



“FAST FASHION” AS A RESULT OF FLEXIBLE MANUFACTURING STRATEGIES AND CHANGING CONSUMER DEMANDS IN READY-TO-WEAR SECTOR

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ABSTRACT

Fast fashion is defined as a trend that presents the products shaped by the consumer's expectation and the recent fashion products to the market with suitable price. Ready-made clothing market in so many developed and developing countries are affected by this trend. The companies that keep abreast of fast fashion trend successfully have strengthened their existence but it is seen that the companies that do not hold the necessities of this trend such as dynamism and flexibility have lost power in their market.

Especially the globalization in commerce and culture and the means that supply this global movement and in addition to them some factors such as the increase in the consumers' income have caused changing in consuming habits. The ready-made clothing sector producing clothing products that are defined as one of the main necessity of humans and at the same time a symbol of identity have also been affected by this changing. Thus, the fast changing of the fashion products according to the customers' admirations have caused a new collection concept per week instead of the studies of collection for two seasons in ready-made clothing sector. This fast changing has obliged the producers to develop flexible production systems. In this sense, the flexibility in every aspect especially such as the product flexibility be developed, from flexibility of labor force to the flexibility of production volume is required. Otherwise, while the producers will not be successful to present the short shelf life but various products to the market swiftly and also will fail to protect their existence in today's dynamic structure.

Fast fashion that has a vital importance for the producers has also brought along the criticisms for this sector in a sense. The sectors that aim the continuousness in design by using the materials intelligently taking the social and environmental responsibility into account have taken attention to the slow production and consumption. While fast fashion democratizing the fashion in a sense, on the other hand it is criticized as a trend of increasing the consumption, bringing along the products of poor quality and short life. Then, how and where the clothing products are produced and environmental and social affects are begun to be examined.

In this study, while the changing in the behaviors of the consumers causing fast fashion trend and the flexible production strategies supporting this trend are being presented by the sample practices of pioneer ready-made clothing producers spreading the fast fashion concept in the world and Turkey, the environmental and social affects are discussed.

Key Words: *fast fashion, flexible production, environmental and social responsibility*

1. INTRODUCTION

Economically, fashion is not a local or national subject any longer, but it is an international language and a global enterprise beyond the national borders. Today, international fashion giants have leaved the very big scaled production line but maintaining their production at the places where the labor and logistic costs are cheaper and the orders are less strict comparing to their own country. French, Spanish and American brands such as Kookal, Zara and Gap can be seen in the streets of the whole world from London to Singapore. National clothing and traditions are lost by the beginning of the losing of authentic features differentiating one nation's product or production from the other and the markets that the western clothing can not be seen are decreasing rapidly¹. Fast fashion, a concept arising by effect of the factors as rapidness and innovation gaining importance in this duration, has not have a wide place in literature yet because of being a very current subject.

Along with this, Barnes and Lea-Greenwood describe fast fashion concept as an enterprise strategy that aims to decrease the necessary time that the new fashion products take their place in shops and fasten the buying cycle and maintain the consumers' demands².

Famous fashion magazine Elle in its article titled "Fast Fashion: Yes or No?" has defined fast fashion as bringing the customers and the newest, current fashion products together by appropriate prices in elegant shops creating shopping freedom and excitement³.

On the other hand, Barbara Kennington, the creative director and editor of WGSN (Worth Global Style Network), has indicated fast fashion as an interesting evolution that the fashion has been passing through for 10-15 years and a channel that transfers the top fashion to large mass⁴.

Fast fashion is generally searched in the scope of supply chain management. Supply chain management is accepted as a management philosophy aiming the integration of all key work processes that take place in the process of maintaining the raw material, and supplying information, service and products by suppliers, and to the end customers⁵. In that case, fast fashion is a concept and effect of which in all functions can be searched from product development to the marketing and to the

¹ Sue Jenkyn Jones, (2009) **Moda Tasarımı**, Güncel Yayıncılık, İstanbul, p.35.

² Barnes Liz and Gaynor Lea-Greenwood, (2006) "Fast Fashioning the Supply Chain: Shaping the Research Agenda" **Journal of Fashion Marketing and Management**, Vol 10, Nr:3, UK, p.259.

³ Öngören Hande, "Fast Fashion: Hayır mı Evet mi?" **Elle Dergisi**, İstanbul, Kasım 2008, p.197.

