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## JOURNAL OF COMPETITIVENESS STUDIES

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**Special Issue**

**Abdulrahman Al-Aali, Guest Editor**

**Business Cases from Saudi Arabia**

I take this occasion to thank all those who have contributed to this second special issue of Competitiveness Studies. I thank the reviewers who provided timely feedback to the authors, thereby helping to improve the manuscripts. I extend a special thanks to the Editor-in-Chief, Abbas Ali, for giving me the opportunity to serve as guest editor of this special issue, the second of two that features business cases from Saudi Arabia. I cordially thank all of the authors who submitted manuscripts for consideration. I appreciate their desire to share their knowledge and experience with readers and business professors in Saudi Arabia, the GCC countries, and the Arab World in general. The seven cases included in this issue concern corporate social responsibility, human resource management, investment analysis, retailing, small business, and strategic management.

I acknowledge and greatly appreciate the funding King Saud University (KSU) provided to enable the creation of business cases set in an Arab context. They are sorely needed. KSU is the Arab World's premier university. Ranked among the top 150-200 universities in "The Academic Ranking of World Universities," also known as the Shanghai ranking, KSU scores high in many international rankings. To its credit, KSU's College of Business Administration took on the challenge of developing cases about issues in Arab businesses specifically to meet the needs and interests of Arab business students and other readers. This is probably the largest collection of such cases to date. I applaud KSU and the Business College for initiating this project. Many individuals participated in this journey from case idea through final acceptance and delivery. To them all, I say: Thanks for a job well done.

Abdulrahman Al-Aali, PhD  
Special Guest Editor

**About The Guest Editor**

Abdulrahman Al-Aali is a Professor of International Business and Marketing at the College of Business Administration, King Saud University, Saudi Arabia. He gained his BBA, MBA, and PhD in International Business at Georgia State University. He is the Director of the PhD in Business Program and a Visiting Research Scholar at Indiana University in Pennsylvania. He was a Fulbright Fellow at the George Washington University and former Dean of King Abdullah Research & Consulting Institute. He was a Trustee of Prince Sultan College of Tourism & Business and is currently a Trustee of Albaha College of Sciences. He has authored or co-authored ten books and over 40 academic articles. He has consulted for many agencies including the United Nations Development Programme, Ministry of Higher Education, and Ministry of Commerce on World Trade Organization issues, and is currently a consultant with UN-Habitat on the Future of Saudi Cities Program.

## DALEEL ALKhibRAH: INTEGRATED FABRIC SOLUTIONS

Mohammad Almotairi, Soad Almeshal

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### ABSTRACT

*The Daleel AlKhibrah Company (DK), a quality-driven textile company which operates in Saudi Arabia, produces fire resistant fabrics that have become a major product segment for DK and has developed fabrics and textiles that help reduce the risk of hospital-acquired infections, among other products. Although the company has faced negligible market competition, the CEO is concerned about the company's future direction. Recently, small-order distribution costs have become a major issue for DK and DK may need to review its commitment to guaranteed small-order, fast-turnaround delivery of highly specialized products. Thus, the CEO has called for a new strategic plan for maintaining DK's current market strength locally, along with recommendations for pursuing expansion in other directions, both locally and internationally.*

**Keywords:** Saudi Arabia, Textile industry, Competition

### INTRODUCTION

The textile industry has always been an important market segment in Saudi Arabia. The industry's production of highly customized textiles and fabrics is essential across multiple sectors – including hospitals, laboratories, universities, and the petrochemical industry – all of which operate in a dynamic, fast-changing environment. Recently, competitive pressures have forced a renewed emphasis on quality. This case profiles issues facing the textile industry by focusing on the Daleel AlKhibrah Company (DK), a quality-driven textile company which operates in Saudi Arabia.

As it looks ahead to the development of new products, DK is facing some industrial, social and technological policy questions which need to be resolved to assure its continued local and

international growth. In confronting these questions, DK seeks to remain focused on ensuring quality in all its product categories, while also providing consumers with the best textile solutions. The following discussion of its product lines, clients, market needs, and future plans provides an analytic framework for those decisions.

