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Working Paper

Status Markets and Standard Markets in the Global Garment Industry

MPIfG Discussion Paper, No. 05/10

Provided in Cooperation with:

Max Planck Institute for the Study of Societies (MPIfG), Cologne

Suggested Citation: Aspers, Patrik (2005) : Status Markets and Standard Markets in the Global Garment Industry, MPIfG Discussion Paper, No. 05/10, Max-Planck-Institut für Gesellschaftsforschung, Köln

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MPIfG Discussion Paper 05/10

**Status Markets and Standard Markets
in the Global Garment Industry**

Patrik Aspers



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MPIfG Discussion Paper 05/10
Max-Planck-Institut für Gesellschaftsforschung Köln
Max Planck Institute for the Study of Societies Cologne
November 2005

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MPIfG Discussion Paper | ISSN 0944-2073

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Abstract

The purpose of this paper is to analyze the social construction of order in two adjacent markets in the production flow of the global garment industry. The consumer market is identified as a status market, while the production market is defined as a “standard” market. In a status market, order is maintained because the identities of actors on both sides of the market are ranked according to status, which is a more entrenched social construction than the commodity traded in the market. In a market characterized by standard the situation is reversed: the commodity is a more entrenched social construction than the identity rankings of actors in the market. The study ties together production and consumption through an analysis of commodities in the market. The results are based on extensive fieldwork and interviews, as well as textual material from four countries: India, Sweden, Turkey and the UK.

Zusammenfassung

Ziel dieses Discussion Papers ist die Analyse der sozialen Konstruktion von Ordnung in zwei angrenzenden Märkten innerhalb der Produktionskette der globalen Bekleidungsindustrie. Der Endverbrauchermarkt wird als „Statusmarkt“, der Produktionsmarkt als „Standardmarkt“ definiert. In einem Statusmarkt wird die Ordnung dadurch aufrecht erhalten, dass die Akteuridentitäten auf beiden Seiten des Marktes eine Rangfolge gemäß dem Status der Akteure haben. Diese Statushierarchie ist eine fester gefügte soziale Konstruktion als die gehandelte Ware an sich. In einem durch Standard charakterisierten Markt ergibt sich eine umgekehrte Situation: die Handelsware stellt eine gefestigtere soziale Konstruktion als die Statushierarchie der Akteuridentitäten im Markt dar. Durch eine Analyse der Handelsware verbindet diese Studie Produktion und Konsum miteinander. Die Ergebnisse und das Textmaterial basieren auf umfassender Feldforschung und Interviews in vier Ländern: Indien, Schweden, Türkei und Großbritannien.

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Introduction

There are two radically different arguments concerning how social order is created and maintained in markets. The liberal view of markets (see Smart 2003: 89–86) is that they are arenas in which monads, or *hominis oeconomici*, sign contracts with each other and order emerges spontaneously. The other argument is that order emerges and is maintained largely as a consequence of the state and state-implemented policies (see Fligstein 2001).

The purpose of this paper is to analyze order in two adjacent markets in the production flow of the global garment industry. The question raised in this paper is fundamental for understanding the social construction of markets, as well as for understanding social order, which is a central issue in sociology that can be traced back to Hobbes (for example, Parsons [1937] 1968; Spence Smith 1992; Wrong 1994; Beckert 1996: 824–827). Social order is a matter of degree (Wrong 1994: 9) and is here defined as the predictability of human activities and the stability of actors' identities in relation to one another. This is another way of saying that the social constructions that give rise to social order are entrenched, by which I mean that they are firmly established and difficult to change (see Eisenstadt 1968: 23–36).¹ The approach used here assumes that order in markets results from interaction of market actors. Thus, order is neither the spontaneous result of “an invisible hand” nor primarily a result of contracts or decisions made through interaction with the state.²

The argument is based on an analysis of two types of market that I define as “status markets” and “standard markets.” In a status market, order is maintained because the identities of actors on both sides of the market are ranked according to status, which is a more entrenched social construction than the commodity traded in the market, in

I am grateful for the comments of participants of the Economic Sociology seminar at the London School of Economics (2004), Centre for Research in Innovation and Competition (CRIC) at the University of Manchester (2004), and especially the comments of Jens Beckert, Caroline Dahlberg, Guido Möllering, Geny Piotti, Armin Schäfer, Richard Swedberg, and Raymund Werle. I gratefully acknowledge the financial support of the research reported here received by Axel and Margaret Ax:son Johnson Foundation.

- 1 For a general discussion of social constructions see, for example, Hacking (1999) and Searle (1995). I argue in favor of a global social constructivism, which implies that it is not a matter of degree of social construction, but rather of how entrenched social constructions are. If one thinks of social constructions holistically instead of atomistically, they are related. This means that some social constructions are built upon others, which, to borrow a term from phenomenology, is to say that they are “taken for granted” (Aspers 2005a: 156, 216; cf. Spence Smith 1974).
- 2 While states may be part of the process of creating social order and do play a role in creating legal structures and the means of supporting them (for example, Fligstein 2001), this issue will not be the focus of this paper. I will, however, briefly discuss the role of the state and power at the end.

my case, fashion garments. By status rank I mean the relative positions of actors on each side of the market as a result of past interactions and positioning. Each firm and idealtypic consumer has a position in the rank order of their side of the market interface, signaling that they have more or less status. A status order lacks an independent principle of evaluation. A commodity that is tied across the market interface by high-status brand retailing chains and high-status idealtypic consumers becomes a high-status commodity.

In a market characterized by standard, the situation is reversed: the commodity is a more entrenched social construction than the orders of identities participating in the market. The value of commodities is evaluated according to the standard. In this case the standard is more taken for granted than the order of actors on the two sides of the market interface. This means that I identify two different ways in which order is maintained in markets. These two ideal types of order exclude each other, though they will be mixed in real life. I claim that, historically, the role of the material base has diminished and symbolic meaning has become more important for value production. As a consequence, status is likely to be an even more frequently encountered principle governing social order in markets in the future.

