


The Power List

Stitches reveals its list of the most powerful people and companies in the industry today. Ranked from 1 to 56, everyone on this list is influencing the direction the decorating industry will take in 2011 and beyond.

By Robert Carey, Joan Chaykin, Shane Dale, Joe Haley,
Alex Palmer, Nicole Rollender, Daniel Walsh and Erica Young

THE POWER 56

- 1. Paul Gallagher and Hitoshi Tajima** - Hirsch International/
Tajima Industries Ltd.
- 2. Martin Kristiawan** - Wilcom International Pty. Ltd.
- 3. Marty Lott** - SanMar
- 4. Gerard Metrailler** - Corel Corp.
- 5. Ray Titus** - EmbroidMe
- 6. Dean F. Shulman** - Brother International Corp.
- 7. Glenn Chamandy** - Gildan Activewear
- 8. Pang Shiu Keung** - Lee Shun Computer Embroidery
- 9. Anna Wintour** - *Vogue*
- 10. Tas Tsonis and Brian Goldberg** - Pulse Microsystems Ltd.
- 11. Tetsuji Yamaue and Bob Stone** - Barudan
- 12. Ted Stahl** - GroupeSTAHL
- 13. Ira Neaman** - Vantage Apparel
- 14. Tom Myers** - Broder Bros. Co.
- 15. François Lesage** - House of Lesage
- 16. Hajo Voeller** - Madeira USA Ltd.
- 17. Mike Angel** - Melco
- 18. Scott Colman** - SWF East
- 19. Mike Rhodes** - Bodek and Rhodes
- 20. Craig Mertens** - Digital Art Solutions
- 21. Zahoor Kareem** - CafePress
- 22. Phil Rubin and Eric Rubin** - Blue Generation
- 23. Chris Waldick** - FastManager SMS
- 24. Dov Charney, Tom Casey and Marty Bailey** -
American Apparel
- 25. Owen Dunne** - American & Efirm Inc.
- 26. Robert Kronenberger** - American Needle
- 27. Susan Ritchie, Arch Ritchie and Jennifer Cox** -
National Network of Embroidery Professionals



Power is a force that's keenly felt – it reverberates, as powerful people influence companies, industries, regions, even whole countries. The decorating industry itself is a powerful force, as imprinting touches nearly every other industry – and product – out there.

Welcome to the *Stitches* Power List, our first-annual ranking of 56 industry heavyweights, those with the most influence now – and into next year – over how business is conducted in the decorating marketplace. They're the people everyone in the industry knows – and wants to emulate. The ones who challenge the status quo and are a force for driving growth – the innovators who develop new and exciting decorating and digitizing techniques; the thinkers who bring new equipment, software and apparel products to market; the

mentors who continue to develop raw talent; the stellar businesspeople who drive profits and revenues to their companies; and even people who work at companies that don't operate in the industry at all, but impact it nonetheless.

Each person and company on this list is making an impact on how everyone in the industry operates – and they're setting a go-to-market course for the industry as it heads into 2011. Turn the page to learn who these most powerful people in the industry are, and their plans for the future.

THE METHODOLOGY

The first step in considering possible candidates for the *Stitches* Power List was a solicitation of nominations. In that effort, we received more than 50 potential names for this list. We then also considered the heads of the top machine, software, thread and apparel suppliers, along with other industry vendors, plus others outside of the industry who we felt were important.

Each of these people were then measured on areas such as awards won, how successful the company they work at has been, how much that company has invested in the industry, how many times the person has been mentioned or quoted in *Stitches* magazine, and how many times the person's name popped up on Google searches. These ranking brought the list to the 56 you see here.

28. Joyce Jagger - The Embroidery Coach
29. Cory Dean and Emily Cheney - Artwork Source
30. Ray Materson - *Sins and Needles*
31. Michael Savoia - Villa Savoia Inc.
32. Chase Roh, Ph.D. - AnaJet Inc.
33. Jimmy Lamb - Sawgrass Technologies
34. Vasilis Thomaidis - Compucon
35. Mark Venit and Jay Malanga - ShopWorks
36. Thomas Moore Jr. - Strawberry Stitch Co.
37. John Lynch - Lynka Promotional Solutions
38. Jack Ma - The Alibaba Group
39. Akira Ikeda - Mimaki Engineering
40. Fred Lebow - Cotswold Industries
41. Lee Caroselli - Balboa Threadworks
42. Steve Garnier - Epilog Laser
43. Mark D. Lange, Ph.D. - National Cotton Council of America
44. Abdus Salam Murshedy - Envoy Group
45. Martin Favre - Bernina of America
46. Michael Stuart - MS Designs Ltd.
47. Darin Anderson - Embroidery.com
48. Eileen Roche - *Designs in Machine Embroidery*
49. Michael Robertson - Specialty Graphic Imaging Association
50. Deborah Jones - MyEmbroideryMentor.com
51. Christopher Bernat - Vapor Apparel
52. Joanna Grant - Affinity Express
53. Randy Carr - World Emblem International
54. Kristine Shreve - EnMart and Ensign Emblem
55. Jenny Hart - Sublime Stitching
56. Nick Coe - Land's End

1. PAUL GALLAGHER and HITOSHI TAJIMA

President and CEO, Hirsch International; President, Tajima Industries Ltd.

FUN FACT:
Paul Gallagher
was hired to be
Hirsch's chief
problem-solver.



Paul Gallagher

Why they're on the list: One out of every two customers in the embroidery industry is a Hirsch International customer. Founded in 1968, the company has more than 4 million sewing- and embroidery-machine users worldwide. For 35 years, Hirsch has been the exclusive U.S. distributor of Tajima-brand embroidery machines from Nagoya, Japan-based Tajima Industries Ltd.

In 1944, Hitoshi Tajima founded Tokai Industrial Sewing Machine Co. Ltd., which broke into the embroidery industry in 1964 and has since produced more than 3,000 types of embroidery machines with one to 56 heads. Today, Tajima Industries Ltd., which is widely accepted as the world's leading developer and manufacturer of top-quality, advanced embroidery systems, distributes Tajima embroidery equipment to more than 100 countries.

Backstory: Gallagher left a job in New York City to take over at Hirsch on September 11, 2001 – which he has always seen as “an omen” of sorts – in order to be the company's chief problem-solver. “I was really the fix-it guy,” he says. “What I've always done in my career is fix and grow companies in a wide range of industries, from tow trucks to lithium batteries.”

Gallagher was brought in because Hirsch, a publicly traded company at the time, ran into financial trouble in the late '90s. “We had a successful turnaround to making the company more customer-centric,” he says. “Over the next several years, we diversified from the legacy business of embroidery to decorated apparel. That's when we added screen printing, laser and other products. The common theme was always best-in-class, top-quality products to our clients in North America.”

After the financial collapse and economic downturn of 2008, Hirsch saw its stock decline significantly, which led to it dropping out of the public sector and becoming a private company once again. “When we saw the downturn in the financial markets and in the economy, we saw quite a decrease in capital spending by our customer base,” Gallagher says.

Hirsch went private on October 29, 2009 – a step in the right direction, according to Gallagher. “If there was a silver lining in the cloud of the economy, for us it was that it devastated the stock price to the point where it allowed us to go private,” he says. “The real advantage is now there are no outside shareholders and we can totally focus on our customers.”

Leading the way: Gallagher says Hirsch has held a leadership position in the decorated-apparel industry since its inception. “Our relationship with Tajima, the technology leader in embroidery, allowed us to gain a significant market share of embroidery growth in the '80s and '90s,” he says. “Tajima was – and is – the dominant market brand, and the result of that was a significant amount of customers we have to this day.” In 2005, Tajima America Corp., headed up by Kenji Tajima, and Tajima Manufacturing Inc. opened the new Rancho Dominguez, CA-based headquarters to offer comprehensive parts and services support, along with machine assembly, to the Americas.

Now, Hirsch's extensive product line

includes embroidery machines, screen-printing equipment, direct-to-garment printers, textile lasers and companion multi-level DG/ML by Pulse software. Some of Hirsch's newer products include Tajima DG/ML by Pulse Version 2010 software, SEIT Single-Head Laser and Tajima Shuttlehook. Hirsch also provides a range of decorated-apparel training, from embroidery machines and digital products to software and application.

Personalization prosprs: Gallagher says the strongest trend that Hirsch and Tajima are seeing in the retail and end-marketplaces is personalized products. “People are spending money on this,” he says. “And, the personalization runs the gamut from team sports logos to individual monograms. Whether it's uniforms or corporate logo wear, that business is very strong.”

Following that, in 1994, the Japan-based Tokai Industrial Sewing Machine Co. Ltd. Technical Center was established to design and develop new products, including new operator-friendly machines with low vibration and super-low noise.

Looking ahead: “The newer decorating technologies – digital printing on apparel, more sophisticated laser etching and cutting – really kind of change the direction of the embroidery industry a little bit,” Gallagher says. “The transition we made five years ago was to say, ‘We're not going to be focused on just embroidery; we're focusing on embroidery and other types of decoration on apparel.’” That all-inclusive attitude reflects the desires of Hirsch's customers, Gallagher says. “The transition I see is that our customers who had been focused on one technology – embroidery – are now focused on offering their clients multiple technologies,” he says.

Predictions: “Everyone tightened up the last couple years, but we're seeing a real hunger and thirst for technology now and ways to be more efficient,” Gallagher says. – *Shane Dale and Nicole Rollender*



2. MARTIN KRISTIAMAN

CEO, Wilcom International Pty. Ltd.



Why he's on the list: For more than 30 years, Wilcom International's technology has helped decorators personalize garments. And, Wilcom is Kristiaman's first and only employer; he joined the company in 1980, one week after earning his bachelor's degree in industrial and mechanical engineering. "Our school had installed a numerically-controlled milling machine, and I selected a project where you could see 3-D graphic simulations on a large green graphic screen," he says. "The idea of graphic simulation then was like having a new iPad today. My professor introduced me to Wilcom founders Robert Pongrass and Bill Wilson, and I became their first staff member. I learned programming on the job, and found that software was an exciting tool to solve real-life problems."

In the mid-1990s, Kristiaman earned his MBA and switched to the commercial side of the business, building business with clients and OEM partners in Japan, the U.S. and Europe. He became Wilcom COO in August 2001, and CEO in 2004.

About Wilcom: In 2007, the firm became Corel Corp.'s strategic partner for collaboration in decorated apparel,

particularly for embroidery. The following year, Wilcom released EmbroideryStudio and DecoStudio e1 and e1.5, seamlessly integrating CorelDRAW, plus combining embroidery effects and specialized printing techniques to allow for new decorating ideas. In 2009, the firm released DecoNetwork, an e-commerce solution and online design tool suitable for embroidery, direct-to-garment printing, heat transfers and other imprinting possibilities. Wilcom has 200,000 software licenses in use worldwide; 100,000 of them in the U.S. There are 70 employees located throughout Australia, Europe, Asia and the U.S.

The aesthetic side of the industry: The multi-decoration systems that combine embroidery, sequins, rhinestones and other bling, plus garment printing and other types of printing, will result in an abundance of new decorating ideas. To allow embroidery shops to mix and match techniques any way they can think of (with consistently high quality), "We've opened the technology between Corel's development team and ours to an unprecedented level, and we'll continue in that direction," Kristiaman says.

