Logistics: strategic function for enterprises in the french ready-to-wear industry?

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Abstract

Logistics became a strategic function for companies, and its outsourcing is increasing. The barometer Outsourcing Ernst's and Young (2005) shows that more than 65 % of companies resorts to the outsourcing of their logistic activity. Nevertheless, that is it on traditional business sectors such as the ready-to-wear industry? This sector is indeed characterized by a large number of SME, the creation of which is the core profession and which still have no real skills in the field of the logistics. But, the seasonality of products, their fast renewal, the distant sourcing, etc. require to master this activity which, because of the constraints of the sector, becomes inescapable and strategic for companies. In these conditions, how is the logistic activity perceived, and how it is set up?

Key words: logistics, outsourcing, ready-to-wear, strategy.

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Introduction

Logistics finds its origins in the military domain (Colin and Paché, 1988) but get henceforth companies. The way companies manage their logistics strongly evolved in time (Paché and Colin, [2000], Colin, [2005]). It appears as "the management and the piloting of the physical flows of goods by a flow of information" (Colin, 2002b, p. 33). It is thus a question of a "real approach of management endowed with a mission of coordination of the various commercial and industrial transactions so that these are started neither too early (avoid stocks) nor too late (avoid the breaks) with regard to the expressed demand" (Paché and Savage, 2004, p. 6).

It is henceforth included in a wider concept: the supply chain management or the supply chain. The supply chain is "a shape of inter-organizational logistic integration, […] based on a common objective of reduction and optimization of the committed logistic means and the simultaneous improvement of the performances in level terms of service" (Colin, 2002a, p. 66). This channel leans on the frame of the logistics, and tries to insure a link and a coordination between the processes of the other stakeholders of the channel (suppliers, consumers, process of the organization) (Christopher, 2005). The supply chain can be envisaged as a network where the activities are connected between them to create some value. Furthermore, "the shortening of the durations of cycles (cycle of conception, production, life, etc.); the distribution of a management "by project" comes along besides which the management of purchases and logistics does not escape. The choices of the partners and the activities but also the modes of piloting of flows answer henceforth this logic, which is translated by a dynamic management of the relations and the operations. (…) The contemporary supply chains are not linear pipelines in the stable operations and sequenced! They are more similar to dynamic networks presenting buckles, alternative or parallel processes, with arrangements and temporary devices" (Fabbe-Costes, 2007, p. 21). Within the framework of the evolution of the logistics and the supply chain of the actors specialized in this domain appeared in particular.

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We shall thus see at first the logistics and the stakes in its outsourcing for companies. Then, we shall show, through a study carried out in the sector of the French ready-to-wear industry, the stakes in this activity towards specific sector-based constraints. We shall present in particular the perception of this activity and the way which the companies of the sector manage it. Finally, we shall analyze brakes and control levers of action in the development of the activity in this sector.

The logistic outsourcing and its stakes for companies

The outsourcing is "a service defined as the result of the integration of a set of elementary services, to confide to a specialized provider all or any of a function of the company "customer" within the framework of a multiannual contract, on fixed base, with a level of service and duration defined". This outsourcing comes along with a transfer of resources, and requires a commitment of the parts in a sustainable relation. In this perspective, it requires a contractual frame (Quélin, 2003). The outsourcing distinguishes itself from the subcontracting as far as it modifies the borders of the company and the organization of its resources (Hamdouch, 1996). The figure 1 differentiates these notions.

Outsourcing	The activity is confided to a supplier or to a provider rather than to realize it in house. Obligatory result for the provider.
Subcontracting	Operation by which a company confides to the other one the care of executing for her and according to a pre-established specifications a part of the acts of production or services the final economic responsibility of which it will keep Best effort undertaking for the provider.
Downsizing	Method which consists in increasing the efficiency of an organization by reducing its size. The objective is to get rid of staff or equipments which were a part of the company. An outsourced activity remains on the other hand essential to the company.
Reengineering	Operation which consists in improving the performances of the company by melting again its value-creating processes and by eliminating the processes which do not create value. The reengineering can bring to an outsourcing of certain activities. The outsourcing can take place without engaging an operation of reengineering.