The analysis follows a concrete product – garments – from the stage at which vendors encounter purchasers to the stage at which retailers and others sell the product in the final consumer market. These two producer markets (White 2002) are organized and operate according to different logics, but construction of order within the garment industry can be understood only if they are analyzed in relation to one another.

The theoretical argument presented builds on the existing literature and reports on my own research on the international garment industry. I begin by introducing the theoretical approach taken. This is followed by a section on the methods employed and the empirical material. The basic structure of the industry is then outlined. This section provides the foundation for the two central sections dealing with status and “standard” markets.

Identities in markets

Harrison White’s market approach gives precedence to the question of how markets are constructed, focusing on producers.³ He describes producer markets as an array of

3 For a discussion and a more detailed description of White’s theory, and especially his market theory, see Aspers (2001, 2005a; Azarian 2003). In addition to White’s own works (for example, 1981, 1992, 2002), many studies exist which are related to his approach (for example,

producers who hold niches that represent different quality–volume combinations. This implies that actors differentiate by offering products that make each of them unique. A firm holding a niche has a certain reputation or prestige in the market as a result of interaction with consumers (White 2002: 14–15, 32–33). It is through jockeying for market position that identities are compared and positioned in relation to each other. A central aspect of the market is that producers thereby generate a “pecking order” that stabilizes the market (see White 1992). The production of the market is, then, an unintended consequence of the reciprocal orientation among the producers.

A market, according to White, is made up of a handful of competing producers who orient their behavior to each other. The number of consumers, in contrast, is large. Consumers are anonymous, and the producers know little about them. The role of consumers in White’s theory is reduced to saying “yes” or “no” to what they are offered in the market. White (2002: 177–199) argues that markets are interconnected in chains which can be focused on either upstream or downstream flows. Finally, each market is seen as a social structure that reproduces itself over time. The main difference between the neoclassical theory and the Whitean approach is that the latter stresses that producers focus on each other and that they differentiate what they offer. These Whitean insights will serve as the theoretical baseline of this study.

White’s market approach is not without problems. I will address some of the ones I regard as serious, which makes this paper more than an application of White’s theory. Although White does discuss commodities, this issue is clearly not the focus of his thinking. While a market gets its name from what is produced or sold (for example, the “garment market”), its logic and practice cannot be deduced from the commodity or its material status. If the material characteristics of commodities determined the logic of markets, the production and consumption markets of garments would be almost identical, and one would in fact talk of a single market. The physical object, a garment, would be produced, bought and sold – much like stocks in exchange markets – and eventually purchased by a person in order to wear it. This is not the case, however. I argue that one must pay attention to the interplay of the logic of the market, the commodity, and how order is constructed in the market: one cannot analyze these aspects in isolation. This suggests that a commodity and its market are to some extent co-constructed. One consequence of this – which I shall show – is that the commodity has different meanings in the two markets.

White speaks of a handful of producers, but in a country like India more than 30,000 exporting garment producers are registered; this empirical finding must be accounted for. I claim that the producer market can encompass this vast number of actors be-

Benjamin/Podolny 1999; Podolny 1993; Faulkner 1983; Baker/Faulkner 1991; Zuckerman et al. 2003; Aspers 2005a; see also Baker 1984; Baker/Faulkner/Fisher 1998; Podolny 1993; Fligstein 2001; Swedberg 2003).

cause it is highly standardized. Market researchers frequently make use of idealtypic consumers. Acknowledging idealtypic consumers and their role in defining the commodity, as well as in constructing the market, means diverging from the Whitean framework which assumes that the consumer side is made up of an infinite mass of anonymous buyers.⁴ Finally, in the fashion garment market, retailers are organized in status orders, in contrast to the quality–price order that White refers to.

Most real markets, including those analyzed here, are fixed-role markets, which means that the identity of an actor in any market is fixed to only one side of the market (producer/seller or consumer/buyer). In the production flow of garments, vendors buy goods for production from suppliers upstream in the chain. In this market I analyze vendors' roles as producers of garments, not as purchasers. Looking downstream in the chain, I analyze retailers' roles as purchasers of garments and producers of these clothes for consumers in the final consumer market, which also can be called an "edge market" (White 2002: 320). In the White-inspired approach used here, firms gain identities as producers, not as purchasers. This fact, I argue, is a reflection of the economic and symbolic power of retailers, which is greater than the power of actors downstream (the final consumers) and upstream in the production chain (garment vendors).

We need some additional theoretical tools for analyzing the variation of consumer and producer markets, White's theory is not enough. I claim that the theoretical distinction made here between status and standard markets can help us understand and explain the differences observed in the two markets studied.

Empirical materials and methods

This is a theoretical paper supported by empirical evidence. Due to the scope of the garment industry it is not possible to generate empirical material that is both "thick" and still covers all of the different types of actor in the industry. The empirical material underlying the results of this study is drawn from 27 interviews, observations and participant observation conducted in 2001–2003. It also includes written material

4 White, however, would probably refer to this market as an "upstream" market. The assumption here is that most producers operating in final consumer markets have a good knowledge of consumer demand (see Griffin/Hauser 1993; Lengnick-Hall 1996). They may also divide their customers into different types of idealtypic consumers. For example, children and childhood have been constructed as consumers in market research (Cook 2000). Idealtypic consumers do not, so to speak, grow old since ideal types can be seen as social categories with positions that are filled by different incumbents. In this way, although individuals are replaced over time, the social relationship between producers and consumers remains largely the same.

from the garment industry, business magazines, and Internet sites covering various organizations, firms and marketplaces. Much of this material has been used in order to get an understanding of the industry, and what I present here excludes many issues that we as laypersons often talk about, such as “sweatshops” (for example, Bonacich/Applebaum 2000), quotas, industrial politics, and ethical labeling.