Going hand-in-hand with the ballooning number of decorating ideas is the ability to do "mass customization, quantity one," Kristiaman says. Over time, consumers have gotten comfortable using the Internet to help themselves in banking, airline and hotel booking, creating photo albums and more. So, "Consumers naturally are gravitating toward

FUN FACT:
Martin Kristiaman
has worked for one
company and one
company only:
Wilcom International.

the idea of personalizing their apparel before they buy, and they can do that through the Web and then place the order with new online decorating business models," he says.

"It's becoming a reality."

The business side of the industry: New decorating ideas and unbounded, online personalization require more sophisticated business software. "DecoNetwork was designed specifically for helping shops operate more efficiently in processing one-off orders, getting approval, managing small-batch production, managing supplies, handling payments and managing shipping," Kristiaman says. "These tools will continue to improve over the next few years, especially as the growth in online retailing accelerates. There will be a need for lower overhead, yet a wider reach in sales, so that embroidery firms can deliver opportunities at an affordable price but still be profitable."

The most interesting aspect of the industry: End-buyers increasingly want apparel and accessories personalized to the point that they don't have to wear anything that's the same as anyone else – and the ability to actually do this is becoming a viable business model. "After 30 years of dreaming about it, this paradigm shift is probably more exciting than anything else that's happened before," Kristiaman says. "Even better for the entire industry is that small orders are best fulfilled locally, not from overseas. So with advancing technology, businesses of any size can compete and thrive." – *Robert Carey*

3. MARTY LOTT

President, SanMar (asi/84863)



Why he's on the list: Lott is the most popular kid at school, a veritable decorating industry BMOG. The head of supplier SanMar is loved by all, and it shows with the many awards and accolades he has received. Lott has been named to the *Counselor* magazine Power 50 four years running, claiming the title of number one in 2008 and number two in 2009. He is often cited in industry publications and sits on panels to discuss customer service and leadership issues.

And, lead he does. Lott has guided SanMar for four decades, snatching up awards and accolades everywhere. In the last four years, the supplier has snagged 80% of the *Counselor* Distributor Choice Awards for apparel and was named Supplier of the Year in 2007. Consistently in the *Counselor* Top 40, SanMar was *Wearables* magazine's

Reader's Choice Award winner in its apparel design contest earlier this year. And it's been a finalist in the *Counselor* Best Places To Work contest two years running.

Awards aside, SanMar also delivers. Its six warehouse locations ensure that decorators receive apparel in a timely manner – 84% of the country can get goods the next day. The 3.25 million square feet of inventory houses 17 retail and private apparel brands. And on top of that, the company has a heart, launching eco initiatives, green products, community outreach programs and adhering to being a socially responsible business. It has attained an ASI 5-Star Supplier rating and had over half a million product clicks in ESP last year.

Soothsayer: Moving forward into a new year, like many, Lott sees positive signs ahead. "I am cautiously optimistic," he says. "The economy's continued slow gains

FUN FACT:

Marty Lott didn't earn a salary during his first seven years working for SanMar.

should lead to growth and the opportunities that provides." 2011 is also a landmark year for the company.

"A high point will be celebrating SanMar's 40th anniversary," Lott says.

Still feeling it: After 40 years in the business (the first seven of which he never earned a salary) Lott is still driven by the people he spends his time with. "The opportunity to work with my sons and the fantastic team at SanMar," is what Lott says excites him most. "For 40 years, we've faced many challenges, but I love this industry and am excited and challenged every day."

Making connections: Lott believes that over the next five years, technology will continue to creep into the way we do business. "It'll firmly remain a people business, but forms of communication will evolve with social media," he says. "And back-end supplier/decorator computer systems will interact seamlessly." – *Joe Haley*

4. GERARD METRAILLER

Senior Director, Product Management Graphics, Corel Corp.



Why he's on the list: CorelDRAW is the number-one graphics application in the apparel and garment space. "We know from our research – and from walking around the

show floor at ISS Shows and at other decorating industry events – that CorelDRAW is on almost everyone's computers," says Metrailler, who is responsible for developing and maintaining Corel's worldwide graphics product strategy. He drives global strategy and development, and executes initiatives for Corel's

chief graphics products: CorelDRAW Graphics Suite, Corel DESIGNER Technical Suite, and Corel Painter. The Graphics Suite product is used widely for print, direct-to-garment printing and Web work, while a strategic partnership since 2007 with Wilcom International has resulted in strong embroidery-focused products as well, including Wilcom EmbroideryStudio e1.5 for multi-decoration.

Industry direction: Metrailler, who speaks fluent French, German and English, sees the budding multi-decoration environment expanding. "People aren't doing just one thing, such as just embroidery, or just screen printing, in their shops anymore," he says. "They're moving into many different artwork and decoration outputs on all types of products."

FUN FACT:

Gerard Metrailler speaks fluent French, German and English.

Product evolution: "Our core products must allow decorators to create the graphics they want with ease, but also with the highest quality," Metrailler says. "They need to be able to get the image that's in their head into the world of embroidery, printing or any other medium."

The most exciting aspect of this industry: "I'm amazed at the outstanding quality of graphics that we're seeing – the sheer creativity that's found across every medium and in every combination," Metrailler says, citing the uptick in direct-to-garment designs as a base layer, with embroidery sewn on top of it. – *RC*

5. RAY TITUS

CEO, EmbroidMe (asi/384000)



Why he's on the list: As the world's largest embroidery franchise chain, EmbroidMe, founded by Titus, boasts 10 straight years of growth since the company began and is spreading across the globe quickly, currently operating in 15 countries.

Backstory: Running a successful franchising company comes naturally to Titus, who wrote an eighth-grade school paper on how to start a franchise company. He worked with his family at printing company Minute-man Press until the age of 23, when he stepped away to start his own sign company, SIGNARAMA. The success of the franchise and his passion for embroidered goods spurred Titus to found EmbroidMe in 2000. Within four years it had opened its 200th store, and in 2007 Titus was honored with the *Counselor* International Person of the Year award. Titus says that EmbroidMe continues to grow rapidly in spite of the slow economy, and with more than 400 retail locations, "We're in a position that once we see a trend or an opportunity, we can act very quickly."

Outside-the-box is the new normal: Titus advises that growth will come to those decorators who innovate. "It's not

business as usual anymore," he says. "We can't take any customers or industries for granted; we have to continue to look for new ways to market, promote and build our businesses." He gives the example of a recent agreement one of EmbroidMe's franchisees made with a college to serve as its onsite producer of embroidered goods. "Rather than just setting up a company store or doing something online, we actually negotiated the contract where we'd have space on the campus and be able to produce the work right at the facility," Titus says. "That's that kind of thinking we need we build and grow with ad specialties and promotional products."

International rising: "The international side of the business is a huge growth area," Titus says. "There are decorating trends coming from everywhere, from Australia to Italy to you-name-it."

Online and brick-and-mortar are both important: While having hundreds of retail locations serving local needs is a crucial element of EmbroidMe's success, offering products online is an important part of the company's draw. "Our franchisees have a very diversified marketing approach," Titus says. "Yes, they're in the local market where they get walk-in or call-in traffic, but they also have a great online presence." — Alex Palmer

6. DEAN F. SHULMAN

Senior Vice President, Brother International Corp.



Why he's on the list: Shulman, who has a degree in biology from Washington University in St. Louis, has worn many hats in the industry, especially in his 25 years with Brother, where he has worked as a marketing director, parts supervisor and website creator. He became Brother's first director of marketing in 1986, and oversaw the company's expansion into printers and multifunctional technology. "My biggest contribution in the '90s was the ability to recognize the cell phone market and the home office," he says, adding that Brother's P-Touch desktop labeler was one of the most important results of his contributions. Nearly five years ago, Brother asked Shulman to reinvent its sewing and embroidery business.

Brother Backstory: Along with sewing and embroidery equipment (used by 4 million people worldwide), Brother offers garment and laser printers, digitizing, lettering and monogramming software, thread accessories and downloadable embroidery designs. Brother created the very first 10-needle, home-based embroidery machine with a camera built into the nose, which allows users to scan and display a hoop's contents,

and the world's first scanning feature built into a sewing and embroidery machine (the Quattro 6000D). Brother's Sewing & Embroidery Division has seen a 12% growth in sales in each of the last two years.

Deep impact: From its inexpensive sewing supplies stocked at Walmart to its embroidery machines that cost five figures, Shulman says one of Brother's primary goals is to turn decorated apparel from a hardware industry into a fashion industry. "We did that early on by aligning ourselves with *Project Runway*, (we're actually integrated into the show)," he says.

Shulman says the recent awards that Brother won for product innovation – particularly those from *Consumer Reports* and *Consumer Digest* – have enhanced Brother's visibility. "It's amazing how many people use those two vehicles to do their buying decisions," he says.

New trends: Shulman says the typical cycle in which decorators bought new high-end embroidery equipment used to be five years. Today, it's about 18 months. He also sees the overall industrial market continuing to be brought down to the consumer level. "So, in the digital printing area, most of those machines are \$20,000 to \$30,000," he says. — SD

7. GLENN CHAMANDY

President and CEO, Gildan Activewear



Why he's on the list: Glenn Chamandy founded Gildan with his brother, Gregory, in 1984 and has since devoted himself to developing it into an international leader of quality branded basic apparel. Holding the position of president and COO until 2004, he took over as president and CEO that year.

Full speed ahead: Gildan saw strong growth in 2010, reporting record quarterly results in August, with net sales for the first nine months of the fiscal year up 28% from the same period the year before. In spite of the current uncertain economic environment, including significant inflation in cotton and other raw materials, Chamandy says that Gildan is “continuing to implement its strategic plan and proceeding with all of its capital expenditure projects for capacity expansion, cost reduction and service improvement.” These capital investments include a new state-of-the-art textile facility in Honduras and the expansion and automation of Gildan’s distribution center in Eden, NC.

Softstyle: As far as products, Gildan is transitioning to a new Softstyle yarn that Chamandy describes as delivering a “soft feel and great value while improving the printability and fabric performance after wash. We’ve also added three new collegiate colors to an already great palette.”

Growing fast: While North America continues to be a crucial market for Gildan, it has been expanding rapidly overseas, particularly in the Latin America and Asia-Pacific region, and China especially. In October, the *Montreal Gazette* quoted Chamandy expressing the belief that the company would double in size within the next five years. “That’s a low-cost, high-volume production platform for building market share in the Asia-Pacific region, and we’re planning to expand that,” Chamandy said at a meeting of nonprofit business association Cercle finance et placement du Quebec. — AP

8. PANG SHIU KEUNG

Director, Lee Shun Computer Embroidery

Why he's on the list: Keung heads a Chinese embroidery factory based in Hong Kong and Shenzhen that has provided embroidery work for many of the world’s largest retailers, including Old Navy, Gap, Abercrombie and Fitch, American Eagle Outfitters, Nike and Disney.

Working for the big guys: Lee Shun Computer Embroidery is anonymous to most, like many Chinese manufacturers that toil in the shadows producing wares for American retailers. More than 400 people work the production line, which operates 24 hours a day using a variety of machines. The focus is computer embroidery.

Overseas options: With more embroidery work being outsourced to Asia every year, Lee Shun has a key role to play as a preferred option of major North American retailers. Keung overseas a model that’s in high demand for these companies, and that business model’s future could have a significant effect on the industry. — Daniel Walsh

9. ANNA WINTOUR

Editor-in-Chief, *Vogue*



Why she's on the list: Styles change frequently, but two things are constant for London-born Wintour: her bob hairstyle, which she has sported since she was 15 (she’s 61 now), and her dedication to the bible of all fashion magazines, *Vogue*. In an interview on *60 Minutes*, designer Karl Lagerfeld called her the most famous fashion journalist in the world.

