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GLOBAL SUPPLY CHAIN MANAGEMENT: A GLOBAL SOURCING POINT FOR TRENDY WIGS

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Abstract: India is one of the chief exporters of human hair. Hindus have a practice of offering their hair in temples to fulfil their wishes. People go to salon to cut their hair for a stylish look. Tirumala Tirupati Devasthanams (TTD), a sovereign trust which regulates the temple at Tirumala accounts one-tenth of its yearly revenue from sale of hair presented by the devotees. The reputed salons in Chennai get hundreds of customers every day for ornamentation including haircuts. The hair, as a raw material, is collected and exported for mechanizing hair extensions and other products. This trade has taken an global face by attracting countries like Japan, Egypt and South Africa concerning it. The study is an attempt to understand more about the nature of business phenomenon in Tirupati and a hair salon chain in Chennai, for which the researcher has planned a qualitative (Case study) approach.

Key words: E-Auctions, Hair export, Human hair, Remy Hair, Tirumala Tirupati Devasthanams (TTD), Green business and Waste management.

I. INTRODUCTION

In this competitive world, business opportunity may come from any corner. We should realise that these 'wastes' are becoming areas of serious concentration, as they can bring huge money. One such thing that has been a silent revenue producer is 'Human hair'. Human hair is also an exportable item in India (HS code: 05010010 – Human hair) along with animal hair and their skin. As far as Indian hair is concerned, there is a belief that those having shiny, long and minimal contact to chemical treatments are perfect for manufacturing all types of wigs. The exported hairs from India are raw or processed and can generate 15% to 50% profit margins respectively. There is a high demand for Indian hair in foreign countries such as United States, Canada and other European countries. Exhibit 1.1 lists the top 5 countries and their export figures in USD Million.

Exhibit 1.1

S. No	Country	2010-11	2011-12	2013-14	2014-2015*
1	China	80.37	86.26	97.88	98.12
2	Brazil	17.71	26.72	23.29	20.29
3	Hong Kong	15.32	14.69	16.76	15.00
4	Italy	17.66	17.63	11.33	11.33
5	USA	9.48	10.80	13.74	14.51

2014-2015 yr rate is based on the prediction of past 3 yrs.

(Source: Press Information Bureau, Government of India, Ministry of commerce & Industry).

A. Sources of Human hair

The main sources of Human hair in India are shrines and parlors. India is subjugated by Hindus and they have a general practice of 'Shaving' (offering hair to God, as a token of gratitude). There are some temples in India where they get be thousands of devotees shaving their hair every day. Earlier these temples were dumping the waste hair. Nowadays, they have started and many have even developed a making huge business out of that. In salons, there are thousands of men, women and children dropping in for hair shave. The hair gathered from different sources will be of different sizes, different nature and different types.

B. Uses

- Human hair can be utilized for making fashion accessories such as false hair, toupee, imitation eyebrows, beard and whiskers for men.
- Human hair is also used for manufacturing ropes by coiling hair fibers together, and making artistic items for decorative purposes.
- They are used for synthesizing mats that are netted out of human hair for precincts to prevent the plant roots from contrary weather and infection.

- Human hair is also used for clearout oil spills. It is proven that human hair is an excellent imbibing of oil at the workshop stage and the absorbed oil can very well be restated [2]. NASA conducted a study on this in 1990s and proved the efficiency of human hair in riveting oil spills in industries also.
- L- Cysteine is an amino acid that is connected with hair and nail progress. Human hair, when animalculy used becomes an excellent source of this L-cysteine which is generally worn in the substructureof sweet rolls, biscuits and other confectionary items.
- Human hair is also a part in the grounding of Soy sauce, major Chinese food constituent. Till now, there are squabbles running around the usage of human hair in foodstuffs. It is also strongly recommended by cancer activists that consumers should stay away from such foodstuffs, as they can cause cancer.