### **Possible Expansion**

In mid-April 2014, DK faced a decision regarding the expansion of its market to the Eastern and Western regions in Saudi Arabia, and to the Arab Gulf region, as well. Such a strategic approach was motivated by DK's confidence in the quality of its unique products, which has been internationally recognized with multiple quality certifications.

Yet DK has some competing priorities. Its clients are selective, and the segments are known, DK's continued success depends on preserving both its long-term company-client relationships and its reputation for guaranteed customer satisfaction. That reputation rests largely on DK's flexibility and responsiveness: in addition to guaranteeing prompt delivery of any of its routinely warehoused textile products, the company accepts any order with customized requirements -and in any quantity - from its clients, despite the higher distribution costs such small orders often entail.

As it ponders expansion, small-order distribution costs have become a major issue for DK, since expansion could mean an increase in smaller-size but higher-cost orders. The cost of distribution to new, more distant markets – especially for small orders – could make it challenging to sustain DK's guarantee of fulfilling all client orders, regardless of distribution costs.

Aside from the distribution problem, DK may also need to review its commitment to guaranteed small-order, fast-turnaround delivery of highly specialized products. This may be an issue when dealing with customers located in a larger geographic region.

Resolving the question of whether and how to expand – and at what additional cost to the company – is the responsibility of DK management. DK's Chief Executive Officer (CEO) is fully aware of the complex decisions they face.

### **The Textile Industry**

The textile industry was first industrialized in England in the late 18<sup>th</sup> century, and it grew significantly during the Industrial Revolution. The first American textile mill, opened by businessman Francis Cabot Lowell, began operations in 1811. During this period, the textile industry was based primarily on traditional, home-made production.

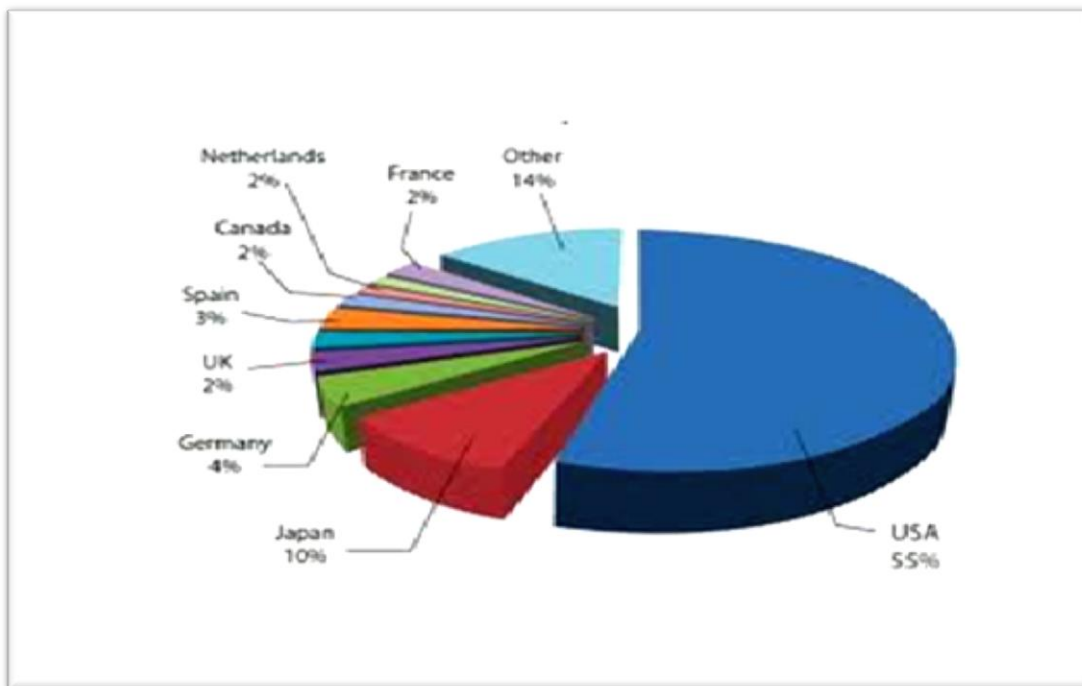
At the beginning of the 19<sup>th</sup> century however, textile factories increased their production through the use of machinery and other technological innovations, and the American textile industry began competing with advanced English technology. The most famous among these inventors and architects was Thomas Somers, who with his colleagues founded the first cotton mill in America.

