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BANGLADESH

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FROM THE EDITOR-IN-CHIEF'S DESK...

New President... New hopes!

The strength of a woman as a mother has been a universal truth from time immemorial, but it is sad that a woman as a human being has had to prove herself time and again to be considered as an equal to a man.

History has shown that in every age, women have played an important role in shaping the destiny of nations and even of history itself... Yet it was only in modern times that women started to question the gender bias that they have been facing for generations.

Fast forward to the last 100 years and one finds many strong women in almost every sphere of activity, be it in scientific research, medicine, corporate world, performing arts, social activities, politics or governance.

The political arena in the Indian sub-continent has been dominated by women, something even the western world is yet to match with the US still to seek its first woman President!

Bangladesh in particular has been in the strong and purposeful hands of the current Prime Minister Sheikh Hasina since 2009 making her the longest serving Prime Minister in the history of Bangladesh.

The stability which Sheikh Hasina has brought to the country and the resultant developments that it has seen is for all to see. Anyone who has been visiting the country in the last decade is awed by the transformation of the country in all areas, from infrastructure to business opportunities.

Of course, much more is needed and development is a continuous endeavour, but her strength of conviction in the country and its abilities is an edge that is reflected in the pride of being a Bangladeshi!

In a country where a woman has been the instrument of change, comes another woman at the helm of an important organisation with a determined passion to take the Bangladesh garment industry to the next level..., a level that is long term and sustainable.

Dr. Rubana Huq is no ordinary lady living in the shadow of her husband; she has been an equal partner in the growth of Mohammadi Group, shouldering the responsibility of the company, equally with her late husband. She has shown guts in following her dreams to do a doctorate at the age when most women are interested to become grandmothers and to take charge of BGMEA only because she wants to put Bangladesh at the top of the sourcing chart in garment retail.

It was indeed a pleasure to interact with her and understand the blueprint for a new BGMEA that will address professionally those areas that are or could be roadblocks in the way of progress and growth.

Her dynamic personality, wit and clarity of thought were reflected in her replies. What was also interesting is the fact that she is not a lone player but a team player and is determined that each elected member of the association has a meaningful role and responsibility.

This collaborative approach to growth is a positive sign for the industry and is for sure going to change the way the BGMEA has functioned in the past.

We at *Apparel Online* wish the new team at BGMEA a very successful tenure and offer our platform for sharing thoughts!



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Q-and-A

The inaugural edition of Apparel Sourcing Week (ASW), organised by Apparel Resources, in Bangalore, evoked overwhelming response from Bangladeshi manufacturers who want to make a foray into the booming Indian fashion retail sector, expected to touch whopping US \$ 115 billion soon.

Don't you think more such regional sourcing events should be organised to exploit the emerging opportunities optimally, and what should be the frequency of occurrence of such events in a year?

Please share your views...

Sandeep Golam

Group Operation Director, Armana Group

Sourcing events provide a good platform for the exhibitors and should happen twice a year, but not necessarily with the same manufacturers every time though.

It is critical to understand that meaningful conversions from these events happen with time, as it takes time for the retailer to instil trust in a new country/manufacturer. More than adding a country or focusing on a few manufacturing destinations, these events should focus on all the product categories being covered in retail to make it meaningful for retailers to look forward to each edition of the show.

Binod

Asst. Manager – Merchandising, Li & Fung India Pvt. Ltd.

I personally feel Apparel Sourcing Week (ASW) should be held twice in a year and the most suitable month to organise the same would be April, and preferably in Bangalore.

I would give 10 out of 10 in terms of performance for the inaugural issue of ASW. For me minimum workable MOQ would be 500 pieces (fashion) and 1,500 pieces (basic) and I would also prefer to see more suppliers from India in the future editions of ASW.

Also, apart from what has been showcased in the 2019 edition, I would like to see more women's fashion items, more value-added products and trims suppliers.

Khokon Chandra Kundu

Director – Marketing, AKR Group

First of all, I would like to thank the organisers of ASW. Although the event ought to have been organised a bit earlier, I am sure it is also right time to take such good initiative. It's a great chance for all apparel manufacturers/sourcing companies to get an opportunity to meet each other, understand each other's capacities while also getting to know the customers' demands.

We have a nice relationship between India and Bangladesh since a long time especially due to India's cooperation during the Liberation in 1971, and it is becoming stronger by the day.

India is a big country/marketing territory, has a huge consumer base and own brands, etc. So in this connection Bangladeshi manufacturers can

easily cater to their demand. However, from my personal experience, I would say that in order to exploit the capabilities of the Bangladeshi manufacturers better, Indian buyers need to have good order volumes and wide-ranging styles as manufacturers here appreciate bigger order volumes to keep the production lines running. Having said that, I would also like to add that there are also large numbers of factories which are not listed due to issues like higher compliance requirements, workers' wages, etc. as such giving another option for the buyers with smaller order volumes. So far we have observed that Indian market demand is bit different than other countries in terms of quantities/styles and prices. However, one issue that puts doubt to India as a destination is their strong import policies; besides most in India prefer their own products (Made in India). In this context, I feel India may add some extra duties in near future like import duty/state cost/education surcharge/other surcharges, etc., which would make the import cost high, and could pose as a barrier. However, I am hopeful that business would boom for the time being.

Ashish Sharma

Director Marketing, Anzir Apparels Limited

Sourcing events like ASW should happen twice in a year as they are important platforms for the manufacturers to explore new territories and also meet seasonal needs. But since India is still a relatively small retail market, not big enough yet for conversions to happen fast, it is better to host ASW once a year so that there is time for the players to work on the feasibility and other aspects that perpetuate long-term business.

POST YOUR COMMENTS

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NEXT MINDTREE QUESTION

The new BGMEA team has taken over responsibilities under the leadership of Dr. Rubana Huq recently. Considering the various challenges the industry is facing, it would not be wrong to term the current phase as critical one, smart handling of which in many ways would determine the industry's future in the coming days. Keeping the same in perspective, what should be the focus areas of BGMEA going forward, to ensure that the industry continues on its growth path?

Please share your views...



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Up close with new BGMEA President Dr. Rubana Huq

Dr. Rubana Huq shares her roadmap with AOB; details out efforts and steps to tackle all burning issues facing the industry

The much-awaited elections for the office-bearers of Bangladesh's apex garment manufacturers' body, the Bangladesh Garment Manufacturers and Exporters Association (BGMEA), was held sometime back.

President and Managing Director of Mohammadi Group, Dr. Rubana Huq (who is also the wife of Late Annisul Huq, ex BGMEA President and Mayor of Dhaka North City Corporation), took over as the new **President of BGMEA**. A multi-faceted personality, Rubana is the first woman chief of BGMEA, and has taken over charge at a time when the industry is going through a very crucial phase.

If on one hand there has been a significant rise in workers' wages, on the other the industry is facing long-standing challenges of falling profit margins, infrastructural bottlenecks, image crisis, rising overheads, declining price points, recurrent increase in gas price, etc. Add to these the lingering concern of remediation and workplace safety with Accord on Fire and Building Safety in Bangladesh approaching the judiciary in a last ditch effort to ensure its stay in Bangladesh while global brands and retailers associated with it allegedly mulling alternative sourcing options in case Accord has to make an exit.

Apparel Online Bangladesh (AOB) caught up with Rubana and one of the new **Directors, Miran Ali**, to know how BGMEA is planning to steer the industry out of the troubled waters and give it a new direction, more so when the goal of US \$ 50 billion in apparel exports by 2021 is looming large.

In the lead story of this issue, we present to you the roadmap of the new BGMEA President as shared with us, Miran Ali's candid observations on the future of the industry and how Rubana could be the deciding factor in building a positive image of Bangladesh in the global arena. Effort has also been made to gauge the industry's sentiments on the contentious issue of fair pricing that has emerged as a bone of contention between the buyers and the suppliers...

I am here to change, not follow...', Dr. Rubana Huq's statement, speaking to *AOB* exclusively, sums up her character and vision for the industry!

First woman President she could be of the apex apparel manufacturers' body, she isn't here to be labelled just as a woman chief but rather be considered an educated woman leader, whose conviction to change comes from her knowledge and strong belief system. It's not every day after all one would come across a Doctor of Philosophy (PhD) donning the hat of BGMEA President.

"My thesis paper was on post-partition English Literature with special emphasis on poetry. I got my PhD degree last December from

Jadavpur University (Kolkata)...," says a beaming Rubana, well aware of the fact that some detractor somewhere is anticipating a damp squib from the new BGMEA President, which she won't allow to happen. What's more, she isn't going to stretch her tenure of two years further to achieve her goals either. That's the confidence one should have...

"For me it is going to be a huge battle but I am going to do it...," says a confident Rubana while unveiling her roadmap that encompasses six key areas, namely brand building, price negotiations, markets & policies, productivity, sustainability and innovation, to take the industry to new heights.



Dr. Rubana Huq, President, BGMEA

We don't want Bangladesh to be the cheapest destination, but competitive...

Perception change is the need of the hour and I would not shy away from the idea of even hiring lobbyists.

From the BGMEA, we will form a separate cell if the apparel owners feel that they need help for price negotiation.

FACT FILE: DR. RUBANA HUQ

- Managing Director of Mohammadi Group. The Group began by exporting readymade garments and then diversified into software, digital distribution, real estate, power generation and media.
- Has featured in BBC 100 Women in 2013 and 2014.
- Won the SAARC Literary Award for her poems in 2006.
- Wrote a book of poems titled *Time of My Life*.
- Is a member of board of trustees in Asian University for Women.
- Served as the CEO of TV Southasia from 2006 to 2010.
- Awarded PhD from Jadavpur University.
- Writes regularly for a weekly column in English newspaper, *The Daily Star*.

To start with, she is planning to overhaul the very structure of BGMEA in terms of its composition and functioning. As a part of this endeavour, each of her deputies (Directors) would be tasked to exclusively work on one designated focus area to make sure that the trade body is not a one-man show and, a collective approach is put forth to bring in the changes.

“Time has come to run the show professionally... My main project is to invest in raising awareness in the industry as to the importance of a well-managed association. I am also going to headhunt for a competent CEO who would look after the day-to-day office affairs while my job would be to set the vision and work towards achieving it,” underlines the new BGMEA chief, which brings her to the point of elaborating on the scheme of things to improve the country's brand image.

The so-called poor image has long been a concern area for the industry for sure.

“Perception change is the need of the hour and I would not shy away from the idea of even hiring lobbyists. We are planning to hire good PR agencies in London and Sweden and a few lobbyists from Geneva, and this might very well change how Bangladesh is looked upon currently,” says Rubana highlighting that the negative campaigns abroad have often rocked the industry and these must be addressed with caution.

Given the fact that a lot of effort has gone into turning the industry to what it is today by all the stakeholders and still be facing the barbs, calls for ready facts and figures and strong voices at global platforms to dispel such disparagements.



“Time has come to run the show professionally... My main project is to invest in educating my colleagues. I am also going to headhunt for a competent CEO who would look after the day-to-day office affairs while my job would be to set the vision and work towards achieving it.”

– Dr. Rubana Huq

Rubana on her part is going to engage with the media to ensure that the right kind of messages reach the target audience.