Figure 1: The outsourcing and the related phenomena

(Source: adapted of Barthélemy, 2007, p.12-13).

The outsourced activities knew an evolution (Gosse and al ., 2002). The outsourcing touched first of all secondary activities or support. The objective indeed is to outsource activities which are not value-creating and which are better mastered in terms of costs and services by persons receiving benefits. Henceforth, the outsourcing gets strategic activities, as logistics, or R&D (Barthélemy, 2007). The company looks for specialists having the necessary skills to realize its objectives. The barometer Outsourcing Ernst's and Young (2005) shows that more than 65 % of companies resorts to the outsourcing of their logistic activity.

We can identify various reasons with the outsourcing (Fimbel, 2003):

- Optimize the costs and/or improve the quality of an activity (Ansoff, [1965], Williamson, [1985])
- refocus on the basic business (Hamel and Prahalad, 1989), improve the structural and organizational flexibility (Bucki and Pesqueux, 1992) or face an internationalization and a strong growth of the activities
- Acquire specific technical skills
- By mimicry and effect of fashion (Lacity and Hirscheim, 1993)

The reasons in the outsourcing are not thus still of economic order (Bourgeois and Martin, 2005). The behavior of companies is influenced first of all by the institutional environment (Emery and Trist, [1965], Scott and Meyer, [1983]). The manager practices are connected to a given period and to a context in which evolve companies. Furthermore, companies belonging to the same sector are engaged in the mimicry (Di Maggio and Powell, [1983], Huault, [2002]). They are going to develop common attitudes which are going to homogenize their behavior. Finally, companies are in search of legitimacy. Companies are going to adapt and to conform to the standards of their environment to improve their reputation (Meyer and Rowan, 1977).

If the reasons in the outsourcing are multiple, there are many risks perceived by company. Among all the risks evoked by Barthélemy (2007) we shall retain four main things:

- The under-performance: the provider does not reach the fixed objectives.
- The dependence towards the provider: the outsourcing does not establisha transfer of activity, so that the company has needs and dependence to his provider, all the more if the activities are basic or sensitive.
- The loss of know-how and skills: the outsourcing can pull a transfer of staff and equipments.
- The social risk: the operations of outsourcing involve a transfer of staff even redundancies.

Nevertheless, companies disengage more and more their peripheral activities to concentrate on their heart of core profession. In these conditions, actors are specialized in the management of these activities. The logistic service providers (LSP) knew how to develop skills to become an essential intermediary in the supply chain. The mobilization of the LSP constituted of real "networks of stable and sustainable skills" (Paché and Savage, 2004, p. 102). LSP intervenes at various levels: in the transport of raw materials, their storage, but also in the final distribution. This presence allows to have the necessary skills to bring "turnkey solutions for the various supply chains to which it brings its help" (Paché, 2007, p. 209). The figure 2 presents the dimensions of the service of the LSP.

Core profession	Additional services to the customer	New businesses
• Preparation of orders • Storage • Inventory control • Transport	• After-sales service • Invoicing for customer account • Filing	• Installation of site • Co-manufacturing • Packaging • Management of call center • Co-packing • Packing • Information technologies

Tableau 2: The logistic dimensions of the service of the LSP

(Source : adapted of Roques et Michrafy, [2003] by Paché [2007, p.209])

We can notice that the LSP is a partner privileged for companies and their relations join over time. If traditionally the LSP manages activities of transport and storage, it's henceforth involved in value-creating activities in particular of operations of delayed differentiation. The extension of the offer of the LSP brings to light that they "participate in the progressive disappearance of the borders between firms associated in the same logic of channel because they take in their account of the functions previously within the competence of the retailers and\or industrial companies" (Paché and Savage, 2004, p. 127). This customization of the activity confers him specific skills by placing him as an essential key actor in the supply chain. It created also sustainable relations with companies being able to give birth to projects through which the important investments are realized by both parts (technology, fleet of trucks, construction warehouses, etc.)