R.J Cutler, director of *The September Issue*, a movie about *Vogue* and its leader, wrote on *The Huffington Post* that he “observed Anna Wintour day-in and day-out as she single-handedly commanded the \$300-billion global fashion industry. In a business where last week’s fashion shows are already old news, she has been at the top of her field.”

Indeed, the iconic Wintour, who’s the alleged inspiration for the title character in *The Devil Wears Prada* and who has a

variety of tough nicknames including Nuclear Wintour, is the voice of fashion and has earned the respect of fashion designers around the world. She has the power to make or break a designer and has been credited with changing young unknowns into some of the most sought-after names in the industry.

Ripple effect: In an interview with Barbara Walters, Wintour said that the mood of the country affects fashion, and a person can glean the trends and mood of the world by reading *Vogue*. Wintour’s massive influence isn’t limited to the runways of New York, Paris and Milan. Colors, fabrics, embroideries and embellishments are just some of collateral fashion extras that end up making their way into the apparel and accessory landscapes of retail outlets across the nation. And, in 2010, *Vogue* featured all types of embellishments (chiefly embroidery, appliqué and beading) on the designer apparel and accessories in its glossy pages, reigniting consumer interest in stitched garments. — Joan Chaykin

10. TAS TSONIS and BRIAN GOLDBERG Co-CEOs, Pulse Microsystems Ltd.



Why they're on the list: Since the 1980s, Pulse – led by its co-CEOs – has invested heavily in research and development for its art-generation and apparel-embellishment software and owns 13

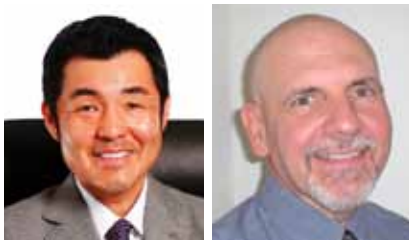
patents, including method and system for automatically deriving stippling stitch designs in embroidery patterns. “One thing I never worry about is the technology,” Tsonis says. “Innovation will continue because our people are motivated to make their products better and simpler.”

Past and future: Pulse has a 20-year relationship with Tajima; impressively, the Tajima DG/ML by Pulse Version 2010 has received the Certified by Microsoft designation for its compatibility with Microsoft Vista and Windows 7, and has 38 new fonts

plus productivity enhancers such as multiple core processing that reduces stitching time by 33% on a 20,000-stitch design. Pulse supplies 15 brands to home embroidery enthusiasts, and owns AnntheGran, an online community of home users that Pulse recently upgraded. The firm has more than 20,000 professional embroidery firms and 300,000 home-based users.

Getting custom: Tsonis sees mass customization as a key trend, and he and Goldberg are focused on automating that process both for embroidery and printing. “We’ve automated a lot of factories for this, but the lifeblood of this industry really is the mom-and-pop entrepreneurs,” he says. “They’ll always need to make a few T-shirts for local organizations, and easy-to-use software and high-quality machines are what they need. We spend a lot of time working on the quality of fonts to satisfy those who only do lettering, all the way up to the major names in this business. We also create our products so that a small shop only has to buy what it needs at that moment, but can add on in the future with no compatibility problems.” – RC

11. TETSUJI YAMAUE and BOB STONE CEO, Barudan; Vice President of Sales, Barudan America Inc.



Why they're on the list: Barudan led the way for the embroidery industry in Japan, building the first industrial embroidery machine 51 years ago. The embroidery machine manufacturer has eight offices

worldwide and serves more than 100 countries, including factories in Japan, France and China. Barudan builds embroidery machines from one to 56 heads in nine-, 12- and 15-needle configurations.

Backstory: Barudan’s founder, Yoshio Shibata, invented the automatic color-change system in 1972, which got the ball rolling for Barudan’s popularity – but it was his high-speed, multi-head embroidery machine creation in 1977 that caused sales to skyrocket, Stone says. This success led to the establishment of Barudan America Inc. in Solon, OH, in 1985.

What decorators want: “Today, there are two types of decorators: established and startups,” Stone says. “Both markets are entirely different in what they want and what they expect. In most cases, the established decorators started with a reputable machine and understand that to get a quality product, they can’t cut corners. The established embroiderers know the importance of service, tech support, parts availability and, most of all, the end product – the quality of the embroidery. Those decorators are the easiest

to sell to; they’ve paid their dues, so to speak, and know what they want and need.”

On the other hand, the startups are a growing part of the industry, which is vital to Barudan’s success, Stone says – but too many of them are focused on price instead of the end product. “I do about a dozen or so trade shows a year, and the newbies make up a large part of the attendees,” he says. “Often, they don’t know what questions to ask. They fail to ask about warranty, parts availability, service and support or resale value.”

The good news, Stone says, is Barudan focuses on educating customers about machines, software and the overall decorating industry. “The bottom line is, we need the startups to become established decorators,” he says. “If we service newbies to the best of our ability, they become very loyal customers. As they grow, they buy more machines, software, parts and supplies.”

Looking ahead: Barudan has a few new machine updates coming out in the first quarter of 2011, Stone says. “Of course, stitch quality is of the utmost importance,” he says. “The generation of sewing head that we currently produce has been around in some form since 1996. We’ve tweaked it to make it better, stronger and quieter. Most folks probably aren’t aware that Barudan embroidery machines are still hand-built and assembled, not much differently than the way Mr. Shibata did it 50 years ago.”

On a positive note, smaller shops are beginning to buy machines again, Stone says. – SD

12. TED STAHL

Executive Chairman of the Board, GroupeSTAHL



Why he's on the list: The head of the global group of companies under the GroupeSTAHL umbrella, Stahl transformed his family-owned, Midwestern die-cut letters and numbers business (founded by his grandfather, A.C. Stahl, in 1932) into a multinational supplier of apparel decorating systems and supplies. Now, GroupeSTAHL is the largest international manufacturer of heat presses and CAD/CUT materials. It has introduced a number of patented decorating technologies to the industry, including Thermo-FILM for athletic jersey personalization and WaterJet technology for custom-cutting twill. It also launched the industry's first free online art creation software (CadworxLive.com). GroupeSTAHL has educated thousands through the industry's longest-running traveling seminar workshop program.

Staying power: Stahl says his group of companies has been able to remain at the top of the decorated apparel manufacturing business for nearly 80 years by constantly adapting to its decorating customers' changing needs. For example, "The computerized WaterJet technology that we pioneered was developed to enable the cutting of twill materials without fraying and is symbolic of the answer to the demand from custom-

ers to provide custom-cut logos in any quantity," he says. "Our custom-cutting division today is still answering that demand, using a wide variety of cutting methods including water jet, laser cutting and blade cutting."

On the other hand, Thermo-FILM, which was introduced 40 years ago, is still a top product in the industry, according to Stahl. Part of the reason for that is its "green" aspect, since it's manufactured with no PVC (used to make vinyl), which was the predominant choice for letters and numbers back then. "Today, it's hard to find any place in the world that isn't using it in some form, since it's available not only in die cuts, but also by the roll for cutting," he says. Based on all of GroupeSTAHL's advancements in the sports industry, Stahl will be inducted into the National Sporting Goods Association Hall of Fame in May.

Looking ahead: "Decorating methods that are faster, better and cheaper, whether that's digital transfer production, improved direct-to-garment printing, improved laser transfer papers or improved cuttable materials," Stahl says. "More and more businesses will offer digital design decorating services. Everyone will have access to the same technologies. It'll be the people who turn those technologies into custom apparel sales who'll be leading the way." – SD

13. IRA NEAMAN

President, Vantage Apparel (asi/93390)



Why he's on the list: When Neaman talks, people listen. That's why the venerable head of Vantage Apparel is a driving force in the apparel world. For five years he's been named to the *Counselor* Power 50, that's on top of being named the *Counselor* Person of the Year in 2003. In addition, his hands-on training and education sessions at industry trade shows are a must-attend for anyone serious about selling branded apparel. It's no wonder he's sought out by editors and writers looking for comments on everything apparel-related.

Aside from his personal accolades, the company Neaman helms is annually in the top 40 in revenues in the ad specialty

industry and has won numerous *Counselor* Distributor Choice and *Wearables* magazine Design Awards. Vantage also has attained the coveted 5-Star Supplier rating in ESP, where it also had nearly 62,000 product clicks last year. The company can be a one-stop shop for apparel purchasers, as it offers cutting-edge decoration, with 1,250 embroidery heads plus digital printers, laser cutters, screen-print machines and more.

Highs and lows: "The high point in 2011 will be when the shortage/speculation of cotton ends, the price of cotton starts falling and the mills and factories can acquire cotton and fabric at lower costs," Neaman

FUN FACT:
Ira Neaman has been on the *Counselor* Power 50 list for five years, and was the *Counselor* Person of the Year in 2003.

says. "The low point will be if the dollar weakens."

While everyone has been riding a wild ride the last two to three years, the idea that the end is in sight is appealing to Neaman. "That we have the promise of a slow, steady economic growth excites me," he says.

Crystal ball: "There will always be something new due to technology and lifestyle, with elements borrowed from the past," Neaman says. As for new innovations, "Mobile apps will get significantly faster with more touch screens and more common use of voice recognition," he says, and believes that future challenges include the continued shortage of skilled workers. – JH



14. TOM MYERS CEO, Broder Bros. Co. (asi/42090)



Why he's on the list: Myers heads the largest *Counselor* Top 40 apparel supplier firm in the ad specialty industry. He is a perennial member of the *Counselor* Power 50 list, ranking in the top 10 in three out of the last four years.

With eight distribution facilities, Broder is able to reach 80% of the U.S. with next-day shipping. Its 2.5 million square feet of inventory includes 35 brands and 800 different products, and continues to grow. "We're offering full lines from our major suppliers," Myers says. "We're introducing Ashworth – the best 'off course' golf brand – to complement adidas – the best 'on course' golf brand." In 2009, the company had 421,000 ESP product clicks.

2011 in a nutshell: To get the economy rolling businesses need to hire, although Myers sees gridlock ahead. "As buyers and sellers of apparel, we're going to be on a roller coaster," he says. "Talk about high points and low points – I'd not be surprised to see price increases in early 2011 and price reduc-

tions by late 2011, once the impact of additional acres being devoted to producing cotton is understood in the marketplace. The prices of polyester and every other apparel fiber will be following cotton – both up and down. Interestingly, the price of apparel won't scare off customers, although there will be grumbling about high prices."

FUN FACT:

Actor Charlie Sheen is a fan of the Devon & Jones Isla Camp shirt carried by Broder Bros. Co.

Challenges abound: "The biggest challenge over the next five years will be keeping up with the demand," Myers says. "The market for decorated basic apparel continues to grow. The embroidered segment is growing faster. New technologies and new apparel styles are allowing family-operated business to produce great-looking stuff.

"One challenge is dealing with the low capacity utilization of decorating equipment. Contract decorators need to price more competitively and serve customers better to avoid living in a land of too many machines chasing too few orders."

His favorite industry-related Tweet: "It was from my sister-in-law, who lives in Hollywood: 'I just saw Charlie Sheen buy a Devon & Jones Isla Camp shirt in Malibu.'" Myers says. – JH

15. FRANÇOIS LESAGE Embroiderer and Founder, House of Lesage



Why he's on the list: Lesage is regarded by many as the greatest living embroiderer. Now in his 80s, Lesage's hand embroidery has been prized in France's haute couture for decades.

