

MARKETING

by Maxine Morris

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Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

Student Name: Maxine Morris

Student Number: 2213032

Programme: Master of Business Administration

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Lecturer: Taonga Kaonga Sobre-Snithers

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INTRODUCTION

Zara as a pioneering organisation vs. H&M as follower: how two macro-marketing actors have created competitive advantages.

Scope & framing. This analysis focuses on two powerful external actors in the European fast-fashion environment and their strategic implications for Zara (as a pioneering, vertically integrated fast-fashion system) and H&M (as a large, multi-brand follower with a more traditional outsourced model):

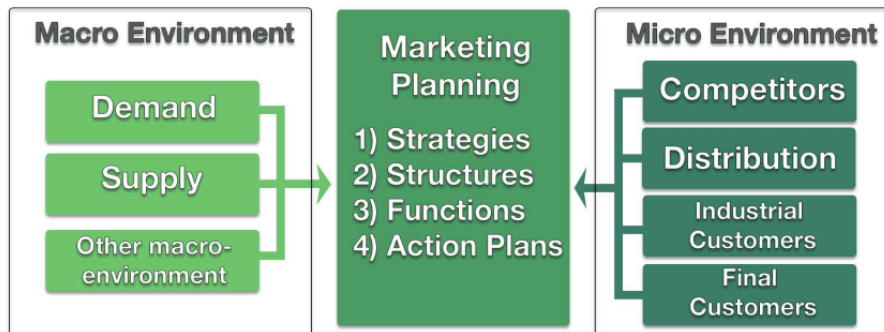
1. **Regulators and policy-makers** (EU-level sustainability, consumer-protection and due-diligence regimes);
2. **Technology actors and innovation ecosystems** (AI, data, RFID and omnichannel infrastructure).

Both actors create opportunities *and* threats that shape speed, costs, assortment, brand equity and **ultimately market share**.

¹ **Zara** is the Spanish flagship store for one of the world's largest and most successful fashion retailers, Inditex. The brand is an overarching global clothing brand with thousands of instore locations and presence in e-commerce. This strategic audit on Zara will take a deeper look into the company's business model and strategies through an external and internal analysis. The analytic tools: Porter's Five Forces, PESTEL, and SWOT analyses are utilized to understand the fashion retail industry's competitive environment and how Zara sustains its leadership through its niche in fast fashion. Strategic recommendations and implementation ideas are also extended with the brand's future growth in mind. Keywords: Zara, strategy, analysis, fast fashion, competition (Ha, 2021).

² H&M's mission statement, 'to offer fashion and quality at the best price, 'reflects its core business philosophy. This concise statement targets a broad customer base by making it accessible and enjoyable for all, irrespective of budget constraints. The mission identifies H&M's core products and services as fashion and quality apparel, accessories, footwear, and home goods. (Team, 2025)

1) The regulator as macro-marketing actor



“Macro Marketing Defines as a higher level of aggregation, usually marketing systems or group of consumers” (Hunt 1976, p.20)

What is changing (ZARA)

The EU has moved from soft guidance to **hard sustainability and consumer-protection rules** in textiles:

- ¹⁰ The **Ecodesign for Sustainable Products Regulation (ESPR)**, in force since July 2024, prioritises textiles in the Commission's April 2025 working plan. Upcoming rules will address durability, repairability, microfibre shedding, and **Digital Product Passports (DPPs)**. Large companies must stop destroying unsold apparel and footwear by 19 July 2026, with detailed disclosure rules adopted in February 2026. ⁹ The **Ecodesign for Sustainable Products Regulation (ESPR)** has come into force ⁹ to make sustainable products the standard across the EU.
- ⁹ This report assessed various product groups and horizontal requirements for potential action under ESPR, considering environmental impact and improvement potential, market significance, existing EU policy coverage, costs, and contribution to EU Open Strategic Autonomy.