⁴ Öngören Hande, Röportaj "Trendlerin Dahi Kadını" **Elle Dergisi**, İstanbul, Kasım 2008, p.132.

⁵ Akgemci Tahir, (2008) **Stratejik Yönetim**, Ankara, 2008, p.110.

management processes that are responsible for the social responsibility activities of the enterprise.

In this study, the developments forming fast fashion strategy, the relation of fast fashion and innovation, environmental and social reactions against fast fashion are tried to be explained.

2. DEVELOPMENTS FORMING FAST FASHION STRATEGY

In order to understand the fast fashion strategy better and fulfill the necessities, it is necessary to examine the factors causing this trend.

Clothing that is the one of the objects that humans possessed have been seen one of the main necessity that humans need. This point of view evaluated clothing piece as a physical being that has specific features that is a product. But today, this clothing piece is more than concrete object as this and declares the experience. When the samples of the high level brands are examined, buying behaviors show that customer is seeking for experience more than the utility that gained from the clothing. Such that, it does not matter how much a customer pays for a skirt, the cost of this product can not be calculated by summing all the cost items (raw material, energy, labour etc.). Because wearing a proprietary good experience itself has a value and the cost is calculated according to this value.

In this sense, it would not be wrong to say that today the clothing is bought for the abstract values that it presents, it is not a main necessity anymore in physical sense. Here it is tried to be declared is that, main utility function of a dress has been replaced by symbolic differentiation, being acceptable, thrusting himself/herself forward and modernism. So many people do not feel a concrete obligation for cloth shopping, after all depending on the developments in the clothing sector, the increase of wealth level and the high purchasing power of the consumers today. But it is very strange that again for the same reasons, the consuming of the clothing has been increased by the consumers but now that have more abstract expectations. The markets that have the goods according to their demands as in quantity, price and quality by the new production methods have begun to demand (power of demand) the goods that differentiated by increasing cultural and economic developments in a short time⁶.

One of the factors that have caused the variation on the clothing consuming behavior is undoubtedly globalization. As it is not the only thing that makes the globalization age that we live in matchless that the companies reaching to farther, faster by the help of the technology but maintain the same opportunity for all individuals too⁷. In this sense, the process of the societies resembling each other in social and cultural field has begun by the globalization. Such that, by the facilitator to reach information and increasing communication opportunities, the change of the image of the societies known as very conservative culturally is possible to be seen.

⁶ Tekin Mahmut, Güleş Hasan ve Burgess Tom, (2000) **Değişen Dünyada Teknoloji Yönetimi**, Damla Ofset, Konya, p. 153.

⁷ Friedman Thomas, (2003) **Küreselleşmenin Geleceği**, İstanbul, sp17.

However, the goods and services through history have been long-lived than the humans that are produced and consumed by⁸.

Within this scope, the most presentable critic samples are presented by eastern societies. Fernand Braudel has given place in his work *Civilization and Capitalism - The Structure of Everyday Life-* to the declarations of a wanderer concerning with the subject in 1793: “The style of the clothing rarely changes because of the fashion or caprice in China. The clothing that a human is wearing according to his/her rank or season is always the same. Also, there is no new fashion of women except the flower arrangement or the other ornaments that they put on their heads”. In Japan, they are stayed loyal for centuries to kimono weared in house and jinbaori that is leather clothing and a picture on the back weared outside not more different than today’s kimono. Again, Braudel has given place in his work quoted from Mouradj d’Ohsson work *Tableau Général de l’Empire Othoman’in* published in 1711 presents same samples for Turkish society. “The fashions that manage the European women tyrannically could not effect the woman kind in East where have been nearly the same hair style, same dress pattern and same suiting”. Braudel has indicated that in such kind of societies the variation just be done by the effect of political events that effect the order of society⁹. The societies mentioned above of course protecting their traditional wearing today but in everyday life they share the same image of the world and there is no need to powerful effect such as political event for the variation.

Variation is formed by the dynamics tried to be mentioned above such as the increase of wealth level of the societies, the increasing purchasing power of the consumers, new production technologies and methods, increasing communication opportunities and globalization. It is possible to say that consumers become more conscious and difficult to be satisfied by the effects of all these factors. Consumers’ desire to see more variety obliged the producers to decrease the quantity order of the models and to increase the variety of the models. Shortly, flexibility of product and capacity has become an important flexibility indicator that has to be provided. These changing in the habits and behaviors of the consumers have caused a new collection concept per week instead of the studies of collection for two seasons and have started fast fashion trend.