The fieldwork of the industry was carried out at factories and buying offices and in stores and at garment fairs. I interviewed people on the buying side (that is, purchasers at retailers, importers, and others), as well as CEOs (who often were also the owners of the firms) of garment vendors. My questions focused on the industry and their experiences as incumbents of roles (for example, a buyer, that is, a person who makes deals with producers about what is to be produced, the quantity, and so on). The interviews were theoretically focused, which means that I made sure that the topics I was interested in were covered. The interviews were organized as informal talks (see Aspers 2004: 10). The average interview lasted for about an hour. The people I talked to were selected because of their positions, not because of their personal traits. Most of those I talked to were in more senior positions and had long experience (usually more than five years) of this industry.

The material was generated in India, Sweden, Turkey, and the UK. The empirical work in Sweden and the UK was carried out in order to understand the buying side of garment chains, as well as the consumer markets. India and Turkey were chosen because many garment producers are located in there, Turkey being the most developed. Moreover, studying several countries enabled me to better understand the industry. Thus, the “sampling” is primarily oriented towards firms, not countries. The theoretical question does not call for analyses of countries (and this assumption was also supported by my research).

The study focuses on more or less branded retailing chains (such as Marks & Spencer, Zara, Topshop, and H&M, as well as some smaller ones), and their suppliers. These chains are central and dominant actors in consumer markets. This focus means that I study one segment of this industry. There are of course other segments of final consumer markets, all of which correspond to producers of garments. These segments include the secondhand market, low fashion production, markets for second-class garments, as well as high fashion markets and *haute couture*.

I employed several strategies for selecting interviewees and locations to study. Most of the people working for garment producers in Turkey and India with whom I talked are oriented towards Europe, but a few of them also have customers in North America. Some respondents were theoretically sampled. This means that I traced the chain from a retailer, through a buying office, to its vendors. This strategy allows the actors to define who is taking part in the market and who is not, which safeguards the subjective perspective (Aspers 2004). I did not go further, to talk, for example, to suppliers of fabrics or to those who are subcontracted, that is, those located upstream of the

garment vendors (see Jacobson/Smith 2001) in Figure 1. In other cases, I chose producers because they were small, large, or because they engaged in certain activities, such as garment fairs. Consequently, my material covers mostly the production side of this industry.

The consumer market for garments receives less attention in the empirical material of this project and therefore I lean on the large existing literature covering this field. This includes literature on consumer markets, particularly for clothes and fashion,⁵ as well as on the garment industry.⁶

The empirical material was interpreted in light of the White-inspired theoretical framework, but the empirical material is one reason why it had to be changed and amended. Thus, theoretical codes – which means codes derived from the theory used – were generated using the modified Whitean framework. However, codes and corresponding theoretical notions were also generated as a result of the empirical work (see Aspers 2004, 2005a). The descriptive sections – as well as direct quotations – are used as evidence of the theoretical arguments, as well as to give a flavor of the field. In other words, evidence is not restricted to direct quotations.

The global garment industry

The following section presents some general characteristics of the international garment industry, focusing on the segment of large branded retailers and its production side. This section serves as background to the more theoretical discussions in the following sections. Though the study targets the European link to developing countries, it can nevertheless be seen in relation to the US market, which is better studied than the European market (for example, Gereffi 1994, 1999; Taplin 1994).⁷

5 See, for example, Crane (2000), Entwistle (2000), Meyer/Anderson (2000), Slater (1997), Finkelstein (1996), Frenzen/Hirsch/Zerrillo (1994), Craik (1994), Green (1994), Bourdieu ([1979] 1984), Douglas (1969), Simmel ([1904] 1971), Foley (1893); see also below.

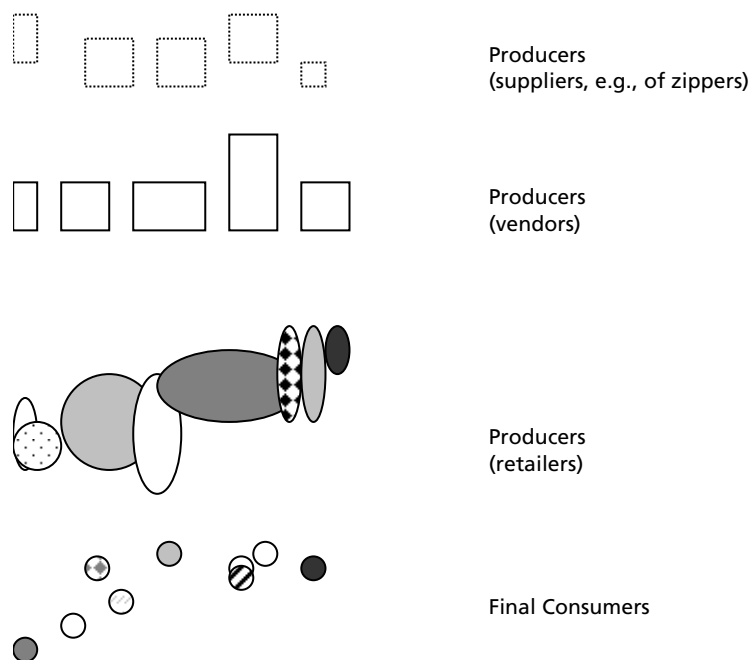
6 See, for example, Skov (2003), Bair/Gereffi (2001, 2002), Bonacich/Applebaum (2000), Gereffi (1994, 1999), Uzzi (1997), Abernathy et al. (1995, 1999), Arpan/De La Torre/Toyne (1981).

7 One difference between the two markets is that the US market demands that products are made in larger runs. A second difference is its lower degree of fashion. As a result, the European markets demand faster change in terms of fashion and smaller-scale production. One practical implication is that US purchasers typically attract larger vendors than European purchasers. Furthermore, US purchasers work more often with, for example, Mexican vendors, than European purchasers do.

