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The Future of Chinese Fashion

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The Future of Chinese Fashion

Introduction

China overtook Japan as the world's number two economy in the third quarter of 2010, and is expected to challenge US supremacy in the not-so-distant future. We are seeing titles such as *When China Rules the World* (Jacques 2009) heralding the next shift in the balance of world power. We can quibble about some of the details—when China will overtake the US, what will emerge as “The Post-Washington Consensus” (Birdsall & Fukuyama 2011), and “Will China's Rise Lead to War?” (Glaser 2011)—but one thing is certain: China is now a major player in the world's economy and the balance of power is shifting eastward.

The history of fashion parallels political and economic history. When Rome governed an empire that stretched from Great Britain to North Africa to Persia, draped fashions were the mark of civilization in the West. After Rome fell, style leadership moved east to Byzantium, then west during the Italian Renaissance. Prior to the fifteenth century, when China and India had the world's largest economies, Chinese silks and Indian painted cottons became favorites wherever they were traded. Styles worn at the courts of Europe's powerful monarchies set international fashions in the West during the seventeenth and eighteenth centuries. The political and industrial revolutions of the late eighteenth and nineteenth centuries concentrated power in Western Europe and America. At the beginning of the twentieth century, these two regions accounted for over half of the world's production, more than double their share before the industrial revolutions (Maddison 2006). This established Western fashion as the dominant mode for dressing in developed countries. In the twenty-first century, fashions shown on the runways of Paris, London, Milan, and New York soon appear on streets all over the world. Now that China is on the verge of becoming the world's largest economy, what will be its effect on fashion? If history is any predictor, China will lead world fashion in the foreseeable future. But how will this leadership emerge?

This paper examines fashion in China as observed through the dual lens of a fashion historian and an economist. It focuses on three aspects of China's future in fashion: production, consumption, and fashion innovation.

Methodology

In the fall of 2010, the authors traveled in China for seven weeks. Using a qualitative approach, we observed fashion in a wide range of urban settings. These included the first tier cities of Shanghai and Beijing, as well as the second and third tier cities of Nanjing, Suzhou, Chengdu, Kunming, Guilin, and Shenzhen. Additionally, we looked for fashion in the smaller cities and towns of Lijiang, Shu-He, Dali, and Yangzhou. All these cities and towns are on the Chinese mainland. We also visited Hong Kong, which is a Special Administrative Region and currently enjoys a high degree of autonomy.

Our qualitative approach was, for want of a better term, field research (Flynn & Foster 2009). Our mixed bag of methods included observation, photography, interviews, and case studies. In each city, we jotted notes in a log on a daily basis followed by detailed journal entries. The field research was complemented by review of business literature and economic data.

We first briefly survey China's past to orient the reader and provide background for later discussion. Then we present our analysis in sub-sections titled production, consumption, and fashion innovation.

China in the Past

Western knowledge of China is dominated by the long history of imperial dynasties that ended abruptly with the founding of the Republic of China. We know about the Han (206 BCE–220 CE), who developed trade with the West during the Roman Empire, and the Mongols who threatened to overrun the West during the Yuan period (1271–1368). The writings of Marco Polo exposed Europe to the wonders of China in the Middle Ages. The Ming dynasty (1368–1644) exported world-class ceramics to the West, yet inexplicably grounded its fleet of Treasure Ships that ruled the Indian Ocean, and focused attention on internal infrastructure investments—rebuilding the Grand Canal to supply the new capital in Beijing and extending the Great Wall to protect its northern borders—just as the Western Europeans led by the Portuguese were entering the Indian Ocean. The Manchu, known as the Qing dynasty (1644–1911), ruled when China was opened to the West and experienced a “Century of Humiliation” that brought about the collapse of the Chinese economy. China had accounted for approximately twenty-five percent of the world's output during

the Han and Ming dynasties, but by the early twentieth century it had fallen to nine percent (Maddison 2006). China's efforts to isolate itself from the world had exacted an enormous cost on the Chinese people.

Fashion historians are well acquainted with China's sartorial traditions. China has a long and well-documented history of court dress through its many dynasties characterized by traditional motifs, specialized textile techniques, and distinctive clothing styles. Chinese robes, skirts, jackets, vests, and accessories from the later Qing dynasty (1644–1911) are plentiful in museum collections in both China and the West (Figure 1). China's museums house older artifacts that are not well known in fashion history. Rare garments from pre-Qing dynasties survive, some from the era of Khubilai Khan (1279–1368).¹ Also intriguing are the well-preserved ensembles of the so-called "mummies" from the Tarim Basin, a desert located in the western Chinese province of Xinjiang. On the mummies' bodies are some of the world's earliest examples of Eurasian coats and trousers as well as Chinese patterned silks.² These well-preserved silks provide evidence for early trade along the Silk Road.

The economic decline of the Qing dynasty brought rebellion, as so often happened in China's past, but this time rebellion brought the end of dynastic rule and its associated court fashions. In 1912, Dr. Sun Yat-sen assumed the role of President of the Republic of China. Sun had spent time studying in Honolulu as a child and in exile in the US, Europe and Japan as a young adult, and when he assumed the presidency he attempted to open China to Western ideas including Western fashion. In urban locations, men began wearing suits, jackets, and trousers. In the inter-war years, Shanghai and Hong Kong enjoyed a reputation for excellent tailoring. Young women donned a blended east-west style with an asymmetrical neckline and mandarin collar known as *cheongsam* or *qipao*. The qipao, which was derived from the Manchu long robe of the late Qing era, signified modernity. It is particularly associated with the vibrant culture of 1930s Shanghai, and with British-controlled Hong Kong in the 1950s and 1960s (Steele and Major 1999). It enjoyed popularity in the West after the release of the film *The World of Suzy Wong* (1960), set in Hong Kong. More recently, Wong Kar Wai's *In the Mood for Love* (2000) – set in 1962 – revived interest in qipao when the character played by Maggie Cheung wore twenty-three different qipao dresses, each expressing a different kind of mood ("The Chinese Qipao, As Seen In..." 2011).