Fifty years at the top: Lesage has been called the "king of embroidery" and "the last embroiderer," but whatever you call him, if you're in the embroidery scene, you should know him. He began his trade

in the late 1940s by traveling to the U.S. to open a shop on Hollywood's Sunset Strip. His embroidered designs adorned such famed beauties as Ava Gardner and Marlene Dietrich and were in demand among designers such as Yves St. Laurent and Christian Lacroix. Today, France's top designers still seek Lesage's work. Chanel acquired his fashion house, Lesage Paris, eight years ago, and new designs continue to emerge from there.

FUN FACT:

The designs of François Lesage, the "king of embroidery," once adorned Ava Gardner and Marlene Dietrich.

Likewise, his work has been at the center of exhibitions in New York, Tokyo and Los Angeles.

The first family of embroidery: Lesage's family has been in the embroidery trade since the 1800s, and that may continue for many more years, though perhaps not in France. Lesage's son, Jean-François, has opened the House of Lesage in Madras, India, where a great deal of the world's embroidery work has migrated. – DW

16. HAJO VOELLER

President and CEO, Madeira USA Ltd.



Why he's on the list: President of Madeira USA for seven years, Voeller was selected to oversee Madeira Germany's U.S. division due to his years of previous executive experience in sales and marketing. Voeller continually has his fingers on the pulse of the industry, and believes that increased reaction time will be the most critical trend for embroiderers in the near future: "The ability to react sooner and faster to the requests of your customers will be the differentiator between businesses that are ahead of the pack and those that are trailing behind," he says. "You'll see this, again, in the specialization that will enable some companies to offer either small or big quantities of goods in record time."

FUN FACT:
Thanks to a function on Madeira's website, embroiderers can actually calculate the cost of a thread break.

Backstory: With the most specialty threads on the market, Madeira estimates that its thread is used by one-third of all embroiderers. The company recently added Frosted Matt thread and its Automated Frame System and plastic film frames, designed for badge and emblem creation. On its website, www.madeiramart.com, the company continues to add new, interactive features, including a function that allows an embroiderer to calculate the cost of a thread break.

Specialization rising: Voeller expects that in 2011, embroiderers will continue "to purchase goods based on specific orders, rather than investing in inventory. I'm a big believer in really targeting your markets, and I also see specialization as a key for running a business successfully in the coming year," he says. "Specialization will be a key to survival, as decorating companies target their work to certain customer groups." – AP

17. MIKE ANGEL

Vice President of Sales and Marketing, Melco



Why he's on the list: Angel, who has been in the decorated apparel industry for 12 years, joined Melco in February 2005. He was previously the director of sales and marketing for Pantograms from 1998 to 2005.

Melco, which created the industry's first digitizing technology (currently DesignShop v9 Desktop Digitizing Software), was founded in 1972 as a subsidiary of Oerlikon; it has more than 100,000 clients. The company offers a variety of embroidery equipment, including AMAYA XTS commercial modular single-head machines and networkable multi-heads, and the MelcoJet G2 direct-to-garment printer.

Award winner: Melco was recently awarded an International Trade Award by the U.S. Department of Commerce for opening new international markets. "Melco benefited from trade conferences, market research and matchmaking services pro-

FUN FACT:
Melco has big-name clients like Disney, Williams-Sonoma, New Balance and ZAZZLE.

vided through the Denver U.S. Export Assistance Center and overseas commercial specialists of the U.S. Commercial Service," Angel says.

Keeping a high profile: Melco has several big-name clients, including Disney, Williams-Sonoma, New Balance and ZAZZLE. "Big brands like Disney want to meet the demands of their customers, and a big part of the demand is personalization," Angel says. Melco is very focused on helping companies offer mass personalization via its LiveDesign Fusion e-commerce personalization configurator and Personalization API software as a service.

Predictions: "Mass personalization is the future," says Angel, who notes that Melco trains its users on its own campus, www.melcouniversity.com. "Internet retail sales will continue to play an important role in the decorated apparel industry. With that said, the capability to offer decorated apparel online, and produce and deliver personalized products on demand, is the key to success in the next five years and beyond." – SD

18. SCOTT COLMAN

President and Founder, SWF East



Why he's on the list: Since founding SWF East in 1999, Colman quickly guided the embroidery equipment manufacturer to being a leader in its market category with its additional product lines of direct-to-garment printers, screen-printing equipment and digitizing software. He had worked in the industry for 10 years before founding SWF, including at the production shop Uniform Nametape and serving as the general manager at Pantograms.

Take a deep breath: Colman is upbeat about the near future. He predicts that “2011 will be a breath of fresh air,” after two very challenging years. “Many of our customers are feeling the upswing starting to happen in the industry,” he says. “As consumer spending seems to gain some confidence, things are normalizing, which helps people’s confidence in investing.”

Direct and customized: Colman expects direct-to-garment printing to significantly evolve over the next few years. “All decorators who want to be viable in this marketplace will need to address the concept of mass personalization, and the

direct-to-garment printing concept is the horse that will be ridden into this arena,” he says. Another shift those in the embroidered apparel industry will want to watch out for is mass customization. He sees this not only in terms of personalized goods, but also “custom prints that are digital and variable in size, color and data.”

The future: In 2011, SWF East will be introducing a new line of heat presses to the market made by the company Drucktech. Colman predicts that this full line of feature-rich presses “will change the way the market looks at heat presses,” but that’s all he’ll say about it for now. — AP

19. MIKE RHODES

President, Bodek and Rhodes (*asi/40788*)



Why he's on the list: *Counselor* magazine Top 40 supplier Bodek and Rhodes is a stalwart apparel company – five warehouses, 37 brands, socially responsible and CPSIA-compliant; it’s no wonder that so many decorators turn to it for blank goods. In fact, it had 182,000 product clicks in ESP last year. Rhodes, a second-generation family member, is regularly named to the *Counselor* Power 50 list and is highly regarded as a person with influence among his industry peers. That clout comes from steering the third-largest apparel supplier in the U.S.

The customer-minded supplier added personnel when others were cutting staff (noting that a loss in staff affects clients) and it has bulked up its customer service tools, adding free custom website designs and a virtual apparel-design studio.

In addition, Bodek and Rhodes has a dedicated staff, including industry educator and *Counselor* Hot List member Marc Held, who

was also named the *Counselor* Supplier Rep of the Year in 2007.

Customers come first: “Customers have told our sales folks that they’re upbeat and are feeling a lot of activity from their customers,” Rhodes says. However, he does offer one caveat: “Cotton costs could throw a wet towel on the market if costs continue to increase and cause prices to increase too high.”

And, staying true to Bodek’s focus on its clients, Rhodes says the company will continue to aid them in their daily efforts. “We’re rolling out a lot of Web offerings and new technology to help our customers grow their business,” he says. “Our new products for 2011 are exciting and are led by the addition of Next Level Apparel.”

Looking ahead: “We expect there will be consolidation at all levels of the supply chain, from manufacturer to decorator,” Rhodes says. “Technology will continue to help our industry be more productive and profitable. The decorated-apparel industry is strong and will remain strong. We don’t expect any challenges that will be difficult for the industry to overcome – our industry is filled with entrepreneurs who’ve always adapted and succeeded.” — JH

FUN FACT:
Bodek and Rhodes
boasts five warehouses
and 37 brands.

20. CRAIG MERTENS

President and CEO, Digital Art Solutions (*asi/14970*)



Why he's on the list: Brother-and-sister duo Craig Mertens and Nicole Mertens have been in the decorated-apparel industry since 1982, and they've been busy. Founded in 1999, their company, Digital Art Solutions (which acquired Smart Design Inc.) has experienced an average annual growth of more than 10% over the last three years.

The diverse product line includes digital art content, graphics software (Smart Designer add-on graphics software for CorelDRAW) and apparel decoration systems. "We've introduced more than 20 new products and services to the industry, including two decorating processes in our Rhinestone System and SmartGarment Printing System," says Craig, who notes that his U.S. client base exceeds 60,000 users.

High points for the industry in 2011: Direct-to-garment and

rhinestone systems. "Since 2007, rhinestoning has grown like crazy and it's becoming a standard thing in everyone's decorating systems," Craig says. "You used to have to buy transfers to do this, but now you can do it yourself with a vinyl cutter, materials and the software."

Other trends driving growth: As decoration processes have gotten more complex, people have relied more on stock artwork and productivity software, which plays to the firm's strength. "Digital printing has gotten more complicated, so shops need better tools to produce patterns for that," Craig says.

The industry in five years: Most shops will want online content delivery for Web stores and other purposes, so Digital Art Solutions will eventually distribute content via the cloud rather than CDs and DVDs. "This will require us to reconfigure our delivery method, and make both capital investments and training investments to adapt," Craig says. — RC

21. ZAHOOR KAREEM

CEO, CafePress (*asi/43167*)

Why he's on the list: Under Kareem's direction, CafePress has led the way in the T-shirt revolution, providing custom designs on T-shirts on a wide-scale format (and largely online) before most others got in on the act. It boasts a user-created catalog of 250 million unique shirts and other products, and the website averages 11 million unique visits per month. The company is tied in to a network of thousands of independent decorating shops.

Why it matters: Aside from the virtual CafePress shop, which includes an online storefront, the firm also provides website hosting, order management, fulfillment, payment processing and customer service. More than anything, though, CafePress offers a voice for the connected and disconnected alike.

Artist outlet: CafePress allows its users to create and sell a wide variety of products on the Web, making it easy for artists to sell their own wares without having to physically set up a brick-and-mortar operation. Because of that, over 2.5 million independent shops have been opened on CafePress since its founding in 1999.

The challenge in 2011: "The economy will continue to be a challenge and we believe it will force a new breed of competition," Kareem says. "As entrepreneurs, this is an exciting prospect for CafePress." — JH

22. PHIL RUBIN and ERIC RUBIN

CEO; President, Blue Generation (*asi/40653*)



Why they're on the list: The Rubins run a multinational company with production facilities in Egypt that handle all aspects of the apparel manufacturing process. They earned the title of *Counselor* magazine Supplier Family Business of the Year in 2009.

Retail to manufacturing: What began as a retail venture has morphed into a successful and growing promotional division that recently broke into the *Counselor* Top 40. The company's success can be attributed to many things, including being on the leading edge of the women's apparel trend and reducing its production cycle by 60 days. The company has weathered the poor economy and is now seeing significant growth. "Our sales are up double digits this year and we foresee that this will continue into 2011," Eric says. "The biggest challenge the industry will face is rising prices overseas on every level — raw materials, labor and shipping. Maintaining inventory levels will also be a challenge due to the current turmoil in the textile markets."

Everything but the kitchen sink: Blue Generation touts a comprehensive business. "Our operation is totally vertical, from spinning the thread to dyeing the fabric to manufacturing the finished product," says Eric. "This also includes producing our own labels, hangtags, buttons and thread. This result is total quality control of the end product. In addition, we stock millions of dollars of dyed fabric and finished garments overseas in a warehouse the size of a football field." — JH

23. CHRIS WALDICK

Founder and President, FastManager SMS



Why he's on the list: In 2000, five years after starting a screen-printing firm, Waldick created what has become the most-used business-management software for small decorators, with more than 1,200 users. Revenue growth for the company has been more than 25% each year since 2007, and 20% of new business comes from shops that were using competing products, says Waldick, who's a member of the Embellished Activewear Standards Initiative.