Garment production

The garment industry makes clothes out of textiles and sells them to customers. Production is often localized in low-wage countries – that is, developing countries – and consumption mainly takes place in developed countries. Starting from the production side, each garment vendor, as with most producers in a production chain, operates as a purchaser in various markets; for example, the transport of finished goods, fabrics, insurance, buttons, zippers, machinery and so on (these are called producers, or suppliers, at the top of Figure 1). It also faces consumers in one market downstream in the chain, where it operates in the final consumer market. Thus, three links in the production chain are used to analyze two markets, as shown in Figure 1.

Figure 1 Markets and Actors in a Production Flow, Schematic Figure



Note: The dotted actors in the production flow, i.e., producers of various input material such as fabrics, are only included to show how the chain continues beyond the two markets of the chain studied in this paper. The various actors in the final consumer market are shown to reflect their size and identities (including their status). Each actor, except the final consumers, has two market roles (cf. White 2002:6): as producer (in the relation downstream) and as purchaser (in the relation upstream). Consumers are depicted as ideal types and not as an anonymous mass.

This and other levels “above” garment vendors will henceforward be omitted from the analysis. However, it should be remembered that each vendor is embedded in a flow of interactions, some of which exist only for a short time and at arm’s length, while

others are characterized by close collaboration that continues for years (see White 2002; Fligstein 2001; Gadde/Håkansson 2001; Uzzi 1997).

Each producer firm usually has relations with more than one buyer because vendors are unwilling to “put all their eggs in one basket,” as explained by actors in the field. Seen from the other side, a large purchaser may need many vendors, located in different countries, to manufacture its fashion lines. The following quotation summarizes a typical strategy used by larger buyers: “My game plan is usually that I have to represent 15, 20 or 25 percent of the vendor’s business so that I am important to him and he is important to me. It works both ways, that we understand and respect that. And that’s what I mean by partnership.” In this way, buyers have power to enforce their interests.

The importance of size implies that small vendors hook up with small purchasers. However, the fashion profile is also of great importance when connections are made across the market. From the perspective of a purchaser with a low-fashion profile, a connection with a vendor working with high-fashion purchasers may be a way of finding out what is in vogue among leading high-fashion retailers and fashion brands. Thus, competitors with higher status in the final consumer market are targeted “because these guys are the market, the trend leaders.” Buyers working for retailers with lower fashion profiles, therefore, actively try to “track down vendors” who are working with high-fashion buyers. This orientation reflects the order of firms’ identities in the final consumer market, in which some branded retailers have more status than others.

Moreover, information about the interaction between vendors and purchasers is not known to everyone in the market – quite the contrary. It is thus part of a buyer’s job to find out about trends in the industry, especially what their competitors are planning to do. One employee of a buying office explains that “when you go into their showroom, you see, and you know that they are working for [name of competitor]; you always take a look and ... you can see that they are buying chiffon blouses, kimono-looking shirts, or that they are making cuttings.” Gaining information in this way is a strategy for a firm with a lower fashion profile. The information can be sent back to the head office. Occasionally, one vendor may produce for multiple retailers who compete fiercely in the consumer market. That retailers almost struggle to work with certain vendors is essentially an effect of the logic of the consumer market for garments. One may see this as a tendency for markets to switch from being downstream (“push”) oriented to being upstream (“pull”) oriented, as described by White (2002: 177–178).

In contrast to knowledge of fashion, knowledge of prices is widespread. Actors know the prices of input materials and labor costs, as well as other costs in the business. A large purchaser may even set the price, so to speak. They do this so that the vendor’s mark-up allows for a reasonable profit and meets the standard of production that the

purchaser wants. That is, buyers may allow the vendors enough profit so that they can reinvest to maintain and even improve quality. Many larger buyers establish close collaborations with their vendors, and this is represented in what people in the field call “teamwork.”

Why do retailers and other garment purchasers establish business relationships with certain vendors and not others? In theory, vendors all over the world are competing for all orders. As already mentioned, however, purchasers pick those that have a track record in the business and with whom they hope to build a long-lasting relationship that may last for years (which is not uncommon). This, however, does not mean that the market mechanism is eliminated. Each long-term relationship is evaluated by both sides, and large buyers have so many vendors that they can easily judge each of them in light of the others, as well as in light of business proposals they get from other vendors. This enables comparisons which may lead to changes in their portfolio of business partners.

The power structure in the producer–purchaser relationship is complicated. However, if one analyzes the situation between a larger vendor and a larger retailer, it is clearly the latter (the purchaser) who calls the shots. In many cases, purchasers even acquire the right to the production of batches of clothes in the future, a practice which bears some resemblance to futures in financial markets (although these rights are not for sale).⁸ That is, purchasers book production capacity in advance, which is then filled – or occasionally not filled due to a change of fashion – with certain design content once the retailer knows what the fashion is going to be. Moreover, vendors may be forced by buyers to keep production running even on holidays to meet deadlines. The power larger buyers have over vendors is partly due to economic resources, but they can also use their position to make vendors, who may be located in different parts of the world, compete against each other for the orders.

Fashion production

I have already mentioned that purchasers in the global garment market come in many shapes and sizes. Not all of them compete with each other in the final garment consumer market; retailers may regard some firms as their fiercest competitors, whereas others are only competing indirectly; instead, markets are divided into segments which are partly country specific. In the next section, I focus on the final consumer market. First, however, I will look at a less well known aspect of fashion production, the period before the clothes reach the consumer market.

8 A futures contract is an agreement between a buyer and a seller to receive and deliver, at a future date, a specified amount of a product at a pre-determined price.

Fashion has attracted social scientists almost since its inception. The world of fashion is still built on seasons, like spring and fall, but the notion of season has become less distinct over time and therefore also less important. Nonetheless, planning must take place long before fashion goods appear in stores (anything from a few weeks to as long as 15 months for designs for upcoming seasons). While no one can predict upcoming fashion trends (see Abernathy et al. 1999: 88–106), various fairs (typically populated by designers, trend consultants who advise on upcoming fashion trends, vendors and others in the business), magazines, and also gossip are important for at least getting a broad idea of what colors and fabrics are most likely to be in vogue. The larger picture – the basics in terms of colors and fabrics – is more or less fixed in advance. One may say that the degree to which fashion can vary narrows the nearer the industry gets to a particular “season.”