It should be pointed out, however, that there was, and is, another China in the country's interior hidden from the gaze of Westerners. There are over fifty ethnic groups that have their own distinctive

cultures and dress. In China, the Han are comparable to Whites in the United States—the dominant ethnic group representing approximately ninety-two percent of China’s population. China’s largest minority ethnic group—the Zhuang who number over sixteen million, about the population of Florida—are concentrated in the Guangxi Zhuang Autonomous Region in Southern China on the border with Vietnam, while the Uyghurs—with a population of over eight million, about the population of New Jersey—are concentrated in Xinjiang Province. Yunnan Province in China’s Southwest, meanwhile, is its most diverse province with nearly half the country’s officially recognized minorities living there. As a result of the geographical clustering of the ethnic minorities, many still wear their ethnic clothing as a sign of collective identity (Figure 2).

The door opened to the West by Sun Yat-sen did not, however, remain open long. In 1949, after two decades of civil war, Mao Zedong became the first Chairman of the People’s Republic of China and promptly turned China inward, isolating the country from external influences just as the Ming had done 500 years earlier. One of the casualties of this decision was that fashion fell by the wayside. In part, fashion was a victim of a very poor economy and a redistribution of income that favored the peasants of rural China, which reduced the discretionary income essential to support fashion. It was also a victim of ideology. During China’s Cultural Revolution (1966–1976), fashion was rejected as foreign, bourgeois, and capitalistic (Wilson 1999). The practical, but bland Mao suit became the choice of the people. The Mao suit was actually a jacket and pant outfit worn by Sun Yat-sen. With only slight differences between the male and female versions, it signified the collectivity of the communist state rather than the individuality of a capitalistic state. Some older people continued to wear it after Mao died in 1976.

In the early 1970s China cracked the door open to the West ever so slightly with the ping-pong diplomacy of 1971 and Nixon’s visit in 1972. After Mao’s death in 1976 and the eventual rise of Deng Xiaoping, a survivor of two purges during the Cultural Revolution, China abandoned Mao’s isolationist policies. In roughly thirty years of imposed self-sufficiency under communism, China’s economic slide had been slowed, but it remained desperately poor. In 1981 China had one of the highest percentages of people living in poverty. Eighty-five percent of China’s people lived on less than \$1.25 a day—an accepted measure of poverty in developing countries—and they represented forty-four percent of the world’s total poor (Chen & Ravallion 2008).

Fortunately for China, Deng was a pragmatist and China's neighbors had provided a blueprint for sustained economic growth. Japan and the Asian Tigers were growing twice as fast as China, so Deng chose to copy their export-led path to growth. But Deng needed to modify their plans in three important ways to account for China's peculiarities. First, Japan was far more industrialized, urbanized and technologically sophisticated in 1950 than China was in 1980, so the policy of building an industrial base from within by supporting domestic firms such as Sony, Mitsubishi and Toyota (Japan) and Samsung and Hyundai (Korea) would not be possible. China would need to import both the funds and technology to accelerate growth. Second, World War II had decimated the existing industrial base in Japan and the Tigers, but it was intact in China making the needed structural changes from heavy industry to light industry more difficult to achieve. China would need to create a second, parallel capitalist economy to grow alongside the politically powerful state-owned industries in the communist economy. Third, to harness the needed resources, China would need to follow Japan and the Tigers and embrace capitalism, although in China capitalism would not be accompanied by democracy.

Deng's "solution" was the establishment of Special Economic Zones (SEZs), an updated version of the Canton system that regulated China's interaction with the world in the early nineteenth century. Under the Canton system, foreign importers were restricted to Canton, modern-day Quanzhou, to minimize China's exposure to Western people and their ideas, while under Deng's system foreign direct investment (FDI) would be restricted to the SEZs clustered along the coast, close to Taiwan and Hong Kong and the ocean linking its factories with European and US markets. As for the nature of those exports, China would once again follow the lead of those who had gone before it. "Out" were the heavy, capital intensive, immobile industries such as steel favored by Mao as symbols of economic might, and "in" were the light, labor intensive, mobile consumer-oriented industries such as textiles and apparel that catered to Western customers. These industries had been on the leading edge of industrial revolutions in the past—in England in the eighteenth century, the US in the nineteenth century, and East Asia in the mid twentieth century—and now they would be the first step taken by China on the road from a rural and agricultural society to a modern, industrial, and urban society.

The results were remarkable. In the first twenty-five years of reform (1980–2005), while the growth rate of the world's economy slowed, China's accelerated; it expanded nearly 200 percent faster than

the rest of the world (Maddison 2006). With this growth came unimaginable reductions in poverty. By 2005, the number of people living on under \$2.00 a day had fallen by nearly 500 million since 1981, while in the rest of the developing world the number of poor increased by more than 500 million. Growth was not shared equally, though. Deng is reputed to have said: “To be rich is glorious!” and his reforms created a generation of “glorious” entrepreneurs who would show their growing wealth through acquisition and display of fashionable products. Those who saw their disposable incomes increase more modestly—approximately 630 million additional people living on \$2 to \$13 a day (Chen & Ravallion 2008)—could participate in some aspects of fashion if only by purchasing one of the new fashion magazines or getting a trendy haircut (Wu 2009).