“I don't think we have to do huge projects or spend lot of money in tweaking what we already have. Everybody has great practices in their factories, but where are those stories, why aren't they heard?” asks Rubana, determined to change the narrative now.

Next on her priority list is the issue of fair pricing... Having spent thousands of dollars on remediation, exporters are still fighting for just prices to survive and sustain let alone flourish.

“In price negotiation, we have been unable to take collective initiatives. From the BGMEA, we will form a separate cell if the apparel owners feel that they need help for price negotiation. No matter what the buyers say we should be firm and strong. There is no country that has the massive capacity as Bangladesh,” underlines the first lady chief of BGMEA, adding, “...We should not engage in uneven competition. Instead of increasing our number of lines, why can't we come together and turn the whole industry into one entity...?”

Rubana gives a clarion call to the industry while emphasising that when it comes to markets and policies, a multi-pronged approach is what is needed to break new grounds. And foremost in this aspect is economic diplomacy involving the High Commissions, Foreign Ministry, the Ministry of Labour and BGMEA.

“The Commerce Ministry could take the lead and others should come together under this umbrella to achieve the goals,” elaborates Rubana.

It's time for low-end manufacturing to graduate to the next level of re-skilling...

While post-Rana Plaza ushered in a whole new era of remediation, doubts around sustainability continue to haunt the sector.

Pilots could be done to assess the basic needs of the industry and innovation could follow our industry needs.

Considering that some major markets have failed to yield the desired results despite the potentials, the MD of Mohammadi Group-turned BGMEA President is in favour of FTAs specially in Europe, Bangladesh's second biggest apparel export bastion.

"If Bangladesh has to qualify for GSP plus there are at least 27 requirements which are more or less governance issues that have to be fulfilled. Under the given circumstances, FTAs are another route to explore opportunities in individual markets," says Rubana, citing examples of a few such names.

According to her, markets like Saudi Arabia reportedly import over US \$ 3,000 million from the world and yet source just US \$ 75.61 million worth of apparels from Bangladesh at 5 per cent duty, while Russia imports total of US \$ 7,000 million against that of US \$ 427 million from Bangladesh. China which has zero import duty is no exception either. Out of total US \$ 7,560 million imports, Bangladesh's share is reportedly mere US \$ 391.64 million. Same is the case with Brazil and Mexico which respectively imports only US \$ 158 million out of total import of US \$ 1,794 million (against a duty figure of 35 per cent) and US \$ 148 million out of total US \$ 3,775 imports (with 20 per cent duty).

But will FTAs alone help capturing these markets now that workers' wages have increased substantially (hiked by more than 50 per cent), thereby shearing the country of its competitive edge – the so-called tag of 'cheapest manufacturing hub'.

"We don't want Bangladesh to be the cheapest destination but



"Wage has to be set based on skills... And if we are to do that we would also have to train our workers to think differently. The wage-skill grid must be practised to assess the basic efficiency of the workers, which would translate into a win-win scenario for all."

– Dr. Rubana Huq

competitive...," asserts Rubana; underscoring such an approach if inculcated would help increase productivity while **addressing the issue of wage hike effectively by making a clear connection between wage and productivity.**

"Wage has to be set based on skills... And if we are to do that we would also have to train our workers to think differently. The wage-skill grid must be practised to assess the basic efficiency of the workers, which would translate into a win-win scenario for all," explains Rubana driving home her point of performance-based incentive to set the ball rolling.

Having spelt out the roadmap to tackle the five burning issues, Rubana now gets down to elucidate her recipe on **sustainability (the new focus area of retailers and end users) and innovation, the one that hinges on vital parameters of the latest that technology has to offer.**

"While post-Rana Plaza ushered in a whole new era of remediation, doubts around sustainability continue to haunt the sector. The common perception is that not all of us want to sustain the positive changes and, somehow the verdict is always in favour of us being monitored. Little do we make it known that we have poured in so much investment into our production units that we now can't afford to see all that go waste," states Rubana.

It's a well-known fact that manufacturers have spent big to make most up-to-date factories that are at once safe and secure while also being socially and environmentally sustainable. The results are here for everyone to

see; Bangladesh today has the second highest number of green factories with some even scoring the maximum in sustainability index globally.

What it calls for now is to keep the momentum going, which as per Rubana, with the help of well-meaning international brands, unions and development partners, the industry is more than capable of doing. As to the monitoring part of it, local engineers (who have worked under various initiatives and have complete knowledge of the sector as well as the remediation process), is what is required currently. Support from the stakeholders, would just add to the efforts, feels Rubana, convinced that given the level of maturity Bangladesh garment sector has achieved, technological intervention is what is needed to graduate to the next level.

"It's time for low-end manufacturing to graduate to the next level of re-skilling so that more jobs can be created to address the intermediate challenges. Pilots could be done to assess the basic needs of the industry and innovation could follow our industry needs," Rubana explains, adding while interventions like bio-printing are already in use, it's Bangladesh's capability to produce its machinery and spares using the latest in technology, which would be the next stage of development and growth.

"It's an era of innovation and efficiency..." winds up Rubana on a positive note, giving an insight of her developmental blueprint for the industry not to mention her burning desire to create an example out of the Bangladesh RMG sector for others to follow.

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Vietnam only competition for Bangladesh: Miran Ali

In an exclusive interview, the new BGMEA Director speaks his mind on the present and future of the industry

As the elections for the BGMEA President and Directors got over recently, the new team is now readying itself to take on the mantle – amidst challenges and opportunities – to guide the RMG sector of Bangladesh to new heights.

Miran Ali, a leading entrepreneur, Honorary Consul of the Slovak Republic in Bangladesh and MD of Bitopi Group is one amongst the Directors... He speaks to *Apparel Online Bangladesh (AOB)* in a no holds barred interview underlining the what's and why's of their scheme of things going forward, and how the new board of directors, plan to achieve the same. Here are the excerpts...

AOB: The industry is undergoing a transformational phase. Various factors (wage hike, gas price increase, need of image building, etc.) have posed new challenges. What is the plan of new BGMEA team keeping future in perspective?

Miran Ali: Yes you are right!

Personally, I see a lot of changes happening in the next 6 months or so. The new BGMEA Board will take over responsibility on April 20; currently we are busy drafting the roadmap as to our actions, goals and deliverables, which include all relevant issues including those of branding, moving up the value chain, improving logistical issues, etc.



“Rubana's leadership would help BGMEA to reach out to the stakeholders and those who matter in a much better and effective manner. She has what it takes to spread our message far and wide to help mould a positive image of brand Bangladesh.”

– Miran Ali

Coming to the vital question of workers' wage hike, I don't think it's an issue in itself. The issue is that of high cost of production, of which wage is just a part. There are several other factors involved in it like having huge WIPs to meet the uncertainties, banking complexities, high interest rates, etc. So going forward, we would first narrow down the focus areas and each Director would be tasked to look after one specific issue in totality. Call it the sub-continental mindset or anything

else, businessmen in countries like ours are more of person-centric than team players as most run their own businesses where they have absolute say. Hence, we felt it wise to divide the roles and responsibilities accordingly so that there's no confusion and conflict and each one has total clarity as to what is expected of him or her.

I am very hopeful of things changing for good at least in creating a positive perception of Bangladesh garment industry. Many brands that had left



Miran Ali, Director, BGMEA

Bangladesh in the aftermath of Rana Plaza are coming back... Overall, we are going for a multi-pronged approach to tackle the existing contingencies.

AOB: The industry's image makeover has become critical lately... What's the game plan?

Miran Ali: We are planning a long-term and sustained approach involving all relevant stakeholders to change the perception of Bangladesh apparel sector. If media is going to play a leading role to help strengthen our position in markets of UK, Germany and North America, we would be working closely with various groups and entities that have helped businesses establish and flourish in the West.

AOB: How would Rubana Huq help in this end... What would be her role?

Miran Ali: The very fact that she's highly educated, articulate and with years of hands-on knowledge of the industry is a big positive in itself! Her leadership would help BGMEA reach out to the stakeholders and those who matter in a much better and effective manner. She has what it takes to spread our message far and wide to help mould a positive image of brand Bangladesh.

AOB: With more than four-decade of manufacturing history, the industry has so much to showcase... What would be your pick in this brand building exercise?

Miran Ali: Even though we have decided on the roadmap, we are currently brainstorming on what we want to sell to the world, will it be workplace safety & workers' welfare, manufacturing practices & efficiency, sustainability... We are hopeful of reaching a

consensus on this soon. However, we have decided to allocate budget towards brand building and also decided to hire a renowned agency to steer the PR exercise.

AOB: As per your reading of things, what is the biggest challenge for Bangladesh garment industry at present?

Miran Ali: I would say the changing global retail landscape. The days of volume business is now giving way to smaller runs, value-added items and shorter lead times. Even though certain amount of volume business is still there but it is not sustainable considering the profit margins. Now having created our factories and production processes, keeping volumes in mind, there is an urgent need to bring in the change and flexibility so that we don't lose out on the smaller orders.

At personal level, I am also facing this challenge. So what I have done is split up four long production lines in my factory to around 12 smaller lines to capture those smaller orders.

The industry as a whole needs to become efficient at that while trying to cut on the lead times. Fast fashion demands sharper lead time and to be in this game, we have to reposition ourselves accordingly. Even though a deep port would come up by 2022 which would help in improving the lead time but till then we would have to look at other avenues... One aspect that we are looking at is trying to work out joint venture opportunities with India and China in secondary processing. Bangladesh is over 60% self-sufficient in denim fabrics as well as over 90% in knit fabrics, but what we are still lagging is in synthetic in which the global apparel business is growing compared to cotton. Both China and India by virtue of their strength in synthetics can be of much help to us.

FACTS

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AOB: In terms of products anything new that Bangladesh can start doing to beat the price blues?

Miran Ali: I think we should concentrate more on value-added offerings... Currently, other countries are mostly bagging such orders but if we can sink our teeth there, business opportunities are immense. I have started two new factories for outerwear and activewear lately. One more aspect that we have to concentrate on is how to get the business that is shifting from China, which is now moving up the value chain into other sectors.

AOB: In terms of competitors, who do you think is inching closer to Bangladesh?

Miran Ali: Vietnam for sure... In immediate future, Vietnam is going to catch up with us value-wise in exports. Apart from Vietnam, I don't see any challenge. Cambodia is going down; as of India is concerned, there's no substantial growth; Pakistan on the other hand is more into men's denims and home textiles; and Sri Lanka is not in this competition any more.

AOB: What about Ethiopia and Myanmar?

Miran Ali: As far as Ethiopia is concerned, I would give it 6-7 years to show up in the manufacturing map prominently let alone becoming a competitor; and as far Myanmar is concerned, its business with domestic markets of China, Korea and Japan is good but otherwise it is yet to make any dent in the global arena.

And now with chances of Myanmar losing the GSP benefit, business is not going to be very prosperous for them. And add to it their primitive banking and customs, which is doing no good to the apparel exporting sector.

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Industry's new recipe to fight the price challenge...

BGMEA President Dr. Rubana Huq promises a cell to help garment makers in the all-important issue of price negotiation

Sample this, as per a report by Mark Anner, Center Director, Penn State titled: *Binding Power: The Sourcing Squeeze, Workers' Rights, and Building Safety in Bangladesh Since Rana Plaza*, the price paid by lead firms to supplier factories has declined by 13 per cent as a result of which supplier factories' profit margins have decreased by 13.3 per cent.