Trends causing the firm to evolve its products: With technology lowering the barriers to entry into this business each year, "Smaller shops are definitely going to grow over the next couple of years and fuel this business," Waldick predicts. For instance, it used to be that shops had complicated pricing systems, but with today's technology allowing new decorating processes and faster turnarounds, the software needs updated pricing engines that acknowledge this reality.

Also, "more point-of-sale opportunities, having multiple physical and online stores, interacting across the Web to transfer data – all of this will affect our products," Wal-

dick says. "We're moving toward having most data reside on the Web, and people accessing it from whichever devices they're using at that moment. We must see how mobile technologies will be used and how our products will need to work on all of them."

On keeping the right focus: "This economy has given us many new customer opportunities," Waldick says. "Our bread and butter is a network application, so we don't get completely caught up on the newest, bright shiny objects and what they might be able to do in the future. We stay focused on what people are doing today, and making those things easier."— *RC*

24. DOV CHARNEY, TOM CASEY and MARTY BAILEY

CEO; President; Operations Manager, American Apparel (*asi/35297*)



Dov Charney

Why they're on the list: American Apparel is biggest clothing manufacturer based exclusively in the U.S. Charney founded the company in 1989 and dove into the custom-apparel business. Bailey joined in 2002 and tripled American Apparel's production by remaking its operations model.

Still standing: American Apparel took a hard hit when the global recession hit just as the company was expanding into retail, opening more than 285 stores over the past six years. Stocks tanked, credit lines dried up, controversies arose and naysayers gleefully predicted the demise of the controversial Charney and his

company.

But American Apparel is still standing. Its British lender came through with new credit terms, billionaire Ron Burkle bought

into the company and stocks rebounded. Meanwhile, Charney and Bailey haven't faltered in their stance on domestic manufacturing. The company's ability to survive can serve as an example for others considering domestic manufacturing.

A-team: Charney gets most of the publicity as the company's controversial and out-

spoken young founder and visionary, and it's his ideas and willingness to allow a creative workplace that enabled the vibrant American Apparel brand to flourish. But if not for Bailey's skillful operations management, the company might still be just another niche designer instead of the big operation it is today. The two men balance and complement each other, and they both recognize the need to embrace change in the marketplace. "You've got to be versatile," Bailey says. "You've got to get out of the paradigm of, 'This is what we do, and this is how we do it.' It has to be about what we need."

With the addition of former Blockbuster CFO Casey as American Apparel's president, Charney and Bailey are once again hearing and responding to changing demands by bringing in a financial guru to fill a perceived gap at the company. — *DW*

FUN FACT:
American Apparel is the largest clothing manufacturer based exclusively in the U.S.

25. OWEN DUNNE

Director, Robison-Anton Division,
American & Efird Inc.



Why he's on the list: Dunne oversees the Robison-Anton division of American & Efird, widely considered to be the number-two threadmaker in the industry. He has worked with American & Efird since 1996, when the company

acquired Threads USA.

Ups and downs: For Dunne, the high points of the past year include the industry's growing ability to stay stylish with its "ability to reproduce fashion trends in small embroidery business." On the other hand, he says, "Consumer concern over hazardous content in products is growing. What are we most excited about? This concern of hazardous content is driving consumers to pay particular attention to the materials going into a decorated-apparel product." He says Robison-Anton is well-positioned to allay these concerns: "Our North American customers can rest assured that the embroidery threads they're receiving are Oeko-Tex Certified and made in the U.S."

Looking local: The global reach of American & Efird and its Robison-Anton division is balanced by a strong focus on local markets. "As this market seeks to reproduce – and in some instances, create – new fashion trends, thread suppliers must be ready," Dunne says. He cites two trends for 2011: "Going finer and more detailed in logo, and going heavier and more unique with decorative embellishments." – AP

27. SUSAN RITCHIE, ARCH RITCHIE and JENNIFER COX

Co-founders, National Network of Embroidery Professionals (NNEP) (asi/187622)



Why they're on the list: The Ohio-based trade association boasts more than 1,600 members; through its events, advice and logistical assistance, as well as member benefits and savings, NNEP continues to be an asset to the commercial embroidery industry.

Backstory: After years running an expanding commercial embroidery business, Susan and Arch Ritchie, along with their daughter Jennifer Cox, created NNEP in 1996.

Made in America: Susan expects to see an increasing demand for American-made garments in the coming year: "As consumers become more and more aware of the major loss of manufacturing within this country due to the overseas market, there will be an increased commitment to products manufactured within the States," she says. "The cost difference will always be a factor, but with time this will begin to close, making USA products more competitive."

New technology: Further in the future, Cox says that, "What's next depends on what new technologies bring to the table. Digital garment printing was only the thing of someone's imagination less than a decade ago. Combining digital garment printing with complex embroidery is still in its infancy. There's so much possibility there – I think some exciting things will come from that front over the next five years."

Fashion forward: Fashion will play a role for embroiderers who have a specialty niche, according to Susan. "They'll want to have the ability to produce multiple application options for their customers," she says. "The tween customer may prove to be a market that needs to be considered more aggressively by the garment suppliers." – AP



26. ROBERT KRONENBERGER

CEO, American Needle



Why he's on the list: Kronenberg's family-owned company was the first to sell embroidered baseball caps for retail purchase. American Needle won a high-profile Supreme Court case against the National Football League this year that will shape the business of professional sports (and maybe the sports-apparel business).

Changing American fashion: American Needle was just another hat company until it revolutionized men's fashion in 1946

by introducing the first retail baseball cap embroidered with a team logo. That first run of Chicago Cubs hats sold out in one day, and American Needle kept producing them. "At the time, there was no competition," Kronenberg says. Sixty-four years later, the cap is firmly entrenched as part of American fashion and has spread to countries where baseball isn't even played. American Needle remains a part of it but has expanded to other apparel.

"The most important case in sports history": Kronenberg showed the same kind of vision as his forebears when he gave the go-ahead to take the NFL to court over its move to exclu-

28. JOYCE JAGGER

Owner, The Embroidery Coach



Why she's on the list: Embroidery Tips & More, Jagger's busy Binghamton, NY-based training and consulting firm for embroidery business owners, includes onsite and phone consultation for embroidery businesses of all sizes, a resource-packed website (featuring more than 150 videos and a tip of the day that she e-mails to her students, as she prefers to call her clients), monthly webinars and live phone chats, e-newsletters, blogs, and now a just-published book that's already generating a lot of buzz: *The Truth About Embroidery Business Success*. Jagger, who has 90 students at any one time, estimates she has trained more than 500 decorator business owners.

High-profile job: Jagger, who started her own embroidery business in 1978 and sold the 36-head company in 1998, has recently been helping to incorporate embroidery into Rhode Island School of Design's (RISD) Textile Department. "I've been working with Anais Missakian, head of RISD's textile department, and *Stitches* Editor Nicole Rollender, to add embroidery and digitizing to the curriculum," she says. "This is an exciting assignment for me. At this point, there are 14 senior and graduate students who are eager to learn embroidery and digitizing, and it makes me happy to be the one to teach them."

Happy New Year: Jagger says that based on feedback from her clients, sales in decorated apparel are going strong in fourth-quarter 2010. "They're a lot busier and are making more sales this year than they were last year," she says. "It's going to keep on increasing. This is supposed to be a 'down economy,' but if you offer high-quality products and excellent customer service, you're going to stay busy. I'm looking forward to 2011 – I have more students joining me at this time than I have in the past few years. Embroidery business owners are hungry for information." – JC

29. CORY DEAN and EMILY CHENEY

Digitizers, Artwork Source (asi/36901)



Why they're on the list: This Tacoma, WA-based digitizing firm is a 24/7 operation with a staff that includes 80 digitizers and 40 vectorizers. Dean, who started the company, took a \$25,000 loan from his parents and grew the digitizing company to more than \$10 million

in revenue in a very short time.

Dean says his company experienced 10% growth in 2009 and plowed \$500,000 into a new website. Just about 17% of Artwork Source's revenue comes from outside of the U.S., "so going global is part of our way of life," he says. "We just completed a new building overseas."

Star Digitizer Cheney works on complicated projects and trains the company's customer service staff. "I like working in this industry because there's always something new to learn," she says, "and there's a challenging element of creative problem solving when digitizing for embroidery – especially with some of our photographic-style designs." For its top-notch digitizing efforts, Artwork Source has won digitizing and design awards from *Stitches*, *Impressions*, *Printwear* and *CorelPro* magazines.

Going global: Dean sees three production models: One is to only use overseas labor from China or India. "These aren't a good fit for most people since communications, billing and security can be risky," he says. "Then there's the purely American model, but it's difficult to create the infrastructure needed to offer top quality using only U.S. staff and resources. Lastly, there's the hybrid system that we use, which we've found combines the best of both worlds and allows us to offer the best service."

Changes: Dean sees a change in the way people shop. "More people want products that appeal exactly to their personal style," he says. "They don't want to compromise by accepting an item that was one of 100,000 pieces run overseas. Companies like CafePress, NikeID and Zazzle will continue to grow at breakneck pace as they cater to those specific tastes. Machine companies will sell a lot of one-head machines and almost no 12-heads. And, the fastest-growing decorating companies will be the ones that sell one-off items at a high price and use technology to organize it with little labor." – JC

live licensing in 2000. Ten years later, the case went before the Supreme Court in what *Sports Illustrated* called "the most important case in sports history." At stake in professional sports was a de facto anti-trust exemption for the NFL and other pro sports leagues that would have drastically remade the way several billion-dollar pro sports businesses do business. American Needle won a stunning 9-0 victory.

But that case isn't over, as it's headed back to the district court level for further rulings on other parts of the case that could similarly remake the sports-apparel business. If American Needle wins at the lower level, sports apparel businesses could have dozens of new markets to do business in, because they'll be able to more freely do work for individual professional clubs. Kronenberger isn't backing down after one win. – DW

30. RAY MATERSON

Embroiderer, Social Activist and Author of *Sins and Needles*



Why he's on the list: Materson was serving a 15-year prison sentence in Connecticut for armed robbery when he started learning to machine-embroider. It changed his life, and *Sins and Needles*, the book he wrote about his experience, has a high-enough profile that it could prompt state prisons to take a closer look at embroidery.

From addict to artist: Materson was convicted in 1987 of armed robbery and kidnapping after he carjacked and robbed someone for cash to feed his cocaine addiction. He spent over seven years in jail before making parole in 1995. While

in prison, he reflected on his life; one good memory was of his grandmother embroidering on the front porch. He picked up embroidery by handcrafting a hoop from a food container and unraveling socks to use for thread.

Today, Materson sells his embroidery as art, sometimes working on commission, and is a case worker for the Community Justice Project, a Vermont-based organization that helps children of prison inmates and ex-cons. He also speaks publicly about the role that prison and embroidery played in turning around his life, and some say he's an example for how embroidery can be used to help rehabilitate felons.

London calling: After his book was published, Materson drew a good

FUN FACT:
Ray Materson spent eight years in prison, where embroidery turned his life around.

amount of publicity from mainstream media, but strangely enough, U.S. prisons didn't come calling. Rather, Materson heard from a British organization that promotes embroidery for prisoners. He thinks both artistic embroidery and mechanized embroidery-machine shops can help inmates. "I think any jobs in prison is a good thing," Materson says. But it's the handcrafting that prompts thought and introspection, and this is what he promotes most. — *DW*

31. MICHAEL SAVOIA

Owner, Villa Savoia Inc.