But what to wear? China, without its own recent history of fashion, looked outside its borders for inspiration. To be fashionable meant to wear foreign styles, not to step backwards into the China of the 1930s. Just as Deng had looked to successful countries for ideas on restructuring China’s economy, its people first directed their attention to nearby Hong Kong, at that time under British rule, and then to other successful Asian countries and regions – Japan, Korea, and Taiwan. China was in search of a national identity as expressed through dress culture.

So where does China go from here? We now turn attention to the issues of production, consumption, and fashion innovation.

Production

The evolving geography of the textile and apparel industries has been largely defined by its low capital requirements and unskilled workforce, which makes entry and exit easy. As a result, the textile and apparel industries are often the lead sector in industrialization and urbanization, the first rung on the ladder leading from poor, rural, and agricultural societies to rich, urban, and industrial ones.

In the post World War II era, the production of fashion took on an international dimension. Technological innovations such as container shipping dramatically lowered the cost of manufacturing in distant locations, while public policies encouraging international trade produced what Thomas Friedman (2005) called a “flattening” of the world. No industries are more mobile than the textile and apparel industries, which is why they played such a central role in the rebuilding of East Asia and Europe after

World War II and why, as the world was moving relentlessly toward free trade through liberal trade agreements, they were singled out for “special treatment” to slow their movement. As early as the 1950s increasing competition from Japan’s textile and apparel producers was generating a backlash, and by 1961 restraints on the trade of cotton goods were formalized in the Short-Term Arrangement Regarding Trade in Cotton Textiles, and the Long-Term Agreement Regarding International Trade in Cotton Textiles of 1962. Suppliers responded to these barriers to the trade of cotton fabrics by shifting to other fibers, and in 1974 the Multi-Fiber Agreement (MFA) extended quotas to non-cotton materials. Its impact can be seen in the number of poor countries that made it to the list of the world’s top exporters in the textile and apparel industries. Excluding China, only two countries classified by the World Bank as low or lower-middle income are in the top fourteen exporters of manufactured goods, while five make it to the list for textiles and seven make it for clothing (World Trade Organization 2011).

Once Deng Xiaoping adopted an export-led growth strategy in 1980, the movement of industries to China in search of cheap labor was a given. In fact, by 1994 a new Agreement on Textiles and Clothing (ATC) was reached due to widespread fear that the combined effect of China’s entry into the World Trade Organization (WTO) in 2001 and the end of the MFA would result in a total collapse of the textile and apparel industries in Europe and the US. Restrictions on Chinese imports were lifted slowly until the textile and apparel industries lost their “special” status in 2005.

These trade restrictions appear to have slowed the movement of industry to China, at least prior to its entry into the WTO, but it certainly did not stop it. In 1980, when Deng began his reforms, China accounted for 4.6 percent of world textile exports and 4 percent of clothing exports, and by 2000 these stood at 6.9 percent and 8.9 percent respectively. These percentages quickly rose once the trade restrictions were eased and China gained entry to the WTO. As expected, movement in the textile and apparel industries was even more dramatic and China quickly became *the* major producer. By 2009 China’s share of textile exports had reached 28 percent and its share of clothing exports had reached 34 percent (World Trade Organization 2011). China’s meteoric growth has prompted some to ask, “Is there an alternative to depending on China’s supply of goods?” (Tirschwell 2010).

The success of the export-led growth strategy is evident in China’s Gross Domestic Product (GDP). In the first thirty years of China’s “capitalism with Chinese peculiarities” policy, inflation-adjusted

GDP growth averaged about 10 percent, more than three times faster than the world average and fast enough for the economy to double in size about every seven years. Growth was not, however, distributed evenly across China as the country's adoption of capitalism undid equality, one of the major achievements of the communist era. Inequality across major regions rose sharply in the 1990s. By 2000, "China found itself with not only one of the highest rates of economic growth but also one of the highest degrees of rural-urban income inequality in the world" (Belton, Li, & Zhao 2007: 1). In 2009, Shanghai and its neighboring provinces, Zhejiang and Jiangsu, along with Guangdong province accounted for 70 percent of China's exports and 29 percent of GDP. This concentration in the coastal areas also characterized the textile and apparel industries (Catin, Luo, & van Huffle 2005).

Some of this inequality is due to factors beyond the control of policy makers in China, namely uneven distribution of resources and globalization that gives coastal areas a distinct advantage. Much of it is due, however, to policy biases that are reversible. First, the creation of the SEZs in the coastal provinces concentrated foreign direct investment (FDI) there (Catin, Luo, & van Huffle 2005). Second, the government's decentralized fiscal structure gave local governments responsibility for the provision of education and health benefits that disadvantages rural areas. Third, poorly defined rural land tenure laws, the *hukou* household registration policy, and discrimination against migrants lowered rural-urban migration below what it would have been. Fourth, Mao's relocation policies of forced migrations to the countryside left China in 1980 with an urbanization rate half that of the world's other less developed regions. By 2010 this gap had been virtually eliminated by an increase in China's urban population exceeding 500 million (UN) fueled by rural-urban migration of 200 million in the last decade alone that exceeds anything seen in history (Herd, Koen, and Reutersward 2010).