Data oriented to clothing industry shows that the brands keep up with the necessary speed for the fast fashion strategy develop very rapidly. The most important samples to be given within this scope may be ZARA, HM and Mango. When we have a look at the development quantities of the companies that take place in clothing sector between the years 1998 and 2002, the most rapid developed company is Zara with 146 %. Zara is followed by Mango with 103 % and H&M with 91%. When the practice of the mentioned brands are examined, the data shows that the firms which always take customers’ pulse and present the right goods at a right time with acceptable price to the right market are successful and grow rapidly¹⁰. When we look at the performance of Zara in 2008, it is seen that it has a big

⁸ Alain De Botton, (2005) **Statü Endişesi**, Sel Yayıncılık, İstanbul, p117.

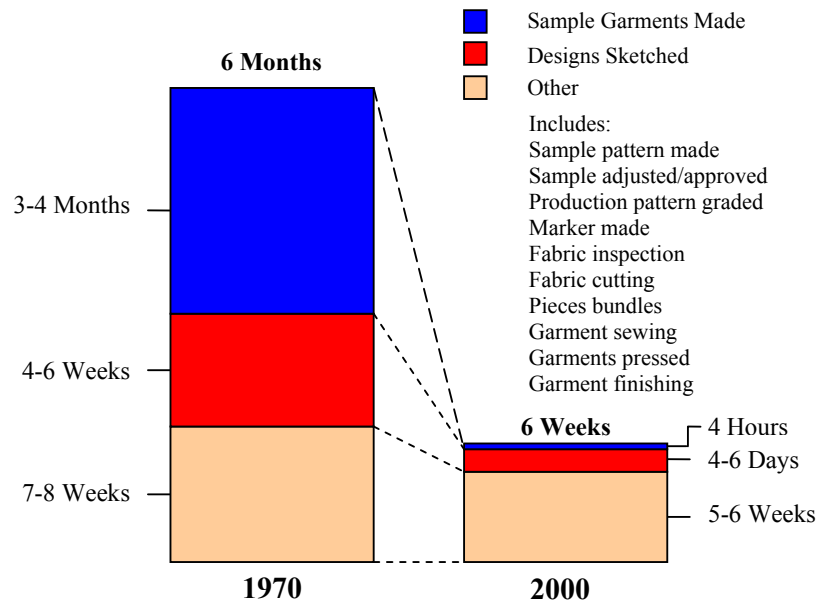
⁹ Braudel Fernand, (2004) **Maddi Uygarlık Ekonomi ve Kapitalizm XV.-XVIII. Yüzyıllar-Gündelik Hayatın Yapıları**, İmge Kitabevi, Ankara, p.284-285.

¹⁰ Öngören, op. cit. p.197.

proportion as 65.6% (6,824 million Euro)¹¹ from the total sales by the Inditex group - 8 brand- in which it is consisted.

In order to point out the importance of the rapidness, the changes in cycle times that Zara continually accelerated since 1963 that the foundation date of it.

Exhibit-1 Changes in Cycle Times in ZARA



Source: Pankaj Ghemawat, Joseluis Nueno (2003), p.22.

This success in cycle times that Zara has caught in supply-chain sensitive to the market has always simplified the production of the new goods and has given the opportunity to Zara to take its place in season with more goods compared with its competitors. While the $\frac{3}{4}$ of the goods of Zara is being changed in 3-4 weeks, 35 % of the goods design and the purchasing is from outer sources, 40-50 % of the purchase of the finished product, and 85 % of the inner production is made after the season has begun. Yet this proportion is 0-20 % in traditional producers¹².

Although the growing of the companies that act at the necessary speed for the fast fashion trend decelerated, their sales continued to increase. A report presented in 2003 by market searching establishment Minte has showed that although there is deceleration at the growth of H&M, Zara and Mango between 1998 and the end of 2002, they have succeeded to double their sales¹³.

When the history of the clothing is examined, we see a period that the consuming is occurred very slowly. Today, the data acquired from the sector exhibits the big variation being lived in purchasing behaviors. As it is understood from the presented

¹¹ Inditex Annual Report 2008, p.39.

¹² Pankaj Ghemawat, (2003) Joseluis Nueno, **ZARA: Fast Fashion**, Harward Business School, p.9.