Why he's on the list: Savoia creates trend-setting embroidery and appliqué work for the interior-design industry. The Hollywood, CA-based business owner has worked with top interior designers such as Michael K. Smith, Thomas Pheasant and French master Jean-François Lesage. His creations have been featured in popular magazines such as *Architectural Digest* and *Interior Design*. His prized pillows, linens and curtains are showcased in the homes of celebrities and other well-known locations, like Frank Lloyd Wright's Hollyhock House in Los Angeles.

Traveling man: "I've started traveling to major cities across the country to visit clients and potential clients in their offices," Savoia

says. "Pictures are great, but they don't really connect the way a personal sales presentation can. Embellished fabric is like candy to interior designers, and seeing the work up close makes it have great impact."

FUN FACT:
Michael Savoia's pillows, linens and curtains are showcased in the homes of celebrities and Frank Lloyd Wright's Hollyhock House.

Gaining attention: One of Savoia's goals is getting noticed by both clients and the media. "I'm currently interviewing public relations specialists who can help get my work in the public's eye," he says. "My goals include creating more business; reaching out to college students to show them the potential of embroidery in the fashion, interior design and textile curriculum;

and to promote embroidery by organizing a traveling exhibit of the work of Jean-François Lesage — who's the creative head of perhaps one of the most important decorative arts embroidery companies in the world." — *JC*



32. CHASE ROH, PH.D. President, CEO and Founder, AnaJet Inc. (asi/16000)



Why he's on the list: Roh is CEO of the 27th-fastest-growing private company in the U.S. AnaJet has grown at an annual rate of nearly triple-digit percentages during the last three years. With 3,000 U.S.-based customers, it holds the largest market share in direct-to-garment printers in America, and it is the primary supplier of direct-to-garment printers to decorators and distributors.

Wind at its back: AnaJet's growth rate was in the triple digits until the October 2008 financial crisis – but the company has still grown at “healthy double-digit rates” since then, according to Roh. “Our direct-to-garment printing is a highly demanded new class of equipment,” he says. “Despite the recession, most of

our customers are doing well, and they're ordering both the printers and supplies.”

Knowledge is power: AnaJet has taken full advantage of the recent direct-to-garment explosion, largely because it has taken the time to pass on knowledge about the printers to promotional product distributors, Roh says. “When many promotional product distributors came to us a few years ago, most did not have any printing or production experience,” he says. “We developed the proper training and support programs for digital apparel printing for both decorators and distributors.”

Looking ahead: Roh says AnaJet is expanding its engineering and marketing departments to help clients expand their businesses, as well as beefing up its online efforts with webinars, social media

FUN FACT:
AnaJet is the 27th-fastest-growing private company in the U.S.

and streaming videos. Higher-speed printers are forthcoming, too. And the company will continue its growth, Roh says, since the decorated-apparel business isn't typically impacted by general business cycles. “We expect that the apparel-decoration industry will do well in 2011, even if the economic recovery continues to be weak,” he says.

The power of social media: Roh expects the role of social media in the industry, including Facebook and Twitter, to expand. “Our most effective Tweet was soliciting visitors to come to our booth at the recent SGIA Expo – the turnout was tremendous,” he says. “Using social media these days helps our customers stay current with what's new at AnaJet, and also with current events and news within the decorated apparel industry.” – SD

33. JIMMY LAMB Manager of Communication, Sawgrass Technologies



Why he's on the list: Lamb, author of *The Embroidery Business Survival Guide*, is one of the industry's most well-known and entertaining educators, hosting at least 80-plus seminars a year at trade shows and other events. “My philosophy is,

in order to properly educate, you have to get their attention, and part of that is entertaining them. If you have a little bit of fun, you're more likely to be engaged and educated,” he says.

Lamb has worked in top marketing roles for other industry companies, including Hirsch International. In a former life, he ran a successful embroidery shop with his wife.

Knowledge is power: Sawgrass has been an innovator of sublimation inks and supplies, and has many high-visibility sublimation customers, such as Dell. Lamb says Sawgrass is constantly refining its inks and drivers for its printers, but a big part of the sublimation movement is educating the public. “Especially with

embroiderers, they don't really know what sublimation is,” he says. “We're really trying to educate people that there's a lot of inexpensive digital technology they can bring into their shops.”

FUN FACT:
Jimmy Lamb hosts at least 80-plus seminars a year at trade shows and other events.

Predictions: Many of the more successful decorators are performing multiple applications under one roof to attract more customers, Lamb says. “If they want to add digital heat transfers or sublimation, some of them are very low-cost to bring in, and it gives them a whole new layer of things to offer their customers,” he says. “It's far easier to sell to an existing customer than to acquire a new customer.”

In terms of overall economic success in this industry, Lamb says he knows people who are extremely busy and people who aren't. “I've always said that true entrepreneurs will always be OK,” he says. “They look at what the current market condition is and adjust. Others twiddle their thumbs right out of business. Microsoft, Burger King, Hilton – they were all started during a recession. Those are important lessons. Things aren't going to go back to where they were; they'll just go in a different direction.” – SD

34. VASILIS THOMAIDIS

President and CEO, Compucon



Why he's on the list: Since 1982, the Greece-based firm has produced a variety of embroidery and laser-engraving software under its own brand as well as OEM brands. Its products cover each level of the industry: the home market, entry-level professional shops and large shops; 5,000 systems are installed worldwide.

“My driving force has always been combining the two fields that I love – software and electronic design – to develop exciting new products and solutions,” Thomaidis says. “This was the reason I went into the business 27 years ago, and it is still what drives me. Developing a solution that will help your customers do their work in an easier, faster and cheaper way is very fulfilling.

How the firm is adapting: Compucon, which has \$4.7 million in annual revenue despite the slow economy, has steadily grown its overall position in the apparel-decorating industry, but not always in the same segments. We’ve been moving more of our focus toward emerging markets as the industry shifts more globally and new opportunities come up, Thomaidis says. He notes the merging of embroidery and printing, and as such, is delivering free tools to integrate with graphic software packages.

Home is where the money is: Thomaidis says professional segments haven’t been investing as much in new hardware and software, and there will be further emphasis on consumer-oriented applications and solutions. As a result, he says, “Households will further move into customized apparel decorating. The evolution of tablet-style computers will be an important factor in this growth; they’ll become another household appliance. So, software solutions especially adapted to them must be developed.” – RC

35. MARK VENIT and JAY MALANGA

Chairman; President, ShopWorks



Jay Malanga

Why they're on the list: In 1995, Malanga’s JAM Grafx formed a new company with Venit’s Apparel Graphics Institute, a leading management/marketing consultant within the industry. Renamed ShopWorks, the firm released OnSite in 1998; this industry-specific software handles marketing, pricing, sales, administration, accounting and finance. Later products include OrdersLink, a Web-based order-status application; and PromoStores, a Web-based e-commerce system to streamline order fulfillment. The firm serves more than 600 decorators, manufacturers and distributors – with revenues ranging from \$300,000 to \$100 million – and adds about 40 more annually. Venit just completed a book titled, *The Business of T-shirts: An insider’s roadmap to successfully selling and marketing decorated apparel.*

2011 outlook: Even in slow economic periods, Venit says, decorating remains in demand because companies want and need different ways to present their logo, design or message. “Decorated apparel’s place in Western society is locked in – it’s ubiquitous,” he says. “Its use for company uniforms or as identification and as a morale-builder among members or participants has held up. The athletic sector is always pretty stable, too. Buyers occasionally trade down one level, but that’s the exception. And in this current economic cycle, that possibility is behind us.”

Next-generation products: “People don’t have to be locked down to a desktop or weighed down by a laptop – they can walk the production floor with an iPad to record and access information, scan barcodes and more,” Malanga says. “We’re adapting our products to the touch-screen interfaces, too.”

Major challenges: Malanga says distinctions between embroiderers, screen printers and advertising specialty distributors are disappearing, and that ShopWorks must strive to deliver benefits for these changing businesses. “We keep our products customer-driven by actively soliciting their input; that will be even more important in five years,” he says. – RC

36. THOMAS MOORE JR.

President, Strawberry Stitch Co.



Why he's on the list: Moore is regularly cited as one of the most influential digitizers in the industry because of his precise punching work (he has taken home more than 40 digitizing and design awards) and his dedication to educating new and experienced digitizers. St. Louis-based Strawberry Stitch opened its Embroidery Design

School in 2000, naming Moore as its director and focusing on teaching computer graphics with a decorated-apparel focus, combined with digitizing theory centered around Moore’s widely-referenced manual, *Digitizing 101* (*Digitizing 210* will be out next month).

While growing Strawberry Stitch to be a Wilcom dealer and a CorelDRAW Training Partner and moving all of the Embroidery Design School’s curriculum to a Web-based instructional

37. JOHN LYNCH

Owner, Lynka Promotional Solutions



Why he's on the list: Lynka, which Lynch co-founded in 1992, is one of Europe's top promotional products companies and has earned more than 40 international awards for the quality of its printing and embroidery. Poland-based Lynka's success can partly be attributed to its branding as a full-service "one-stop shop" where buyers can purchase decorated and customized products.

Growing wildly: In its early years, the Polish market was key to Lynka's success. By 2005, the company was firmly immersed in the German market, and moved on to add Austria and Germany. Poland's entry into the European Union opened new markets, and now Lynka does business in 22 European countries. In 2009, despite the global recession, the company grew its export sales by 25%, thanks to significant growth in the Scandinavia market as well as the "Benelux countries" of Belgium, Netherlands and Luxembourg. Lynka is now selling in most EU nations, including far-flung regions like Malta and Ireland.

Europe catches up: "It's like North America in the 1990s, where blank goods were sold, and it was the distributor's problem to decorate the product," Lynch says. "More and more players are 'seeing the light,' and starting to offer decoration services, but having started so late, they're running into plenty of difficulties. It has been my assertion for many years now that suppliers who don't adjust to this reality will be left in the dust. Fortunately, in our sector, there are very few players who realize this, and we are moving as fast as we can to build systems and capacity to support our continued growth. I think this is our number-one competitive advantage." — *AP*

38. JACK MA

Chairman and CEO, The Alibaba Group



Why he's on the list: The Alibaba Group oversees the world's biggest product-sourcing website, targeted toward small manufacturers and based in Hangzhou, China. Alibaba.com had 39.9 million registered users and 6.3 million suppliers as of June 30, up from 3.6 million and 832,815 on March 31, respectively.

Crashing the American market: The Alibaba Group pushed into the American market in 2009 with a \$30 million marketing campaign. Companies like Walmart and Procter & Gamble use its services to purchase goods. Some suspect The Alibaba Group may even try to compete with Amazon and eBay, though Ma and company say otherwise. For now, Ma, a former English teacher, may be content to continue opening channels to Asian factories for suppliers in the promotional products market, including embroiderers.

Exponential growth: Going from English teacher to CEO of a massive company might seem an unlikely rise, but Ma has made it. The rise has been rapid, too. The Alibaba Group only came into existence in 1999. In 2007, its \$1.7 billion initial public offer on the Hong Kong Stock Exchange was the biggest Internet company's offering since Google went public three years earlier. — *AP*

FUN FACT:

In 2007, The Alibaba Group's \$1.7 billion initial public offer on the Hong Kong Stock Exchange was the biggest Internet company's offering since Google went public three years earlier.

platform, Moore has evolved as an industry consultant. He has a client base of 9,000 and works with such manufacturers as Williams-Sonoma, Pottery Barn, Pottery Barn Kids, Chambers Bedding, Eddie Bauer, Land's End, Radio Cap, Vanity Fair, North Face, American Identity and Real Polo.