It's not the only report highlighting price pressure on the garment manufacturers. There are scores including the one from Better Buying Purchasing Practices Index (BBPPI), which underlined how most garment suppliers face mounting pressure from buyers due to their cost negotiation strategies.

As per BBPPI such practices impact the suppliers' social, environmental, quality and other compliance performance, while according to some experts if Bangladesh has increased wages by 263 per cent over the last 10 years, prices have gone for a nosedive, falling as much as by almost 6.63 per cent and 7.33 per cent from the two major export destinations of USA and Europe, respectively.

And this after investing massively in compliance issues as per buyers' demands while also increasing the workers' wage by more than 50 per cent in the recent past to comply with the social, environmental, worker and work-related parameters.



As per BBPPI mounting pressure from buyers due to their cost negotiation strategies impacts the suppliers' social, environmental, quality and other compliance performance.

"...still 70 per cent of the buyers are giving low prices for the garment product, despite improvements in quality, workplace safety and labour rights," complained an aggrieved **Shaful Islam Mohiuddin, President of the Federation of Bangladesh Chambers of Commerce and Industry** and also a former President of the BGMEA speaking to the media.

The complicity of this issue has forced the Government to take up the matter even at global forums but without any result.

"We've modernised the (RMG) factories. We have ensured building and fire safety with an improved working environment in place. Owners have invested a lot in these areas but price of apparel products is yet to be hiked. Price needs to be increased...", pleaded **ex-Commerce Minister Tofail Ahmed** in one of the TICFA meetings held earlier where he underlined how Western buyers do not want to raise the prices on some pretext or the other.

However, now with Rubana Huq (Managing Director of Mohammadi Group) taking up the position of BGMEA President, many are hopeful of things changing for better. And why not, after all Rubana has promised to help garment makers in getting fair price for their products.

She has planned to establish a separate cell to help the manufacturers in the all-important issue of price negotiations.

Rubana's focus on price negotiations gains more relevance in light of experts' opinions on price points. As per a consultation meeting organised by South Asian Network on Economic Modelling, Bangladeshi exporters were not getting fair and reasonable prices due to lack of negotiation skills.

Speaking on the occasion, **former Bangladesh Bank Governor Atiur Rahman** said that negotiation skills at both the entrepreneurs' level and the Government level and relationship with buyers were very important for reaping fair prices.

The Government should help the manufacturers and exporters to improve the skills along with creating clothing brand and building the country's image abroad, underlined Rahman while **Bangladesh Knitwear Manufacturers and Exporters Association's Second Vice-President Fazlee Shamim Ehsan** said that the local exporters were getting lower prices for RMG products than what the Cambodian and Vietnamese exporters were getting from the global buyers.

Focusing principally on its image of cheap manufacturing destination to bag orders, Bangladesh has failed to match with them on price front, which has been its Achilles heel, many believe.

But under Rubana's leadership, underselling its capabilities is going to be passé, it seems.



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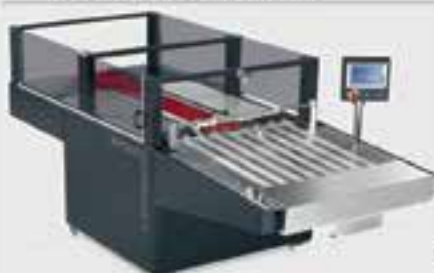
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Technology, IE and Training remain the core of Bangladesh Apparel Industry

*In today's time, the buyers are constantly asking to reduce unit prices, whereas the cost of production for the manufacturers is going up because of increase in the input cost and also because of huge investment made towards enhanced social and environmental compliance norms. This, as a whole, increases the financial load on the manufacturers. In such circumstances, the only available path is to increase productivity by having a complete control on the entire supply chain within a garment manufacturing unit. The control can be done in various ways such as using automation in the most efficient manner; following proven Industrial Engineering (IE) practices to make processes smoother and viable; deploying available workforce in multiple operations to make the best use of manpower; and, of course, training them on exact modules which are needed inside a unit. Bangladesh, the world's second largest apparel manufacturing destination, is effectively working on all these factors to make its manufacturing even stronger. Team Apparel Online Bangladesh recently visited **Mahmud Fashion Ltd.**, **Laila Styles Ltd.** and **Pretty Sweaters** based in Dhaka and observed that each of them is implementing something unique in terms of improving productivity and making a strong work system to make themselves stand out. Let's look at the practices these companies are following...*

'Line Layout is Must'

— MAHMUD FASHION LIMITED

Timely deliveries, building all operations in-house under entirely compliant conditions, being competitive in pricing and a strong emphasis on quality have always kept Dhaka-based garment manufacturer Mahmud Group at the forefront of manufacturing. The Group produces 60,000 denim bottoms per day in its old factory named Mahmud Jeans Ltd. (MJL). That's a whopping per day output compared to many other jeans manufacturers who claim themselves to be big but actually are struggling to get even 1/10th pieces per day output compared to what MJL is achieving. Not just this, in May 2017, the Group further added one more unit named Mahmud Fashion Ltd. (MFL) to cater to increased orders from buyers and



MJL has eight operational lines (at the time of interview) with 60 machines in each line. The unit has already planned to make eight more lines operational by June '19 and a total of 48 lines will be workable till this year end.



Susanth Ranjith Ekanayaka, GM (Maintenance), Mahmud Fashion Ltd.

the factory is exemplary in terms of technology use and IE practices.

Currently, MJL has eight operational lines (at the time of interview) with 60 machines in each line. The unit

has already planned to make eight more lines operational by June '19 and a total of 48 lines will be workable till this year end. Line balancing is of utmost priority for



Newly operational production line in MFL



Profile of Mahmud Fashion Ltd.

Susanth Ranjith Ekanayaka, GM (Maintenance), Mahmud Fashion Ltd., who, since the beginning, has focused immensely to improve line balancing and has even reworked on the line layout to increase productivity. “Wages have increased, overheads have gone up, lead time is getting shorter and buyers’ pressure is already there which are collectively reducing profit margins. When MFL became operational last year, we designed our lines in a way which can get us more productivity using limited resources,” explained Susanth.

MFL has a special maintenance team which is taking care of production lines. The team plans 15 days before changing the layout, and in that period of time, it uses the team members’ expertise to know the kind of product categories that are supposed to come in production lines and the action that should be taken to modify a particular line. If the same design is carried on adjacent lines, the maintenance team replicates the same structure. Currently, MFL is running 18 lines in 4-4-3-4-2-1 layout which is the best possible layout for them. “In second phase, we will set 48 lines in similar pattern,” said Susanth.

It’s not that MFL could achieve the proper line balancing in order to increase output quite easily. “A lot of issues were there before we planned line layouts. The major problem

was scarcity of skilled manpower,” commented Susanth. It’s a fact that attrition rate is high here in Bangladesh. So by the time a person gets through the process, he/she is gone and someone new comes in and then it takes time for a factory to train freshers again. The same was an issue with MFL when it became operational. But the maintenance and production teams together had to tackle this challenge and they did it. In production lines, they identified critical operations first. Then IE people were told to train manpower in a batch of 50 people on all aspects to make them efficient enough to carry multiple operations. “So, while we plan a layout and an operator quits the factory, we don’t have to face issues in finalising the layout as we have everything in place, right from the strategy that we need to follow to the workers who we are going to use,” averred Susanth.

‘Training and Technology are our priority’

– LAILA STYLES LTD.

Laila Styles Ltd. is one of the prominent names in Bangladesh apparel manufacturing industry which started operation in September 2018 and is yet to become fully operational. However, the partial



It is not just installing technology which will boost the business level overnight, it’s all about how a manufacturer utilises the installations to the fullest, making a balance between manpower and machines.

operational unit with its massive infrastructure, technology use in production floors and focus on operators’ training is achieving what it plans. In this new unit, around 3,500 workers are churning out woven bottoms, denims and non-denims, day in and day out in 35 production lines out of which 20 lines are fully operational.

According to Laila Styles, it is not just installing technology which will boost the business level overnight, but it’s all about how a manufacturer utilises the installations to the fullest, making a balance between manpower and machines. On one hand, manpower remains the most crucial part in Bangladesh garment industry, while



Bodiuz Zaman, General Manager – Admin, HR & Compliance, Laila Styles Ltd.



Training centre in Laila Styles Limited



Profile of Laila Styles Limited

on the other hand, moulding the fresh available operators into skilled ones is even more challenging task; failing to do so can cost a manufacturer loss of production datelines. “You will always need a technically strong team to make the best use of machines; a team here means both technical supervisors and operators who ultimately are responsible to handle sewing machines. We have that strength and experience which assist us in such a way that our investment does not go in awry,” shared **Bodiuz Zaman, General Manager – Admin, HR & Compliance, Laila Styles Ltd.**

To upskill the workforce, Laila Styles Ltd. has set up a training centre within the factory premises which can accommodate 40 operators at a time. The unit has not only installed basic SNLS machines in the centre but also high-end special sewing machines to train operators on both. “When we recruit them, we judge their skills. If we find them skilled enough, we place them directly on floor. If they are not up to the mark, we consider them as fresh and train them in our centre where one month training is given to them,” explained Bodiuz. The trainers impart technical knowledge and quality skills to the operators as they know what type of skills an operator would be needing while working on Laila’s production floor. This way operators come prepared mentally and technically from the training centre. Every operator who gets training is further evaluated by the production team after one month before allocating them any production-related work.

Focus on the use of latest technology is as strong as training in Laila Styles. The company has kept pace with continuous global transformation as far as technological upgradation and excellence is concerned. It has installed 650 sewing machines (mainly from Juki and Brother) of which 450 are SNLS machines and rest are special machines such as feed-off-the-arm, overlock (Pegasus and Kansai) and jeans automats (Vibemac and Jam International). “To get quality production, we use all sort of automation except for auto-cutter which is actually not viable for us,” underlined Zaman stating that maximum time is taken by spreading operation for which Laila is using auto-spreaders. “Cutting is not that difficult, so for the time being, we are not investing in auto-cutters but rather we are using straight knife cutters to solve the purpose,” stated Bodiuz. Currently, the per month capacity of Laila’s cutting room is (operational) 3,00,000 pieces. And, soon it will be 6,00,000 per month once the pending lines will be operational by May this year.

Reducing human intervention is another need for garment manufacturers in order to stay relevant in this cost-competitive era. Since Laila is manufacturing denim bottoms too, it has invested in two of the renowned technologies, Vibemac and Jam International; both are from Italy and are known for clubbing multiple operations on one automat. JT 882 model of Jam International assists Laila in carrying five different operations on one machine, needing just two operators,



Since Laila is manufacturing denim bottoms too, it has invested in two of the renowned technologies, Vibemac and Jam International; both are from Italy and are known for clubbing multiple operations on one automat.

while in regular machine, 7 people are needed to perform these five operations. Hence, this technology not only helps in enormous saving of manpower but also enhances the productivity. “We are proud of having technical excellence in our machine department,” concluded Bodiuz.