Even with this rural-urban migration, the combination of high demand growth and restricted supply has created labor shortages in coastal China that has translated into labor unrest and rapidly rising wages. In February 2011, Shanghai's minimum wage was raised 10 percent, a month after Beijing's went up 21 percent, and about a year after Guangdong province raised its minimum wage nearly 20 percent. For the decade 2000-2009, wage growth averaged 12.6 percent a year, substantially higher than the 1.5 percent in Indonesia and 0 percent in Thailand (Brown 2011). It is difficult to get comparison data, but there is little doubt that China's labor costs are on the high end for developing Asia. This has prompted the coastal

textile and apparel industries to head out of coastal China in search of lower costs (Meta 2010). In truth, this is not a new pattern, with textile's share of exports in the coastal region declining from 32 percent to 26 percent between 1990 and 2000 (Catin, Luo, & van Huffle 2005).

As for where the vendors are headed, some are shifting production abroad, often to nearby Asian countries. Production has gravitated to lower wage countries such as Bangladesh, Cambodia, and Vietnam where clothing exports expanded faster than those of China for the last decade. Other vendors, meanwhile, have headed inland. China's size and extent of regional inequality makes possible the outsourcing of production to low cost areas *within* China, replicating what happened in the US a century ago when the textile industry moved from north to south. China may be able to sustain rapid growth rates by expanding both its high tech capital-intensive sector on the coast and its low-tech labor-intensive sector in the underdeveloped interior, something its smaller Asian neighbors could not do.

The extent to which China develops its interior, and moves the footloose textile and apparel industries inward instead of abroad, will depend in large part on its efforts to reverse the coastal biases in its policies. It appears efforts are underway to do just this. One effort can be seen in the massive investment in transportation infrastructure made in the last decade. The building of new highway systems is transforming the nation's geography, just as it did in the US in the 1950s. Airports are also world class, and built way ahead of demand. All the major cities, and increasingly the minor ones, have large new airports. High-speed trains will soon extend inland to bring the "magic" to the interior. Presently, new tracks are being laid to Wuhan and then on to Chongqing, two enormous cities along the Yangtze River. The Chongqing region alone is home to 32 million people.

This infrastructure boom is part of a grander scheme: continued growth to maintain the peace. China's solution to serious imbalances—in the world's financial system and in its own income distribution—is a commitment to build domestic demand, an issue we address in the next unit. If China is to increase domestic consumption and expand the middle class, there is no choice but to move production inland. China's geography favors manufacturing over agriculture, so continued growth will require a movement of many from rural farms to urban factories, and not enough space is available in the coastal cities to house these people and site the factories in which they work. The infrastructure investments will stimulate the development of China's interior, and the textile and apparel industries will play a key role in

that development as they head inland in search of lower wages. China will remain a major producer of textiles and clothing in the near term, but its biggest impact may be on patterns of consumption.

Consumption

The Chinese market has long fascinated Western producers. The Opium War between England and China was fought over better access to China's markets for England's exports, a sentiment captured by a British writer in the 1840s: "If we could only persuade every person in China to lengthen his shirttail by a foot, we could keep the mills of Lancashire working round the clock" ("Go East, Young Men" 2010). China still demands the attention of producers around the world who have flooded the country with their goods. In the old days state-run department stores offered consumers a limited range of merchandise, but this has changed. Every major city now has shopping streets with chic department stores and boutiques. Beijing has Wangfujing Street, Shanghai has Nanjing Lu, and Chengdu has Dongfeng Road. Tree-lined streets such as Chang Le Road and Fuxing Road in Shanghai, and Pingliang Lu in Suzhou are brimming with trendy shops. Areas around universities also sport numerous fashionable shops.

One of the most striking retail scenes in China is the supersized mall. China's first and second tier cities are bulging with malls. Whole city blocks are being gutted for these behemoths. Some large malls are right next to other malls. The philosophy behind mall development seems to be: "build it and they will come." The new malls are built using the same formula — an open central area with shops located around the perimeter (Figure 3). Their multiple stories require banks of escalators that go up two floors at a time. To go up or down one level, shoppers must walk by more stores. Shops are predominantly the international brands that want to break into the Chinese market such as Burberry, Gucci, and Tommy Hilfiger. Many international fashion labels are in these malls.

Markets selling counterfeit goods and knockoffs are also present. These include large multi-storied emporiums such as Yaxiu Fuzhuang Shichang in the Sanlitun district of Beijing, sprawling underground mazes like the A.P. Plaza below the Science and Technology Museum in Shanghai, and the five-story LuoHu Commercial City and the open-air stalls of Shenzhen (Figure 4). Bargaining is expected. In touristy areas of big cities (Hong Kong excepted), hawkers are ever-present with special offers: "Lady, lady –

Gucci, Prada” and “Mister – Rolex?” While second-hand/vintage shops are rare, many sparsely furnished shops selling discounted brand names are brimming with customers.

Outdoor shopping villages are a new direction for high-end retailing. Two of these are Sanlitun Village in Beijing and Xintiandi Plaza in Shanghai. Sanlitun is near the embassy district; the former ramshackle bars and clubs are being edged out by new boutiques selling Balenciaga and Balmain. An Apple store, trendy restaurants, and a building designed by Frank Gehry are in the complex. The knockoff market is not far away, so some sportswear merchandise similar to that found in Sanlitun’s Nike, Adidas, and Puma shops may be purchased for a fraction of the price. Xintiandi is a redeveloped shopping, eating, and entertainment district that preserves the district’s nineteenth-century stone “shikumen” houses on narrow alleys. The new Xintiandi Style Mall, opened in the fall of 2010, features both international brands and Chinese designers (Figure 5).