However, even if one keeps up to date and maintains close contacts with other actors in the industry, things may go wrong. By the time the designers have made up their minds, the buyers have placed orders with vendors and the garments have been produced, shipped, and are in the shops, fashion may be different than predicted. As a result, shortening the lead-time from design to placing an order has been a major concern for firms selling garments in the final consumer market.

Needless to say, the picture painted here is not a detailed image of the industry. Most of what has been discussed so far could easily be expanded, and further details could be included.⁹ Still, this description raises a number of questions: Are the production and the consumption markets for garments differently constructed? More precisely, is order constructed and maintained in the same way in these two markets? I begin by discussing the consumption market in which the construction of order is based on the principle of actors’ status rank. This market affects the garment production market more than the other way around.

The final consumption market – order through status

In the following, I discuss topics that are crucial for understanding the final consumer market for garments in contemporary Western countries. I begin with a section on identity and consumption, arguing that an important aspect of contemporary identity formation is constructed through consumption and commodities such as garments. This is followed by a section on how fashion is diffused. The next section discusses the commodity itself – fashion garments – and argues that the social relations between

9 See, for example, Ford et al. (1998) for a story of everyday decisions in companies, and Abernathy et al. (1999) for an overview of the US apparel and textile industry.

idealtypes consumers and retailers discussed in the two previous sections are actually the key to understanding fashion garments. This, finally, leads to a discussion about value and order in the fashion consumption market. All in all, this shows a market that is ordered as a function of status.

Consumption and identity

Contemporary market theories in sociology make frequent use of the notion of identity. Identity is also important in sociological research more generally (see Cerulo 1997/Brubaker/Cooper 2000 for overviews). By “identity” I mean a narrative pegged on a perceived similarity. The similarity of a firm, whose peg is made up of its logotype, staff, stores and products, is sustained over time through activities and products that are connected by memory and narratives constructed using advertising, communication, and so on, of the actors in the market. Identity formation is partly related to consumption, and garment consumption is a prime example of this (Crane 2000: 1–25; Entwistle 2000: 112–139).¹⁰ The relationship between commodities and identity has been discussed within the so-called “cultural economy” literature (see Slater/Tonkiss 2001: 176–181; Du Gay 1993: 579–580). Final consumers are also seen as having reflexive capacity:

[P]eople define themselves through the messages they transmit to others through the goods and practices that they possess and display. They manipulate or manage appearances and thereby create and sustain “self-identity.” In a world where there is an increasing number of commodities available to act as props in this process, identity becomes more than ever a matter of the personal selection of self-image. Increasingly, individuals are obliged to choose their identities. (Warde 1994: 878)

Consumption is a way of creating and reflecting on the self (Warde 1994: 882), which contributes to the development of an individual identity. Also, Lash and Urry stress the role of consumption for “the constitution of individual and collective identity” (1987: 288–292). This idea is clearly expressed by Clammer: “Shopping is not merely the acquisition of things: it is the buying of identity.” (1992: 195) More generally, this means that “without consumer goods, certain acts of self-definition and collective definition in this culture would be impossible.” (McCracken 1988: x)

¹⁰ Consumption here is defined widely enough to include lifestyle (Slater 1997).

Fashion as constituted by interaction between things and persons

People interact with things, which affect their identities, but the effect can also be seen the other way around. That things are affected by people is not a new insight. It can be seen in the seventeenth-century practices of the East India Company, which successfully introduced cotton into a British market previously dominated by wool. Its method was to extend favors and services to “prominent and useful people; samples of Indian goods were distributed where they would attract attention and create fashionable demand.” (Douglas 1969: 29) Thus, not all customers are of equal worth and some are targeted because they are assumed to influence other consumers. All this was done by producers who knew that existing or potential consumers must be reached through the “right” people (Moor 2003: 46). Fashion often begins among those who are perceived to be trendsetters and these trends later spread to other groups. A key idea, then, is that some consumers persuade others of the value of certain brands or commodities.

This idea is also expressed by Simmel’s ([1904] 1971) “trickle down” theory of fashion, though he of course saw this happening within a class structure rather than among “icons,” trendsetters, and reference groups (Merton 1968). That is, since the East India Company’s activities in the 1660s, income distribution has become more equal and “prominent and useful people” or “opinion leaders” may be found not only in the vicinity of the royal family or the upper class, but also among, say, the gay population, celebrities, or clubs in Los Angeles or Manchester (see McCracken 1988: 80–81). The role of celebrities in particular has increased over time (see Aggrawal/Kamakura 1995; McCracken 1989). This is supported by a comment from the head of one buying department, who said that “these days, trends travel extremely quickly over the world. One immediately notices when icons like Beckham or Madonna are wearing something new.” Contemporary trends are also more circular, and ideas are picked up and used from both the top and the bottom. This makes it harder to tell who initiated a trend; it is perhaps not completely true that people like David Beckham and Madonna “invent” fashion trends, but their behavior may certainly contribute to diffusion of trends. Consequently, over time street subcultures have also become highly important as sources for new products and ideas in many cultural industries such as fashion (Slater/Tonkiss 2001: 168–171; cf. Huat Chua 1992: 123–124). Craik (1994: 217) calls this the “trickle-up” process, in contrast to the “trickle-down” process described by Simmel.¹¹

11 See also DiMaggio and Cohen (2005) on the diffusion of goods. One may, in their language, characterize fashion garments as a commodity associated with prestige and negative externalities, that is, their value decreases the greater the number of people using them, at least after a certain tipping point (Gladwell 2000) is reached. Moreover, one may in some cases think of a network as “borders” for the diffusion of a fashion.