‘We are among the first to use exceptional knitting technology’

– PRETTY SWEATERS

Pretty Sweaters, the second largest sweater manufacturer in Bangladesh with around 12.7 million pieces output in 2018, is riding high on technology. It was only in 2013 when the company came into existence and made all positive headlines due to its inclination towards the technologies which were unheard of back then by other Bangladeshi sweater manufacturers. “The idea



Sunil Marasinghe, GM, Pretty Sweaters



Ergonomical chair for operator near linking machine



Profile of Pretty Sweaters

behind transforming the production floor of our factory was to use those technologies which Bangladesh sweater manufacturing players were not using and we were amongst the first ones to use advanced Japanese knitting technology of Shima Seiki and Italian linking technology of Comlett to manufacture our products,” claimed **Sunil Marasinghe, GM, Pretty Sweaters.**

Sunil further underlined that previously major components such as panels in sweaters were handled manually which resulted in low production. “The use of technology has helped us increase our production by 50 per cent over the years,” asserted Sunil. The factory earlier used to work on ‘Make Through System’ where an operator assembled a single piece of sweater at a time by carrying out all the sewing processes necessary to assemble a sweater. In this system, an operator was provided with a bundle of cut-work pieces and he/she continued to assemble them based on his or her own method of work. But the method was not efficient when bulk production was there. Since it takes an immense level of operator skills and time to manufacture a sweater, Pretty Sweaters switched from ‘Make Through System’ to ‘Line System’ seeing the huge quantity of orders placed by Japanese and European buyers. “My intention was to go to the line system from the start – one operator, one machine and one operation out of around 20 operations that are there to manufacture a high-end sweater,” said Sunil. Pretty Sweaters has installed 1,500 Shima Seiki knitting machines that auto-knit shaped panels of huge quantities of

sweaters. Normally, one operator can do six to eight pieces of sweaters in a day, while with the induction of Shima Seiki knitting technology, the factory increased to 200 per head as one operator can now handle 10 machines simultaneously.

Notably, the main difficult part is to handle the labour involved in the assembling of sweaters which is a serious thing to consider. Taking this difficulty as a challenge, Sunil and his team worked hard to eliminate this using line balancing and the use of technology. The team set up dedicated lines with all necessary linking machines and divided components in these lines operation-wise. The manual operations needed in these assembling processes are also added in these lines. Once shaped panels come to these assembly lines, linking method is used in almost every design of sweaters to join those panels. However, in some cases, shaped panels are joined by sewing process as well. “22 machines are there in each line. One machine can reduce two to three operators which is a great saving for us,” claimed Sunil.

Pretty Sweaters is in full support to use expensive but proven technology because of long-term benefits. According to Sunil, linking machines of Comlett cost almost 10 times higher than normal sewing machines but they can reduce three workstations and eliminate the need to have 6 to 9 operators. “ROI is also just eight months and average sweater production per head in assembly is 40 to 60 per day as compared to around 20 to 30



The factory earlier used to work on ‘Make Through System’ where an operator assembled a single piece of sweater at a time by carrying out all the sewing processes necessary to assemble a sweater. Since it takes an immense level of operator skills and time to manufacture a sweater, Pretty Sweaters switched from ‘Make Through System’ to ‘Line System’ seeing the huge quantity of orders placed by Japanese and European buyers.

in other manufacturing units who work on normal machines which is a massive difference. It’s not that we ‘eliminated’ the manpower but we can say that we increased the capacity to almost double,” explained Sunil.

In another development, Sunil has kept the ergonomics standard on top priority for the operators performing linking operation. It’s a fact that linking operators have to move on both the sides and bend forward to carry out the operation effectively but the standard chairs are difficult to sit on with so much activities to perform for an operator, resulting in increased fatigue level and back pain. Sunil and his team have therefore developed C type chairs with rollers underneath which move according to the movement of the operators. “You won’t find this development anywhere else. We have to look at the comfort of operators as well and imbibing technology should not be the only thing to consider,” boasted Sunil.

Not just garment technology, Pretty Sweaters is also using tools to collect data which help them in decision making. The company has RFIDs to rope in a proper system for data collection and to eliminate the chances of playing with production data on shopfloor. Asserting the same, Sunil concludes, “At least 5 per cent production data prepared manually by most of the garment units is not correct. We wanted to keep a watch on working progress on the production floor using RFIDs to know where we stand and what all tasks are left to do. At each and every area, we have a data which helps us in decision making.”

EVENT REVIEW

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REPORT: LECTRA VIP FASHION EVENT 2019

'WINNING OVER THE NEW FASHION CONSUMER' TALKS ABOUT DIGITAL TRANSFORMATION OF FASHION INDUSTRY

A VIP fashion event themed 'WINNING OVER THE NEW FASHION CONSUMER' was organised on 10-11 April 2019 by Lectra in Bordeaux-Cestas (France). The 2-day event marked with over 140 visitors from all across the world which included Lectra's customers, retail brands' executives, technology strategists and media. It's worth telling that *Apparel Online* (print vertical of Apparel Resources Group) was the only media that was invited from South Asia and south-east Asia to cover the event.

Day 1 witnessed speakers focusing on the need of digitalisation of processes within apparel industry

All through the event, speakers pointed out that digital transformation is a must-to-do task for both retailers and manufacturers in this era of 'hyper-connected consumers'. Endorsing the same, the first day of the event started with a keynote presentation given by **Peter Jeavons, Managing Director (Europe), First Insight**.

Peter told the audience about why hyper-connected consumers are rapidly increasing and how have they driven the market with their instant gratification. He also emphasised



The era is of 'Design-Sell-Make' concept. So apparel brands and manufacturers need to give up 'Design-Make-Sell' strategy if they want to cater to hyper-connected consumers.

on the rising need of social media which is influencing the customers' purchase decision. "About 37 per cent of consumers search for online reviews of a product they are looking to purchase," said Peter.

Peter further explained about why the apparel and textile industry doesn't need new technology instead of matured technologies which are already available in the market but need to be adopted. Some of them are Artificial Intelligence (AI), Data Analytics Tools and IoT. Peter gave an example of Alibaba and Amazon and enlightened the audience that if these e-commerce giants can use AI and Data Tools, then others should also use it.

To conclude his presentation, Peter underlined that the era is of 'Design-Sell-Make' concept. So apparel brands and manufacturers need to give up 'Design-Make-Sell' strategy if they want to cater to hyper-connected consumers. He also suggested the areas where retail brands need to digitally innovate their operations. "Digital product creation, advanced analytics and insights, smart connected supply chain and foundational product technology are some areas where retailers should focus to pace up with the changing trend," concluded Peter.

The second keynote presentation was given by **Craig Crawford**,



Audience played a vital role in the 2-day Lectra VIP Event with their sharp observation on what the speakers said



Mark Antoine (left), Master of Ceremony conducted interview of Céline Choussy, Chief Marketing & Communications Officer, Lectra

Founder, CrawfordIT and he asked the attendees to work on a strategy 'Stop Working, Start Thinking to Create Collaboration'. His focus was primarily on the customers' needs, and he pointed out to make businesses customer-centric which is only possible by introducing right kind of collaborative IT solutions to the retail businesses. Craig gave some real and proven examples of some retail brands, those that are using AI and AR (Augmented Reality) to enhance customers' experience both on online channels and in stores. "Digital transformation is must for the retailers. Max Factor is using AR, while Tommy Hilfiger is using Chatbots and are successfully achieving what they plan," said Craig enthusiastically.

The next in line was the interview with **Céline Choussy, Chief Marketing & Communications Officer, Lectra**. The interview was conducted by the master of ceremony Mark Antoine. During the 20 minutes long interview, Céline disclosed that hyper-connected consumers are driving Lectra to adopt strategies that work for the betterment of Lectra, its customers as well as end-consumers. "We are what we wear, and we wear what we are. Innovation is in our DNA, so we give those solutions to the industry using which designers, pattern makers and product development teams



PETER JEAVONS
Managing Director (Europe),
First Insight

“Digital product creation, advanced analytics and insights, smart connected supply chain and foundational product technology are some areas where retailers should focus.”



CRAIG CRAWFORD
Founder, CrawfordIT

“Digital transformation is must for the retailers. Max Factor is using AR, while Tommy Hilfiger is using Chatbots and are successfully achieving what they plan.”



MAXIMILIEN ABADIE
Chief Strategy Officer, Lectra

“Kubix Link incorporates PLM, DAM and PIM functionalities all together and unlocks greater agility in the existing platforms such as ERP, CMS, PCM, WMS and e-commerce.”

work on single version of truth,” explained Céline.

Kubix Link, a data-driven PLM solution, demonstration was also given by **Maximilien Abadie, Chief Strategy Officer, Lectra** and **Matthieu Griziaux, Business Development Director (Fashion),**

Lectra. Kubix Link incorporates PLM, DAM and PIM functionalities all together and unlocks greater agility in the existing platforms such as ERP, CMS, PCM, WMS and e-commerce.

“It’s time to rethink over enhancing product experience. Kubix Link is all about the way companies collaborate



Mariam Benissi (C), a representative of Lectra's customer Balenciaga, explained MODARIS' role in fabric saving



Demonstration of VIRGA cutter

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Attendees during presentation of 'Fashion On Demand' solution



Lectra VIP Event guests entering Château Smith Haut Lafitte for gala dinner



An operator engrossed in assembling process at Lectra's factory site

to give enriching experience to its customers," asserted Matthieu. Lectra also asked one of its customers, Tecnica Group, to be a part of this demo. Tecnica is a leading sportswear manufacturing Group based in Italy. Tecnica Group brands include Tecnica, Nordica, Moon Boot, Rollerblade, Lowa and Blizzard Sport. Another company which took part in this demo was Pomellato, an Italian luxury fashion jewellery brand. Both the Lectra customers described how they have used Kubix Link to overcome challenges in terms of data collection and then take decision based on that data.

The last session of the day was based on Modaris, a 3D tool offered by Lectra. Session was themed 'CAD ENHANCED BY THE POWER OF THE CLOUD'.

Phillippine Saint-Pere, CEO and Founder, Eponymous Brand, gave presentation on what's her take on 3D. She discussed all the pros and cons of the available 3D tools for the designers and explained how Modaris stands out. Phillippine's presentation was followed by Lectra's demo on '20 MINUTES FROM PINTEREST TO PRODUCTION READY' where a team of Lectra gave live demonstration on the features of Modaris and Diamino; Quick Estimates and Quick Nest. The demo talked about what a customer wants in this era of personalisation and how a designer can help customers in providing a product of their choice using Modaris which suggests the best possible outfit in lowest cost possible.

Quick Estimate allows product development teams to calculate fabric requirements instantly from their Modaris® – Lectra's 2D/3D patternmaking and grading solution – working environment with direct access to the cloud applications. Pattern developers have the flexibility to make pattern adjustments more quickly to optimise costs, while protecting the brand's quality and assuring speed-to-market. On the other hand, Quick Nest can be accessed through Diamino®, Lectra's marker-making solution. During the production development stages, Quick Nest users

are able to process more detailed markers faster. "Quick Nest can also be used by production teams to treat lists of markers automatically in record time via the cloud," as observed during the demonstration.