By the early 20<sup>th</sup> century, the textile industry in developed countries was facing competition from developing countries in Southeast Asia. Additionally, globalization enhanced outsourcing capabilities in overseas markets. In 2002, the textile and apparel industry reached \$400 billion in global exports; this represented six to eight percent of world trade. In the early years of the 21st century, the largest importing and exporting countries were developed countries, including the European Union, the United States, Canada and Japan. In 2005, the World Trade Organization (WTO) Agreement on Textiles and Clothing was established in accord with General Agreement on Tariffs and Trade (GATT). Figures 1 and 2 document world textile and fabric production by country.

### The Textile Industry in Saudi Arabia

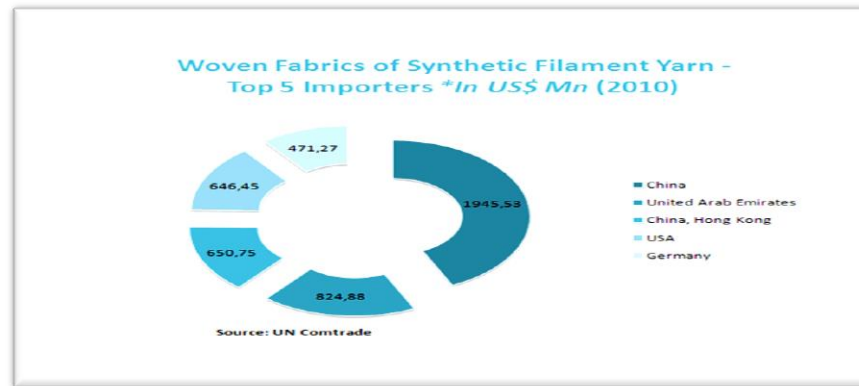
Saudi Arabia ranks first among Gulf Cooperation Council (GCC) countries in terms of demand for textiles and fabrics of all kinds and for all uses. Due to Saudi Arabia’s population growth and real estate boom, the Kingdom’s textile market has increased annually by 13 to 15 percent, with textile imports reaching more than 4 billion US dollars.

**FIGURE 1**  
**Textile Production in the World**



Source: reportlinker.com

**FIGURE 2**  
**Top Five Importers of Woven Fabrics**



Source: UN Comtrade

Therefore, Saudi markets have developed the latest, specialized machinery systems and equipment to support the production of high-quality textiles. This has prompted companies and institutions in countries around the world to build long-term partnerships with Saudi companies to provide textile products and related services.

With the Ministry of Commerce estimating that Saudi Arabia has 78 factories nationwide, robust investment has spurred growth in the Saudi textile industry. Recent reports have estimated 2010 investment volume at SR 33 billion, but this only represents production for domestic consumption. It does not account for the number of factories producing textile goods for export. Investment in the domestic fabric and textile market is expected to reach nearly SR 40 billion in 2014 (Textile Market Reports, 2014).

The Saudi textile market represents an excellent opportunity for those who wish to enter the industry. That opportunity has prompted another trend in the industry, the creation of new enterprises run by Saudi women interested in the fashion and textile industry. Some of these women have acquired international experience and knowledge of textiles and fashion. This trend was motivated by the reluctance of some expats to work in Saudi, reportedly as a result of recent government decisions, which represented a strategic correction of the labor market in the Kingdom.

## OVERVIEW

### Who is DK?

DK is a Saudi company specializing in the import, manufacture, and trade of textile products. The company supplies clients across multiple sectors, such as hospitals, factories, laboratories, universities, clothing and linen companies and the petrochemical industry. DK provides



specialized fire resistant and antibacterial curtains, clothing, linen, uniforms, and other industry attire to meet its clients' specific and very time-sensitive needs.