II. LITERATURE REVIEW

Indian hair is the most sought after one in the international market, as they are considered to be the best quality for making wigs. Because of its shiny quality and look it has backed thousands of exporters. But, the sources of Indian human hair are fewer in number. . There are varieties of hair based on their nature and they are remy hair, non remy hair, single careworn and double careworn, wavy, weft and curly hair. The single drawn is demanded more among these and is considered as the first-class export quality. The chief source of single drawn hair is Indian temples, where people come for shaving. .

Indian hair business is a multimillion dollar industry, with temple shared hair being finest priced by the wig makers. Robert D Hisrich, Director of Thunderbird School, which is a center for International Entrepreneurship says that with the opportunities originated in this hair business, even small players can reach a status of large corporations. He also states that there is a elasticity observed in the nature of this industry.

The style world hassles hair extensions and wigs to have a sinuous look. Chinese hair, thoughaccessible is not favoured due to its violent nature not serving the purpose. Domestic and global models insist Indian hair in their wigs, hair extensions and other fashion items. The market is very large and seems to be increasing, as Indian hair looks just European.

III. RESEARCH METHODOLOGY

A Qualitative Case study methodology using unstructured interview, to have a in depth view over the hair collection in TTD and beauty salons in Chennai have been adopted. The Beauty salon samples were selected from Naturals beauty salon chain subject to Chennai area. A stratified random sample of 27 Beauty salons of Naturals comprising of Unisex, Lounge and Women-only parlors were taken in to account. Apart from interviews, some details were collected from the secondary sources like records of MSTC and TTD.

IV. CASE STUDIES

A. TIRUMALA TIRUPATI DEVASTHANAM (TTD)

Tirumala Tirupati Devasthanams is an sovereign trust that manages all operations and accounts of the world's richest Tirupati Venkateshwara temple (in terms of contributions received from the devotees), Andhra Pradesh, India. TTD was recognized in 1932 as a upshot of which the temple administration is taken over by a committee of 7 members supervised by a commissioner selected by the Madras Government. The act was not well-developed as there was no specific qualification for the committee members and the commissioner. In 1969 the panel of trustees was extended from 5 to 11, with representation from certain communities made mandatory. The Andhra Pradesh Charitable and Hindu Religious Institution and Endowment Act prescribed that the board should comprise one person from schedules castes, three persons from state legislative assembly and one women member with term fixed as three years.

Now, TTD has 16,000 employees and it is managing 12 main temples and sub temples throughout India. Not limiting itself to the management of shrines, TTD also does many social, educational and literary services by instituting educational institutions, research centers, Libraries and religious services by preserving temples even abroad. With more than 60,000 daily visitors and 1,90,00,000 yearly visitors (2012) Tirupati is the frequently visited location in the world. To handle the enormous crowd of devotees, TTD joined with TCS (Tata Consulting Services) came with complicated queuing algorithms and technical support for the same. TTD's main sources of income are contributions from the devotees such as money, gold and precious stones, its delicious laddu and hair presented by the devotees also referred as 'Black Gold'.

A.1 Tonsuring and collection process

Shaving is a wide-ranging practice in India as it is dominated by Hindus. It is called as 'Chudakarana' in Vedas and is done either in the initial or third year of a child. Apart from that in certain temples, even adults do shaving as a token of gratefulness to God for having made their wish and prayers come true. Among every 100 devotees sojourning Tirupati, 85 people consisting both men and women, does hair shaving. This is for what TTD has fixed an elite group of barbers to tonsure in places exclusively for this purpose called 'Kalyanakatta'.

TTD Kalyanakatta has 650 barbers, 65 women, functioning in six shifts per day. The Kalyanakatta building has two big shaving halls with seating measures for pilgrims and barbers. To handle the crowd during pinnacle seasons, 100 additional barbers will be occupied who could shave 60 heads in an average per hour and take out 800 kg of hair during week days. This will go across even 1000 kg in the weekends and pinnacle seasons. In a year April, May and September months are considered to be the pinnacle periods. To get along the crowd, there are four waiting halls and a well regulated Queuing with computerized tokens in the kalyanakatta building. Bathrooms connected with geysers, appliance of antiseptics before and after tonsuring are some of the supplementary services in Kalyanakatta.

