

Præsentation og debat om veje til samarbejde/nye muligheder for danske modevirksomheder, der ønsker vækst på det internationale marked

Formål:

Åbne op for dialog og forståelse for samarbejde på tværs af virksomhederne.

Få etableret kontakter til efterfølgende dialog.

Ultimativt udvikle og implementere en brand platforms model der tjener deltagernes interesse.

Middel:

Gennemgang af brandplatforms modellen, drøftelse af dennes varianter med deltagerne og involvering i drøftelser

Indhold af workshop

- Den danske modebranches nye virkelighed
- Det ”dobbelte skruestik”
- Kompetencer i mindre virksomheder; hvordan kan flere tilføres
- Brand platform og stordrifts fordele ved ”upstream” og “downstream” betragtninger
- Forskellige brand platforms modeller
- Diskussion af modellerne, identifikation af fælles interesser

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- Ticket-To-Heaven, Evita Peroni , HTM, Stella Nova bestyrelse
- Spandet And Partners
(Birger C., Ej sikke lej, Hollys, Noa Noa, Venus de Milo, Gardenia, Closed, Ticket To Heaven, CIFF)

ENTREPRENEUR OF THE YEAR 2004



“DYRBERG/KERN has won the Danish competition thanks to the complexity of the company. DYRBERG/KERN has not only created a unique design concept, but they have also been able to strengthen and motivate the organisation and increase the turnover by 30% annually since the company foundation in 1985”

Børsen, November 2004



“In its efforts to realize a brand platform strategy Stella Nova has decided to give up further financial support of Baum und Pferdgarten due to lack of payments from the retailers and lack of support from the bank “

Børsen, July 2009

Survival of the Biggest

ICCompanys, Bestseller, Brandtex

1000 Mio.

Bruuns Bazaar, Day, Marlene Birger

200
Mio.

Metropol/DK Company

100
Mio.

Stella Nova, Baum und Pferdgarten

30 Mio.

designer brands mellem 10-20 Mio. kr. med tab, eller meget beskedent overskud – behov for 8 + medarbejdere

20 Mio.

Meget små designer brands med 1-3 ansatte



Dafi/Børsen april 2009

Mit HD Studie 1982 & nu
... slående ligheder...

”Om 3 måneder er der kun 1/3 af Jer tilbage”

g den 24. april 2009

erfor er det også
gt, at Lene Esper-
ud og giver udtryk
n selv mener, der er
en rigtig god pakke,
per Rangvid.

enter

et politisk
mun
at
det
un

Offshore selskaber og fonde
www.anglocorporateservices.com

HJÆLP!

Vores bank er ved at kvæle vores supergode forretning. Udsatte beslutninger og en kreditafdeling i bankens hovedsæde, som som SKAL sige nej til enhver indstilling fra vores banks erhvervsafdeling gør, at vi ikke kan forvente banken indfrier deres lånetilsagn til os.

Om os:

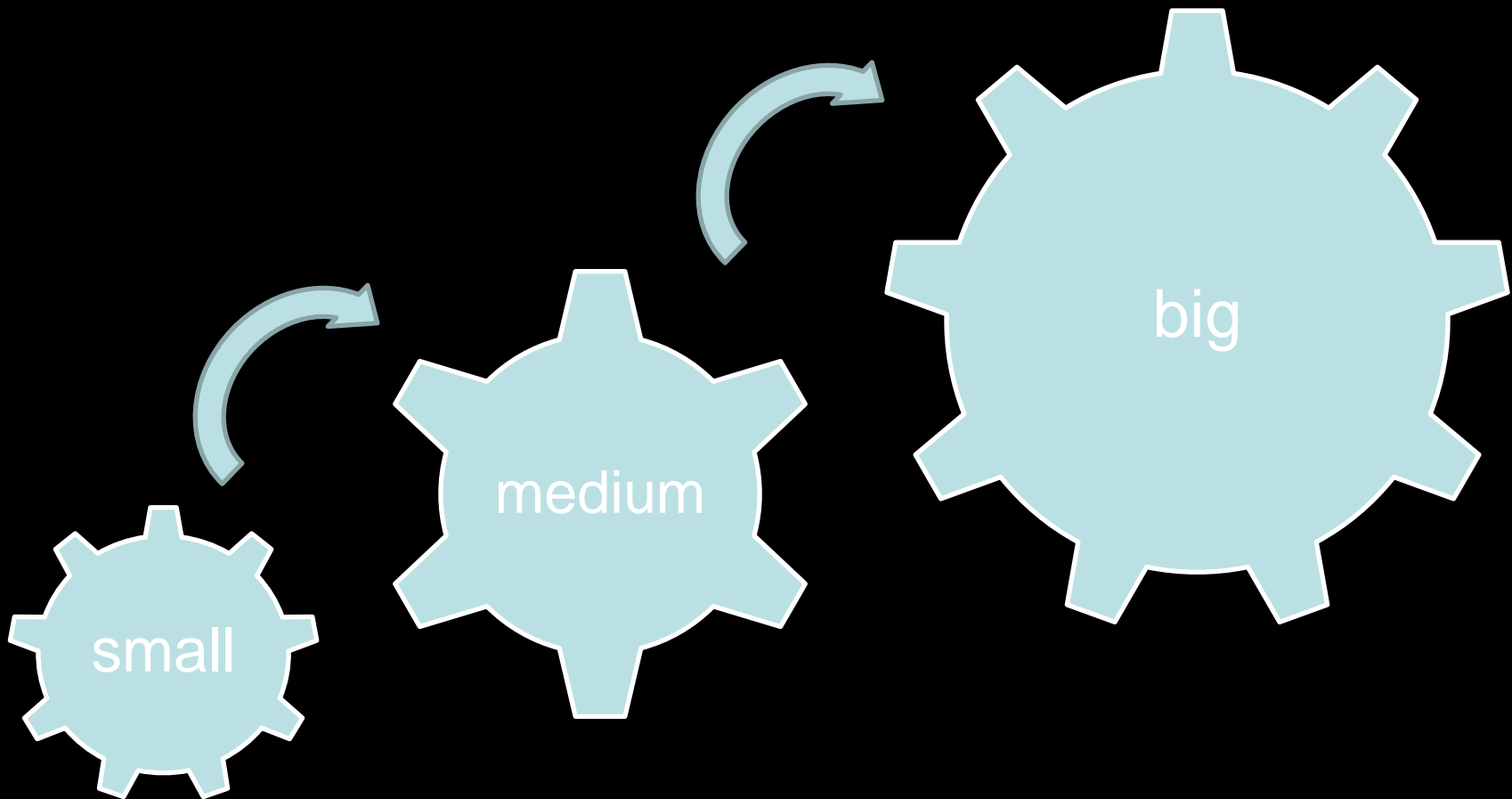
24 – 30 mio. omsætning. 8 ansatte. Kraftig stigende aktiviteter. Stor og voksende ordrebeholdning, som ikke kan effektueres, grundet manglende finansiering. Salg af kapitalvarer. Fremtrædende og respektabel position i markedet. Egenkapital 4,0 mio. Årligt overskud 2,0 – 3,8 mio. Afkastningsgrad 21 – 43%. Egenkapital forrentning 25 – 40%. Soliditetsgrad 60 – 80%. Vi søger kapital 2 – 3 mio. kr. HER & NU ! Stilling som adm. direktør kan tilbydes. Henv. Inden 28/4-2009.

Billetnrk. 7944, Børsen, 1140 København K.

Facts 2009-2010

- 20% tvunget i et strategisk samarbejde eller lukket
- Den strukturelle udfordring kombineret med den nye finansielle virkelighed et "dobbelt skruestik" for de mindre og mellemstore virksomheder
- Færre end 5 store modevirksomheder herhjemme (ICCompanys, Bestseller osv.) står for den største del af omsætningen og eksporten.

The Challenge



Brand Platform Strategy

- Market penetration: can be done by "any" entrepreneur and designer – insufficient to become an international brand and an international player (expensive to be small)
- Market development: (eg. China, USA) requires network and international competences – especially branded retail
- Product development: can be done by the creative owner – however needs cash flow and supply chain support to speed up process and utilize potential
- Diversification: needs license competences and supply chain skills – will speed up critical mass

Brand Platform Strategy

- Future growth capabilities may be limited due to
 - lack of management and leadership competences
 - cash flow issues for market- and product development
 - lack of critical mass
 - lack of international competences and vision (expansion)
 - supply chain issues – delivery, quality, purchase power, control
 - lack of retail understanding

Key Words for The Brand Platform Strategy:

- *Backwards integration*
- *Forward optimization*
- *Background:*
- *Suppliers/Brands within fashion apparel in +/- 15 mio. DKK turnover have realised fast growth through wholesale market penetration due to*
 - *Concept competences*
 - *Design competences*
 - *Entrepreneurship*
 - *Immature market structure*
 - *Sales and distribution capabilities*