¹³ Tungate Mark, (2005) **Modada Marka Olmak**, İstanbul, p.38.

samples, the companies that turn this variation into their advantages by the fast fashion strategy and continue to their activities can protect their powerful places in the sector.

3. FAST FASHION and INNOVATION

Fashion industry is very dynamic sector by the effects of its goods in cultural and social field except that economical effects. In the beginning clothing production was in tailors' power, shaped by the rich customers' demands. In 19th century, English origin Charles Frederick Worth living in Paris, has made the women accept his taste, is the first tailor or rather the first fashion designer or the person that started the fashion history¹⁴. Fashion production that comes today by effects of so many factors such as wars, illnesses, economical crises and technological developments is the biggest source for many developing countries today. If it is exemplified, the biggest employment source in Turkey is textile and ready-made clothing sector since 1950. The sector supplies employment for 523,000 registered people nearly in 27,500 companies by the characteristic of labor intensive. This number reaches to 2.000.000 by the supplier industry network¹⁵.

Today there are some opinions that the fashion has finished but it will be wrong to accept this yet. Of course it would not be wrong to declare the fashion has been all changed for the last fifty years. In this process, fashion's recycling might be thought. But while it is recycling, it is always vivid and has a new form¹⁶.

There is no doubt that one of the biggest revolutions in fashion history is the fast fashion trend that has changed the structure of fashion industry radically and rebuilt the rules of the competition. Fast fashion has forced the establishments to re-plan their properties and capabilities for being more productive and faster. In this context, new production techniques, new logistics techniques and new shopping techniques are developed.

The most interesting sample in Turkey for this development is the T-Box products of Boyner. T-Box is wedged so creased but it is very practical with it is ergonomic box, it is defined as an amusing and a very trendy brand that overlaps the understanding of buy and consume rapidly¹⁷. T-Box begun with five products in May of 2003 today reaches 4.050 sales points in four continents¹⁸. Doğan Kaşıkçı General Director of T-Box says that they had 300 different goods in their shelves and points out that they were trying to add a new product in their collection per month¹⁹. T-box does not aim a very luxury good desired from the well-established firms, quite the contrary breaking the natural cycle of textile, it presents Fast Moving Consumer Goods. "The company is dealing with textile and fashion for years. Fashion has a

¹⁴ Tungate, op. cit., p.21.

¹⁵ İGİAD, **Tekstil Sektörü Değerlendirme Raporu 2009**, p. 3.

¹⁶ White Nicola(Editor), (2000) **Fashion Business : Theory, Practice, Imag**, Oxford, , GBR: Berg Publishers, p 20.

¹⁷ <http://www.t-box.com.tr/Anasayfa.aspx>, 2009

¹⁸ T-Box (2009) <http://oddat.blogspot.com/2008/01/t-box.html>

¹⁹ Fast Fashion (2009) <http://www.gossipgirltrends.com/?p=508>

definite cycle. T-box is breaking this cycle and makes textile as a fast consuming product” says Kaşıkçı “This means that we can reach the customers everywhere. In supermarket, pharmacist, petrol station, beach... T-box using various distribution channels brings a different approach to the textile retail.” The goods that used to be seen on models and hangers are now in a very small box that can fit in handful. The creasing method just used by the specimen till today is the first and the most important innovation that Boyner brought in order to make a main fact of new business model²⁰.

There are innovations that meet the customers rapidly in the basis of the fast fashion trend. Innovation lies also in the basis of the creative destruction process we are living in that annihilating the old and bringing new in its place. In this period, as an establishment makes profit by presenting the innovations to the market thus providing the advantage of competition, the profit itself becomes a *quasi-rent* as a result of these innovations. In other words, profit is getting unearned income provided by being a transitional monopoly between the period that the innovations existing and the time its competitors imitate them or produce superior goods than it²¹. As it is understood from this expression that profiting from an innovation is possible till the competitors imitate it and surviving long period competition and making more profit than normal depends on the rapidness of presenting the goods to the market before competitors. The speed of response to market can be defined as the capability of forming the big or small scale productions as identified by the market rapidly and taking the customers’ demands into design process rapidly²².