- The analysis identified priority areas for ³the first ESPR Working Plan: eleven final products (textiles and footwear; furniture; tyres; mattresses; detergents; paints and varnishes; lubricants; cosmetics; toys; fishing gear; absorbent hygiene products), seven intermediate products (iron and steel; commodity chemicals; non-ferrous metals excluding aluminium; plastics and polymers; pulp and paper; glass), and three horizontal requirements (durability, recyclability, and recycled content). (FARACA *et al.*, 2024)
- The Directive amends the UCPD by banning vague environmental claims, offset-only claims, and unverified eco-labels. Member States must transpose it by March 2026 and apply it from September 2026. Uncertainty around the proposed Green Claims Directive has shifted enforcement toward the strengthened UCPD framework under the ECGT. (Europa.eu, 2024), (Lüttin, 2025), (Kontosakou, 2025)
- **Extended Producer Responsibility (EPR) for textiles:** EU rules are progressing, mandating countries to collect textile waste separately by 2025 and adopt EPR systems with higher fees for hard-to-recycle items. France and the Netherlands already have national versions in place. (European Commission, 2022) (Bergmann, 2025)
- **Corporate Sustainability Due Diligence (CSDDD):** Came into effect in 2024, narrowed after 2025; still requires large apparel companies to implement human-rights and environmental due diligence across supply chains, gradually applied through the late 2020s. (European Union, 2024)

H&M (follower): ⁴ H&M Group is not just a family of brands. It is something bigger. It is an idea that goes all the way back to our founder. In short, it is about unlocking the positive power of fashion for everyone. (H & M Hennes & Mauritz AB, 2025)

Technology actors & innovation ecosystems

What is changing

Fashion's value capture is increasingly mediated by **RFID, AI/ML, robotics, and omnichannel orchestration**:

- AI is transforming fashion, textiles, and manufacturing into smarter, more sustainable systems.
- Part of Industry 4.0, it uses machine learning, computer vision, predictive analytics, and generative design.
- AI increases efficiency, precision, and innovation in production processes.
- In textiles, it supports predictive maintenance, defect detection, waste reduction, and smart textile development.
- Benefits include lower costs, reduced environmental impact, and improved product quality.
- H&M and Zara use AI to optimize supply chains, inventory, and customer personalisation.
- AI also enhances sustainability through better material selection and energy optimization, supporting circular economy models.
- Successful adoption requires workforce reskilling, ethical governance, and responsible implementation.
- The future of AI-driven manufacturing depends on balancing technological efficiency with human-centred sustainability. (Biswas, 2025)

Strategic opportunities & threats

Zara / Inditex (pioneer): ⁵ **ZARA** is a Spanish fast fashion retail subsidiary of the Spanish multi-national fashion design, manufacturing, and retailing group Inditex. **ZARA** sells clothing, accessories, beauty products and perfumes. The head office is located at Arteixo in the province of A Coruña, Spain. ⁶ **ZARA** has lower product prices, unique and numerous designs, high production efficiency, and low production costs.

ZARA is in a competitive impact position because it has lower relative compliance costs and stronger margin advantage through built-in operational efficiency.



Definition of SWOT Analysis in an organisation: ⁸ Describes the history of strengths, weaknesses, opportunities and threats (SWOTs) analysis, it is research based, applications, and its own strengths and weaknesses. ⁸ SWOTs are often arranged in a 2-by-2 table or matrix. (Leigh, 2009)

ZARA

STRENGTHS • Nearshoring strategy – Proximity sourcing (e.g., Spain, Portugal, Turkey, Morocco) enhances agility and reduces overproduction. • Data and RFID integration – Item-level tracking improves stock accuracy, replenishment speed, and traceability (supporting DPP compliance). (admin, 2023) • Strong brand equity – Perceived as trend-led yet affordable, with global market presence. • Inventory discipline – Small batches and test-and-repeat model protect margins and reduce markdowns. (Roshan Viknesh SV, 2026)	OPPORTUNITIES • ⁶ The rapid development of AI- the increase in resident income, the development of Internet and e-commerce. • Design development- of the internet and e-commerce. • Increase in income. (Shen and Chen, 2024) • Vertically integrated- nearshored agility enabling low waste, regulatory fit, and traceable compliance. • A high share of proximity- sourcing in Spain, Portugal, Turkey, Morocco. (Chain, 2025)
WEAKNESSES • Sustainability Concerns: Zara's fast-fashion model contributes to waste and pollution. Rapid product	THREATS • Low product quality.

turnover encourages a throwaway culture and environmental harm.

- **Labour and Ethical Issues:** Zara has faced criticism over low wages, poor working conditions, and worker exploitation. Efforts have been made, but ethical concerns remain.

- **Dependence on Trend**

Forecasting: Zara relies on accurately predicting fashion trends. Missing trends can reduce its competitive edge ¹¹ and market share.