In most of the business sectors, the logistics and its outsourcing are set up in a common way by companies. Nevertheless, in the case of the ready-to-wear industrie, constituted with majority of SME, the priorities are not the same. The activities considered as strategic in certain sectors, are not it still for the others. By taking the case of the french ready-to-wear, this article aims at understanding how logistics is perceived in this sector.

Methodology

Our methodology is qualitative and based on a series of 24 semi-directive interviews realized with actors being member of the french ready-to-wear industry. This sector represents 25 billion euro of turnover and groups includes a multitude of actors. The size of companies is an important characteristic. Indeed, even if the sector consists of very big companies, the companies of the ready-to-wear industry are especially small or average: 9 companies on 10 have less than 50 persons, and 6 on 10 less than 10 persons (FORTHAC, 2004). It is about an opened sector where we observe at the same time companies, having very different sizes, which are created, and companies, not having been able to adapt itself to their market, which disappear. These companies are very unevenly distributed in France. So, for historic reasons, only certain regions are dynamic in this sector. Nord-Pas-de-Calais and region Rhône-Alpes represent 43 % of jobs (FORTHAC, 2004). The ready-to-wear industry in Marseille, on which our research is based, is constituted in particular by very small structures with family character. The companies of less than 10 employees represent 56 % of establishments and concentrate 24 % of the salaried staff (SESSI, 2006).

The interviews were led face to face in an individual way, recorded, then retranscribed as soon as possible so as to protect the quality of the information (Romelaer, 1999). The data were then handled from the software N-Vivo. Interviews highlight two main trends in the ready-to-wear industry. Companies, in spite of the strong constraints of their environment, grant not enough importance for a successful piloting of their logistic activity. They stay in particular in individual logics where the outsourcing of this activity is not still envisaged.

Logistics stakes in the ready-to-wear industry

The logistics of the textile industry is complex because it manages products having sizes, colors and very different references. The acceleration of collections and the necessity of making a fast assortment renewal of products, to avoid in particular losing sales, are also additional constraints for companies. Furthermore, according to the distribution method (franchisings, stores solely, shops multibrands, hypermarkets) and the origin of manufacturing of products (Asia, the Maghreb, Turkey) the management of flows will contain new constraints. The main problem of companies being to reconcile a manufacturing at a lower cost with criteria of quality and optimal management of flows.

The specificity of the fashion product results from their strong added value as far as they are short-lived and creative products. Three types of management can be thus envisaged according to the types of products: the permanent, the seasonal and the updatings (figure 3).

Products	Presentation	Logistics implications
Permanent	Basic products, timeless, which we find from a collection to the other one (bottom of collection).	• Long Circuit • Massification of purchases and development of the big import • Decrease the cost of returns by the control of logistic costs not to miss a part of the collection by a late arrival of products.
Seasonal	Produced in the heart of the trend for the season.	• Low-cost sourcing to reconcile with a strong business responsiveness. • The first order is in mass made, and resupplying are gradually made on zones more close to selling points.
Updatings	Produced in the heart of the trend, renewed every week or every month.	• Short circuit • Budget dedicated to anticipate the errors of inadequate trends.

Figure 3: Typology of products and logistics implications

(Source: adapted of Supply Chain Magazine, 2008)

As we saw it previously, the sector of the ready-to-wear knows a strong seasonality with a fast renewal of fashion products. In passing from 2 to 6 collections a year, the industrialists accelerated the processes of innovation and creation, what requires henceforth a control of the flows of products so that they are sold in time on the market.

"Sometimes we have the impression to treat fresh products. And this constraint of deadline exists as well in the mass-market retailing as in the very high-end ". (LSP 4)

"Thus at the level of the logistics there is really a very strong stake at this level there: it is the first ones in the shops which sell in the first one. Moreover, shows changed their dates: has a small revolution there which was made because the fashion show will take place in July of the next year and not in September, thus with two months beforehand and thus an enormous gap!" (Association 1)

The actors of the sector became aware of the importance of the logistics as well upstream, for raw materials, as downstream, for distribution of products in selling points or demands of assortment renewal. The study carried out puts however in front different kind of management of the logistic activity according to the level of maturity of companies. Indeed, even if they become aware of the strategic importance of this activity towards the strong constraints of their sector, the implementation of a successful logistics is not still realized.