It is not just the range and size of the retail outlets that captures one’s attention, however. One can’t miss the fact that many of the malls and high-end stores are empty. We observed some lookers, but few buyers in the large malls in Beijing, Shanghai, Chengdu, Kunming, and Shenzhen. One wonders how long companies can operate in the red. One ex-pat American working in Beijing maintains that rents in malls and premier shopping districts are kept deliberately low in order to attract fashionable international brands, who provide stock and salespeople as an investment in the future (Stadelmann 2010). At least two of these new malls have already proven to be unsustainable. One is the Golden Resources Mall, which opened in Beijing in 2004. At six million square feet, it earned the distinction of being the largest mall in the world. In 2006, South China Mall in Dongguan, located in Guangdong province surpassed it in size. Both suffer from problems with location. Golden Resources Mall is situated far from the city center, near Beijing’s fourth ring road. Few people make the trip there. South China Mall is far removed from transportation routes, and as result it has a 90 percent vacancy rate. Further, the merchandise in these malls carries price tags that are too high for the average Chinese consumer. A shopper at Beijing’s Shin Kong Place complained: “These prices are too expensive. People can’t afford it” (Montlake 2007). These empty malls have earned the name “ghost malls.”

How could this be – and what are the implications for the future? As for why, there are three reasons. First, despite its rapid growth, China remains a very poor country. How poor depends upon the

way per capita GDP is measured, and data is difficult to get. The traditional approach is to calculate GDP in Chinese currency and then convert it to US dollars based on the current exchange rate, and then calculate per capita GDP. In 2010 China had the world's second largest economy with GDP of \$5.7 trillion, twice the size of France, slightly larger than Japan, and about 40 percent of the US. Once the adjustment has been made to account for population, however, China slips to 94th on the list of the 183 countries reported by the International Monetary Fund. GDP per capita in China was just \$4,282, sandwiched between that of Ecuador and Belize, and not quite 10 percent of the US figure. The situation is not as bad as it appears, however, because prices in China tend to be lower for the basics. Purchasing power parity estimates are adjusted for these price differences, and these show a wealthier China. Per capita GDP rises by nearly one third. It is unlikely, however, that this will generate much demand for fashionable clothes at Western prices.

The Chinese are also a frugal lot, and while part of any explanation for their very low consumption rates may be cultural and difficult to change quickly, part of it can be attributed to public policy decisions. China is rapidly aging and on a trajectory that will have it getting old before it gets rich, which encourages savings and discourages consumption because China lacks social security and private pension systems. The lack of unemployment and health benefits also raises savings. When China introduced its market reforms, many of the public benefits were shifted to local governments ill prepared to provide those benefits, so individuals became responsible for their own expenses. The same is true for education, which has received so much attention lately in the US with the publication of *Battle Hymn of the Tiger Mother* (Chua 2011). The Chinese want to provide the best education for their children so that they can effectively participate in China's future, and this increases savings.

Increasing consumers' access to funds in the form of credit cards and loans could also expand domestic demand. Theoretically, expanding access to funds should reduce savings and spur demand. This certainly was true in the US in the not-so-distant past. In the late 1960s the personal savings rate in the US was near 10 percent, but after Reagan's financial deregulations in the 1980s, the personal savings rate began a relentless decline. By the early 2000s it was under 2.5 percent, and even briefly turned negative. Easy mortgages in the early 2000s led to a real estate boom, and then bust, ending in a worldwide recession. China will need to tread carefully as consumer credit expands. In 2003 there were 3 million

credit cards issued in China, and by 2008 they numbered 150 million, 50 million of which were issued in that year alone (Li 2010).

Expanding domestic demand also will depend upon China's success at increasing wages' share of GDP, which has been declining in recent years as profits' share has been increasing. The industrialization underway in China has created incredible wealth, just as it did in the US and Japan during their industrialization periods. China has adopted the American model of capitalism—one that allows far more inequality than in other rich countries, and as a result we are seeing substantial increases in inequality as already noted. It was the Gilded Age in America then, and it is the Gilded Age in China today. In 2011, China was second on Forbes' annual list of billionaires by country with 115, nearly 47 percent who were new in that year. Another official statistic, the Gini coefficient that measures income inequality, showed that in the 2000–2009 period China's inequality surpassed the US, the only country with more billionaires than China.

Chinese authorities are well aware of these issues. The National Development and Reform Commission, in their assessment of the 11th Plan and draft of the 12th Plan, have established “social harmony and stability” and “accelerating the transformation of the pattern of economic development” as goals (National Development and Reform Commission 2011: 19). In their own words, “We need to give higher priority to properly solving major problems that concern the immediate interests of the people such as employment, income distribution and social security” (National Development and Reform Commission 2011: 23). Noteworthy for the present discussion is the first on their list of nine tasks for 2011: “We will adhere to the strategy of expanding domestic demand, especially consumer demand, and maintain steady and rapid economic development” (National Development and Reform Commission 2011: 24).

China's success at creating consumer demand, sustaining economic growth, and moving labor-intensive production inland will depend upon the growth of a middle class. This link between the rise of a middle class and economic development has been well established in the literature. There is some disagreement on exactly how to define or measure the middle class; but regardless of the measure, we are looking at some very big numbers in China. McKinsey Global estimated 100 million middle-class households by 2009, rising to 520–612 million by 2025. It is predicted that China will have the world's

largest middle class within 15 years (Li 2010). The middle class will be the driving force for local Chinese designers to grow.