Another component must be considered when analysing the rapid changes in fashion that characterize contemporary societies. As already mentioned, there is a fierce struggle to establish niches, or market positions, in the consumer market, which has consequences for the logic of fashion. Several competing firms may have similar products. This often results in people buying similar products, and a certain type of garment is more likely to come into vogue if enough (of the right) people – in which ethnicity, gender, age, and lifestyle are important components – begin to use it.

In other words, relatively entrenched social constructions such as the gender, age, or rank order of the identities of idealtypic consumers contribute to creating order. This they do due to the observable market transactions which bind producers, commodities, and consumers to each other. We often think of this process in terms of commodities defined through the selling and buying (and wearing) of high-status actors. The process can also go in the other direction, however: actors with identities of low standing may “contaminate” the commodity and thereby diminish its status. Thus, a commodity may go out of fashion when too many people begin to use it, when people in the provinces or small children begin to use it, and when it is sold in cheap stores and through mail-order catalogues.¹²

One conclusion that can be drawn from the discussion so far is that though fashion trends are difficult to predict, they can be changed. Actors on both sides of the market – producers and consumers – have the power to change current patterns. Both sides can try to couple and decouple, that is, shift those they interact and collaborate with in the market, thereby reconstituting what is in fashion. As a result, the identities of actors in the market are affected by the changes that occur in the status hierarchy (see Podolny 1993). Garment sellers, retailers, and others come up with new products, put things on display, advertise them and create brands, as Alfred Marshall (1920: 300–302) already pointed out. However, only as a result of consumers’ choices – and trendsetters’ choices in particular – will certain garments come to be in fashion and others not. No one is in total control of the social game being played, though some actors have more power to affect not only the result of the game, but also its rules (see Bourdieu [1992] 1996: 254–255).

One may therefore say that the field of fashion lacks a command centre with the power to decide which fashion is in vogue. It is rather an effect of collective production represented by interaction between actors, none of whom controls fashion. However, larger players, typically independent design houses, fashion magazines, larger retailers, and branded marketers, usually have more say (see Entwistle 2000: 220–236).

12 Depending on who one talks to, particular things can be out of fashion at different times; people seem to have different thresholds (see Granovetter 1978) for this. One should also consider the fact that brands can be introduced even to early preadolescents (ages 8–12), and that peer group effects on fashion are strong at this age (Meyer/Anderson 2000).

Power to influence fashion is a function of size and status.¹³ A firm's identity in the market, including its history and status position, is crucial for its ability to spread its idea of fashion.¹⁴ So far I have looked at this relationship from both sides, that is, buyers and sellers, but I have not yet directly discussed the product. How can one describe fashion garments?

Order, value, and identity in status markets

All garments have basic functions, such as protection and keeping their wearer warm. However, these aspects do not define fashion garments. It is clear that consumers do not pay primarily for quality, in terms of long-lasting fabrics and so on (though naturally this is part of what gives a commodity value in the eyes of consumers, see White 1981). Many clothes are left in the wardrobe before they are worn out or are recycled to developing countries. This, I claim, shows that the symbolic value of the commodity matters more.

The symbolic value of commodities can be understood as a function of a network of connections generated by sellers and buyers in the market, as indicated by the discussion of fashion above. To unfold this idea, one must consider how value is created in markets. This means going beyond a simple semiotic analysis and bringing in social position and status.

The value of a commodity is created in relation to idealtypes actors (see McCracken 1988: 71ff; Beckert/Rössel 2004). Phenomenologically speaking, a commodity has meaning, but this meaning is constituted in relation to its horizon (or "fringe," as William James called it). When a certain brand of garment (or even a certain type of brand) is awarded high status by consumers and producers, it is because it has a "fringe": for example, being seen as "urban young Asiatic." The constitution of a commodity is a result of who sells it and who wears it (and their status), as well as its relations to other commodities as perceived by the actors in the market (see McCracken 1988: 74; Slater 2002: 71–72; Callon/Méadel/Rabeharisoa 2002).

In garment consumption markets, idealtypes consumers' and retailers' (brands') identities are fairly entrenched, meaning that they are more or less taken-for-granted social constructions that occupy positions in the respective status hierarchies of the two sides of the market. Some retailers and brands have more status than others, and an

13 One should also remember that most of the product value is added in the final step, where retailers face consumers. This is fundamental for understanding retailers' power in negotiations with vendors.

14 This situation is not uncommon in fields in which aesthetic considerations are important.

analogous status order exists among idealtype consumers. It is my thesis that the status orders established in the market are more stable than the products themselves, namely fashion garments. The fashion products themselves, the things that are produced (such as various kinds of skirt), however, are less so; fashion changes quickly. The sociological question is how to theorize these social phenomena.

In order to understand what is going on one must consequently focus on the theoretical notion of status in addition to the aforementioned discussion of the diffusion of fashion. If a garment is sold by a high-fashion-status firm and is worn by consumers identified as influential and trendsetting, it is much more likely to become fashionable than if consumers with low status (for example, the elderly) buy the same clothes.

It is easy to observe the interaction between retailers' and brand identities on the one hand and idealtype consumers on the other. Fashion is predominately visual, and just being around certain people or being in the places they frequent provides information about current fashion. However, the visual dimension reaches further than this. Things such as fashion photography, store design and display, and the plastic shopping bags carried by different kinds of people (idealtype consumers) are also important in the construction of fashion. The efforts of brands and retailers to promote certain styles are reflected in the location of stores, the way the clothes are hung within them, the lighting, the music, and the style of the salespersons. All of this is strengthened by advertising and editorial fashion stories in magazines (McCracken 1988: 79). Through this relationship actors see garments that hang or are used together, or which are used in editorial photography together, and which transmit status to each other. In practice, this often means that high-status retailers and brands exchange status with one another, whereas low-status retailers and "non-brands" mutually reinforce their lack of status. This is a form of "interaction" between people and things which are perceived as having certain meanings. One can conclude that the visual dimension is fundamental in creating the perception of status orders in the market.¹⁵ In this market, firms know their competitors and relate to each other (see White 2002). This is expected in status markets: without it, it would be hard to make the relational dimension of status a factor of order.