### **DK's History**

DK was launched five years ago. The company began its operations with a single textile item, "The Special Textile Product," as a highly-specialized product solution for hospitals and clinics providing hyperbaric oxygen therapy. The treatment requires special, customized uniforms not found elsewhere in the Middle East. Once it began supplying these customers, DK successfully developed a product that could be used for different sizes and ages.

As a result of this product development, DK became the first textile company in Saudi Arabia to twice earn Occupation Health and Safety Assessment Series (OHSAS) certification, the British standard accepted worldwide for occupational health and safety management systems.

DK has also moved from producing curtains to the production of more advanced products, such as specialized textiles for hospitality products and other customized products.

"At DK, every product sold is of the highest quality, simply because we care, and the products are designed to reflect the pride that customers take in their brands. Thus, we pay meticulous attention to every detail of our apparel and exercise a great deal of care in every aspect of the manufacturing process," said Mr. Ahmed, DK's CEO, in an interview at his office in Riyadh. Furthermore, DK staff work closely with customers to guarantee the provision of cutting-edge technology, on-time delivery, superb customer service and outstanding quality. Customers can also utilize the company's unmatched expertise and services to customize their own apparel.

### **DK Organizational Structure**

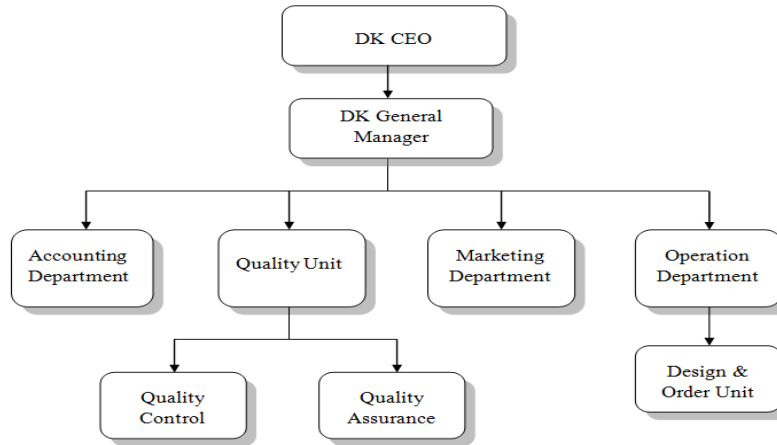
The company's organizational structure is based on its core functions, with a core focus on ensuring quality. The organization is owned and run by the CEO, who founded the company. The CEO is a highly-specialized engineer with a solid business background and a particular focus on small business development and management. Because the company has a relatively small staff, it is located and managed entirely from its headquarters in Saudi Arabia's capital city, Riyadh.

The CEO is responsible for planning and managing strategic issues, such as commercial partnerships and long-term contracts with suppliers and customers. Under the direction of the CEO, the company's general manager monitors and manages daily activities and executes operational plans. The Marketing, Accounting, Quality, and Operations departments closely coordinate their operations and are led by qualified supervisors who report to the general manager. The CEO manages from both a macro and micro perspective: he ensures close coordination among the departments, but as DK's owner and founder he also pays tremendous attention to the details. The company's organizational structure is illustrated in Figure 3.

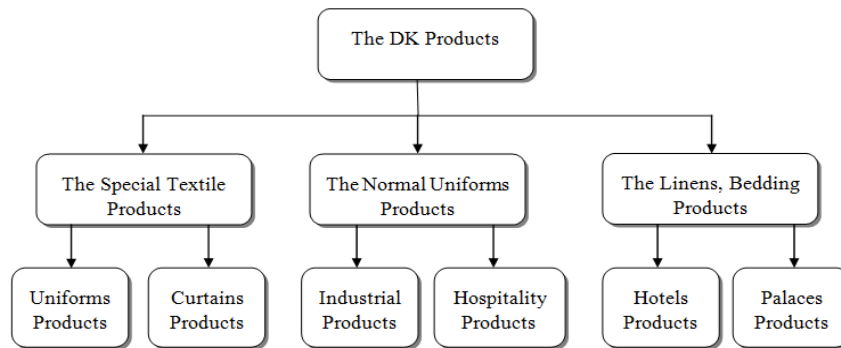
### Product Lines

The DK Company has diverse product lines as shown in Figure 4.