- **Limited Advertising and Promotion:** Zara depends on word-of-mouth and store presence for promotion. This limits its reach to new customers.
(Roshan Viknesh SV, 2026)

- Excessive scale expansion, and bad reputation for plagiarism.
- Strong competitors, threats from brand loyalty.
- Following strong competitors.
- Decline for brand loyalty.
(Shen and Chen, 2024)
- Greater transparency increases legal, reputational, and design of compliance risks. (Muratore and Marques, 2021)

H&M

STRENGTHS

- Global scale and strong brand recognition, giving wide market reach and customer familiarity.
- Affordability and trend-driven assortments, appealing to price-sensitive mass-market consumers.
- Investment in AI, data analytics and forecasting, offering potential improvements in demand accuracy and inventory efficiency.

OPPORTUNITIES

- Stronger EU rules reward credible, traceable sustainability, giving H&M a chance to turn compliance into competitive trust.
- AI-driven forecasting reduces waste and improves margins.
 - Circular services boost loyalty and reduce regulatory costs.
 - Nearshoring improves agility, traceability, and cost efficiency.

WEAKNESSES • Slower operational agility compared with ultra-fast competitors (e.g., Zara, Shein), limiting speed-to-market. • Margin pressure due to price-sensitive consumers and heavy reliance on discounting in some markets. • Fast-fashion sustainability scrutiny, exposing the brand to reputational risk despite strong communication. • Large and complex supply chain, making rapid structural change more challenging.	THREATS • New EPR, DPP, and durability rules may raise H&M's per-unit costs. • Price competition increases margin pressure. • Stricter rules heighten greenwashing scrutiny and legal risk. • Weak execution limits AI-driven gains. (H&M GROUP PRESS RELEASE, n.d.)

ZARA – Competitive Positioning Summary

- A leading global fast-fashion brand, Zara excels at rapidly translating trends into products through a vertically integrated and nearshored supply chain.
- High operational agility, underpinned by RFID and AI, helps minimise overproduction, reduce markdowns, and protect margins.
- Strong overall, Zara's competitive strength lies in combining speed, efficiency, and regulatory readiness in a way that is difficult for rivals to replicate.
- Equity and trend-driven, affordable fashion enable broad customer appeal across markets.
- It is data-rich, transparent supply chain positions Zara favourably for upcoming EU sustainability requirements such as ESPR and Digital Product Passports, turning compliance into a strategic advantage.
- Key pressures include competition from ultra-fast fashion players, rising imitation, and ongoing scrutiny of sustainability performance.

H&M – Competitive Positioning Summary

- H&M is a major global fashion retailer recognised for accessible, trend-focused apparel and strong sustainability messaging.
- Its wide international footprint, combined with investments in material innovation and emissions reduction, strengthens credibility with environmentally conscious consumers.

- The company's growing use of AI and data-driven forecasting offers opportunities for better inventory accuracy and operational efficiency.
- However, its speed-to-market lags behind ultra-fast competitors such as Zara, limiting its ability to capitalise on rapid trend cycles.
- Margin pressures remain significant, driven by price-sensitive shoppers and rising regulatory compliance costs across the EU and UK.
- Maintaining competitiveness will depend on H&M's ability to convert its digital investments and sustainability commitments into tangible improvements in efficiency, cost control and responsiveness.

Recommendations

Zara	H&M
Leverage Regulatory Alignment: Use ESPR and DPP compliance as a marketing tool to strengthen brand trust and differentiate from competitors. Expand Circular Initiatives: Introduce repair, resale, and recycling programs to further reduce waste and align with EU textile regulations. Maintain Agility: Continue nearshoring and rapid replenishment strategies to sustain	Accelerate Operational Agility: Translate AI and data insights into faster, more flexible supply chain responses to reduce overproduction and meet regulatory requirements. Strengthen Circular and Sustainable Practices: Scale recycling, repair, and resale programs to align with EPR schemes and enhance brand credibility.

speed-to-market advantage over ultra-fast fashion rivals.

4. **Enhance Sustainability**

Communication: Proactively communicate eco-friendly practices to pre-empt greenwashing scrutiny.

3. **Broaden Geographical**

Diversification: Reduce dependence on European markets by expanding in Asia, Latin America, and other emerging regions.

4. **Leverage Sustainability**

Leadership: Use transparent, auditable sustainability claims under ECGT to build customer trust and differentiate from competitors.

5. **Monitor Regulatory Impact:**

Anticipate compliance costs from ESPR, DPP, and eco-modulated fees, and integrate these into pricing and operational planning.

