles in general, but more focused on the fashion side. Likewise often read.	weekly, 30,000 copies.
Die Linie	Lingerie. **The** journal for the sector	bi-monthly, 4,00 copies.
Dessous-Mode International	Lingerie	quarterly, 6,300 copies in Germany and 28,700 copies in Europe
Sous	Lingerie	bi-annual, 8.000 copies.
Men's Fashion International	Men's wear	bi-annual, 9 à 10,000 copies.
Sportswear International	Sportswear / Street wear, “hip“	18 issues a year, 21,500 copies.

8. FASHION CENTRES

● Fashion centres are regional groups of permanent showrooms (agents, importers, or direct manufacturers) based in the same complex of buildings, which allow:

- ⇨ buyers to focus their buys at their convenience for an ideal period of time (call on several suppliers located at the same spot)
- ⇨ manufacturers to benefit from the power of attraction of other manufacturers.

● Organisation: At the centre of a fashion centre there are showrooms which are generally structured by theme (women's wear, children's wear, men's wear, lingerie, sport...). There are also specialised fashion centres for a particular sector (men's wear for example) or for a price range (example: group of upmarket collections) or even for purchase modes (such as group of wholesalers offering take-away clothing for retailers)

● Geographic division: There is one or several fashion centres in each of the major German cities

FASHION CENTRES IN GERMANY

City	*Name*	*Characteristics*
Berlin	Mode-Center Berlin	250 showrooms
Hamburg	Fashion-Pool *Hamburger Men's Fashion Center* Mode-Centrum Hamburg *Sport-Modecentrum Norderstedt* Dessous-Mode-Center Norderstedt	11 showrooms brand products men's fashion *323 showrooms* all fashion products *focus on sportswear* specialised in lingerie
Hannover	Mode Centrum Hannover	230 showrooms
Düsseldorf	Fashion House *Men's Fashion Center* Euromoda *Imotex* Imotex Haus Paris + Haus New-York *Euromoda Sport-Fashion-Center* Fashion Square	190 showrooms medium-range price level *45 showrooms* *men's fashion* 365 showrooms mainly sold from stock *mainly sold from stock* 230 showrooms from agents *no direct selling* *specialised in sportswear* 115 showrooms grouped in a Düsseldorf quarter designer collections highly frequently during trade fairs
Münster	TMC Textil & Mode Center	
Osnabrück	MCO Mode-Centrum Osnabrück	30 showrooms
Kamen-Heeren	Sport-Mode-Center	specialised in sportswear
Eschborn	Häuser der Mode Eschborn *Sportswear Haus*	450 showrooms *sportswear*
Sindelfingen	Häuser der Konfektion *Haus der Mode Exquisit*	140 showrooms *270 showrooms*
Munich	Fashion Atrium *MTC Münchner Mode- u. Textil Center* MOC *MZM Mode-Zentrum-München* Sturm Plaza	42 showrooms *385 showrooms* 124 showrooms specialised sportswear *33 showrooms* 20 showrooms up-market fashion
Nürnberg	Fashion Forum Nürnberg	160 showrooms
Leipzig	Mittel Deutsches Mode Center	196 showrooms

9. PAYMENT

9.1. RISKS AND GUARANTEES

• Until a few years ago, Germany was still a safe market in this respect, In the meantime, with the textile crises, the situation tends to deteriorate : numerous shops are closing down and it is advised to obtain sufficient information on the solvency of the clients before delivery.

9.2. TERMS OF PAYMENT

• The invoice will be made out in DM and in line with the customary terms and conditions of payment for this sector.

• Here the official terms of the clothing industry used by many of the manufacturers:

⇨ **4% discount for payment within 10 days**

⇨ **2.25% discount for payment within 30 days**

⇨ **net for payment within 60 days**

• Note that:

⇨ A few years ago, the boutiques much more frequently referred to discounts than they do today. **The terms of payment have extended**.