Støtte til vækstbehov

- Alle ikke identitetsopbyggende aktiviteter kan organiseres og drives på en fælles platform med maksimal driftssynergi – produktion, fragt, logistik (pick & pack), økonomi & IT, finansiering, administration & legal samt overordnet ledelse – UPSTREAM INTEGRATION
- Alle identitetsopbyggende aktiviteter - DOWNSTREAM OPTIMIZATION – produkt / koncept, udførende engrossalg på hjemmemarked organiseres og drives ofte af mærket selv, da det er svært at tilbyde down-stream delen løst gennem organisering af fælles salg og markedsføring

The Brand Platform :

Synergies through shared:

1. management and leadership competences
2. Customer service
3. PR
4. Accounting
5. Supply chain
6. Office space
7. Ware house
8. IT
9. Systems
10. Bank
11. Reporting
12. Retail, shop in shops, retail competence
13. International expansion

- Core competences of the owner/s through specialization
- Separate Design and product development
- Competition in sales/at the point of sale

Brand Platform Synergy and savings within

- CEO
- Sales Management
- Marketing/PR
- Product Management
- Finance
- IT
- Stock
- Logistics
- Office

	Inexpensive	Expensive	Expensive need capital	Expensive need capital	Need Critical Mass	Need Critical Mass	Need Critical Mass
Turnover	0-15 Mio.	15-25 Mio.	25-30 Mio.	30-50 Mio.	50-100 Mio.	100-200 Mio.	>200 Mio.
Example	Vadum, Style Snob	Baum und Pferdgarten	Stella Nova	Rützou	CCDK	Malene Birger, Day, Odd Molly	IC Companys, Best Seller
Distribution	Multibrand - Wholesale	Multibrand - Wholesale	Multibrand - Wholesale, consignment Magasin	Multibrand - wholesale, Flagship Shop, own internet shop	Wholesale, Flagship Shop, own internet	Wholesale, Retail, Franchise, Internet	Wholesale, Retail, Franchise, Internet
Markets	Denmark, 1-2 agents Scandinavia	Skandinavia	Skandinavia, NL	Europe, Japan	Europe, Russia, Japan	Worldwide	Worldwide including USA
Distribution brand perception	Poor	Non controlled	Non controlled	Non controlled	Controlled	Controlled	Controlled
Covered by	Agents	One sales rep. And agents	One sales rep. A sales Manager and agents	One sales rep. A sales manager and agents	Several sales reps., sales management and some agents	Sales Management, Distributors, Own Sales Subs.	Sales Management, Distributors, Own Sales Subs.
Marketing	PR, owner story	PR, owner story, perhaps fashion show DK	PR, perhaps fashion show and some local advertising	Local Consumer and trade marketing, Events and Campaigns	Local Consumer and trade marketing, Events and Campaigns	International Consumer and trade marketing, Events and Campaigns	International Consumer and trade marketing, Events and Campaigns
Organisation	5 - 7	12	14	20	40	60	above 200
Organisation Type	Generalists/Entrepreneurs	Generalists/Entrepreneurs	Generalists/Entrepreneurs	Generalists/Entrepreneurs	Generalists and some specialists	Specialists	Specialists
Board	Uncle or Father	Investors	Family board	Family board and investors	Professional board	professional board	professional board
Turnover per employee	500 t.dkk	700 t.dkk	1 Mio.	2 Mio.	2,5 Mio.	3 Mio.	

Brand platform

1 + 1 = 3



5 forskellige modeller

- 1. Køb af 100%, 51% eller 49% af en eller flere virksomheder**
- 2. Fusion af en eller flere virksomheder**
- 3. Et fælles shared services selskab**
- 4. Fælles kontor**
- 5. Udlejning af kontor og deling af services**

5 forskellige modeller

1. Køb af 100%, 51% eller 49% af en eller flere virksomheder

Ikke nødvendigvis nok med kontrollen, da man som 51% ejer stadig ender i en situation, hvor 49% ejeren vil "bitche" over anvendelsen og især betalingen for shared resources, især hvis brandet er succesfuldt

2. Fusion af en eller flere virksomheder

3. Et fælles shared services selskab med en til flere (kapital stærke) virksomheder, hvor der indskydes kapital af de forskellige virksomheder i et "back office"

4. Fælles kontor – eventuelt med et delejerskab (eller option på et delejerskab) som alternativ eller del betaling for shared services.

5. Udlejning af kontor og deling af services såsom bogholderi, køkken, telefon og andre "enkle" omkostninger. Separat tilkøb af diverse ydelser indenfor supply chain, ledelse, IT mm. – enten fra de individuelle virksomheder eller fra diverse konsulent virksomheder (som del af en outsourcing strategi