The day was concluded with the voice of Lectra customer, **Balenciaga**. The company's representative, **Mariam Benissi**, explained how Lectra's Modaris has helped Balenciaga to save enormous fabric cost using Quick Estimate.

Once the event got over, Lectra took all its guests to the countryside for a gala dinner at a beautiful place called Château Smith Haut Lafitte. The 4 hours of this outing was filled with fun activities and the guests came to know why Bordeaux is known as 'Wine City'.

Day 2 was filled with demos, QA sessions and factory visit

The day 2 activities can be summarised by simply stating that Industry 4.0 and Mass Customisation are something Lectra is enormously focusing on. Throughout the day 4.0 concept was seen in some way or other. Day 2 of the event started with a guest presentation given by Craig Crawford who took his discussion on 'MASS PERSONALISATION' to the next level from where he concluded it on day 1. He explained the journey of the luxury fashion brand Burberry in personalisation. While most of the brands are now going with the trend of customisation and Made to Measure, Burberry opted for it back in 2010 in its iconic trench coat which was entirely a design based on MTM. "Burberry further strengthened this concept using the optimal use of social media as well as apps such as WeChat (in 2014) which gave the brand a massive success in China and other big fashion retail markets such as Hong Kong," said Craig. He further added that the pace of technology adoption has never been faster than in last two years.

"Amazon filed for 7 technology patents in January 2018 which include AR and visual recognition mirror, supply chain UV fluorescent

inks, 3D on-demand manufacturing, airborne fulfilment centre serviced by drones, fabric storage totes for use in manufacturing, tech to recognise hand poses as computer interface and voice controlled light switches,” elaborated Craig. He, however, emphasised on the fact that designers are still not working in collaboration with pattern makers and until this situation changes, the trend of customisation, MTM can't see the worldwide growth.

This was followed by an interactive discussion by two of Lectra team members: **Frédéric Gaillard, Product Marketing VP, Cutting Room Offer;** and **Christine Dandieu Sales Director, Fashion,** on 'LECTRA STRATEGY FOR FASHION & APPAREL: THE DIGITAL TRANSFORMATION'. The crux of the session was that there is need in the fashion industry for collaboration, automation and simplification. The all new 'Fashion On Demand' system of Lectra is a solution which caters to this need. According to Lectra, the digital revolution has prompted consumers to demand personalised products and experiences nowadays. This is an advantageous business model for fashion companies, as it allows them to accurately match supply with demand, and solve a host of problems that regular business models usually face. By simply knowing ahead of time what and how much their consumers want, companies can produce in precise quantities and avoid overstocking and markdowns. In addition, as consumers pay upfront for their orders it improves cash flow for businesses. Fashion companies can use personalisation as a way to outshine their competitors and earn consumer loyalty, by offering one-of-a-kind products that make their customers feel exclusive. “This solution combines 3 packages within it including Made to Order, Made to Customise and Made to Measure,” said Frédéric.

'Fashion On Demand' is disruptive offer which gives fashion companies a 360° view of the entire personalisation process, providing them with the visibility to streamline multiple

production processes and manage complex individual demands from custom order to cut piece. “Thanks to the supply-chain flexibility that companies gain with this innovative Lectra solution, they are able to expand their product range and offer more variety, be it womenswear, menswear or childrenswear, and appeal to a broader audience and jump on trends without interrupting their existing production processes,” explained Frédéric.

The 'Fashion On Demand' presentation was followed by voice of customers session in which master of ceremony Mark Antoine took a small interview of representatives of Lectra's customers Groupe Mark and Balsan (uniform manufacturers). Both the representatives underlined that Lectra's solutions have helped in achieving greater productivity. They stated that less consumables are being used, also there is enormous cut down in manpower, besides reduction in fabric cost which is another significant benefit they are getting out of Lectra solutions.

Frédéric again came to the stage for one-on-one interactive session with Mark Antoine where he explained about the packages offered in 'Fashion On Demand' solution and also responded on each and every question asked by the audience.

This QA session was followed by the demo of Lectra's VIRGA cutter. Interestingly, this cutter does not use any paper or flimsy material to hold the fabric layer while cutting operation rather it creates vacuum on the cutter's bed due to which fabric layer gets adhered to bed. By this technology, VIRGA saves cost of the paper and plastic materials which are commonly used during cutting process by apparel manufacturers.

After demo, a factory tour was organised by Lectra in two different groups. During the visit, the visitors closely observed manufacturing processes, assembly processes, packaging and dispatch processes of different machines offered by Lectra.



OMRON robot used by Lectra in its factory for material movement



'Fashion On Demand' is disruptive offer which gives fashion companies a 360° view of the entire personalisation process, providing them with the visibility to streamline multiple production processes and manage complex individual demands from custom order to cut piece.

The factory is exemplary in the sense that it uses as less manpower as it can. For spare part and inventory handling, Lectra is using Omron robots which have 4-5 trays in it and all trays carry some small metal parts (rivets, nuts, bolts, spanners, etc.) which are further used to assemble machines. Omron robots are studded with 2 sensors which can sense a human's movement until 1.5 metre near the robot's zone and once sensed the robots automatically get stopped. Lectra has divided its factory into different segments and each segment takes care of a particular industry, for example the machines for airbags are manufactured and assembled in a different zone in factory while machines dedicated for garments are being taken care in different area in the same premises.

After factory visit, the 2-day event came to an end and Lectra bid adieu to all its guests and customers with a small token of thanks.

Dekko Accessories along with Agami geared up for the future with complete solutions and flexible capacities

As the end consumer becomes more demanding and difficult to please, the textile value chain is increasingly challenged to constantly innovate to remain in business. While retailers struggle to get the mix of product offerings right, manufacturers optimise systems to remain competitive and support the industry that provides the products and services to produce and get the products to the market apart from looking at new ways to stay relevant. In this complex matrix, there are companies like the Dekko Group that has in its fold Dekko Accessories and Agami Accessories, which together are a complete package for garment manufacturers looking for single point solution to all trims and accessory needs. In conversation with *Team Apparel Online*, **Mohammad Abdur Rouf, Executive Director of the Accessories Division at Dekko** shares the differentiators that make Dekko a market leader in accessories and trims.

Considered a pioneer in plastic and metal buttons in Bangladesh, Dekko Group is much more than just buttons. Their product categories include woven and printed labels, polybags, paper packaging, woven belts and waistbands, PVC and board items, covering a very wide range of products



“The fact that Dekko has everything under one roof and is willing to invest further, adds to our strength.”

– Mohammad Abdur Rouf,
Executive Director of the
Accessories Division at Dekko

that are a major USP of the company. The future areas of growth under consideration are hanger plating, zipper, dyeing and lingerie accessories. “The fact that we have everything under one roof and are willing to invest further adds to our strength,” says Abdur Rouf. No wonder the company has names like H&M, OVS, M&S, VF Asia, Tom Tailor, PVH, Tesco and Chicco, as its global clients to name a few.

Run by a set of professionals, led by the very dynamic and forward thinking Abdur Rouf, the team not only understands the products, but also the market demands, because of which this well managed and organised company is geared up for sustainable growth. “Today, the lead times have reduced drastically and every manufacturer is looking to source from local companies to save time, but that is only possible if the quality parameters are of global standard,” reasons Abdur Rouf. Perhaps this is one of the biggest reasons that quality is at the core of everything that the company is doing.

The confidence that the Dekko team has in its systems built to ensure quality is evident from the company’s factory, which not only has the best infrastructure including technology and



Latest technologies support manufacturing



Trained workers are a big strength of the company

testing lab, but also trained manpower and compliant facilities. “We are proud of the quality that we deliver, and hence our prices, though competitive, are not cheap,” adds Abdur Rouf. The latest European technology is being used in specialised processes for detailing and even in printing, the company has acquired the Mellow100 club certification which indicates the precision in printing quality.

Quality is not only maintained in the manufacturing process but also starts from the selection of the raw material and attitude of over 1,600 workers in the factory. “While multinational companies can get advantage of cheaper raw materials and bigger brand value, I can vouch that the quality, if not better, will be at par with them,” states Abdur Rouf. This confidence that Dekko has in its products has resulted in major expansion over the last two years, and while the process of expansion has been completed in the plastic and label segment under the banner of Dekko Accessories, expansion is still underway at Agami which is exclusively for metal products. At Dekko, the capacity has been enhanced by 30 per cent, while the capacity at Agami, is going to be doubled from next year from the current capacity of 10,000 gross per day.

Sharply keeping a hawk’s eye on quality, the company is equally committed to sustainability and worker welfare. “Only an engaged and happy worker will give productivity that enhances the bottom line,” says Abdur Rouf. The efforts in this direction are visible through the

relaxed but purposeful body language of the workers in the factory, who go about their job with resolution. “We are very sensitive towards the needs of the workers and they can share their problems with us, without any fear. We encourage their children to seek education for which we run a free schooling project and also enhance their talents. A painting competition held recently saw the best paintings converted into a calendar and the children who got selected for their talent are being nurtured further which is a great source of motivation for them,” avers Abdur Rouf.

On the sustainability front, the company is driving initiatives in all directions, from saving resources to using less harmful chemicals, to reducing processes to innovating in the recycling and reuse of waste materials. “Not only do we use sustainable raw materials wherever possible, but all processes are also sustainable and workers are educated to understand the importance of the environment and saving of resources,” shares Abdur Rouf. The company, besides other CSR activities, also encourages its employees to plant more trees for building a sustainable environment.

Another focus area for the company is its R&D, which supports the growth objective of the company by providing solutions for product and process innovation, cost minimisation and quality improvement. “Continuous efforts in R&D and innovation help to anticipate and meet the market needs. In 2018, we had 578 new developments of which 67 (11.59 per cent) were selected by customers,” says



Inkjet machine for woven labels

Abdur Rouf proudly. He is also satisfied by the fact that the company could clock on-time delivery of 98.7 per cent, which is no small feat in an industry where time is money. “With fast fashion becoming a norm, the fact that we have a complete range of products, flexibility in minimum quantities and responsive services to keep pace with the industry, is definitely a differentiator. Not many companies in Bangladesh can offer the same, which makes us very positive about the future,” concludes the Executive Director with conviction.



R&D and testing is a continuous process



Quality is maintained through the use of best technologies

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Hohenstein supporting Bangladesh to reap the fruits of the sustainable movement with value

The fast-evolving manufacturing set-up in Bangladesh is actively taking the support of experts to upgrade and add value to their business. Entrepreneurs are not shying away from making investments and are taking active steps for improved efficiencies and working environment. In this proactive situation, Hohenstein Institute, Bangladesh, has presented to the industry STeP by OEKO-TEX®, which can give the industry value for the numerous sustainable investments that the players

have made. In conversation with *Team Apparel Online*, **Dr. Md. Kamruzzaman (Kamrul), Managing Director, Hohenstein Operations** in Bangladesh, underlines the edge that the company has over other TIC companies, being a research institute and a forward-thinking entity.

Though Hohenstein has been present in Bangladesh for a long time having introduced the OEKO-TEX® certification in 2005, it is only last year that the company developed a new laboratory that consists of high-quality analysis equipment for all textile testing needs. “Testing standards and requirements are changing very frequently and it is important to have the latest equipment to be prepared for the new regulations,” says Dr. Kamrul. The new fully loaded lab is offering various advanced testing services and result analysis such as testing for harmful substances, performance-based tests, quality control tests, on-site sampling and analysis services for wastewater and sludge with all relevant regulations such as ZDHC, Detox to Zero by OEKO-TEX® and STeP by OEKO-TEX®.