Continuing education: "For a long time, education in this industry was a hearsay, pass-along, artisan-type trade knowledge," Moore says. "But as the industry went away from that and become more about mass production, it didn't keep up with the education

required in the typical production facilities of other products."

That's one of the reasons that Moore has dedicated so much time and effort to educating the industry. "What I saw was this big void in education, which reflects pricing and demand for products," he says.

Predictions: "I see some manufacturing coming back state-side," Moore says. "I also see some new techniques as far as multimedia, including combinations of rhinestone embroidery that are progressing." — *SD*

39. AKIRA IKEDA President, Mimaki Engineering

Why he's on the list: Ikeda's leadership helped Mimaki become a publicly listed company in March 2007. Mimaki specializes in high-speed inkjet printers and cutting plotters for the decorating industry. On the industrial side, it's an industry leader in flatbed inkjet and cutting plotters, and in its software: ProfileMasterII (which allows users to reproduce exact colors) and FineCut 7 for CorelDRAW and Illustrator.

On the textile and apparel side, Mimaki offers RasterLink Pro5 TA, which includes image paneling and color-replacement function, and TxLink for digital textile printing.

Italian fashion leaders: Ikeda has overseen the spread of Mimaki's textile printers into some of the most fashion-forward places in the world, including Milan, Italy, and northeast France. In fact, more than half of the textile printers in these regions are Mimaki-made.

Signs of the times: Mimaki prides itself on creating printers and inks that allow for some of the top illuminated signs and shop banners in the industry. For example, its JV4-130 printer, along with aqueous pigment ink and white cloth, was responsible for a series of wall advertisements inside a Japanese store, and a combination of its JV3-130S printer, solvent ink, vinyl matte and lamination film was used to create some vibrant bus graphics.

Looking ahead: Ikeda says Mimaki's overseas sales have greatly surpassed its U.S. sales recently, and its next step is to expand into the Asian regions, including a manufacturing and sales subsidiary in China. Mimaki also plans to introduce a series of new machines for the sign-graphics market that will improve upon image quality. — SD

FUN FACT:
Mimaki's products have been used to create vibrant bus graphics and Japanese wall advertisements.

40. FRED LEBOW Consultant and Developer, Cotswold Industries



Why he's on the list: Considered the guru of stabilizers for the embroidery industry, Lebow's most recent success was with the new Eco Stick, a biodegradable tearaway stabilizer that's been received enthusiastically in the market. He is

frequently tapped as a speaker for events, including the Imprinted Sportswear Show, NNEP Show and Hands-on Sewing School, among others.

Going green: Lebow has been developing innovations for the sewn-products market for more than 30 years. He's worked with Cotswold for 20-plus years, developing its entire line of stabilizers. With the success of the Eco Stick, Lebow sees the environmentally friendly trend continuing. "Hopefully, we won't have a choice," he says. "You'll be seeing a lot more recycled products. With stabilizers and the screen-printing industry, if they're going to stay in this country, it has to be more green than it is."

Go-to man for stabilizers: Lebow is well-known as an educator and the person to go to when one needs help with stabilizers. In the industry, his name has almost become synonymous with stabilizers ... better-known in some corners than the company itself. — AP

41. LEE CAROSELLI Co-Owner, Balboa Threadworks



Why she's on the list: A well-respected industry educator, embroiderer and digitizer, Caroselli turned heads with her one-of-a-kind Elvis Presley stamp design (yes, *that* one). She created the design with only six colors, "when people didn't believe we could blend thread colors on a commercial machine," says Caroselli, whose Palm Desert, CA-based Balboa Threadworks has become synonymous with true embroidery artistry. Her design style has permeated the industry in her work, and in her students' work; it's also evident in second-generation designs found on Great Notions, Dakota Collectibles and other stock design websites.

Jesus is a favorite: In addition to the Elvis design, another



Caroselli favorite is a design of Christ from a 16th-century painting by

the Italian artist Guido Reni. "This design is run at shows that I attend, and the response has been strongly positive," she says.

Diversity matters: "If embroiderers aren't learning to digitize, they're learning how to communicate with their digitizers in order to control the quality of their designs, and their bottom line," she says. "Diversifying our products has led to the marriage of embroidery and graphics." She expects the next decade to show what can happen given a longer marriage between those two. "We'll see every form of graphic mixed with the elegance of embroidery designs and then finished with dashes of bling," she says. — JC

42. STEVE GARNIER

CEO, Epilog Laser

Why he's on the list: Epilog has 27,000 clients in Europe and the U.S. and saw record-breaking laser equipment sales the last two years, thanks to the Zing 16 Laser, Zing 24 Laser upgrade, and Zing 24 Rotary Attachment. Garnier is the man driving the train.

Lasers and clothes: Many decorators might not be aware of the CO2 and fiber laser-engraving embellishment method, but Epilog has brought it to the decorated-apparel industry. "Fabric is becoming a very popular material for laser applications," says Mike Dean, Epilog's vice president of sales and marketing. "Because the laser is computer-controlled, users can dictate exactly how much speed and power is being given to the laser. You can literally etch away the tiniest layer of fabric to expose a contrast between the engraving and original material. Additionally, because the laser is so precise, our customers often use the laser for cutting patterns and materials for appliqués and other embroidery-related projects. Anything from tackle twill to leather to microfleece can be processed easily with a laser."

Work for this man: Epilog has made the *Denver Business Journal's* Best Places to Work list in three of the last four years (#5 in 2007, #7 in 2008 and #4 in 2009), and has been nominated for 2010, as well. It also won the 2009 Bronze Quill Award for Media Relations/Campaign Management and was named one of the Fastest-Growing Companies in Colorado by *Colorado-BIZ* magazine. — SD

43. MARK D. LANGE, PH.D.

President and CEO, National Cotton Council of America



Why he's on the list: Lange heads up the organization that understands more about this key ingredient in the apparel industry than any other group, tracking key data to provide to companies and growers nationwide.

Cotton cost: Today's cotton prices are the highest they've been since the Civil War. Acreage devoted to cotton has declined in the U.S. and abroad; demand declined for two years and then burst upward in 2010. The supply and demand issue is straight out of Economics 101, but it's still "incredible," Lange says. "The strength of the price reflects a real concern about the scarcity of the fiber."

The man with his finger on the pulse of the cotton industry has the knowledge and crystal ball to see what lies ahead. "Right now the futures prices for the 2011 crop is below what the current future prices are," Lange says. Currently prices are about \$1.35 to \$1.45 per pound, and he's anticipating it to be around 97 cents to 98 cents within a full year. That reduced price will certainly trickle down to the cost of finished goods.

The upshot: Lange believes that the next harvest cycle could be positive. However, it won't be until the crop is being processed that people in this industry can breathe a bit easier, he says with a degree of cautious optimism. — JH

FUN FACT:

Though today's cotton prices are the highest they've been since the Civil War, Lange predicts they're going to start falling soon.

44. ABDUS SALAM MURSHEDY

President, Bangladesh Garment Manufacturers and Exporter Association; Managing Director, Envoy Group

Why he's on the list: Murshedy heads the most influential trade group in Bangladesh, the source of an increasingly large proportion of the world's apparel and embroidery production. He also started the Envoy Group, a multi-business conglomerate with more than a dozen garment houses.

Athlete turned businessman: Murshedy gained fame as a soccer player, playing and serving as captain for the national team and setting the single-season mark for most goals scored in Bangladesh's national soccer league. He started the Envoy Group in 1984 and expanded it well beyond apparel, going into information technology, freight, real estate, banking and health care.

FUN FACT:

Murshedy is a soccer star, playing and serving as captain for Bangladesh's national team. He even set the single-season mark for most goals scored.

A center of the apparel world: With Bangladesh becoming more of a power in apparel production, Murshedy's role as head of BGMEA could become that much more significant due to recent unrest by workers seeking better wages and working conditions. Nearly 3 million workers are employed by Bangladesh's more than 4,000 garment factories. That comprises about 40% of the nation's industrial workforce, which should give a sense of how prevalent the industry is there. Most people work more than 10 hours a day and as many as 15, often for the monthly minimum wage of \$25. Murshedy could have a central role in steering the course of a major source of embroidery production. — DW

45. MARTIN FAVRE

President, Bernina of America

Why he's on the list: Favre led the way on key acquisitions of embroidery-related companies for Bernina, and he's the man behind the Embroidery Software Protection Coalition's crackdown on design piracy.

Big spender: Favre was the man at the top when Bernina acquired Oklahoma Embroidery Supplies and Designs in 1997 and Quilters' Resource Inc. in 2001. Considering he came to Bernina as an export marketing manager with a directive to grow market share in the Americas, these acquisitions fit in well. Of course, by the time they came around, he'd been promoted to Bernina of America's president.

The anti-pirate: Favre headed the Embroidery Software Protection Coalition, a multi-company coalition that aggressively went after people accused of using stock designs without permission. The approach was controversial, as people who claimed they didn't know they'd bought designs without copyright received letters threatening lawsuits, but some felt a crackdown on piracy of intellectual property was long overdue. After some negative publicity, the ESPC faded away, but Bernina remains front-and-center in the debate on copyrights. And, Bernina also owns Great Notions, one of the industry's largest and most popular stock-design firms. — *DW*

46. MICHAEL STUART

Owner, MS Designs Ltd.



Why he's on the list: Stuart studied architectural drafting in college, but due to a recession, couldn't find a job. So, he joined a New York-based embroidery firm as a designer. "Instead of skyscrapers, I was drawing elaborate embroidery – my architecture," says Stuart, who bought the firm in 1981. His work has been worn by A-list celebrities from Jennifer Lopez to Julianne Moore, and he has created pieces for top designers like Calvin Klein and

Oscar de la Renta, bringing haute couture hand and machine embroidery to the center of the fashion world.

Coming out of hibernation: Stuart expects the industry's recovery to be in full swing next year. "The period of hibernation is coming to a close," he says. "Most designers cut back budgets so drastically that decoration and embroidery took a backseat to bread-and-butter looks that kept their companies afloat." But now things seem to be shifting: "There is a vibe," Stuart says. "It is easy to detect, as there has been no heartbeat at all for most of '09 and '10. That vibe is from the survivors!"

Embellishment returns: "Embellishment has and will always be cyclical," says Stuart, advising that embroiderers be on the lookout for a return to this style in the coming years. "When most have forgotten what others had done years ago, they do it again. My experience is that it takes seven years to go around."

Keep it simple: Stuart expects simplicity to be the coming trend. "Clean, simple looks," he says. "And for the bigger boys, lots of work in the fabric, but not shiny or glitz. Kind of like Calvin being designed by Valentino." — *AP*

47. DARIN ANDERSEN

CEO, Embroidery.com



Why he's on the list: A tech-savvy youngster, Andersen began digitizing in the late '80s for Thread Images, his father's embroidery business. He realized the potential of a graphical interface to the Internet and after trying various methods, he eventually created an automated system that could securely collect payment information and make the designs available in a download center. "The entire system had to be written from scratch," he says. "With the automation, individual designs could be offered at a price that home and commercial embroiderers were willing to pay. We approached independent digitizers who had small, attractive collections."