Conclusion

Regulation is embedding sustainability into formal, enforceable systems rather than leaving it as a voluntary branding exercise.

Zara's vertically integrated, nearshored operating model aligns closely with ESPR's anti-waste requirements and Digital Product Passport (DPP) traceability rules. Because its model already minimizes overproduction and supports item-level tracking, compliance is less disruptive and may even reinforce its existing advantages in speed, inventory control, and margin performance.

H&M, by contrast, has demonstrated leadership in sustainability communication and has made measurable progress in materials innovation and emissions reduction. However, to prevent rising regulatory obligations from eroding profitability, it must further adapt its sourcing, production, and inventory systems so that compliance becomes operationally embedded rather than an additional cost layer. (De, 2016)

Technology drives the gap: Zara's RFID/AI and nearshoring reinforce its lead, while H&M can catch up if operations keep pace. Competitive advantage now requires combining compliance with data-driven agility.

Strategic Responses of Zara (Pioneer) and H&M (Follower): A Framework-Led Evaluation

Executive summary

Zara (Inditex) continues to grow through a differentiation strategy centred on fast, nearshored production and highly accurate item-level stock visibility, supported by RFID and digitally integrated omnichannel operations. These capabilities not only enhance conversion and sell-through but also align with emerging EU expectations for traceability and reduced waste (Genuine Printing 2025; The Future Factory 2025).

In contrast, H&M is recalibrating its cost-focused model by embedding AI across forecasting, localisation and pricing to reduce markdowns, while advancing measurable circularity practices that better fit stricter consumer-claims and sustainability disclosure requirements (CTO Magazine 2025; Shamsuzzaman *et al.* 2025).

Given continued price sensitivity among UK/EU consumers, Zara's tight integration of technology and operations provides a clear execution advantage, whereas H&M's long-term competitiveness will depend on converting AI-driven insights into shorter lead times and lower exposure to unsold stock and regulatory liabilities as EU rules intensify.

Strategic context (macro factors shaping growth)

EU sustainability policy has moved decisively from voluntary guidance to binding regulation. ¹⁰ The Ecodesign for Sustainable Products Regulation (ESPR), effective from July 2024, designates textiles as an early priority and introduces strict requirements, including a ban on destroying unsold clothing and footwear for large companies from July 2026, supported by delegated acts adopted in early 2026. Digital Product Passports and enhanced durability standards will follow as core compliance mechanisms. At the same time, the Empowering Consumers Directive strengthens consumer-protection rules by amending the Unfair Commercial Practices Directive to prohibit unverified environmental claims and offset-based messaging, making product-level evidence mandatory from 2026. A dedicated textile Extended Producer Responsibility (EPR) framework is also progressing, mandating separate collection and eco-modulated fees that penalise designs which are difficult to recycle, with France and the Netherlands demonstrating early implementation models. Across the UK and EU, continued cost-of-living pressures mean households remain highly price-sensitive, intensifying elasticity in apparel demand and shaping how brands adapt to these tightening regulatory and economic conditions. (European Commission, 2024)

Porter's Generic Strategies: evaluation of responses



Source: Porter, (2008). *Competitive Strategy: Techniques for Analyzing Industries and Competitors*. In M. E. Porter, *Competitive Strategy: Techniques for Analyzing Industries and Competitors*. New York: Simon and Schuster Inc.

Michael Porter's framework of competitive strategy, particularly the Five Forces model and generic strategies, remains central to strategic management theory. Generic strategies, cost leadership, differentiation, and focus, provide firms with broad approaches to achieving sustainable competitive advantage regardless of industry structure or organisational size (Porter, 1980; Porter, 1985). By adopting a clear strategic position, firms can better define their market scope, align internal activities, and respond effectively to competitive pressures.

Within the fast-fashion sector, companies such as ZARA and H&M illustrate the practical application of these strategies. ZARA leverages differentiation through rapid design-to-retail cycles, vertically integrated operations, and limited production runs, enhancing responsiveness and perceived exclusivity. Conversely, H&M primarily pursues cost leadership supported by global sourcing efficiencies and economies of scale, while maintaining trend-oriented product offerings. These contrasting yet coherent strategic choices demonstrate how Porter's generic strategies underpin competitive positioning in the global apparel industry.