**FIGURE 3**  
**DK Organizational Chart**



**FIGURE 4**  
**DK Product Lines**



### DK Products’ Competitive Advantage

Each product in the DK catalog has unique features to promote usability and provide users with the highest quality and satisfaction. The following overview provides details.

**a. Specialized Textiles for Uniforms and Other Garments:** For hospitals and other healthcare clients that must provide high quality service that meets international standards, specialized anti-bacterial uniforms and linens are needed. The hyperbaric environment, which presents a unique challenge, requires some precautions for patient safety and for the safety

of those health professionals managing patient treatment in the chamber. Increased pressure and oxygen in a hyperbaric environment raise the risk of fire. This sensitive atmosphere requires pajamas for patients and scrubs for caregivers that are 100 percent cotton. The fabric (for these garments), which DK itself produces, must also be flame retardant and antistatic.

**b. Curtains:** The healthcare sector also requires curtains made of specialized fabric that is antibacterial and flame retardant. In addition, DK supplies hotels, offices and residences with items from this product line.

**c. Industrial Uniforms:** Laboratories required specialized uniforms to minimize the risk of infection transmission between patients and laboratory staff. DK provides medical laboratories with uniquely specialized uniforms made of fabric that is anti-chemical, liquid repellent, and acid-alkali proof.

**d. Hospitality Uniforms:** DK also provides product solutions for the hospitality sector that must meet worldwide hotel chain safety standards. DK produces fabrics that are inherently and permanently flame retardant for these clients. The fabrics are stable in humid environments and can be washed with water and detergent. These fabrics can also withstand machine hot-water temperatures without losing color or shape. To maintain product quality however, DK advises designers and clients to always use discretion in the laundering process, especially for fabrics woven with special effects, such as loose floats and clippings. The fabric requires machine washing at 176°F (80°C), the standard washing temperature for hospitality and hotel use.

**e. Linens and Bedding:** DK has a special line of linen and bedding products for hotels and royal palaces. These products are also made of antibacterial and fire retardant fabric.

### **Why Flame Resistant and Antibacterial Fabric Products?**

DK's long-term strategy to increase its market share in the textile sector is based on establishing itself as the dominant producer in a particular market niche: DK develops unique textile products that will help its clients reduce operational risk and liability. Building on this identity is aligned with the larger aim of enhancing the company's competitive advantage.

One major objective in pursuit of this goal is to build a solid customer relationship management (CRM) system with key loyal clients. Accordingly, DK strives to actively partner with its clients as they deal with the following concerns:

- Risk reduction to prevent loss of life
- Risk reduction to prevent building damage
- Risk reduction pertaining to liability and insurance issues
- Education to promote public safety
- Risk reduction to prevent bacteria transfer
- Permanent antibacterial effect
- Risk reduction to prevent contact contamination

- Prevention of bacteria-caused unpleasant odors
- Other health and safety issues (ensuring that fabrics contain no heavy metals, formaldehyde or arsenic)

### **Important Issues to be Considered**

In supplying hospitals and other healthcare entities, DK has focused on the development of fabrics and textiles that help reduce the risk of hospital-acquired infections, which have become a major concern in healthcare settings. According to the Centers for Disease Control and Prevention, in the United States (US), 99,000 people die every year from infections acquired while in hospitals. Reducing the risk of such infections is clearly an important goal for hospitals and healthcare providers worldwide. As one American cardiologist, Dr. Charles Kinder at Heart Care Centers of Illinois, noted, “The goal in our profession is to help cure you, not introduce you to another deadly infection.”

### **Dangerous and Deadly Bacteria Hide in Uniforms**

One culprit in the accidental spread of disease is the common lab coat and scrubs worn by medical personnel. According to recent studies conducted by the University of Maryland and Virginia Commonwealth University in the US, hospital personnel, including doctors and nurses, sometimes conceal infection-causing organisms in their uniforms, opening the door to accidental exposure of patients to MRSA, a strain of bacteria resistant to multiple strains of antibiotics.