Companies' perception and types of logistics in the ready-to-wear industry

The logistics remains a new activity for the companies of the sector and its stakes are not still mastered. Companies realized step by step, through logistic service providers, or sometimes in a very "craft" and individual way in every company. It's not a part of the sector culture and the priority remains given to the creation of collections.

"The fashion it is a tiring business: it is necessary to create products permanently. You cannot say yourselves I created my collection and I wait to see, it is already necessary to restart on the creation of the following collection. That asks for a capacity to react which is often very strong, and the creator often has around him no skills to take care of the sourcing, etc. Thus it is a little "do-it-yourself" ". (Association 5)

Interviews with companies and logistic service providers brought to the foreground 3 types of logistics in the sector (figure 4):

- A logistics internalized by big companies because they have the necessary resources to master this activity, but where the skills build themselves gradually.

"It is a will of the top management of wanting to internalize logistics. This industry is also composed of different intermediaries' channel, with various stages. We prefer to master everything. There is only the transport which we outsource, and that is really delicate for us because there we master nothing more ". (Enterprise 1)

- A small-scale logistics for SME where everything is still managed in the hand as far as their preoccupations limit themselves to the construction of their collection to insure their survival from one year to the next.

"After the majority of the SME have enough volume I think to resort to a big warehouse, with a logistics, labeling all the products, etc. that is still made in hand". (Enterprise 2)

"For all SME which started, they made everything at the same time, and they also managed the delivery, logistics. They formed themselves with stocks, warehousewoman, etc. And thus some spend time going to see the stock, seeing if everything takes place well. Well they are more "pictures", and the others more organized who let manage that by the others". (Association 1)

- Finally, an outsourced logistics by the big and the small firms which made the strategic choice appeal to the skills of a provider.

"There is quite a lot of export, shorter and shorter deadlines; thus that supposes means and important experience. A brand is not going to venture to make that alone: too many stakes (deadlines, costs, quality), lack of experience, misses time (many phases: supply, dispatching, labeling, put on hanger, expedition, distribution to appropriate stores). That would be a too important investment". (Syndicate 3)

«Companies included the stakes in the logistics, they concentrate henceforth on their core profession which is the creation. And to drop the logistics, they outsource it to actors who have the competence". (Syndicate 1)

Type of logistics / **Criteria**	**Small-scale logistics**	**Internalised logistics**	**Externalised logistics**
Investments	No investment in logistics tools: manual	Investment in logistics resources (warehousing, employees, IT systems, etc)	No investment
Motivations	Lack of logistics competencies	Management wish for internal management	Desire to refocus on core profession Cost reduction Benefit from logistics competencies
Volumes	Low volume	High volume	High volume

Figure 4: Logistics models observed in the ready-to-wear sector (Source: Dari, 2010)

In a general way logistics is more or less mastered to assure at a minimal level the companies that their products are in time on the market. Companies tend to outsource transport, whereas the activities of supply and preparation of orders are less subcontracted. It is strategic activities for companies as far as their control guarantees to companies a good management of time in the preparation of their collection and the supply of their selling points. The outsourcing of the logistics is however at its beginning in the sector and companies do not master all the possibilities. The LSP is not still collected as a key actor and a partner who can bring a real competence and an innovation to the company. In these conditions, the projects of mutualization of the logistics, such as we observe them in the other business sectors as mass distribution, do not seem to find an echo with the companies of the ready-to-wear industry. The figure 5 synthesizes all the elements concerning the perception of the logistics by the questioned actors.

Stakes and utility of logistics	• Have the product in good condition, in the good place: insure a quality follow-up. • Do not waste time: short-lived collection. • Refocus on the core profession: creation. • Bring solutions of the new conditions of the market (research skills) in lesser costs (prices) • Have a faster rotation of collections, update products: necessity of mastering its logistics.
Stakes of outsourcing	• Select the best provider according to countries. • Guarantee the brand image of the company. The provider is an expert: knowledge of the sector and the product. • Develop a real partnership: create of the nearness to reassure companies and develop their activity.