⇨ Major clients (large-scale distribution) work with special terms and conditions to be negotiated on a case-by-case basis.

• CAUTION : on an invoice or on a note « o.MwSt » means « exc. VAT », and a price « inkl.MwSt “ means « VAT included» (« Mehrwertsteuer » « VAT »)

9.3. PAYMENT MODALITIEIS

• **Remittance** or **cheque** are the most frequently referred to modes of payment

• Having an **account in German**y will be an asset: clients do not like making foreign transactions which are subject to higher bank charges. This could act as a restraint at the moment of deciding on a buy.

10. USEFURL TERMINOLOGY

Men's Wear	Herrenmode, Herrenbekleidung, HAKA
Women's Wear	Damenmode, Damenoberbekleidung, DOB
Children's Wear	Kindermode, Kinderoberbekleidung, KOB
Lingerie	Wäsche
Lingerie for men	Herrenwäsche
Lingerie for women	Damenwäsche
Lingerie for night	Nachtwäsche

Shirt	Hemd
Blouse	Bluse
Trousers	Hose
Suit (ladies')	Kostüm
Hosiery	Strumpfwaren
Socks	Socken
Slip	Slip
Bra	BH
Suit	Anzug
Tie	Krawatte
Hat	Hut
Coat	Mantel
Large sizes	Großkonfektion
T-shirt	T-Shirt
Waistcoat	Weste
Impermeable	Regenmantel

Fashion centre	Modecentrum
Trade fair	Messe
Season	Saison
Order	Bestellung
Delivery	Lieferung
Date de delivery	Lieferungsdatum
Time of delivery	Lieferungsperiode
Terms of payment	Zahlungsbedingungen
Discount	Skonto

Cotton	Baumwolle
Wool	Wolle
Natural fabric	Naturmaterialien
Linen	Leinen

Size	Größe
Colour	Farbe
Quantity	Menge
Collection	Kollektion
Samples	Muster, Musterteile

Commission	Provision
Margin	Spanne, Marge
Price level	Preisniveau
Agent	Handelsvertreter, Vertreter
Importer	Importeur
Department store	Kaufhaus
Mail order	Versandhandel, Versender
Chain store	Handelskette, Fachkette
Coffee roaster	Kaffeeröster
Buying group	Einkaufsgruppe
Specialised retailer	Facheinzelhändler

11. BUSINESS CODE OF CONDUCT

- Working languages used : German (national language)
  English : often spoken

- Entertaining a private rapport beforehand is not customary during the normal course of business

- The order, the method, the severity, the planning are all an integral part of the German conduct. It leads to a certain comfort and a great deal of reliability in the commercial relations – one does not fall back on decisions, one does not change projects, one respects the terms and business promises.

- <u>Professional meeting</u> :

  ➔ do not forget to confirm a meeting arranged by telephone in writing (fax)

  ➔ punctuality is customary

  ➔ careful preparation: discussions are held on the grounds of documents sent in beforehand to the counterpart, or discussions already held by phone, and good knowledge of the needs of the client

  ➔ heads straight for the useful, to what is efficient, does not drag on for no reason

  ➔ business dinners are not customary. One rarely mixes private and professional issues, the commercial rapport is not very sociable : it must remain formal, keep a certain distance at all times.

  ➔ issues to be discussed are approached one after the other, in a structured and modular way. One does not move onto the next subject without having concluded the previous one.

  ➔ The appearance is important since reassuring. It is better to arrive to one's business meeting in a spacious, clean car.