Framework	ZARA	H&M
Competitive Strategy	Differentiation through speed	Cost leadership with fashion appeal
Value Proposition	"Latest trends, now	"Fashion and quality at the best price"
Competitive Advantage	Agile supply chain	Economies of scale

Zara (via Inditex)

Zara's proximity sourcing (Spain/Portugal/Morocco/Turkey) and postponement model (greige fabrics; small initial batches) compress lead times and limit overproduction, reducing exposure to unsold-stock bans and eco-fees. Its RFID-enabled single stock ledger (SINT), store fulfilment and frequent replenishment translate demand data into rapid inventory flow, sustaining sell-through while creating a DPP-ready traceability backbone. Digital tools (virtual fitting, AI imagery) enhance conversion and potentially lower returns with modest capex. Inditex's recent financial outperformance suggests the model scales profitably alongside logistics and formal investment.

Risk. Identified traceability gaps increase regulatory and reputational risk under CSDDD/DPP; remediation is essential to sustain differentiation.

H&M

H&M is applying AI to forecasting, localisation and pricing to reduce markdowns and improve stock turns, while upgrading stores and digital channels to strengthen omnichannel performance, measures aimed at margin recovery. It reports sustainability metrics (e.g., ~29.5% recycled content; ~89% recycled/sustainably sourced materials; Scope 1&2 -41% vs 2019) to support claim-ready differentiation under ECGT/UCPD.

Risk. Without lead-time compression or nearshoring, AI may deliver limited profit and loss (P&L impact, while EPR and unsold-stock rules could erode gains; ECGT heightens risk if claims lack SKU-level substantiation. (The, 2019)

Porter verdict

Zara's tech-enabled proximity model strengthens differentiation as regulation favours low waste and traceability. H&M's hybrid strategy is plausible but depends on converting analytics into sourcing agility to approach Zara's unit economics.

Ansoff's Growth Matrix



Definition

⁷ The Ansoff strategic opportunity matrix, often referred to as the *Ansoff matrix*, is a tool for managers to identify various strategies for business growth. The tool helps Managers to identify strategies for growth management. (Zugay and Zakaria, 2023)

Ansoff's Matrix linked to Zara and H&M

In the fast-fashion sector, strategic growth depends on a brand's ability to balance speed, innovation and market responsiveness, pressures that make the Ansoff Matrix a particularly valuable framework for examining how leading retailers such as Zara and H&M pursue expansion. The model's four pathways, **market penetration, product development, market development and diversification**, offer a structured lens for comparing how each company leverages technology, supply-chain design and sustainability initiatives to maintain competitiveness.

Zara's strategy exemplifies a **tech-enabled penetration-product development approach**, driven by real-time inventory accuracy and agile, nearshored production. Its

deployment of RFID across inventory systems enhances visibility and reduces overstock, supporting rapid in-season flows and higher conversion rates, while nearshored manufacturing enables faster product refresh cycles and lower unsold risk (Ethan, 2025)

H&M follows a data-driven penetration strategy and circular-led product development, using AI to optimise assortments and reduce markdowns while integrating recycled materials and resale to meet rising sustainability expectations.

Positioned within the Igor Ansoff Matrix, both brands rely on digital transformation but differ in emphasis: Zara prioritises speed and nearshoring, whereas H&M focuses on AI optimisation and circular expansion, demonstrating distinct yet effective growth paths in global fast fashion. (CTO Magazine 2025; Shamsuzzaman et al. 2025).

Ansoff's Comparison (via Ansoff's Matrix)	Zara	H&M
Market Penetration	Expands RFID-based unified inventory and virtual try-on to raise conversion, improve replenishment accuracy, and cut returns, growing share without heavy discounting.	Uses AI-driven demand forecasting and store-level assortment optimisation to reduce markdowns and improve size/colour availability across existing stores.
Product Development	Nearshore, agile production enables rapid capsule launches and in-season design updates, lowering overstock risk and waste.	Focuses on circular products, recycled inputs, resale integration, and traceability, aligned with circular-economy design principles.

Market Development	Invests in large flagship formats supported by omnichannel fulfilment and centralised logistics to scale efficiently in global cities	Expands selectively through new-market entry and store upgrades, using AI to limit working-capital risk and excess inventory.
Diversification	Develops adjacent digital tools (e.g., advanced imagery, virtual services) to enhance efficiency and customer experience rather than enter distant sectors.	Diversifies via venture investments and resale platforms to broaden revenue streams and offset sustainability-related costs.