To sum up this discussion, a commodity gets its identity, and thereby its value and price, in relation to observable patterns of interaction between a brand name and its wearers. Through interactions such as these, actors, retailers, and consumers also manifest themselves and reconstitute their own identities, as well as the identities of the garments they wear. In accordance with this thesis, the value of products, as seen from the consumers' perspective, comes more from their social ties, position, and

15 This visual dimension cannot be reduced to pure signaling of information (as White's adoption of Spence's work [2002: 16] implies). It is not information unless the actors are capable of perceiving it, and it should therefore rather be seen as knowledge.

status in the respective status order, and less from, say, the types of fabric used (see Podolny 1993: 833; Marshall 1920: 56–57, 799–803). It may appear strange that the identities of firms selling garments and the idealtypes consumers are considered to be stable in relation to each other, but the important point is that these orders are at least more stable than the commodity, the fashion garment.

A fashion garment is more a function of the coupling of high-status actors from the two sides (orders) of the market than the other way around; that is, the actors are functions of the commodity. No single actor can determine what other actors do; a branded retailer cannot, for example, control who will buy their clothes.¹⁶ This means that the “objectified” meaning of the garments is a somewhat unintended effect of the interaction between producers and consumers.

The industrial production market – order through standards

I will now turn to the social order of garment vendors’ identities as producers of garments. To understand them, and more importantly to understand how order is constructed in this market, one must also consider the purchasers of their products. Vendors’ market identities derive from their commitment as producers and their interactions with retailers, who they face downstream in the production chain. In contrast to the consumer market, order in the garment production market is connected to the “commodity.” However, the commodity is more like a standard consisting of a price–quality function. This standard is largely determined by the purchasers. Vendors in this market acquire their identities in relation to how well they meet the standard (see White 2002: 78–79). Standard (“quality”) is used as a norm, which functions as a valuation ordering (see White 1992: 29), regarding a certain product or service, much the same way as there are standards of time, weight, and so on (see Wilson 2000: 57). Standards, in many cases, enable people to communicate, trade, and calculate.¹⁷

The processes of garment production and trade are embedded in international agreements, conventions, and standards. The legal aspects of trade, most notably the contract, exemplify this. Buyers of garments monitor manufacturers both before and during the production process and are, by and large, in control of production. This monitoring includes financial, legal, technical, and social aspects. I asked a vendor whether the buyers return to the factory every now and then to check the production. She replied: “No, the buyers come only once or twice a year. The [representatives from]

16 Though some control can be exerted through, for example, marketing.

17 This idea is central in the French economics of convention, but of course also in other schools (see Favereau/Biencourt/Eymard-Duvernay 2002; Biggart/Beamish 2003).

buying houses come very often; they come to see the fabric, the printing, the process; they will check the sizes, we will send them samples; they will check the measurements to see that they are according to the requirements.” A contract between vendor and buyer often allows the latter to show up at virtually any time to conduct an inspection. It is clear from my own observations in factories that these inspections focus on how the producers maintain the quality of the garments produced.

Vendors use references from other purchasers and samples of products to prove their ability to meet certain standards of price and quality, which enables them to compete. Consequently, they do not merely compete on price, assuming that the other requirements have been met. One may instead say that they compete on quality, assuming that they are equal in other terms, including price.¹⁸ Prices, usually set in US dollars, tend to be fixed. As explained by one buyer, “prices are not a problem, it can be one or a few cents up or down.” In addition, the costs of all input material are also known by the buyer, who describes their price in terms of a “stock exchange.” I asked if this effectively means that buyers determine the profit margin, and received the following reply: “Indirectly, we do.” One may even say that the prices are decided in the consumer market, and that the effect of these prices, as it were, travels backwards. One vendor explained that buyers target prices, “and we see if we can do it or not.” Buyers also inform vendors about prices in other parts of the world. Thus, this is what a vendor was told by a buyer: “Now we are buying from China at that price and Bangladesh at this price.” This way of quoting prices from competing vendors is one way in which information is spread across the industry.

Producers in this standard market do not compete as retailers in a status market do, by aesthetic differentiation, but by having a better price–quality–delivery combination. Or, in the words of one agent: “We try our best to negotiate with buyers and give the best price, and make sure that the supplier is of the right quality, and delivers on time.” Thus the aspects of price and quality cannot be separated. I asked a buyer what she thought characterizes a good vendor. She replied, “A good vendor is [one who] has good products, the right price, secure delivery and communicates well. And then it may be that the vendor has design input. But the first four are the most important.” Thus, while the role of design is included in the equation, it matters less than the more standardized aspects for establishing, maintaining, and evaluating a relationship. Failure to meet these requirements may result in the termination of the relationship. This shows also that the role of status matters little in this market.

18 This preoccupation with price is easy to understand as prices are not difficult to measure and calculate and can be seen as reflections of quality. But in many markets, particularly in the bazaar (Geertz 1973), prices may say little about the products.

Differentiation, as already mentioned, is an important aspect in a status market and it is a condition for carving out a niche in the market. In standard markets, actors try to outperform their rivals by scoring higher on the standard measurement (that is, producing the right quality and delivering on time). One may in fact say that the vendors in standard markets are rather similar when it comes to self-presentation, how work is organized, and pricing. This is not to neglect variation among them, but rather to recognize that the variation is not primarily oriented to status.

Similarities between vendors are seen clearly in the way they market themselves. The information material that vendors send to potential buyers puts the spotlight on production capacity; how short the lead time is; what kind and quantity of machines they have; how well they check quality; and their relations to purchasers. If pictures are included in vendors' PR material, they often show the factory from the outside and some pictures of production. In India, when traveling in the industrial districts, it is often impossible from the outside even to recognize what is going on behind the walls; signs or other means of identifying the business are often missing. This kind of "marketing" would be unthinkable on the high street. Moreover, the production technology is not a secret in this industry. The secret is the design of the fashion garments.