What really sets the company apart from its competitors is its focus on R&D that not only helps the lab to be prepared for the challenges of the future, but also to create new standards to address new challenges. “Our legacy is rooted in research, and even till today, the labs around the world are off-shoots of Hohenstein Institute, which is the master brain behind our services,” avers Dr. Kamrul. And he is not exaggerating as the company has a reputation of being a pathbreaker

and the focus is today on technical textiles and sustainability solutions, the growth engines of tomorrow.

With around 1,200 OEKO-TEX® certified companies in Bangladesh, Hohenstein is now geared to partner with the major sustainability movement in the country with Sustainable Textile Production (STeP®) by OEKO-TEX®, which is a certification system for manufacturers from the textile chain who want to communicate their achievements regarding sustainable manufacturing processes to the public in a transparent, credible and clear manner. “One of the biggest challenges today for manufacturers in Bangladesh is to reap the benefits from going green, because not many retailers are willing to pay for the efforts on the products produced, though they appreciate the initiatives,” argues Dr. Kamrul.

Perhaps this is one major reason that frustration is setting in with regard to Green initiatives and exporters are asking tough questions to their buyers. However, with STeP® and its six modules, companies can convey their sustainable achievements and brands and retailers can tag the product as ‘Made in Green®’, which is recognised by customers; hence it will help the companies fetch better prices. “We cannot blame the end consumers for not appreciating Green initiatives, because they don’t know whether the product has been made in a green environment, but once the tag is attached which also has a QR code for traceability, the value of the product in the eyes of the end consumer increases, which by default adds a few cents more,” reasons Dr. Kamrul.



Dr. Md. Kamruzzaman (Kamrul), Managing Director, Hohenstein Operations

The STeP® certification is possible for production facilities of all processing stages from fibre production, spinning mills, weaving mills, knitting mills to finishing facilities and manufacturers of readymade textile items. The methodology is very clearly defined, wherein through modular analysis of all relevant company areas such as management of chemicals, environmental performance, environmental management, occupational health and safety, social responsibility and quality management, the STeP® certification allows a comprehensive and reliable analysis of the extent of sustainable management provided by a production facility.

Working in partnership with the companies, Hohenstein with its STeP® modules, can support change in factories and workplaces by saving resources, reducing cost, increasing efficiencies and helping companies achieve sustainable goals in line with global demands. Giving a comprehensive understanding of the STeP® certification, Dr. Kamrul shared that the unique process encompasses three different levels describing the extent to which the company has achieved sustainable production and working conditions: Level 1 – Entry level; Level 2 – Good implementation with further optimisation potential; and Level 3 – Exemplary implementation in the sense of a best practice example.

The growing popularity of STeP® certification is obvious from the fact that the country already has over 25 such certifications and many more are under process.

“The apparel business in Bangladesh is not only growing, but growing sustainably and we at Hohenstein are ready with all the tools to support this growth and achieve targets that will keep this country as the preferred manufacturing destination of global brands and retailers for many more years,” signs off Dr. Kamrul with confidence.

“Taking the leadership role in the TIC industry seriously, we have to lead the way”

– *Abdur Rashid, Country Manager, SGS Bangladesh*

About five months ago, SGS Bangladesh Limited announced, for the first time in its long history of presence in the country, a local talent as the Head of Operations – **Abdur Rashid** officially taking over as the **Country Manager**, having serviced in SGS for last 10 years, and earlier being responsible for the consumer and retail segment of the company. Controlled by expats till now, it is a big privilege and challenge for Rashid to not only take on a leadership role, but also add new dimensions to the operations in Bangladesh with his understanding of local issues and concerns. In a candid interview, he talks about his new role, the challenges and the opportunities ahead.

AO: *As a local boy, what are the advantages as also the major challenges that you see?*

Rashid: Our country’s major revenue comes from the apparel industry and so all of us have friends in the industry from whom we have understanding of ground realities, which expat leadership do not have. To be honest, being a local, I know the industry, the manufacturing community and all the positives and negatives. Also, I am easily accessible to the industry and to my staff, so they can express their expectations, difficulties or desires whenever they want. This is a good starting point, but then the expectations are high.

Since expats were not much accessible, they had not faced the challenges that I do. Earlier if there were any mistakes, then headquarters used to think that it was due to market dynamics, but if we will fail now, then there is a chance



Abdur Rashid, Country Manager, SGS Bangladesh

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that they may put the responsibility on the local person. This is the internal side of the story. The external side is that the expectations from the industry have increased manifold. Being a local, people believe that empowerment and authority is on me. So, the additional pressure is on me to perform and create the right balance to satisfy all and justify my position as head.

AO: As an industry, Bangladesh has changed in the past five years; what are the positives that you see in Bangladesh today?

Rashid: If we look at Bangladesh 10 years before, we have had many negative things. But, ironically, after the unfortunate Rana Plaza incident, many good things happened. After the incident, the buyers understood that Bangladesh is an attractive manufacturing destination and even those which were trying to penetrate into other countries, came back. They realised that this is the place they need to stay on and fix, giving birth to the Accord and Alliance. There was a joint understanding by the Government, industry owners and the buyers. Everyone thought in a positive way with positive efforts, investments and mindset, which gave a good shape to the industry, but unfortunately this has not been promoted or communicated to the rest of the world properly.

The people who come here regularly are aware of this, and those who don't, still have that old perception of the country 5 years or 10 years before. After witnessing the present changes, few of my seniors, who came here after 10 years, said that Bangladesh should be promoted now. For this, we have assigned an R&D team from Hong Kong to make some presentations, provide articles, and to be able to give a clear picture, we have asked them to stay in the country for sometime to find the true, real Bangladesh. They admitted that the internet doesn't give a clear picture, and out of 10, 8 things show negative aspects of the country.



There are many positives that one can find in Bangladesh, like our expertise, capacities and capabilities in the apparel industry, besides the entrepreneurial skills of the people here, encourages global brands to invest in the business.

Some of the top green factories of the world are from Bangladesh. These are the things that many people don't know. This is an opportunity, which is currently challenging but an opportunity which we need to cash in on properly.

There are many positives that one can find in Bangladesh, like our expertise, capacities and capabilities in the apparel industry, besides the entrepreneurial skills of the people here, encourages global brands to invest in the business. Some of the top green factories of the world are from Bangladesh. These are the things that many people don't know. This is an opportunity, which is currently challenging but an opportunity which we need to cash in on properly. This is even more important now, as with the wage hike, sooner it won't be the cheapest country. So all the stakeholders need to put their heads together for a viable and sustainable roadmap to growth.

AO: With so much competition in the TIC industry, what is your USP that will keep you relevant today as it did many years ago?

Rashid: Earlier, TIC companies used to sit back, waiting for people to come with their samples. That was the culture, but now the USP is to put solutions at the door steps of the customers. We have labs in Dhaka and Chittagong, and we are the first to introduce free pickup samples from the customer's factory or premises. We have also expanded all our services for the customers. Previously, we only had the textile lab, but now we have footwear lab with all the solutions in Dhaka. We have formally started a calibration laboratory. This facility is for factories that can't calibrate, we give them services starting from compliance, testing for all the products needed such as textile, footwear. We also provide help in maintaining the internal lab equipment. If the customer has its own lab and doesn't need commercial test from a third party like us, then we consult those factories and give them the SGS certification for the lab. This helps the factory, as it proves that it has the capability of testing for certain domains as they have the equipment.

We are now becoming more customer-focused, so surely, we are changing with times. We have also started an SGS academy, where we provide training sessions for upcoming industry-related topics, and also hold workshops. Every week, we are gathering 50-60 people from different factories to share our technical knowledge, which are provided free of cost. Taking the leadership role seriously, SGS has to lead the way and is hoping to inspire others.

AO: How are you using IT-enabled tools to support your vast businesses that are helping you to be more at the doorsteps?

Rashid: Being a leader, we are not just thinking, but acting on the same. IT is one of the ways or tools that is making every industry efficient and making life much more comfortable. Going on, inspection will become a manual job. We have done a fusion, making most of the things automated. For inspection, we have created OLB (Online Booking). The customers from anywhere can visit our website and can book an inspection, asking for the same within three days from a particular factory on any particular item and quantity, along with the specifications. He/she can upload all his requirements and immediately our back office will act on this. This is one of our developed tools. And after inspection, we will upload our results on our portal. So, the customers sitting in US or Europe can track and analyse the report whenever needed. This is the inspection side.

On the testing side, we are going to implement a new version of LIMS (Laboratory Information Management System). SGS Global is going to implement this at our Dhaka lab which has been selected as the trial lab. After successful implementation here, other countries will follow the system. This is a matter of pride for us!

Texprocess: EFKA to display cutting edge solution

EFKA will showcase its technological solutions during the four-day international trade fair Texprocess from 14th-17th May 2019 at Frankfurt, Germany.

The main highlight of its offerings will be its range of Retrofit controllers, AB6xxx that provide great versatility to elevate sewing machines of different classes to a new level. The company offers a wide variety of motors in all common performance classes of the sewing industry and its controls are able to support basic to full function sewing machines. Even machines with integrated motors can be adapted to the AB6xxx controls.

These controllers are equipped with EFKA's Fail Safe technology that

provides better energy efficiency and the special motion control assists the machine with high reliability due to better performance.

Also on display will be the prototype of the new control generation which will revolutionise the standard for drive technology on a sewing machine. The SewingManager 4.0 that can be used with any sewing machine, can easily upgrade the old version of sewing machines to a better one. These controllers help to digitise and connect all sewing machines to manage the production better.

The technology easily connects, supports and controls all the sewing production processes for better managing the daily business and

workflow of the sewing factories. It creates a dashboard that displays all the data for better control by the sewing operators, technicians, supervisors and managers running on tablets and/or desktop.

This enables the factories to have access to the most up-to-date information combined with meaningful statistics enabling an innovative, cost-efficient and sustainable approach to production planning and execution. Moreover, SewingManager 4.0 helps in creating a full transparency of the production process therefore assisting the factories with improved production output, better quality control besides providing a professional maintenance tool for

predictive maintenance. This further increases the work ratio, optimises the performance efficiency and finally lowers production costs for the sewing operation. Because of full access to all settings and all activities of the machine, SewingManager 4.0 gives the best chance to 'Think BIG, Start Small and Learn Fast'. 'The Open Source Concept' allows the integration of many different sewing machine brands and different third-party software. The network structure, communication modules and tablets can be flexibly selected to meet a wide range of requirements. All existing EFKA controls of the last 10 years can be easily integrated into this system.