Collezione can be shown as another sample for the companies that move by the consciousness of innovation and fast fashion strategy in fashion industry of Turkey. Customers visit the shops of Collezione that the first shop of it in Turkey was founded in 1987 per month. 120 new products get into the shops of the company everyweek that prepares 6 main and 6 flash collections in a year. The company predicts the beginning of a trend “dirty, throw, renew” as the company thinks that this rapid change is the indicator of the customers will visit the shops in every 15 days. For this reason, Collezione began to form the groundwork of the innovation study of 24 weeks consisting of 12 main and 12 flash collections²³.

Achieving this success is the result of the success brought by the very flexible supply chain management. Presenting high model variety goods in smaller volumes for constantly renewing collections to the market rapidly from a company that can not manage all the processes taking place in supply chain in a flexible way should not be expected.

As it is seen, fast fashion strategy that existed by the changing demands of the consumers brought innovative practices in all processes. Within this scope,

²⁰ T-Box (2009) <http://oddat.blogspot.com/2008/01/t-box.html>

²¹ Günalp Burak ve Özel Hüseyin, (2005) “Rekabet Politikalarının Esasları” [ekosem.ieu.edu.tr /siyasa/siyasaburak.pdf](http://ekosem.ieu.edu.tr/siyasa/siyasaburak.pdf)

²² Doyle A. Setephen, Moore M. Christopher and Morgan Louise, (2006) “Supplier Management in Fast Moving Fashion Retailing” *Journal of Fashion Marketing and Management*, Vol 10, Nr:3, UK, p.274.

²³ Akyiğit Ekrem, (2007) **Pazarlamada Inovasyon**, http://www1.iso.org.tr/kongre/Kongre_2007/Sunumlar/3B-Ekrem%20Akyigit.

innovation that can be described as the biggest competition device for all sectors is the most powerful dynamics of fast fashion as a device.

4. ENVIROMENTAL and SOCIAL REACTIONS AGAINST FAST FASHION

At a time the charming of the mass production was the similarity of all of the goods from fabric. This charming started by Ford with T-Model in industry has felt short by the time, consumers have been taken into production process and thus designs have been varied. By the increase of competition, new methods had to be invented in order to affect the consumers and to exist the purchase behaviors. Post-Fordist production had the name of plain production by flexible specializing. In this period, variety of the goods presented to the market increased and this variety progressed to mass customization that is comprehension of private production. As Foster has asked what happens when the nature succumbs at the end, the markets lose the balance and the employees working in very bad conditions in all over the world rebel?²⁴

Consumers now become demanding an emotional comfort in order to know the companies that they buy their clothing use ethic and sustainable methods for the waste and the production methods. The works such as ‘No Logo’ by Naomi Klein that displays the bad use of the employees and the sources in the production of the third world countries and some campaigns have started a conscience movement towards the fashion companies²⁵.

In this process, the period that the clothing industry witnesses as the most flexible, the most productive and the most profitable by the fast fashion trend creating an unproductive environment claim gains wide currency. The decreasing supply of the energy and the increasing demand for natural sources by the fast consuming, the conditions that the waste is no evaluated by an ecologist policy give harm to the sustainable environmental studies.

Yale Dean of Environmental Forest Faculty James Gustave Speth explains the point of today as: “Natural brilliance of natural life compensates all of the felicity provided by economical development, all the overcome illnesses and poorness, the shining brilliance of our civilization. This compensation is a huge compensation and has to take its place as a lost in balance”²⁶.

By these improvements, the struggle of design in new millennium has become to provide the sustainability both in environmental and economical field. Many of the people struggling to decrease the environmental effect started to this study by the laws of the governments and public relations. Green design considering the social and environmental responsibilities has adopted to increase the part number as less as possible, to use only recycling materials suitable for environment and it has brought the concepts such as green production and green marketing with it²⁷.

²⁴ Foster Hal, (2004) **Tasarım ve Suç**, İletişim Yayınları, İstanbul, p.37.

²⁵ Jones, op.cit. p.30.

²⁶ Friedman Thomas, (2009) **Sıcak, Düz ve Kalabalık**, Boyner Yayınları, İstanbul, p.56.

²⁷ Brigitte Borja de Mozota, (2005) **Tasarım Yönetimi**, Capital Medya Hizmetleri, İstanbul, p. 42.

The concept of slow fashion against the fast fashion is another concept existed by the responsible parts that means the products bought consciously can be used for years²⁸.