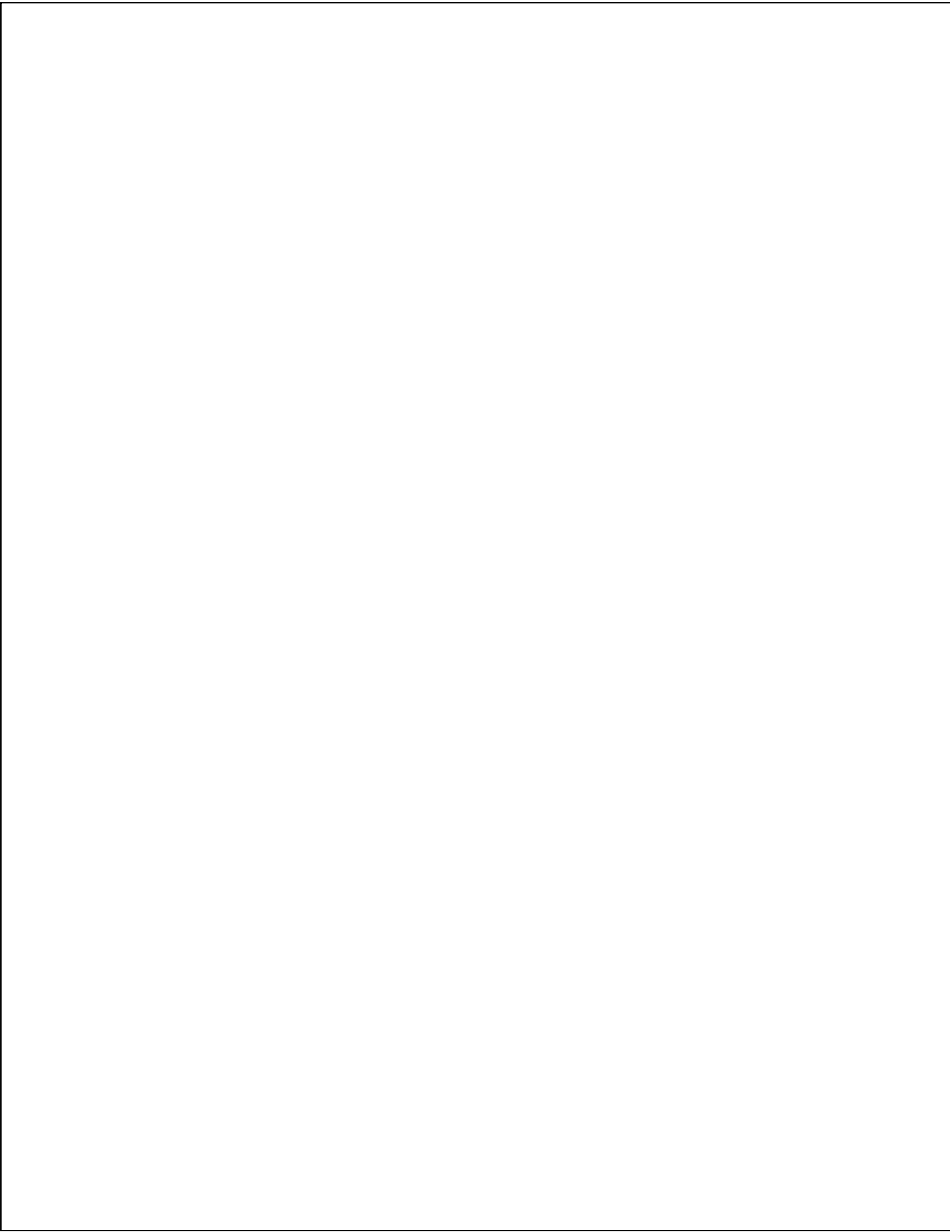
Conclusion using Ansoff verdict

Overall, Zara's growth profile relies heavily on market penetration coupled with product development, reinforced by a tightly integrated technology-operations model that accelerates speed and inventory visibility.

H&M's growth mix largely centres on AI-enabled penetration and circular product development, using diversification, particularly resale ventures, as a supplementary hedge rather than a primary expansion engine.