One study published in the *American Journal of Infection Control* found that at least 50 percent of the samples tested were found to contain pathogens. About 53 percent of the uniforms sampled yielded dangerous, infection-causing bacteria. What’s worse is that 11 percent of the organisms found on the clothing were MRSA, the most dangerous kind of bacterium. Doctors’ clothing yielded lower amounts of bacteria than nurses’ uniforms, with 60 percent of doctors’ uniforms testing positive for pathogens and 65 percent of nurses’ uniforms testing positive for bacteria.

DK saw the study as an opportunity to help educate healthcare managers about the benefits of buying clinic apparel and linens made with antibacterial fabric. The company utilized the study to market its products to hospitals and other medical facilities.

### **Business Driven by Fire Resistant Products**

The development of fire resistant fabrics has become a major product segment for DK. The company’s specialization in this area builds on research showing that some 70 percent of fires originate from upholstered furniture, mattresses, or bedding. The number of fire-related deaths has been reduced thanks to the implementation of fire standards in furniture, bedding, and textile production, and the reduction in numbers of smokers.

Demand for fire resistant products is growing among consumers and organizational customers in Saudi Arabia. Various factors have contributed to this trend, including greater public awareness about fire risks and official regulations and requirements, such as:

- Government regulations
- Fire authority recommendations
- Fire fighter recommendations
- Insurance company recommendations
- Building contract specifications
- Retail specifications of retail
- Commercial and industrial marketing activities

### **DK Clients**

DK supplies a diversity of local and global textile customers with a variety of apparel, linens, and other products in a multitude of fabrics and colors. DK's client base spans a number of different industries. They include, the Ministry of Commerce, the Ministry of Health, the NADEC Company, The Armed Forces Hospital in Jubail, the AlQassim Cement Company, the Aldahran Medical Campus, Marriot Hotel, Mercure Hotel, Coral Hotel, Holiday Inn Hotel, Riyadh Airport Hotel and Avari Dubai Hotel. Globally, DK has several international clients, which include the Amron International Company in the US.

### **DK's Distribution Situation**

DK built its distribution system based on the structure of its business and the needs of its clients. Through its distribution system, DK manages the flow of its manufactured products from three production centers to its final client destinations. DK's current production centers are located in Germany, China, and the United Arab Emirates (UAE). The system is not overly complex, and it is overseen by DK, which arranges product shipments by air, sea, and truck. Upon arrival, products are stored in the company's warehouses and then scheduled for delivery to clients by DK's company-owned trucks. The warehouse system is designed and managed as part of a distribution system that depends primarily on air and, to a lesser extent, on air cargo and truck shipments.

The normally high cost of air delivery is made even more costly when DK clients order small quantities, and additional cost is involved when those products must be shipped under temperature-controlled conditions. Air cargo is cheaper but takes longer and may be late in some cases. Truck delivery is slowest of all, although it provides a lower-cost delivery option.

### **Guaranteed Quality**

All of the resources, personnel, and management of DK – from the CEO on down – are mobilized and united by the company's overriding goal of producing textiles of the highest quality.

Under the leadership of its Quality Assurance team, DK manufacturing strictly follows a “No Compromise on Quality” policy. DK also has enormous confidence in the quality of its management, especially given the corporate goal set by the CEO. “Our aim is to be professional and meet the highest standards of customer satisfaction,” he said.

DK also addresses every business process with the aim of meeting international standards for textiles and fabrics. Quality control and assurance are integrated at each step of production, from raw material to user-ready products. Special fire retardant and antibacterial curtains, uniforms, and linens are all produced under the supervision of the Quality Assurance team. The product is checked at every stage against the highest standards for texture, color, and design.

In addition, to ensure that all DK products meet all relevant standards, the Standards and Quality department sends random samples to laboratories such as SGS, the world's leading inspection, verification, testing, and certification company, which is based in the US. Such inspection ensures that DK is in compliance with all necessary product specifications. As a result of these inspections, DK obtained ISO 9001:2008 quality certification from the International Organization for Standardization in Geneva, Switzerland. The company also has OHSAS 18001 occupational health and safety certification under the British standards now accepted worldwide.