In general, tonsuring is at free of cost. But, in specific mini kalyanakattas positioned near the travel guest houses and cottages, Rs.10 per head is composed after shaving. The main kalyanakattas operate for 24 hours and there are even 16 mini kalyanakattas functioning from 6 AM to 6 PM every day. TTD's Kalyanakatta has manifested its excellence as the largest hair dissemination center in the world Guinness book of records.

All hairdressers of TTD should qualify a test before their selection. The earning of a barber per month can be Rs.25,000. "We earn more as tips everyday from the believers which in pinnacle seasons will be more than salary. The tips may range from Rs. 20 to Rs. 1,00,000 (Once Chiranjeevi rewarded a barber as tips, who balded his head)", says Mr. Babu, a Kalyanakatta barber.

The barbers speak that the shaved hair is collected once every six hours and are kept in large sealed containers and are conserved till the date of auction. A team of 60 members are implicated in the gathering duty. The hair locks are composed and divided into 5 categories (exhibit 1.2) and are weighed in the charisma of an auction officer. As barbers wet the hair before they tonsure, the hair curls are completely assorted under polycarbonate sheets as 1,200 kg at a time, which will escalate in summer season. The braids are then preserved in a container chambers in stacks up to 2.5 meters high and are reserved for buyers to trial before the auction.

Exhibit 1.2: Hair Varieties and their nature as grouped internationally

S.NO	CATEGORY	Nature (Color / Size in Inches)
1	First variety	Black / greater than 30 inches
2	Second variety	Black / 16 to 30 inches
3	Third Variety	Black / 10 to 15 inches
4	Forth Variety	Black / 5 to 9 inches
5	Fifth Variety	Black less than 5 inches
6	Sixth Variety	Grey hair / any size

A.2 MSTC and E-Auction

The collected hair was auctioned by inviting buyers traditionally till 2006, after which TTD decided to move in for E-auction. "When it was done conventionally we could captivate only local bidders and the revenue was also very low. But now, in this e-auction, we are able to attract bidders from China, UK, US, Europe and even from Iran, thereby fetching more revenue as the business has taken an international face" says Mr. Srinivasa Rao, who is an officer associated with TTD for more than 25 years and involved in collection, segregation and sale of human hair in Tirumala.

E-auctioning is being successfully carried out by TTD with the help of MSTC (Metal Scrap Trading Corporation Ltd., a category-I PSU under the administrative control of the Ministry of Steel, Government of India). The e-auction portal for TTD is designed and managed by MSTC. The notice for e-auction will be posted in the TTD website and biddings will be invited. Exhibit 1.3 is a sample auction notice posted for January 2013 auction.

Exhibit 1.3: TTD E-auction Notice

TIRUMALA TIRUPATI DEVASTHANAMS
TENDER CUM OPEN AUCTION NOTICE FOR LICENSING OUT TTD
KALYANAMANDAPAMS

Adv. No.14 /TA/SE-III/TTD/2015-2016

Dt:07-07-2015

1. Sealed tenders are invited by the Executive Officer, T.T.Devasthanams, Tirupati from the interested persons / Societies / Associations / firms Professing Hindu religion (A self declaration is to be furnished to this effect along with application) who are capable of maintaining TTD Kalyanamandapams located in **Khammam and Ranga Reddy Districts** as noted below to grant license to operate and maintain TTD Kalyanamandapams for two years from the date of handing over.

2. The tender schedules can be obtained in person from the Executive Engineer-IV, TTD, HYDERABAD up to 5.00 P.M on the dates mentioned below:

Names of kalyanamandapams	Date of receipt of application for tender schedules and issue of tender schedules	Date of receipt of tenders	Date of opening of tender	Place of conducting tender and open auction
Khammam and Ranga Reddy Districts . 1) Palvoncha. NIT No: 58/EE-IV/Hyd/2015-16 2) Gaddiannaram NIT No: 59/EE-IV/Hyd/2015-16	23-07-2015 to 30-07-2015 up to 5.00pm - Do-	31-07-2015 to 01-08-2015 upto 3.00pm -- do--	01-08-2015 at 3.15pm ----do----	O/o the E E-IV, TTD HYDERABAD. ----do----