The social effects of the fast consuming also get reactions as its environmental effects. Such, this condition has caused an infectious psychological disease in our age. Affluenza. Friedman has told about this term in his book *Hot, Flat and Crowded* that has been used by the opponents of the protecting of consumer rights and added that the sources has defined this term as agonized, infectious, lie heavy on the society, debt, anxiety and waste²⁹.

Endless consuming craziness by the new dimension that it has gained carries a big risk. The humans living in wealth and consuming unlimited have feeling lackness and dissatisfaction in their inner world and this case pushes them more consuming. While this vicious circle harming the individuals psychologically and socially and the society in broad meaning, turns the world to a big consuming garbage dump and causes environmental harm.

Barbara Kennington in an interview in *Elle* journal has declared that the biggest danger in fast fashion reflecting the high fashion to large mass of people would be occur when the production contains the processes giving harm to consumers, nature and the employees taking place in the production and has argued that the production could not continue under these circumstances. But except this danger, she predicts that fast fashion contains a payable compensation for many people and that fast fashion is a continuous trend³⁰.

After all, the powerful actors of the fast fashion emphasize that they care about the environment, consumers, employees and they move with this consciousness at every turn. But it is possible to see the opposite of this case. Such that, the Thailand Labor Force Campaign spokesman Junya Yimprasert declared as “If hypocrisy and exploitation were an Olympic sport, the sportswear industry would win a medal,” said Junya Yimprasert from the Thai Labour Campaign and member of the Clean Clothes Campaign network”³¹, the number of the people who supports this case is not less. Although the laws and the representatives of the sectors has determined some behavior rules in order to protect the employees, in reality the business practices especially such as fast fashion creates pressures that leads to disingenuousness of labor force.

Attali advocates that the growing seriously affects the poorness, and gives conspicuous examples in his book named *A Brief History of the Future*. The most important part of the goods (clothing, toys etc.) exported to the shops in Europe and America with low prices is produced by the much exploited employees in the poorest countries of Asia and Latin America. In 2006 in the earth, 250 million children- ¼ of them under the age 10- illegally, and 180 million of them are working under the

²⁸ Alter Lloyd, (2008) “Hayatımızı Değiştirebilecek 7 Yavaş Akım” <http://www.arkitera.com/h36870-hayatimizi-degistirebilecek-7-yavas-akim.html>

²⁹ Friedman (2009), op. cit. p.63.

³⁰ Öngören, op. cit. p.134.

³¹ Play Fair at the Olympics, Pres Release 2004, <http://www.fairolympics.org/countries/PLAYFAIRpress.pdf>

unacceptable exploiting circumstances. 22.000 children had lost their lives at the same year. And nobody checks anywhere³².

The reactions from all over the world in the sense of environment show that fast fashion is creating waste generally that has no re-cycling and consuming the natural sources rapidly. In the social sense, the indisputable reality confronts us that the humans both producing in hard situations and that have the high consuming behaviors are effected negatively.

5. CONCLUSION

Clothes are supposed to be the most valuable goods of a person till the industrial revolution and the existence of ready-made clothing. The poors could not reach the new clothes; they generally had used the clothes that had passed several hands. As the clothes were very expensive and valuable, they had turned to be payment device and had been frequently used instead of gold in order to pay the service³³. We have passed from such a period to a period that the consuming of the clothing has accelerated as some other goods by the concept of “disposable”. Consumers have the opportunity to buy the biggest designers goods by fast fashion. The need for the resistance of the goods is reduced by the shortening of the fashion’s life. While this situation is causing surplus production and behaviors of single use clothing, the producer of the clothing and how the producer produced them and linking to this social and environmental effects gain importance³⁴.

The declarations of the representatives of the sector and the data acquired from the sector show that fast fashion is spreading both in geographic and in social field. But what will be the cost of this speed and can this cost be compensated? How will the limited sources of the world response to this speed in the future? Can the physical and physiological health of both the producers and of consumers be protected against the rapid production and consumption? Can the enterprises develop positive processes to reply all these questions? The positive answers of the fast fashion actors taking place in the sector and the of course the consumers forming the power of the demand will diminish the criticisms against fast fashion. Thus, the clothing sector that has an important role in the development of so many developing countries will go on its development by the consciousness of environmental and social responsibilities.

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³³ Crane Diana, (2003) **Moda ve Gündemleri; Giyimde Sınıf, Cinsiyet ve Kimlik**, Ayrıntı Yayınları, İstanbul, p.14.

³⁴ Alter Lloyd, op.cit.

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