Meeting all international quality standards through the procedures detailed above enables DK to guarantee quality and customer satisfaction for all its clients, with additional assurance that all DK customers receive full value for their money.

### **GGT Apparel Technology**

DK has never hesitated to adopt the latest manufacturing technologies. The engineering and sampling department is equipped with the latest Gerber Technology (formerly known as Gerber Garber Technology, or GGT) Accumark software for designing, grading and marketing technical textiles and industrial fabrics. As the backbone of DK's entire manufacturing operation, the pattern-making and sampling department takes great pride in creating quality apparel.

### **Customization**

DK's focus on offering clients extensively customized product solutions is an integral part of its competitive advantage. The company's design team collaborates closely with DK clients to meet their design, size, color and finishing specifications, creating various styles for uniforms, curtains, and linens. The inclusive DK catalogue provided to each client contains an overview of the diverse pattern and color options, along with a statement of the company's commitment to work within customers' requirements and preferences.

### **DK's Sales History**

DK began marketing its Specialized Textiles in 2009, while production and sales of its Uniforms line commenced in 2011. The following year, the company launched sales of its Linens and

Bedding product line. Table 1 below illustrates average sales (in approximate Saudi Riyals) for DKs' main product lines.

**TABLE 1**  
**DK Sales (SR)**

Year	Products		
	Specialized Textiles	Uniforms	Linens and Bedding
2009	3,000,000	0	0
2010	4,500,000	0	0
2011	6,000,000	2,000,000	0
2012	3,500,000	4,000,000	3,000,000
2013	3,000,000	8,000,000	5,000,000

### **FUTURE DIRECTION**

By spring of 2014, DK's strategic plan included local expansion in the Western and Eastern regions of the Saudi market. Ahmed, DK's CEO, was also considering markets beyond the Kingdom, with international expansion to the GCC Countries slated to begin in 2016. DK was also planning to open a new branch in Ajman, UAE, by 2016.

The DK Company had historically defined itself as serving the Saudi Arabian market and, in contrast to the general textile industry, had defined itself as a producer of highly specialized textiles.

Although the company was facing negligible market competition (as defined by the company) the CEO was concerned about making the right decision regarding the company's future direction. He realized that timing was a critical factor, and that if he did not act quickly, he might lose the opportunity to expand locally and internationally in ways that would strengthen DK's already solid brand. He therefore called for a meeting with his general manager, requesting key documents and reports for a detailed overview of the company's financial and operational performance. He also hired a consultant to deliver a marketing analysis at the meeting that would outline the opportunities and challenges associated with the proposed local and international expansion. The CEO hoped that the information and analysis presented at the meeting would help him assess the situation and recommend a realistic and effective course of action. He hoped to emerge with a new strategic plan for maintaining DK's current market strength locally, along with recommendations for pursuing expansion in other directions, both locally and internationally.

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The *Journal of Competitiveness Studies* is an interdisciplinary blind peer-reviewed journal that focuses on the competitive positioning of firms in the global market and on national competitiveness in a changing global business environment. The journal combines conceptual analysis and normative considerations in order to shape the discourse on competitiveness in scholarly and policy circles. Articles in the *Journal of Competitiveness Studies* deals with pressing questions of competitiveness that are of interest to scholars and practitioners. They cover a broad range of subjects, from organizational performance and economic growth to sociological and historical aspects. Contributors with interdisciplinary perspectives and those who have an interest in international competitiveness are encouraged to send their contributions.

Format:

Manuscripts submitted for publication as articles should not exceed 25 double spaced typewritten pages, including tables and figures. Authors should send their submission electronically to office.asc@gmail.com.

The style guidelines of the publication manual of the American Psychological Association should be used. The first page of the manuscript should include the title of the paper, the author(s) name(s), and their affiliations, addresses, and phone and fax numbers. Author's name should not appear in the body of the paper, except where appropriate in citations and references. The second page of the manuscript should contain only the title and an abstract of the article (not to exceed 100 words). The text of the article should begin on the third page. All articles under review will be submitted to turnitin.com.

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