- The complete and exhausting information is an indispensable element for taking a decision

- <u>Commercial documentation</u>: preferably drawn up in German, otherwise in English. The documentation must be complete and include technical issues, tariffs, the terms of sale, and, if need be, accompanied by samples

- <u>Delivery times</u>: beware of late delivery, which are often used as an excuse to refuse acceptance of a delivery

• Purchase motivation :

- ➔ quality
- ➔ security and reliability (importance of standards as commercial argument)
- ➔ performance
- ➔ practicality
- ➔ price (predominant importance in the sector of commodities)
- ➔ after-sales service
- ➔ ecology (beware of rules, notably on packaging – to be passed on sales tariffs)

• Decision mode : often collegial, dialogue and consensus are the rule

• Respect for commercial commitments is capital. Therefore, late deliveries are badly perceived and are often cause for changing the supplier.

• Mode of payment most frequently used in business :

- ➔ remittance frequently used
- ➔ cheque
- ➔ avoid bills of exchange

• Terms of payment :

- ➔ invoice must be in DM
- ➔ terms of payment rarely in excess of 30 days
- ➔ discount is frequently referred to

12. ADDRESSES

12.1. FASHION CENTRES

Mode Center Berlin	Mariendorfer Damm 1-3	D-12099	Berlin	030/700950
Hamburger Men's Fashion Center	Willhoop 1-7	D-22453	Hamburg	040/482018
Mode Centrum Hamburg	Modering 61	D-22457	Hamburg	040/5505956
Fashion Pool	Osterfeldstr. 16	D-22529	Hamburg	040/482018
Sport Modecentrum Norderstedt	Gutenbergring 67b	D-22848	Norderstedt	040/5233909
Mode Centrum Hannover	Hessenstr. 1	D-30855	Langenhagen	0511/784411
Fashion House	Danzigerstr. 101	D-40486	Düsseldorf	0211/4541844
Men's Fashion Center	Emmanuel-Leutz-Str. 12	D-40547	Düsseldorf	0211/594494
Euromoda Neuss	Anton-Kux-Str. 2	D-41460	Neuss	02131/120181
Sport Fashion Center Neuss	Anton-Kux-Str. 2	D-41460	Neuss	02131/120181
Imotex	Breslauer Str. 8	D-41460	Neuss	02131/106 0
TMC Münster	Borkstr. 13	D-48163	Münster	0251/784707
Mode Centrum Osnabrück	Rheinerlandstr. 195	D-49078	Osnabrück	0541/94600
Häuser der Mode Eschborn	Frankfurterstr. 70-72	D-65760	Eschborn	06196/482628
Sportswear House Eschborn	Rahmannstr. 1-7	D-65760	Eschborn	
Haus der Mode Sindelfingen	Mahdentalstr. 96-98	D-71065	Sindelfingen	07031/876033
Häuser der Konfektion Sindelfingen	Mahdentalstr. 114	D-71065	Sindelfingen	07031/868010
MTC München	Taunusstr. 45	D-80807	München	089/3569633
Fashion Atrium	Ingolstädter Str. 42-46	D-80807	München	089/356150
Sturm Plaza	Karl Weinmairstr. 6	D-80807	München	089/3561240
M,O,C	Lilienthalallee 40	D-80939	München	089/32353175
MZM	Brecherspitzstr. 7	D-81541	München	089/696983
Fashion Forum Nürnberg	Südwestpark 37-41	D-90449	Nürnberg	0911/9678770
MTC Chemnitz	Schulstr. 38	D-09125	Chemnitz	0371570430
Mitteldeutsches Mode Center	Am Roßberg	D-04435	Schkeuditz	041/2230

12.2. TRADE FAIRS ORGANISERS

For all general information (sectors, dates…), contact the following organisation :

AUMA (Ausstellungs- und Messe- Ausschuss der Deutschen Wirtschaft
Lindenstr. 8, D-50674 Köln
Tel : 0221/20907-0, Fax : 0221/20907-12
http://www.auma.de

For all precise information contact the trade fair organiser directly :

Düsseldorf : Igedo Internationale Modemesse Kronen
Stockumer Kirchstr. 61, D-40474 Düsseldorf
Tel : 0211/4396-01, Fax : 0211/4396-345
http://www.igedo.de
e-mail: igedo-company@igedo.de