This easy way of auctioning has provided more flexibility and transparency in the process. On the other hand, it reduces the chances of fraudulent activities that occur often in the traditional bidding. In September 2011 auction, TTD have successfully disposed 466 tonnes of human hair for Rs.132.55 crores. The official sources say that 49 bidders across the world have participated in that auction. In the second phase of auction held in March 2012 over 96 tonnes of hair has been sold. The total revenue from the auctioning of hair in the year 2011-12 is Rs.197.9 crores, which accounts 1/10th of the total revenue of TTD. The cost per kilogram of first quality hair is Rs.20,180. In pinnacle seasons Tirupati sees 45000- 50000 people tonsuring their hair per day and so India is able to export 2000 tonnes of human hair every year.



ANDHRA BANK
(Govt. of India Undertaking)
Head Office: 5-9-11, Dr. Pattabhi Bhavan, Secretarial Road, Saifabad, Hyderabad – 500004
Zonal Office: RRPet, Eluru -
Branch Office: RP Road, Tanuku - 534211
Tel. No. +91-8819-228158, Fax No. +91-8819-228158, E-mail ID: bmeir554@andhrabank.co.in

Exhibit 1.4: TTD E-auction Notice

E-AUCTION SALE NOTICE

PUBLIC NOTICE FOR E-AUCTION FOR SALE OF MOVABLE & IMMOVABLE PROPERTIES LAST DATE TIME OF SUBMISSION OF EMD AND DOCUMENTS 05/05/2014 UPTO 04:00 PM

Sale of immovable property lies mortgaged to Bank under Securitization and Reconstruction of Financial assets and Enforcement of Security Interest Act, 2002 (No.54 of 2002). Whereas, the Authorized Officer of Andhra Bank had taken possession of the following properties pursuant to the notice issued under Sec.13(2) of the Securitization and Reconstruction of Financial Assets and Enforcement of Security Interest Act, 2002 in the following loan account with right to sell the same on "AS IS WHERE IS BASIS" and "AS IS WHAT IS BASIS" for realization of Bank's dues plus interest as detailed hereunder and whereas consequent upon failure to repay the dues, the undersigned in exercise of power conferred under Section 13(4) of the said Act proposes to realize the Bank's dues by sale of the said properties. The sale will be done by the undersigned through e-auction platform provided at the website.

DESCRIPTION OF IMMOVABLE / MOVABLE PROPERTIES.

Lot. No.	Name of the Branch & Account	Name of the owner of the property	Details of property	Demand Notice Date/ Outstanding Amount	Reserve Price	EMD	Bid Increase Amount	Date/ Time of e-Auction
1	B/O TANUKU A/C 1) Tatavarthi Naga Venkata Ram Kumar 2) Chintalapati Sambasiva Raju	Tatavarthi Naga Venkata Ram Kumar	All that part and parcel of the property consisting of RCC Building with two shops therein at Site in RS No.177/3B admeasuring 172 1/2 Sq. Yds. in 4 th Ward (old 3 rd ward) at Bhimavaram town bearing D. Nos. 3-7-12 held in the name of Sri. Tatavarthi Naga Venkata Ram Kumar bounded by East: Site of TNV Ram Kumar – 31'6" South: 40' Wide Road – 50' West: Site of G Suresh Kumar – 30' North: Site of TVV Nageswara Rao	Date 13.12.2013 1) Rs:77,35,153/- + Interest thereon at contracted rate and expenses. 2) Rs:77,42,382/- + Interest thereon at contracted rate and expenses.	Rs.76.25 Lacs	Rs. 7.63 lacs	Rs.5,000/-	07-05-2014 10.30 A.M to 11.30 A.M.
2	B/O TANUKU A/C 1) Tatavarthi Naga Venkata Ram Kumar 2) Chintalapati Sambasiva Raju	Tatavarthi Veera Venkata Nageswara Rao	All that part and parcel of the property consisting of ACC shed on Site in RS No.177/3 admeasuring 455 Sq. Yds. in 34 th Ward at Bhimavaram town bearing D No. 3-7-12/1 held in the name of Sri. Tatavarthi Veera Venkata Nageswara Rao bounded by East: Site of TNV Ram Kumar South: Site and shed of Kotta Ayyappa swamy West: Site of G Suresh and others North: Site and wall of TTD	Date 13.12.2013 1) Rs:77,35,153/- + Interest thereon at contracted rate and expenses. 2) Rs:77,42,382/- + Interest thereon at contracted rate and expenses.	Rs. 215.00Lacs	Rs. 21.50 lacs	Rs. 5000/-	07-05-2014 11.30 AM to 12.30 PM

