

## COMPETITOR ANALYSIS ...

### KEY PARTICIPANTS IN THE FASHION AND JEWELRY INDUSTRY...

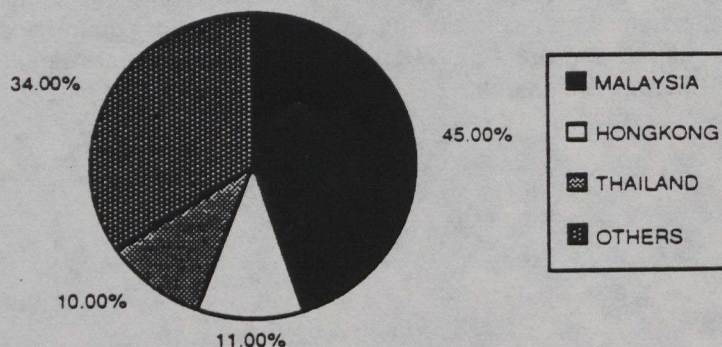
There are about 373 local manufacturers of wearing apparel with an output of S\$1.55 billion in 1987. Shirts and outer garments were the largest sectors contributing S\$1.50 billion. Other significant sectors included tailoring and dressmaking (S\$13.9 million), brassieres and other under garments (S\$13.6 million).

Of total wearing apparel production, 80% was exported. The major export products were shirts and other outer garments and other wearing apparel.

The major companies currently producing wearing apparel for export are Wing Tai Manufacturing, Pacific Garment Manufacturing, Polly Allied Knitwear, Chin Heng Garments, Yangtze Kiang and others. Companies which manufacture apparel for the domestic market include Heshe, Majestic Industries and Mido Textile. HeShe markets its products through 12 retail outlets and 20 counters in department stores such as Sogo and Daimaru. Both Majestic and Mido also market their products through their own retail outlets.

The top country suppliers of imported clothing and apparel are Malaysia, Hongkong and Thailand. Malaysia dominates most product categories except for outer garments for ladies, clothing accessories of textile and other clothing accessories which come primarily from Thailand, Italy and Hongkong respectively.

IMPORTS OF APPAREL BY COUNTRY OF ORIGIN (1988)



In the jewelry industry in 1987 there were 48 local manufacturers with an output of S\$167 million. The majority (78%) of local production was sold to the domestic market. Major producers include Larry Jewelry, J'Taime, Beauty Goldsmith and others.

The top country suppliers for jewelry are Hongkong, Italy and Switzerland. Hongkong products dominate most product categories. Imports of jewelry of precious and rolled precious metal are mainly from Italy while China is the largest supplier of articles containing pearl, precious or semi-precious stones.

Bata Shoe Singapore Pte Ltd is a Canadian company which is engaged in the retailing and wholesale of shoes (eg : Bata, Marie Claire, Bubble Gummers) in Singapore and in the region. It also trades in garments, bags, costume jewelry and others. Its export markets include Europe, South America, Middle East, Australia and to the ASEAN countries.