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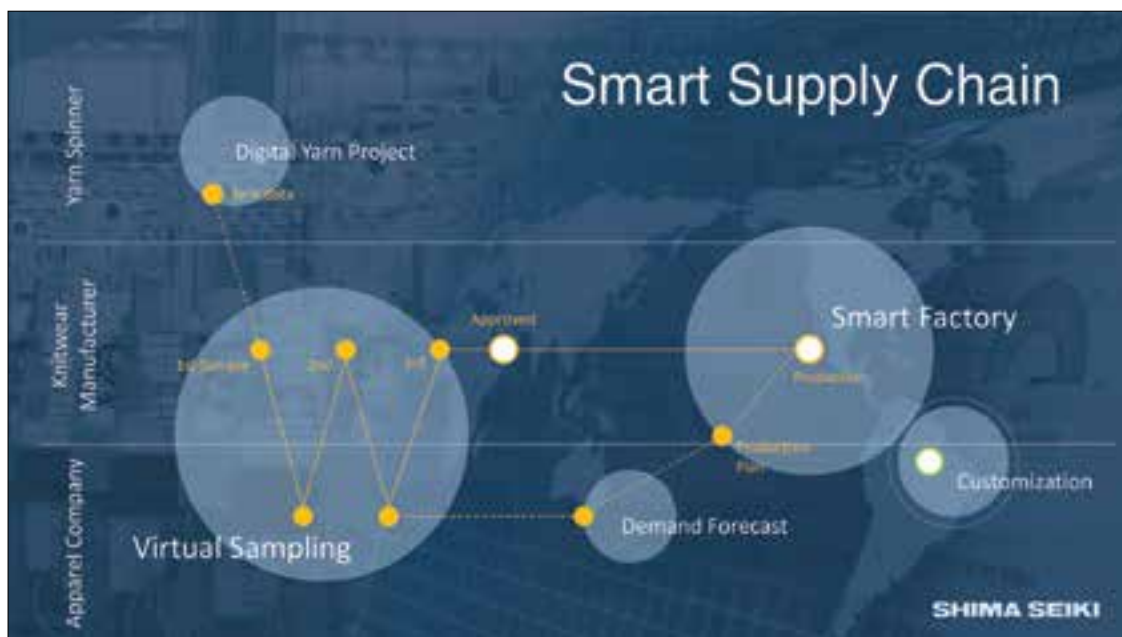
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SHIMA SEIKI DISCUSSES TOTAL SOLUTIONS FOR THE FASHION INDUSTRY AT ASW '19... INDUSTRY SHOWS INTEREST



Though Shima Seiki as a company needs no introduction, having already built an enviable reputation for its flat knit technology that is widely used the world over to produce fashion knitwear, the changing dynamics of business, particularly in Asia, have presented new opportunities to reinvent what the company stands for. At the recently concluded Apparel Sourcing Week 2019, the focus of the company was on 'total solutions in the supply chain' rather than knitting machines for suppliers, which was highly appreciated by the visitors and exhibitors alike.

Indeed, from being leaders in flat knit machines with incredible design options to becoming a total fashion solution provider, Shima Seiki has come a long way. Today, the company has a range of dynamic technology to address many of the pain points in fashion retail from fresh design possibilities to faster lead times to virtual sampling to mass customisation. All these challenges find solutions with technologies from Japan's leading manufacturer of computerised knitting machines.

In fact, for an industry that has always perceived Shima Seiki as a machine manufacturer, it was a pleasant surprise to see the many dimensions of its offerings. The focus area for the company was on WHOLEGARMENT technology, its unique concept of mass customisation and on innovation in supply chain management/processes with its All-in-One 3D design system, which offers complete solutions



“While generally, buyers drive the market for new solutions, in case of our 3D design system, the push for greater integration between the supplier and the buyer is coming from suppliers who are already using the solutions for in-house productivity and to cut down on wastages.”

– Tadanori Ueno, Manager (Joint Sales Division), South Asia Unit, Shima Seiki



for the apparel supply chain from planning to production and sales support.

However, the offerings of the company do not end here and include a line-up of a full range of knitting machines, cutting machines and inkjet printing machines, all with high-user confidence based on years of experience and know-how.

“We have a solution to suggest to the fashion industry in smart and sustainable way throughout the whole process, from planning stage, designing, programming, production to even to sales promotion as well, with virtual sampling and WHOLEGARMENT, Knit PLM, and our web media, STAF for trend forecasting. Those Total Fashion System will help to reduce wastage in every stage and also to build smart supply chain,” said **Yuri Tomita, Asst. Manager, Joint Sales Division, South Asia Unit.**

Understanding that only talking to the suppliers to buy machines is not the way forward, all presentations by Shima Seiki were geared up to address both the manufacturers and retailers. “Today, lead time is very critical and every manufacturer and retailer is searching for ways to reduce the time taken across the supply chain from conceptualisation to sampling and approval process and of course production. Shima Seiki, with its sustainable solutions, is a perfect match to address all these concerns and more,” said **Yasuyo Shimamoto, Manager, Total Design Center, Shima Seiki Mfg., Ltd.** There is an underlining need for every player in the supply chain to look for solutions that will reduce few days from the fashion cycle, and solutions from Shima Seiki can be of great help.

The two dedicated sessions of Shima Seiki at ASW were well attended and many companies were keen to understand the options that Shima Seiki had to offer. “While

generally we find that buyers drive the market for new solutions, in case of our 3D design system, the push for greater integration between the supplier and the buyer is coming from suppliers who are already using the solutions for in-house productivity and to cut down on wastages,” shared **Tadanori Ueno, Manager (Joint Sales Division), South Asia Unit, Shima Seiki.** Adding to his thoughts, Yasuyo Shimamoto said, “What really makes our technology stand out amidst this competition is the fact that not only are we the best integrated digital connect with suppliers, but also have the most realistic detailing during the design and virtual sampling process, wherein even the minute hair on the yarn can be seen, giving a true ‘live’ experience to the retailers when zeroing in on a sample.” For suppliers and buyers who may be in two different continents, the time, energy and resources saved in the process are noteworthy.

Shima Seiki is changing the way business, systems and processes are looked at and what is supporting this movement is the evolving mindset of users of technology. “Earlier people and companies were comparing invoices and looking at price points when deciding on which technology/solution to invest in. However now slowly but surely, the players are studying the whole picture and performance of the machine/technology over a period of time, changing the way technology is being bought,” said Tadanori Ueno. In case of a slight difference in price versus a huge advantage in performance, the choice goes to the best performing technology, which speaks highly of the changing dynamics of the fashion industry, where fast turnaround times with maximum savings is the mantra for success.



“Today, lead time is very critical and every manufacturer and retailer is searching for ways to reduce the time taken across the supply chain from conceptualisation to sampling and approval process and of course production.”

– Yasuyo Shimamoto, Manager, Total Design Center, Shima Seiki Mfg., Ltd.



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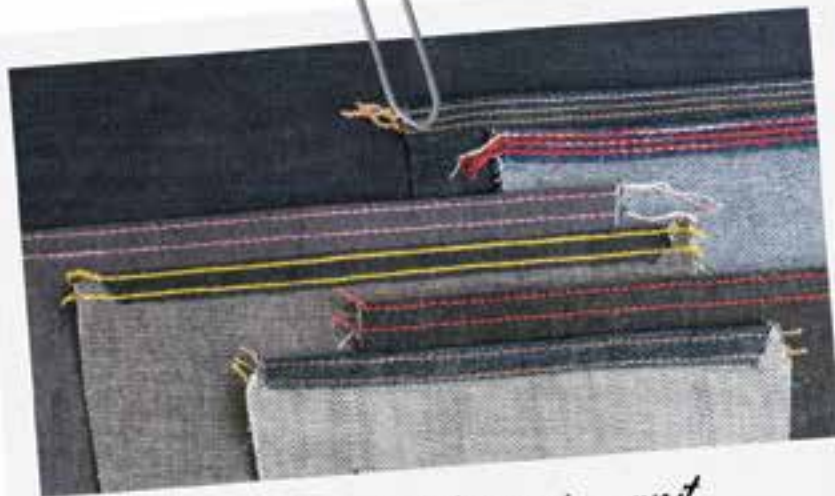
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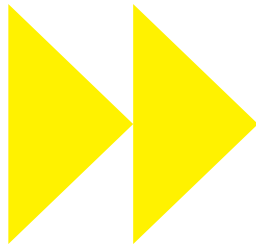
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ACCORD'S EXIT AND PROBABLE SOURCING SHIFT

Probability of the buyers' body exiting Bangladesh sooner or later getting strong; brands/retailers are reportedly weighing other sourcing options

Accord, at best, seems set to go following the Bangladesh Supreme Court order to leave the country, on the pretext that the home-grown national regulatory body Remediation Coordination Cell is capable of taking over its work.

Bangladesh Accord on Fire and Building Safety, in response has appealed the decision, which as per experts is its last resort to ensure if it can stay put for some more time before calling it a day! And as it would have been, the court proceedings are yet to show any signs of conclusion with dates of hearing getting deferred time and again. Nonetheless, the tug-of-war between Bangladesh and the retailers' body reaching a climax, counter allegations of Bangladesh's lack of preparedness to take over the unfinished work of Accord is flying thick and fast amidst fears that Accord deciding to wind up operations in Bangladesh will come with the threat of a sourcing shift!

As per a report published by the Clean Clothes Campaign, the International Labor Rights Forum, the Maquila Solidarity Network and the Worker Rights Consortium, Bangladesh is

apparently far from being prepared in taking over from Accord the remediation work.

According to it, Bangladesh "shows a shocking level of unreadiness" with around 745 factories under the Government's inspection programme "yet to eliminate high risk safety hazards."

What's more, the report further claimed that Bangladesh has failed to shut down factories that were deemed dangerous. "But today half of these same facilities operate again under the Government's inspection programme. There is no indication in the Government's own records that any safety improvements have been made to these factories," the report claimed, adding, "Currently, international stakeholders across the board agree that Bangladesh's national inspection agencies do not yet meet the expected standard when it comes to transparency, monitoring or enforcement."

However, the lack of clarity as to whether Bangladesh can successfully handle the transition without compromising on the remediation

process and standards, has reportedly sowed seeds of doubts amongst brands and retailers, who are apparently weighing other options as far as their sourcing strategy is concerned.

Norwegian company Kid Interiør has reportedly reiterated that it is "committed to safe working conditions in Bangladesh and Accord is one of the most important measures to make sure this happens in a fair and cost-effective way," while German retailer KiK on its part reportedly maintained, "The considerations of the Government of Bangladesh to send the Bangladesh Accord out of the country disappoint us very much. The work of the Accord has been immensely successful and the progress should not lose speed."

Apart from Kid Interiør and KiK, several other big names including the likes of Esprit, H&M, Adidas and Inditex have also reportedly come out in support of Accord's continuance, indicating in no uncertain terms that with Accord moving out of Bangladesh, brands and retailers would rather be looking at other viable options for the future.

It may be mentioned here that the Bangladesh Accord is a legally binding pact signed by 200 fashion companies following the infamous Rana Plaza building collapse, which claimed lives of 1,100 garment workers.

With little signs of court proceedings ending anytime soon, manufacturers *Apparel Online* spoke to underlined that considering the existing scenario, they are hopeful of its continuation for a year, if not more.

So for the time being, they could heave a sigh of relief, it seems.