Exhibit 1.5: TTD E-auction Notice

TIRUMALA TIRUPATI DEVASTHANAMS

"OM NAMO VENKATESAYA"

From
P.Srinivasa Rao, M.E.,
General Manager (Auctions)

Office of the
General Manager (Auctions)
Marketing Dept.,TTD, Tirupati.

Roc.No.A1/03/GM(Auctions)/MRKT/2013

Dated : 19 -01-2013

Sub:- TTD – Marketing Department – O/o General Manager (Auctions),
Tirupati – Flashing the information about conducting the e-auction of
human hair on 31-01-2013 on e-platform of MSTC Limited,
Visakhapatnam in TTD website - Requested - Regarding

Ref:- Note Orders of the Executive Officer, TTD, dated: 13-01-2013

ooOoo

It is to inform that TTD is disposing the human hair through MSTC Limited (A Govt. of India Enterprise), Visakhapatnam through Global e-auction and the due date for e-auction is on 31-01-2012.

Hence, as per orders of the Executive Officer, TTD vide note orders in the reference cited, I request you to flash the following information in TTD Website, up to 30-01-2013.

"TTD is disposing the Human Hair through Global e-auction on e-platform of MSTC Limited (A Govt. of India Enterprise) on 31.01.2013, for further details log on to www.mstcecommerce.com /www.mstcindia.co.in."

To be on the safer side by preventing the bidders entering into illegal understandings, the highest price fixed during the last auction would be the upset price for the forthcoming auction. By this way, the interest of TTD is also safeguarded.

E-Auctioning of human hair by TTD has started fetching more revenues year after year. In 2011 the total revenue out of this e-auction is being accounted as Rs. 133 crores, whereas in 2012 it is recorded as Rs. 198 crores. It is conventional to grow even more in the coming years. This is because of the growing demand for the wigs in domestic and international market. An executive officer who manages the temple dealings in TTD says, “We acquire bidders who supply for Hollywood and Bollywood. Remy hair is the most sought type in European market as it is uniformly trimmed and woven to wigs. Non-remy hair is broken and short in nature for which there is high demand in China, Africa, US and in particular Nigeria”. Some bidders have association with Bollywood stars and they are still standing as the most dependent wig supplier for those stars. “Tirumala hair has a huge demand among Mumbai models and celebrities”, he said.

Mr. Rahul, a Mumbai resident wig producer for Bollywood stars, says that he entered this industry in 1990. “In 1990s I’ve sold women’s wigs for Rs.2000 – 3000. But now, I’m selling the same for Rs.20,000 – 30,000 and the male varieties for Rs.6000 – 10,000. The type of wig demanded by heroines has hair braids of 50 – 60 inches long and the tonsured hair is the first choice for wig making”, he says. It is also being told that about 70% of the total export market is being dominated by non-remy hair as cost just one third of the price of remy hair braids. This is due to the growing competition in the domestic market for remy hair and its increasing price. Exhibit 1.4 states the auction details of June 2012 and the upset price for September 2012 auction for all the varieties of hair.