Also in this market, which is ordered around a standard, all actors that can meet it compete. It is impossible to judge how many producers – for example, out of the 30,000 garment producers in India – compete directly. It is, however, clear that they do not know about each other in the same way as retailers do.¹⁹ Thus, their orientation is to the standard (because this is stable and a good predictor of what it takes to make it in this market). In the status market, firms orient themselves much more actively to each other.

What about the commodity in this type of market? While one would assume this to be a market for fashion products, this is in fact not the case. The contract between purchaser and vendor is not primarily about the physical products; instead, it is more correct to view it as a standardized service contract. This is because decisions about what to produce, how it should look, and so on, are made by the purchaser, while the contract deals with the production facilities, delivery, and related issues – aspects that constitute the standard. Thus, the purchasers are most concerned with the production facilities, including the skills of the workers, and they may, as already mentioned, book the factory capacity before they know exactly what they want to produce. In this market the physical aspect of the garment is conceptualized in terms of quality in the service contract. Everyone in the business knows the standard, and the identity of the vendor is determined by how well they perform in relation to it.

19 This is of course not to deny the existence of collaboration and cooperation, which does take place.

Conclusion

This paper highlights the main differences between the construction of order in the producer markets and in the final consumer markets of garments. In the consumer market, order is a function of stable ranks of identities of idealtypes consumers (for example, “young professionals” and “urban women”) and firms (like GAP, Macy’s, Zara, Topshop, H&M, Marks and Spencer and other branded retailers, see White 2002). Both the idealtypes consumers and the firms – on each side of the market interface – are identified in relation to each other, some having more status than others. These orders are fairly stable and at least more entrenched social constructions than the product. Order in production markets for garments, on the other hand, is a function of stable standards: the standard in the market is more entrenched than actors’ identities. Thus, order in standard markets is constructed in the opposite way from how it is constructed in status markets. In addition, one should also consider issues of culture and power, which are undoubtedly important aspects in the construction of order.

There are of course many similarities between these two markets. Both, for example, are fairly stable and enduring social structures. As has been shown, however, a social construction is stable only in relation to at least one other, less stable (less entrenched) social construction.²⁰ Furthermore, actors in both markets take the social structure for granted. Even actors who are not “born” in the market will “take its order for granted” soon after their entrance into it. Through their actions they will reinforce or reconstruct the social structure of the market. This form of “cognitive path dependency” makes the social constructions more stable (see Berger/Luckmann 1966).²¹ Newcomers may of course affect the market, but in larger markets, even the largest single actor is still a very small player. They are both fixed role markets (see White 1981), and in this sense they are two kinds of the most prolific forms of market.

There are also differences. The two markets differ in structure: one is a consumption or “edge” market, the other a production market; one is more local and the other more global. While important, these aspects are not the focus of this paper, nor do they seem to have direct relevance for how order is maintained in markets.

This study contributes to the existing literature on the sociology of the market by outlining aspects that need more attention if a more coherent sociological theory of markets is to emerge. While there are a growing number of studies of real markets, they do not clarify what key distinctions should be made. In this paper, I argue that the

20 Social constructions cannot be measured against an objective “standard of entrenchment”; this would be to abandon the very idea of social construction and fall back into naïve realism or idealism.

21 I am grateful to Jens Beckert who suggested this term.

distinction between standard and status markets is profound.²² This connects the work to the discussion by White (1992) on types of markets (arena, council, and interface).

Status markets are typically found where aesthetic judgments are common (see Warde 2002: 192). Examples of status markets will be found in many different industries. I hypothesize that standard markets, on the other hand, include commodity markets in which the principle of evaluating the commodity is clear and stable, but also in technology-driven industries (see Schmidt/Werle 1998).

I wish to conclude by reflecting on a number of additional points. Most market actors work in an uncertain and aggressive business environment and hence have an interest in shaping the market so that its structure suits their purposes. Size and status often translate into power. In standard markets, powerful players can improve their positions by imposing standards of how to do business on their counterparts, and thereby increase inequality. Standards make it easier for firms to calculate and predict the environment of the firm (Brunsson/Jacobsson 2000; Schmidt/Werle 1998: 81). Industrial standards usually contribute to transparency since firms may have to document the fact that they adhere to a standard, such as an ethical code of conduct, which is important in this industry. The state can be a vehicle for groups with different interests (see Woll 2005; White 2002: 88; Fligstein 2001), for example in creating standards, including quotas, trade rules, and so on. However, the theoretical argument focuses on the standard and status markets, and it does not depend on the existence or intervention of states. Nonetheless, once standards have been set, both sides relate to them.

These remarks can be seen in the context of the structural change that this industry has undergone. For example, some production still exists in the Occident (see Gereffi 1999; Arpan et al. 1981), but it often uses advanced technology (Abernathy et al. 1995: 177). In addition, immigrants from certain countries have started up garment production both in Europe (Morokvasic 1993) and in the United States (Bonacich/Applebaum 2000). One consequence is that production on the one hand and design and marketing on the other have become separated. Out-sourcing of production is prevalent, and a large share of production takes place in countries where wages are low (Abernathy et al. 1995). Production is becoming globally diffused largely due to the cost of labor.

22 In a study of the Californian wine market, Benjamin and Podolny (1999) argue that the status position of a firm in a market affects the possibility for it to establish a reputation as a quality producer. However, they do not, in my opinion, question the idea of quality; it is essentially taken for granted in their analysis. In other words, they analyze the wine market as a combination of a status and standard market. This may be due to Podolny's definition of status, which unfortunately fuses status and quality.

The globalization of the industry has repercussions for market structure because identity formation is central to retailers in the garment industry. Identity formation is the task of designers and people in marketing divisions (Gereffi 1994; Taplin 1994) who contract advertising agents to do their practical work. Production is merely a reflection of these activities and is no longer the main issue among managers of large retailers; it is mainly about getting the lowest price, given constraints such as quality, quotas, lead times, and so on.

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