Between 2001 and 2008 household spending more than doubled on clothing, healthcare, transportation, and telecom services. In 2009, in the midst of the worldwide economic downturn, China's retail sales rose 15.5 percent to \$1.8 trillion (Lu 2010). Already China is the world's second biggest market for art, diamonds, and broadband, and the largest for mobile phones, LCD screens, and automobiles. And consumption is heading inland, with a good deal of encouragement from the government.

The big money is betting that the growth will continue. One concern, though, is that China built too far ahead of demand. The malls are not the only empty buildings. The many dark condo units in China's high rises point to a real estate bubble. This is clearly a concern to Beijing's policy makers who in recent years have been devising policies to slow demand. There is no question that China faces the risk of a bursting real estate bubble, but if it happens it should only slow China's rise. China will continue to be a major producer and consumer of just about everything, including apparel. What remains unclear is the impact China will have on fashion, which we address in the next section.

Fashion Innovation

Very little of the retail price of a Gap tee shirt, an Ann Taylor suit, or a Ralph Lauren polo shirt remains in the country in which they were sewn. We hear about China's rise, but as we noted earlier, it is still a poor country. To increase the middle class and sustain growth, China will need to be more than just the low-cost producer of goods like apparel.

China's success will depend upon its ability to capture more of the price through innovation. As goods, services, and people become more mobile, the last barrier to entry that provides real profit is intellectual property, whether it be a new technology or a copyrighted brand. China's leaders are well aware of this fact as evidenced in the 12th Five Year Plan's goals.

We will vigorously stimulate independent innovation and the development of strategic emerging industries. We will conduct research and formulate a plan for improving independent innovation capacity and a national medium- and long-term program for developing major science and

technology infrastructure. We will intensively advance the Knowledge Innovation Program, the Technology Innovation Program and major science and technology infrastructure projects; accelerate the implementation of key science and technology programs; and carry out national pilot projects and demonstrations for innovation-oriented cities. (National Development and Reform Commission 2011: 27).

This directive could include developing China's own designers and branded fashion merchandise. But would Chinese fashion sell to the Chinese, and eventually to non-Chinese?

The urban Chinese are very interested in fashion. They dress as fashionably as their incomes and frugal natures allow, especially the young. Many fashion magazines are sold in convenience stores including *Vogue*, *Harper's Bazaar*, *Marie Claire*, and *Elle*. These magazines are closely studied for trends (Bian 2010). Fashion images are ubiquitous in major cities. Passengers on Beijing's subway trains can catch glimpses of fashion products via holograms on the tunnel walls, or watch fashion shows on LCD monitors. In a shopping district in Chengdu, a row of bronze sculptures traces the history of fashion in China during the twentieth century. "Fashionista" contests and model contests are held at chic hotel bars in both first and second tier cities. Young consumers follow Chinese fashion personalities on Weibo, the Chinese equivalent to Twitter. In short, the new China has embraced fashion with open arms.

Currently, the Chinese are in love with international brands. Many international brands have entered the market or are expanding their operations there, primarily in the major cities of Shanghai, Beijing, and Hong Kong. International brands have been absent from second and third tier cities like Guilin, but this is changing quickly. Louis Vuitton, with its recognizable logo, is arguably the most desired Western luxury brand in China. Women are often seen carrying Louis Vuitton bags and gazing at window displays. Louis Vuitton claims to have been profitable in China since opening its first store in 1992, despite the high cost of its products and the prevalence of fakes (Lim 2007). We heard of one Beijing office worker who asked an American ex-pat friend to buy a Louis Vuitton handbag while on a visit to the US. Was it because she feared that a domestic purchase might be a knockoff, or because an authentic bag bought on the Chinese mainland carries up to 35 percent surcharge in import duties and taxes? Such a bag would cost

several months' wages. She could have gone to Hong Kong, where there is no duty on foreign goods, but not every mainland Chinese citizen is permitted to cross the border to shop (Figure 6).³

So many international brands have entered the market that the Chinese have problems recognizing the status brand hierarchy. While some European and American brands are well known, most are not. This results in what we would think of as incongruent placements of brands. It is not uncommon to see a LensCrafters next to a Rolex store, or a Sally Hansen cosmetics counter next to Clinique. The Chinese rely on advertising, magazines, and friends to form preferences (Wu 2009). Increasingly, Western companies are using museums and galleries to draw attention to their luxury brands. On May 31, 2011, Louis Vuitton opened the exhibition "Louis Vuitton Voyages" at the National Museum of China in Beijing, strengthening its dominance of the luxury market. Public outcry ensued because of the show's commercial nature. More successful was Diane von Furstenberg's retrospective exhibition "Journey of a Dress" at Beijing's Pace Gallery; she invited Chinese artists to create artwork based on her image, thus marrying art and fashion (Zhang 2011).

Besides Louis Vuitton, Gucci and Armani are doing well. Gucci designer Frida Giannini stated that China is the fastest growing market for Gucci products (Franco 2011). Giorgio Armani boosted his reputation with a retrospective at the Shanghai Art Museum in 2006, thus establishing his name as foremost in the minds of the new Chinese elite. Luxury clothing is often associated with other luxury products, such as automobiles: branded jeans and shirts are sold in BMW Lifestyle shops (Figure 7).

Barring the ability to buy a luxury item, the Chinese still prefer international labels. To wit, one Shanghai shop featured the following on its window: "European and American Brands. Japanese and Korea Boutique." Also popular are Chinese-made clothes and accessories emblazoned with fashion's English vocabulary such as "fashion," "style," "couture," and "vogue" (Figure 8).