Tableau 5 : Perceptions of logistics stakes for enterprises of the sector (Source: Dari, 2010)

The outsourcing of logistics became necessary due to the increase of the activities of companies. So, the increase of operating costs, the constraints on the sale price, the obligation of speed the deliveries, the refocus on their core profession, etc. make of the logistic outsourcing an inescapable point. Furthermore, if the logistics was previously a benign pain, it is the object of reflections today to increase the added value and guarantee the brand image of companies. The LSP realized the specificity of the products of fashion which cannot be mutualized with other products, and so develop specific services (project of platform, RFID, webcam in warehouses to allow brands to see their products, etc.).

"It is important for us because it is our image which is at stake. If the customer receives late parcel or damaged he will not be satisfied, he will not see that it is the fault of the carrier but the fault of X, and he will think that our quality of service is not good. There are still customers for which one there had been errors there are 4 or 5 seasons of that which still talk again us of it! You cannot make a mistake above". (Enterprie 1)

Through the study which was led we can observe various levels of implication in the logistic activity, even if this one is considered as a major strategic stake for the companies of the sector. A more detailed analysis allows to put in front of brakes and control levers of action in the development of this activity.

Brakes and control levers of action in the development of the logistic activity and its outsourcing

The externalisation of logistics has therefore become a requirement for fashion companies, even though some continue to integrate it into their activities. The current economic crisis could be a favourable factor for the development of externalisation as part of a cost reduction dynamic. Participants who were interviewed do not establish enterprise types in terms of their size, or whether they are likely to integrate or to externalise their logistics. The decision to outsource depends on enterprise maturity in terms of logistics and on a requirement to reduce costs internally.

The evoked anxieties are more or less identical from a business sector to the other one. We can then wonder why companies have so much evil to outsource their logistics? The major apprehension concerns especially the fact that companies cannot see any more and cannot touch their collection when they outsource. Companies invest a lot in the creation and their survival depends on it. A collection which did not meet the expected success can have heavy consequences (financials and in term of image) for the company. In these conditions, the relationship in the product is almost important and it is essential for her to manage at best the activities downstream The product must to arrive at the right time and in a good state in the sale point; and information feedbacks to know if products are sold or not are essential. Furthermore, some of them invested in logistic resources (warehouses, computing, human resources), and cannot abandon everything at the risk of undergoing in particular important social losses. The interviews brought out enterprises' uncertainties concerning outsourcing:

- Not seeing or touching their collection: companies are afraid they will not be able to manage any eventual problems as they used to do. Externalisation requires them to reconsider their ways of thinking and working. From this perspective, service providers make tools available especially to lessen these anxieties (photos, a webcam in the warehouse). The service provider's familiarity with the specific sector characteristics, its culture and the products are also factors that further the relationship with companies and establish proximity.

"What comes up most frequently is "but I won't see if there's a problem"; "you'll receive the goods, you won't see if there's a problem and it will go to my customers like that." ". (LSP 4)

"Not being able to see the articles any more. Textiles are there to be touched, they're living products". (LSP 3)

"Not seeing their collection any more makes these companies feel extremely unsure. Not having it alongside them; and so not to see it any more, or touch it, and so not to work on it a bit more each day. They are so involved in it, so much in tune with the work that not having it there any more rather annoys them. So it's a fairly intellectual approach, I think, an approach we need to adopt together, a trusting approach. I'll paint you a picture: if you trust someone to look after your baby tomorrow, will he be given just as much help and care and love as you would give him?." (LSP 2)

- The social risk and the realized investments are criteria important for companies. These last ones work for several years with certain employees, who besides acquired skills in the management of the logistic activities.

"I, as for me, for the moment, today I am not for (the outsourcing). But one day maybe. I have internal resources, from employees who are there for a long time, who know well the activity". (Enterprise 3)

- Notions of pricing and competency are also taken into account in the decision to outsource. The service provider needs to have a more attractive price and to offer enterprises real solutions.

"Then there's the price, because the customer always has the impression that it will be expensive. And yet not many customers have any grasp of what it costs them." (LSP 3)

- The fact of being under contract is also a point that companies come back to. In fact they are less free to react in decision-making and must comply with the rules that have been set down with the service provider.