Embroidery hub: In 1999, Andersen acquired the domain name Embroidery.com, and grew his business into a massively successful online center – it contains more than 85,000 designs being accessed by 195,000 registered users. Through

the Embroidery.com portal, more than \$6 million in royalties has been paid to embroidery designers and \$32,000 raised for charity. In addition, Andersen oversees a prominent education center on the site that provides over 600 hours of live, online e-classes, a public library of over 300 step-by-step projects and 150 instructional video segments.

Predictions: Andersen says there will be greater reliance upon online resources that assist each stage of the apparel ordering, production, and customization and accounting processes. "Locally installed software applications such as QuickBooks will give way to powerful online subscription-based services that are easy to set up and integrate the company's website," he says. "Customers will have greater control. Businesses large and small will benefit from these services by greatly reducing the overhead. However, with these advancements comes the challenge of fostering and maintaining personal relationships with customers." — *JC*



48. EILEEN ROCHE

Editor and Publisher, *Designs in Machine Embroidery*



Why she's on the list: Roche is an in-demand educator, the author of *Contemporary Machine Embroidered Quilts and Contemporary Machine Embroidered Fashions*, and a regular guest on PBS TV's *Sewing With Nancy*, *Sew Much Fun*, *Martha's Sewing Room* and HGTV's *Sew Much More*.

Combination of services: Roche attributes her success to hard work and a great team of employees. Looking ahead, she predicts finding "competent, inspired and dependable" workers will be a challenge, as will maintaining clients. "Companies that are willing to offer a combination of services such as large production runs and small custom jobs will fare best," she says. "Smaller companies will outsource large jobs while focusing on smaller, profitable jobs in-house."

Edgier embroidery: Roche sees easy-to-incorporate mixed-media techniques on the forefront of 2011's new innovations in the decorating industry. "I also think more fashionistas will be seeking one-of-a-kind garments, such as edgier embroidery with radical densities, raw-edge appliqué and cut work," she says. Still, the same challenge remains: "delivering unique finishes while making a profit." — *Erica Young*

49. MICHAEL ROBERTSON

President and CEO, Specialty Graphic Imaging Association (SGIA)



Why he's on the list: Robertson has been president and CEO of SGIA since 2001 and part of the organization since 1982. SGIA is the only international association for specialty imaging and provides services such as the extensive SGIA Information Network and portals that offer members the latest news and research on the industry.

A diverse marketplace: SGIA represents a diverse group of garment decorators, but most fall into one of two camps: "On one hand, we have the more traditional garment decorators, where screen-printing is the predominate technology and their business model has changed little over the years," Robertson says. "On the other hand, marketing companies are employing garment-decoration technologies to create a product suited to their market channels." Having both sectors, Robertson says, "adds new competition and presents a challenge for those unwilling to adjust with the times."

Looking ahead: Robertson anticipates a slowly improving economy in 2011, with good opportunities available for decorators who seize the moment. "North American-based garment decorators who are on top of their game will benefit from a rapidly changing marketplace, and customers will benefit from regional production for some applications," he says. And while he anticipates that both screen-printing and digital-imaging technologies will be valued for some time to come, he also expects "to see more combined solutions where digital imaging and screen printing are used in tandem or in combination. This opens new creative options while maximizing production capability." — *AP*

50. DEBORAH JONES

Owner, MyEmbroideryMentor.com



Why she's on the list: For more than 30 years, Jones has worked with computerized embroidery techniques for a vast range of accessories and apparel. Jones' private consulting, videos and seminars through MyEmbroideryMentor.com and her articles have earned her a Floriani Lifetime Achievement Award for embroidery education.

Fresh faces: Jones plays a key role in educating new embroiderers, and she expresses particular pleasure at seeing individuals from a variety of backgrounds entering the industry, which she expects will continue through 2011. "I'm most excited to see continuing growth of new

embroidery businesses," she says. "Veteran embroiderers should embrace the opportunity to mentor newer embroiderers to help preserve the integrity of the art of embroidery."

FUN FACT:

Jones' favorite Tweet announced that Simon Cowell received a monogrammed scarf from *American Idol*.

Viva variety: In the longer term, Jones anticipates more crossings of styles and methods in embroidery. "Bold is in at the present time, so we will probably swing toward softer effects," she says. "Distressed embroidery and other decorating methods show no signs of slowing down. Bling, the polar opposite, will also remain popular."

Most memorable Tweet: Jones' favorite: "The Tweet announcing that Simon Cowell received a monogrammed scarf as a departure gift from *American Idol*." — *AP*

51. CHRISTOPHER BERNAT Chief Revenue Officer and Co-Founder, Vapor Apparel (asi/93396)



Why he's on the list: Bernat and his partner, Jackson Burnett, started Vapor Apparel six years ago. It's the first company to develop performance-apparel garments in an array of styles, colors and fabrics specifically for the sublimation process.

Risk and reaction: Bernat and his team have always had a good vision of the macro trends in the marketplace, and have focused their attention on customization. "But next year will be about managing risk and maximizing reaction time. It'll be good for those who deliver value to customers, and tough for others who don't," he says. "We're excited about our new 'Zero Decorated Inventory' model that we're launching for several major specialty retailers. We like to win on value, not price."

Industry growth: Bernat echoes *The New York Times* Columnist Thomas Friedman when he says the world is quickly getting flatter, which will challenge conventional sales models. "More and more customers will demand to buy from manufacturers through the Internet, which is here to stay," Bernat says. "We'll see massive growth for the digital printing industry as consumables go down in price and customization enters its next stage of adoption in society." As for new innovations? "Who knows!" he says. "If you focus on value creation, the business will grow." — *EY*

FUN FACT:
Vapor Apparel is the first company to develop performance-apparel garments specifically for sublimation.

52. JOANNA GRANT Vice President of Graphic Production and Support Services, Affinity Express



Why she's on the list: After building its expertise in advertising since its founding in 2000, Affinity Express has become a comprehensive resource for digitizing, graphics and multimedia services for advertising and marketing; it serves decorators, distributors and suppliers alike. "We didn't want to

offer a product that decorators liked but other industry players wouldn't be interested in," Grant says. The firm's business is trending steeply in the right direction: Sales volume is "way above what we had predicted for 2010," she says.

Ever-evolving: In the graphics world, the true product is knowledgeable, intuitive and quick service. As a result, "We're always moving forward from a training standpoint," Grant says. "We serve those who don't have the in-house capacity to do certain things, which means being able to handle whatever their needs are. So we make sure to have the most up-to-date and useful techniques from Wilcom, Adobe and the other digitizing software firms."

Five years from now: People will develop new ways to decorate, requiring Affinity to become capable of accommodating those techniques, according to Grant. For instance, rhinestones hit the big time about three years ago, and "We had to become proficient at applying the techniques for laying out stones," she says. — *RC*

53. RANDY CARR CEO, World Emblem International (asi/98264)



Why he's on the list: Carr took over the business 11 years ago, and grew it from a small, local embroiderer to an international company with some 700 employees

in eight locations. World Emblem International has had a busy 2010, rolling out new products, including 3-D Doming and Trimax transfers, and acquiring French distributor Imatel in June of this year.

Expanding the customer base: Carr

expects to continue servicing World Emblem's core customer base for industrial uniforms and patches, but he sees possibilities for higher-end options, as well. "I've seen a lot more people getting away from the traditional emblem look and going for the name badge, hospitality style," he says. "More people are getting away from rental clothing and more into purchasing their own clothing, but need to identify themselves with a removable piece of identification."

Boosting flexibility: The company's new Trimax transfers allow customers

to buy the transfers and order the garments separately, applying the transfers as needed. "They don't have to supply the money for inventory of garments already being printed, but they still get the economies of scale by buying the transfers all in one spot," Carr says. World Emblem has added to that by putting more focus on training its sales force. "We put a lot more money into training our employees to be team leaders, our team leaders to be managers and our managers to be executives, and I think that brought us a lot of dividends," Carr says. — *AP*

54. KRISTINE SHREVE

Director of Marketing, EnMart and Ensign Emblem



Why she's on the list: Shreve is at the forefront of the embroidery industry's push into modern Internet marketing and communications, leading a new way of connecting with and maintaining customers.

Fresh eyes: Shreve approaches her marketing role with the sensibility of someone who understands the modern Internet, and that sensibility may make her a model for other companies. She has blogged for years and has four personal blogs that she updates with varying frequency, so she understands the dynamics of online social media. That means she gets the distinction between using Twitter and Facebook to broadcast to thousands of people about what you ate for breakfast vs. using them to more personally target several hundred people who you can get to know. "My feeling is, I don't want 5,000 followers on Twitter, because you can't connect with 5,000 people," Shreve says. "I want it to be enough that we can have discussions. We don't want to have so many that it's just faceless masses."

A modern girl in an old world: Shreve's blogging and use of social media has helped give embroidery and sublimation supplies company EnMart, a relatively young firm and subsidiary of Ensign Emblem, a more personal contact with its customers. That was starkly at odds with many people she would come across at Ensign and in the industry. "People in this industry haven't picked up on social networking or even the Internet," Shreve says. "I needed to figure out a way to talk to people." — DW

56. NICK COE

President, Land's End (asi/250566)

Why he's on the list: Coe leads catalog and retail giant Land's End, which offers a massive retail outlet for decorated apparel.

Expanding into promotional products: Coe made waves last year when Land's End announced it was expanding its promotional product offerings. As an ASI-listed distributor, Land's End had offered decorated apparel for years, but has now expanded into other product categories such as desk accessories, pens, bags and golf items.

Going mainstream: Land's End has something many embroidery companies don't: An easy outlet to a vast purchasing audience. How Coe directs that over the next few years could have a dramatic impact on the embroidery industry, either co-opting North American embroiderers or forcing more work overseas. The company is a massive competitor, and Coe is the key man behind that. — DW

FUN FACT: Land's End offers decorated apparel, desk accessories, pens, bags and golf items to the ad specialty industry.

55. JENNY HART

Artist and Owner, Sublime Stitching



Why she's on the list: Hart's embroidery and artwork have appeared pretty much everywhere. Her shop in Austin, TX, has become widely known for its work despite beginning as a one-person startup.

"This ain't your grandma's embroidery": That phrase tops Sublime Stitching's website, and it's definitely true. Hart was an artist long before she took up embroidery, and she's brought to the trade an edginess that differentiates her from her peers and helped her cross into the mainstream. While many toyed with teddy bears and flowers, she was stitching designs of tattoos, rock stars and technology. "I just didn't want bunnies and teddy bears," Hart says. "Because there are so many notions of what traditional embroidery is, I liked even more bringing in designs of taxis, pinups, Las Vegas and things like that." Her work has graced publications as varied as *The New York Times*, *Rolling Stone*, *Vogue* and *Spin* and in collaborations with bands such as The Flaming Lips and The Decemberists.

The It Girl: There's a certain "It Girl" quality to Hart. Maybe it's because she's young or outside the norm. Maybe it's because many hold her in high regard as an artist and hand-embroiderer long before they talk about her business. Perhaps it has something to do with her role in the Austin Craft Mafia, a collaborative of independent startup businesses that has spawned offshoots in other cities to promote and support the businesses within them. Or it could be the high-profile spat she initiated with Minneapolis-based Urban Threads and Embroidery Library in 2009, questioning whether they stole her designs, before backing off that claim.

Though in some ways Hart stands at the fringe of the embroidery industry, she's at the center of conversation, and considering the quality of her designs and the pure artistic talent she possesses, that's where she belongs. — DW

FUN FACT: Jenny Hart got her start stitching designs of tattoos, rock stars and technology, not flowers and bunnies.