China can be expected to continue to expand the specialty stores that knock off American or European brands. The conceptualization of such stores has a name: "bang mingpai," which means "relative of a famous brand." Erke, Clio Coddle, and Polo Villae are three prominent examples. Erke, a sportswear company whose name mimics Nike, has a modified "swish" logo (Figure 9); Clio Coddle's crocodile logo owes its lineage to France's Lacoste brand. Polo Villae evokes Ralph Lauren's Polo line, down to its Mongol horseman logo.

For the Chinese to be successful at developing their own designers and brands implies some level of innovation whether in design, branding, or merchandising. China's potential for design creativity has been on the minds of many fashion observers. Valerie Steele and John Major's *China Chic: East Meets West* (1999) featured U.S.-based Chinese and Chinese-American designers Vivian Tam and Anna Sui, whose designs derive from Chinese cultural heritage. Also mentioned were David Tang of Shanghai Tang and Kin Yeung of Blanc de Chine, about whom more will be said later. Douglas Bullis's *Fashion Asia* (2000) featured forty-six designers from eight countries. Only two designers are from mainland China. (Hong Kong is covered separately from China.) One of them was from a state-owned company and was not allowed to provide photographs for the book. The other was Coco Ma, also known as Ma Ke. Christine Tsui (2010) included Ma Ke as one of the ten contemporary designers featured in *China Fashion: Conversations with Designers*.

Will a great Chinese designer emerge on the world scene as Issey Miyake, Yohji Yamamoto, and Rei Kawakubo did when Japan's economy ruled in the 1980s? Or will China develop successful mid-range designers and brands? Ma Ke is the type of designer is emerging as one of China's stars. A 1992 graduate of the Suzhou Institute of Silk Textile Technology, she started a mid-range brand called Exception de Mixmind in 1996 and the couture line Wu Yong ("Useless") a decade later ("Ma Ke" 2010). Her designs are the antithesis of cheap Chinese fashion and are not inspired by Western fashion trends. She uses eco-friendly fabrics and handmade artisan production for her minimalist styles, which are sold in her own stores. Ma Ke was the only Chinese fashion designer represented in "daringdesigns," an exhibition featuring Chinese and Dutch designers at the Netherlands Architectural Institute in Rotterdam (Rawsthorn 2011). She was named "Best Asian Fashion Designer" at the 2007 *Elle* Style Awards. Her more experimental and expensive Wu Yong collection was shown in Paris and featured at London's Victoria and Albert Museum. Such recognition in two of the world's fashion capitals has in the past been a necessary step in gaining international acclaim for a designer. What is noteworthy is that her designs rely on a distinctly Chinese philosophy without incorporating any of the known Chinese design clichés.

Qiu Hao is another contemporary designer whose work is highly original. Trained at Central St. Martins in London, his deconstructed fashions incorporate innovative fabrics. He bases his work on Buddhist philosophy, which is peculiarly appropriate to fashion:

... there are 900 birth and death cycles within the moment of flapping one's finger. ... What we see in reality are just continuation of these extremely short moments, as everything cycles through death, birth and next life. Design is nothing different. ... New is old, and old is new. ... Every idea had existed before and was designed once or more in the past ("The Cycling of Design" 2010).

Hao won the Woolmark Prize in 2008, a recognized "coup" for an up and coming designer. Media mogul Hung Huang, "China's Oprah," picked him as one of the top five Chinese fashion talents. She said:

"Imagine a brand new China where modern women reject increasingly ubiquitous foreign luxury goods, and their counterfeit reproductions, in favour of raiment designed by Chinese fashion talent" (Peng 2011).

Huang promotes emerging Chinese designers in her store, Brand New China (BNC), located in Sanlitun Village. Her fashion magazine *iLook* also features rising Chinese fashion designers. Huang named Uma Wang, Chen Ping, Qiu Hao, Qiao Qiao, and Christine Lau as top talents (Peng 2011).

Another company that trades on sustainability and tranquility is Shanghai's Urban Tribe (Figure 10). Begun by Jasmine Mu and Gao Ping, both of Shanghai, they attempt to bring the peaceful lifestyle of the countryside to city. Their slogan is "Life Tracing to the Source" and their logo evokes China's ethnic minority groups. They have two stores in Shanghai where they sell natural fiber clothes, jewelry, and housewares of their own design plus photographs by one of the founder's husbands. Tea is served in a small garden at the Fuxing Lane store. Billed as a "boutique, gallery, and teahouse," it has garnered international press from *The New York Times*, *Elle*, and *Travel and Leisure*.

The work of these designers and their brands is only sold in China. The more established Chinese luxury brands in the West, such as Shanghai Tang and Blanc de Chine, rely on recognizable Chinese styles like the qipao and the frog-closure jacket. Both of these companies started in Hong Kong, free of the governmental restraints of the mainland. David Tang, a Hong Kong businessman, founded Shanghai Tang in 1994. The concept and the stores evoke Art Deco Shanghai, and the company's designs use luxury materials such as silk brocade and jade. Its early success captured the attention of the Swiss luxury group Richemont, who bought the majority stake in 1998 (Reeves 2005). This investment has allowed the company to expand to forty locations. Now Shanghai Tang stores can be found in Europe, America, and the

Middle East as well as in major Chinese cities. Their presence is especially strong in the duty-free sections of international airports (“Shanghai Tang” 2011), which suggests that the target customer is not necessarily Chinese. In fact, Chinese customers are not supporters of retro fashions that evoke China’s past (Finnane 2008).