Recommendations

ZARA	H&M
• Short production cycles, small-batch experimentation, and unified inventory management allow regulatory compliance (e.g., ESPR/ECGT) to be leveraged as a commercial advantage. • Supports differentiation and margin protection while sustaining fast-fashion responsiveness under waste and durability-focused regulations. • Institutionalise supplier-level transparency to pre-empt CSDDD risk; include DPP/QR as a service layer (care/repair guidance, verified durability) to extend differentiation as ECGT tightens claims.	• Strengths lie in group-wide AI deployment and demonstrable ESG progress. • Sustainable growth requires: • Lead-time compression to accelerate responsiveness. • SKU-level DPP-ready data to translate planning insights and marketing claims into economic gains under EPR and destruction-ban rules. • Pair AI with nearshoring/late-stage finishing pilots to make buys more reversible in-season; implement claim-to-SKU mapping and eco-modulated design to curb EPR fees and protect margin while communicating progress credibly.



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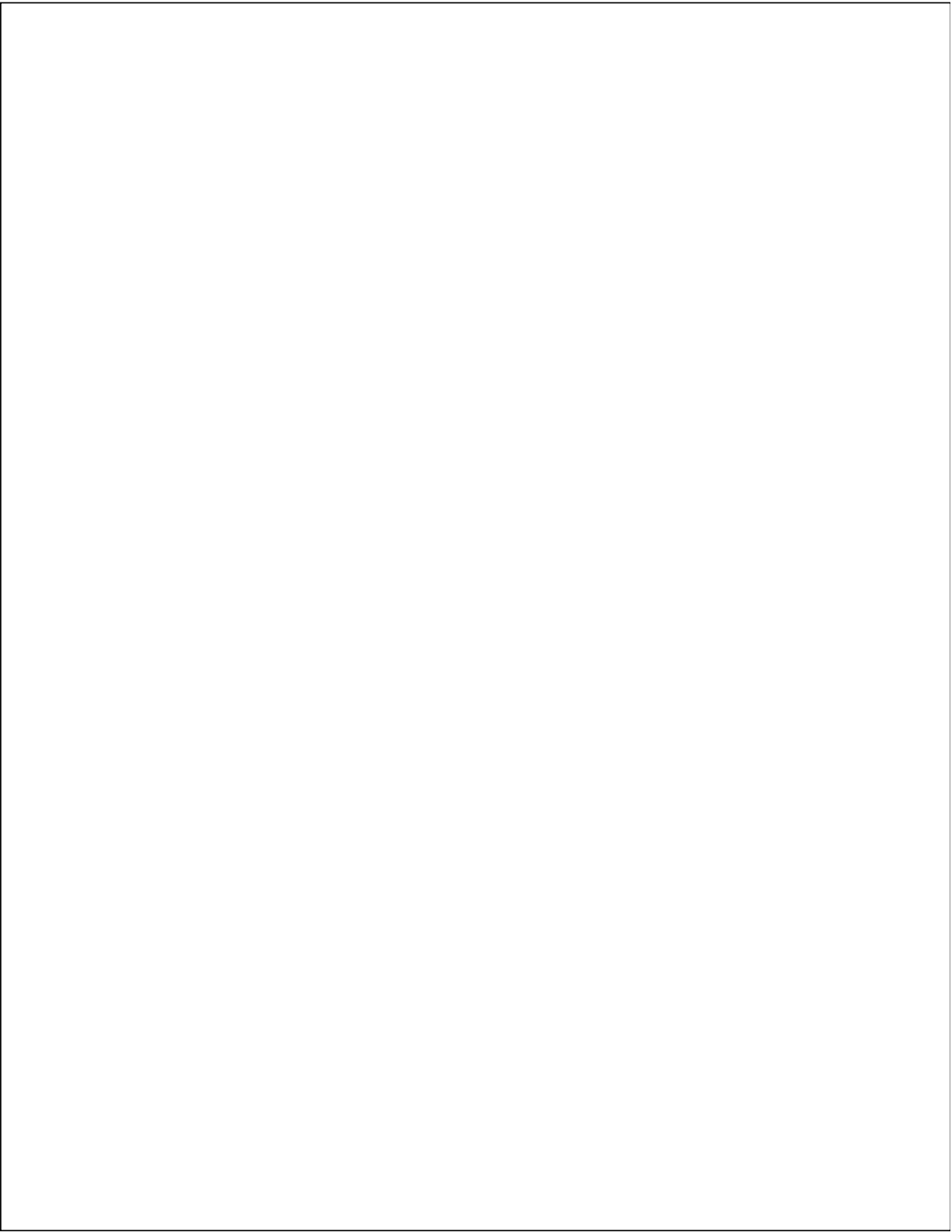
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