Frankfurt :	Frankfurt Messe GmbH Ludwig-Erhard-Anlage 1 D-60327 Frankfurt am Main http://www.messefrankfurt.com	 Tel : 069/7575-0 Fax : 069/7575/643
	Fur & Fashion Frankfurt Messe GmbH Niddastr. 57 D-60329 Frankfurt/Main	 Tel : 069/242635-0 Fax : 069/236716
Leipzig :	Leipziger Messe GmbH Messe-Allee 1, D-04356 Leipzig Tel : 0341/678-0, Fax : 0341/678-8762 http://www.leipziger-messe.de e-mail: info@leipziger-messe.de	
Cologne :	Messe- und Ausstellungs-Ges.m.b.H. Köln Messeplatz 1, D-50679 Köln Tel : 0221/821-0, Fax : 0221/821-2574 http://www.koelnmesse.de	
Munich :	Messe München GmbH Messegelände, D-81823 München Tel: 089/949-01, Fax: 089/949-09 http://www.messe-muenchen.de e-mail: info@messe-muenchen.de	
Friedrichshafen :	Messe Friedrichshafen GmbH Messegelände, D-88045 Friedrichshafen Tel : 07541/708-0, Fax : 07541/708-110 http://www.messe-fn.de e-mail: messe@messe-fn.de	

12.3. TRADE JOURNALS

Baby & Junior
Hainstr. 15, D-96047 Bamberg
Tel : 0951/861116

Die Linie
Stadtwaldgürtel 46, D-50931 Köln
Tel : 0221/2033166

Men's Fashion
Deutscher Fachverlag
D-60264 Frankfurt am Main
Tel : 069/7595-1731, Fax : 069/7595-1730

Styling News
Pilgerstr. 20, D-51491 Overath/Köln
Tel : 02206/60070

Textil Mitteilungen
Königsallee 70, PF 101 701, D-40212 Düsseldorf
Tel : 0211/132365

Textil Wirtschaft
Deutscher Fachverlag
Mainzer Landstr. 251, PF 100 606, D-60326 Frankfurt am Main
Tel + Fax

Stamm Verlag : sells databases with editorials on fashion issues (professional press and major public), journals and periodicals with regard to fashion
Goldammerweg 16, D-45134 Essen
Tel : 0201/84300-0, Fax : 0201/472590
http://www.stamm.de

12.4. FINANCIAL SERVICES AND INFORMATION

ITP Exportdienste GmbH
Tel : 0211/384 87 0, Fax : 0211/384 87 29
e-mail : itpgermany@aol.com

Bürgel Centrale
Tel : 040/89803-400, Fax : 0211/89803-759
http://www.buergel.net

Creditreform
Tel : 02131/109-210, Fax : 02131/109-309
http://www.creditreform.de

Dun & Bradstreet
Tel : 069/6609-2380, 0180/5863333, Fax : 069/6609-2305 ou 2349
http://www.dbeuro.com

Bundesanzeiger
Tel : 0221/97668-109, Fax : 0221/97668-115
http://www.bundesanzeiger.de

12.5. PROTECTION OF BRANDS

German Patent Office - Deutsches Patentamt
Zweibrückenstr. 12, D-80297 München
Tel: 089/2195-0, Fax: 089/2195-2221
Central German institute for protecting brands and patents

Deutsches Patentamt - Dienststelle Berlin
Gitschiner Str. 97-103, D-10969 Berlin
Tel: 030/25992-0, Fax: 030/25992-404
Berlin branch of Deutsches Patentamt Munich

12.6. CHAMBER OF COMMERCE CFACI

Chambre Franco-Allemande de Commerce et d'Industrie (CFACI)
18, rue Balard – 75015 Paris
Tel : 01 40 58 35 35, Fax : 01 45 75 47 39, Minitel 3616 CFACI
Legal service telephone: 01 45 75 47 39
Good contact for all problems regarding legal matters, standards, brands