"Then there is also the fact of being under contract. In other words, if I don't have a sample form, I don't have an order. With home-workers, I go there and say "Here, take two jackets and send them to such-and-such a place". The kind of reactivity that comes from having the product at one's own site doesn't exist anymore." (LSP 3)

- The notion of confidentiality is also important but is easy for service providers to manage.

"Anything confidential is organised through contracts and we create protected areas for customers who require a high degree of confidentiality. There is a lot of secrecy upstream, with the research agencies… When goods are with us it generally means that the product will be in the shops in less than 5 days and can be seen by everyone." (LSP 3)

"Confidentiality, yes well, but… They all ask us whether their articles aren't shown too much to their neighbours; it's what I was telling you just now. But it's part of our job not to mix up the products, and then when customers come we don't necessarily let them see their neighbour's articles." (LSP 4)

Interviews bring to light a lack of professionalization of the logistic activity. The companies of the sector are in a dynamics of permanent creation which leaves not enough time with the development of a real logistic reflection. Furthermore, some having to integrate this activity, the fear of the change within their organization does not incite them to outsource this activity. A set of brakes and, consequently, of control levers of action can be identified to allow the companies to join a real logistic approach (figure 6).

Organizational brakes	• Companies are afraid of losing their autonomy as regards the management of their products. • They wish to delegate a minimum of their activities because of the confidentiality of their product, even a lack of confidence. • The logistics is not a priority for companies, even if these are conscious that it plays an essential role in their sector cycles. • They miss time because of the fast renewal of their products, and so prefer to focus on their collection. They cannot make errors in terms of creation at the risk of disappearing from the market. • The decision to outsource logistics is difficult to take for companies. It changes their habits to work and the way they manage their products.
Sectorial brakes	• Little maturity of companies in logistics: SME and family companies which make quite in house. • Very individualistic sector culture: importance of the creator and the leader. • Mimicry effect: companies outsource if the others make it or if they manage to establish reliable relations with the LSP.
Outsourcing brakes	• Need of nearness and confidence: establish sustainable links. • Guarantee the confidentiality. • Respect of deadlines, quality of service and attractive price. • Have a good knowledge of the sector, its culture, the product, an empathy with regard to companies and in them difficulties "abandoning" their collection by confiding the management to a LSP.

Figure 6: Brakes and levers to the development of successful logistics activity

(Source: Dari, 2010)

Conclusion

The research wonder about the place of logistic activity in a traditional business sector such as that of the french ready-to-wear industry. We notice that companies are conscious of major stakes in the control of this activity. They indeed evolve in a strongly competitive and turbulent sector, to which comes to be added a fast renewal of products. The logistic dimension plays then a dominating role as far as the piloting of the flows of products throughout the channel allows them a better control of their activity and a strategic advantage on their competitors. The article brings to light however different levels of management from the logistic activity. These levels are function of the degree of maturity of companies with regard to the logistic activities, but also depend on characteristics of the sector (SME, culture of the sector based on creation). The logistic activity is not the object of an outsourcing which would allow the companies to be more successful in their sector. The research identifies organizational and sector brakes limiting the development of the outsourcing.

These results confront with projects, with initiative of the State, which nevertheless wish to return the more competitive sector through the control of logistic activity. The implementation of a local productive system in Marseille is a good example. The objective is to group together the companies of the Region on a coordination of their logistic activities in order to be more dynamic. This project brings to light the delay of the companies of the sector on these problems, and requires to develop working axes to incite companies to set up real logistic solutions, even to mutualize their resources in this domain. It is thus a question:

- To escort and support the cultural transformation of a sector: mutualization is an important stage which requires to think in a collective way. Now, we are in a sector where the individualistic character of the entrepreneur is dominating. It is necessary to take into account this parameter to favor mutualization.

- To meet the needs of companies with an ethical guarantee: mutualization has to be set up to answer specific expectations of companies. Mutualization has to be also to manage by a third party stakeholder guarantor of the equity.

- To present the gains of mutualization: it is a question of advancing the advantages stemming from this action to incite companies to work together.

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