Blanc de Chine, on the other hand, is more ethereal and philosophical in its aesthetic approach than Shanghai Tang. The French name means “white of China” and refers to a type of white porcelain made in Fujian. Designer Kin Yeung founded the company as a design workshop in 1986 and as a retail group in 1990. It has stores in Hong Kong, Beijing, and New York. It claims to be the first Chinese luxury brand to translate “traditional Chinese cultural values into modern fashion that befits today’s lifestyle” (“Blanc de Chine” 2011). This is an exciting claim. Yet the men’s and women’s styles shown at New York’s Fashion Week in February 2011 relied on traditional qipao, Dai vests, and Mao suits for inspiration (Reed 2011).

In order for mainland companies such as Ma Ke’s Exception de Mixmind, Qiu Hao, and Urban Tribe to grow, the Chinese will need to develop a national confidence in their own designers. Either Beijing or Shanghai will need to get on the list of world fashion cities. Both Beijing and Shanghai host Fashion Weeks, two of which do not feature Chinese designers exclusively (Hexun 2010). Since the birth of couture in nineteenth-century Paris, London, Milan, New York, and Tokyo have all become fashion centers, and they coexist because they have carved out different niches. Paris is the center of *haute couture*—one-of-a-kind designs by members of the *Chambre Syndical de la Couture Parisienne*—which is now a closely watched trend indicator for the ready-to-wear industry. London tapped into the youth market as baby boomers were coming of age. Milan joined the list because of Italian entrepreneurs’ ability to identify a relatively new niche in high fashion: ready to wear. America’s post-war economic growth provided the world’s biggest market, built on the rise of professional men and women who loved Armani’s suits. New York City rose to international attention in the 1970s with the minimalist designs of Calvin Klein and Halston, and Ralph Lauren’s lifestyle brands. In Japan, Tokyo emerged in the 1980s as the center of a rapidly expanding textile industry with innovative designs by Issey Miyake, Rei Kawakubo, and Yohji Yamamoto.

France has a *cachet* far bigger than its GDP would suggest; it sells a luxurious life epitomized in the city of Paris. For China, Shanghai seems the natural choice for the country's fashion capital, partially due to its reputation for culture in the pre-Mao years, and partially because of its rapid transformation into a new, exciting city with stupendous bullet trains and high-rise office buildings. Shanghai's urban planners are aware of the attributes of a world-class city. Their master plans include improving shopping areas, importing well-known restaurateurs, offering historical and cultural heritage tours, and hosting fashion events (Shanghai Urban Planning Exhibition Center 2010). Beijing, on the other hand, is the seat of government, past and present. Tiananmen Square makes us think of Mao, whose portrait overlooks the vast square. Beijing's famed sites are the Forbidden City, the Summer Palace, and the Great Wall – all symbols of China's dynastic past. Presently international buyers do not go to Beijing or Shanghai for their fashion weeks, although some Western designers have shown in Beijing and Shanghai. Focusing on fashion week in one city—Shanghai—would heighten awareness of Chinese designers among fashion critics, both Chinese and international.

American fashion designers and journalists are increasingly intrigued by Chinese culture. Chinese models appear in Western fashion magazines. The same magazines include Chinese actresses and Chinese-born socialites in feature articles. American designers are nodding to China, finding inspiration in Ming vases and the styles of 1930s Shanghai.⁴ *Harper's Bazaar* even had a panda on the cover of its February 2011 subscriber issue. With all eyes looking east, what is next for Chinese fashion on the international stage?

To grow their own designers, Chinese investors will need to step forward and support more emerging brands. Chinese backers could provide both financial backing and business mentoring. City governments could reduce shop rents for beginning designers to help them get established. Already in Shanghai there is government support for emerging designers who graduate with degrees from the city's fashion programs. Funding to operate a business, including a storefront, is provided for one year after approval of a business plan. Many designers come and go on the streets where these fledgling shops cluster (Bian 2010).

Chinese fashion design should not ignore the new middle class consumers. The middle class in Asia does not yet have the resources to buy like their American equivalents. Knockoff emporiums, open-air

stalls, and small stores are the places we observed people making the most purchases. Ma Ke's daywear line and Urban Tribe's offerings are not expensive; they are on par with mid-range brands in the US. Their innovative designs, fabrics, and craftsmanship could find an audience outside China as well as among newly confident Chinese consumers of fashion.

Notes

1. Coats and jackets from the Yuan dynasty were displayed in “The World of Khubilai Khan: Chinese Art in the Yuan Dynasty” at the Metropolitan Museum of Art, New York (September 28, 2010 – January 2, 2011). These rare garments were on loan from the Inner Mongolian Autonomous Region Museum.
2. “Secrets of the Silk Road” (Penn Museum, February 18 – March 15, 2011) featured coats, pants, dresses, and accessories dating from the second millennium BCE to the medieval era. Chinese patterned silks were among the many textile artifacts on loan from Chinese museums.
3. Hong Kong, which reverted to Chinese control in 1997 after 150 years of British rule, has a different history than the mainland. Hong Kong has been allowed to continue to operate as a capitalist economy until 2047, fifty years after the British handover to the People’s Republic of China. Mainland Chinese citizens need exit-entry permits to travel to Hong Kong or Macao from Mainland China. Further, such permits are available only to residents of Guangdong Province and twenty-eight select cities on the mainland. This prevents some Chinese from traveling to Hong Kong to shop.
4. Laura and Kate Mulleavy, the sisters behind the Rodarte label, took inspiration from a Ming vase to create a unique blue-and-white printed fabric for use in their spring 2011 collection (*Harper’s Bazaar*, November 2010). Ralph Lauren used jade green, embroidered dragons, and qipao styles in his Chinese-inspired fall 2011 collection.

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