Exhibit 1.6

JUNE 2012 AUCTION DETAILS					UPSET PRICE FOR SEPTEMBER 2012 AUCTION	
Variety	Available stock in Kg	Sold in Kg	Price / kg in Rupees.	Total in Rupees	Variety	Upset price per Kg in Rupees.
I	Nil	Nil	-	-	I	20,180
II	39,688	28,700	18,700	53,54,00,000	II	18,650
III	19,591	8,300	7,446	6,18,00,000	III	7,450
IV	1,717	1,717	5,450	93,57,000	IV	5,450
V	50,000	50,000	80	40,00,000	V	80
VI	696	696	9,360	65,18,000	VI	9,360

This idea of hair business in TTD is a live example for other such temples in Palani and Samayapuram in Tamil nadu. In such case, quality of Indian hair exported can be improved even more and also can ensure more remy hair exports.

B. NATURALS CHAIN OF BEAUTY CARE CENTERS

Naturals have become a familiar name in the market of beauty care and styling. It has 200 salons in the busiest towns and cities of South India and it is still expanding with at least 4 new salons every month. After 10 years of its existence, Naturals chain is recognized as the most sought beauty salons in India. Apart from this, Naturals stands as a leader and trend setter in this industry through its innovations, uniformity in service levels and service ranges. They have popularized the concept of Unisex salon and are also in to the steps of covering more segments like middle age women and premium range people through other models like women- only salons and Lounges. All employees are professionally trained by the training institutes owned by them.

They have established a good franchisee network through win-win market deals. All franchisees are assisted with interior decoration ideas to show uniformity in the ambience and employees (beauticians) from their own institute. Naturals offer lot many beautification services to men and women ranging from hair cuts to occasional grand make over.

B.1 Hair recycling

As far as Naturals chain is concerned, they get minimum of 100 – 200 customers visiting their salon every week in metros and 50 - 100 customers in small towns. They come for different services but 80% of male customers and 30% female customers (in a day) seek hair cut. The size of the cut hair will be less than 5 inches (Fifth variety) and are best suited for artificial beards, mustaches, eye brows and eye lashes. But, the chain is unaware of the present opportunities. Sangeetha, a salon manager says, “Neither we are approached by any traders nor we are instructed to recycle the hair. Even if we are asked to do so, collecting, segregation and storing these will be a great problem for us”.

“We sweep out all the bits and pieces of hair and dispose them into bins”, says Kiran, another stores manager. They are unaware of the recycling and even after introducing about the benefits associated with that they are not

interested. Irrespective of the type of salon (Unisex / women only / lounge) they don't have a practice of recycling any of the scraps.

V. FINDINGS AND SUGGESTIONS

TTD has the most efficient process of recycling that helps them to increase their revenue as well as their image in the international scenario. They are very organized in cutting, collecting, categorizing, storing and even selling the hair. Apart from adding revenue, this process has crafted a 'green' image for Tirupati among the tourists especially foreigners.

In spite of more opportunities for recycling, even a well organized beauty care salon doesn't show importance for that. As they offer exclusive make over as one of their services, they can very well catch a vendor for making artificial hair attachments and other related products, which are all direct materials for their servicing.

They can have 2 or 3 collection centres for each district or city, collect the hairs in zip lock pouches once in a week, segregate, clean, dry and store them. Any external vendor can be fixed to whom the hair can be handed over for making artificial wigs and other products. In case of excess hair, they can be sold to that vendor itself for ensuring credibility and long term relationship or even auctioned.

Though hair have quite long shelf life, when it is conserved in a proper way as discussed above (Zip-Lock) it can be collected from various cities where they have live dharshan e.g. Chennai (Chinna Thirupathi – T.Nagar). This cities can act as a hub for their locality collecting hair as discussed above.

TTD can also collect hair from other various temple as they play major role and act as an intermediately between vendors.

TTD have raw material (Hair) they can be direct supplier to Manufacturing unit also increase revenue.

VI. CONCLUSION

Human hair export business is not as simple as it sounds. Finding untapped business opportunities is one of the major factors concerned with the success of an entrepreneur. Human hair business is green business model and is related to the waste management. Apart from business motive, TTD saves the Tirumala environment and its interest by proper disposal of human hair, which if not done would have been a major polluter in such a big tourist point. Being an independent trust, if TTD can do hair disposal in an organized manner, other temples and salons can also follow this and make revenue in the global market.

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