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ALLEGED MISUSE OF BONDED WAREHOUSE FACILITY AND ITS IMPACTS

► Besides loss to national exchequer, such malpractices are posing a huge challenge to the textile mills of the country

Introduced with noble intentions to help export-oriented industries maintain a competitive edge, bonded warehouse facility is apparently turning into a big headache for the Government and the textile sector alike. The alleged misuse of this facility is reportedly leading not only to loss in revenue earning but also is posing a serious challenge to the very existence of the textile mills of the country.

Under the bonded warehouse system, export-oriented industries can import duty-free fabrics. Licences are given to import raw materials without any duty charges against a commitment to export the finished products, which makes exports more competitive. It helps export-oriented industries, especially garment exporters, reduce lead time and keep prices competitive.

As per reports, 90 per cent woven items, 45 per cent garment accessories and 35 per cent knit items are imported under the bond system for the apparel sector. However, some unscrupulous entities with vested interests are allegedly misusing this facility to sell duty-free imported goods in the local market, instead of using them for export purpose, to earn easy money.

If the country's textile manufacturers are to be believed, they are losing around US \$ 6 billion annually in the domestic market due to misuse of bonded warehouse facility along with smuggling of yarn and fabrics into the country. "The size of domestic market of fabrics is 7 to 8 billion metres worth US \$ 11 to US \$ 12 billion. Of this, local producers meet only 3 to 4 billion metres worth nearly US \$ 6 billion and the rest is met by smuggled fabrics and bonded warehouse fabrics," maintained **Mohammad Ali Khokon, President, Bangladesh Textile Mills Association (BTMA)** speaking to media, adding, "Market situation suggests that smuggling of fabrics



As per reports, 90 per cent woven items, 45 per cent garment accessories and 35 per cent knit items are imported under the bond system for the apparel sector. However, some unscrupulous entities with vested interests are allegedly misusing this facility to sell duty-free imported goods in the local market, instead of using them for export purpose, to earn easy money.



into the country and misuse of bonded warehouse are taking place in a big way."

If that was not all, loss to exchequer in the form of taxes and duties is also quite substantial. As per a media report published in March this year which cited some high-ranking officials of the National Board of Revenue (NBR), in one-and-a-half months alone, 40 companies were reportedly found flouting norms of the facility thereby depriving the state of an estimated Taka 30 crore (in duty and taxes).

In another instance late last year, Chittagong-based customs officials reportedly discovered abuse of duty-free facility under bonded-warehouse scheme after auditing the documents of some 136 import consignments belonging to one particular garment exporter. The consignments of RMG fabrics came through the Chittagong Custom House (CCH) in 2018. The Customs Valuation and Internal Audit (CVIA) Commissionerate during physical verification reportedly found that the relevant garment company had sold the fabric imported duty-free to the local traders. If this particular case has hit the headlines, scores of

others go unreported, feel many in the industry. Moreover, licence holders sometimes purportedly use fake addresses to escape the monitoring mechanism, while some deliberately neglect maintaining records to hoodwink the authorities.

This has now motivated the NBR to introduce a system to prevent the open market sale of items imported under bond facilities. The revenue collection authority's 'Bond Automation' initiative is part of its plan to stop the illegal practice that is causing the national exchequer a huge loss. However, many in the industry are bemused as to the unwarranted delay in automating the whole process. "We have long been requesting NBR to introduce software to prevent misuse of bonded warehouse facility but NBR officials somehow are unwilling to automate the system," alleged **President of Bangladesh Chamber of Industries Anwar-Ul Alam Chowdhury Parvez**, who reportedly claimed that Bangladesh's primary textile sector was losing its competitiveness due to misuse of bonded warehouse facility along with the factor of increased cost of doing business.

PM'S RENEWED FOCUS ON RMG SECTOR

► Considering that apparel sector is the mainstay of Bangladesh's economy, Prime Minister, Sheikh Hasina undertakes numerous steps to keep the growth going

It's not without a reason that industrialists and entrepreneurs, especially those in the business of garment manufacturing, are all praise for Prime Minister Sheikh Hasina. It is under her strong leadership and her pro-industry policies that the RMG sector of the country has flourished and developed into what it is today.

Coming back to power with convincing majority in the last general election, the first thing Hasina did was to hand over the baton of the all-important commerce portfolio to someone who is not only an industrialist but a garment manufacturer and ex-BGMEA chief, to give a fresh impetus to the industry, which is raring to touch new heights.

"I am humbled by the confidence that our honourable Prime Minister has shown in me by giving me responsibility of such an important portfolio. Coming from a business background my approach is to touch upon issues that impact business..." maintained **Commerce Minister Tipu Munshi** speaking exclusively to *Apparel Online* in an earlier interview, adding, "My nearly 50 years of business experience, a majority of which is in the garment manufacturing industry, has given me a very deep understanding of the potential and challenges that the industry faces. I am very proud of the entrepreneurial skills of the people involved in the business and the way they have responded to innumerable challenges. This gives me confidence that the industry still has the hunger to grow..."

Hasina's focus on taking the industry to the next level has, however, been not restricted to just selecting Munshi to head the business and commerce. Her vision for the industry has been evidenced in a number of steps that she has undertaken ever since coming back to power.



"We have already held detailed discussions with officials of Bangladesh missions calling them in Dhaka and directed them to find out which products have high demand in which countries."

– Sheikh Hasina

The most important perhaps is the renewed thrust towards economic diplomacy to widen Bangladesh's reach in the global arena. As part of this unique approach, Bangladesh missions abroad have reportedly been asked to scout for new markets.

"We have already held detailed discussions with officials of Bangladesh missions calling them in Dhaka and directed them to find out which products have high demand in which countries," stated **Prime Minister Sheikh Hasina** at an event in Dhaka recently.

Having identified the potential markets, Hasina plans to help the industry diversify its product offerings. "After that discussion, we also put emphasis on producing and exporting those products..." added the Prime Minister.

In this direction, Bangladesh has already identified in its neighbour India a potential apparel export destination, and is working to exploit the opportunities to the fullest.

"I truly believe that India is an important market for Bangladesh garment manufacturers... Also, proximity is very critical. However, we need to also take a prudent

view of the fact that the official data of exports to India, which is about US \$ 300 million, does not reflect the true volume of business that is happening in this segment, as a lot of garments do not cross the border through a proper channel. This business can be channelised properly and brought into the mainstream," explained Munshi on India as an export destination.

With non-traditional markets coming up strongly, Bangladesh Government has also increased incentive for RMG export to 4 per cent from earlier 3 per cent, to motivate garment makers to go for the new destinations.

However, it is not only in the market front that Hasina is concentrating. Her approach percolates to the grassroots to ensure that the workforce, which is at the core of the industry, is well-looked-after. Describing various welfare-oriented steps for the garment workers, the Prime Minister underlined that minimum wages have been hiked to Taka 8,000 from Taka 1,600 in 10 years.

"Besides, the Government has constructed a number of dormitories for the female workers and is providing financial assistance to them in the case of accidents," Prime Minister Hasina underlined, adding, "We don't want any obstruction be made in the trade and commerce... Our garment industry has already earned name and fame across the world. This sector is making huge contributions to our economy. We'll have to sustain the garment industry as employments for a huge number of women have been created in the sector... Its impact has reached up to the villages, improving the socio-economic condition of the rural people."

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Industry bats for long-term policy approach to combat recurrent gas price hike

It's not very often one would see a particular sector losing its sleep over another! However, for the Bangladesh garment industry, the country's energy sector is emerging more than a cause of worry, in the prevailing circumstances.

Amidst talks of proposed hike in gas prices (distributors' proposal for doubling the average gas price – from Taka 7.35 to Taka 14.91 per cubic feet), garment manufacturers are at their wits end as to their survival and future. With wafer thin margins, increased workers' wages and overheads, and the economical burden brought in by sustainability-related demands, further hike in gas prices is the last thing garment makers could afford to accept. "There is no scope to raise gas price... For whose interest will the gas price be increased? If the gas price is hiked at the moment, many factories would shut down," the observations of BGMEA's former President Siddiqur Rahman demanding scrapping Government's move to implement the hike draws a very grim picture for the industry, if the same is affected in principle. It may be mentioned here that the Government wants to hike prices of gas to reduce the burden of subsidies as it has to buy per cubic metre of LNG at Taka 32 and selling it at Taka 7.17, keeping in mind which Bangladesh Energy Regulatory Commission (BERC) held a series of meetings with industry bodies and other stakeholders.

Even though the Government necessarily may not strictly stick to what it has proposed and rather try to hammer out a more agreeable middle path, to wriggle out of this situation. However, as per Nurul Islam, a former professor of the Bangladesh University of Engineering

and Technology (Buet), there's no choice but increase the gas price given the fact that the huge liability in form of subsidy would hit the country's exchequer for sure. So what is the way out? As per industry insiders what it calls for now is a long-term energy policy for the export-oriented manufacturing industries to enable entrepreneurs plan things accordingly and well in advance. Economists are of the opinion that prices should be reasonable and the policy must be stable. Otherwise, it could have a lasting impact on investment and manufacturing industry, hindering not only the industry's growth but also the country's overall economy. The garment industry after all is the backbone of Bangladesh's economy contributing for more than 80 per cent of foreign earnings besides providing large-scale employment.

"...the policy should be predictable so that an investor can take decisions in making new investments. Frequent changes in policy are a barrier to invest, while it hinders the stability on investments both from home and abroad," underlined a former BGMEA President interacting with the media.

Some are calling for increased transparency in the whole process to rein in the abrupt price hike as they feel even though Bangladesh is purchasing gas following the Public Procurement Rules, the same is not always followed when it comes to the energy sector. Given the present scenario, the continuous hike in gas prices as has been witnessed in the last few years, would definitely eat up Bangladesh's competitiveness in the global market (due to rise in production cost) thereby providing opportunities to the competitors to grab its apparel export share, fear many within the industry.

PM congratulates Dr. Rubana Huq on winning BGMEA elections

Prime Minister Sheikh Hasina congratulated Dr. Rubana Huq on winning the Board of Directors of Bangladesh Garment Manufacturers and Exporters Association (BGMEA) elections and becoming the first female President of BGMEA. On 7 April, Dr. Rubana Huq met the Prime Minister at her office and it was during this meeting that the PM wished the new President and the Sammilita Forum panel for sweeping the BGMEA polls to the garment entrepreneurs' body. The Sammilita Forum panel won all 35 posts for directors in the polls held on 6 April. Dr. Rubana Huq, also the Managing Director of Mohammadi Group, was elected in full panel for a term of two years and it is worth noting here that her husband Late Annisul Huq was also a former BGMEA President. She has also been vocal about her commitment to rebuild the image of country's apparel sector in addition to helping the industry people adopt the best of technologies. Before being elected the President, Dr. Rubana Huq stressed on the need to rebuild the image of the sector, which as per her, was a major challenge. "If my team wins, I will be committed to rebuild the image of Bangladesh at home and abroad as negotiation over the price of products largely depends on it. Besides, I will also ensure measures are initiated to help the industry people adopt the latest technology," said Dr. Rubana Huq.

B'desh continues good show in exports

Bangladesh continued to witness a good show in exports in March 2019, fetching 9.51 per cent more than what it was during the same period last year. The overseas shipment in March, according to the Export Promotion Bureau data, brought US \$ 3.3 billion, which is 2.45 per cent more than the target set for the month. At this pace, the country is in a comfortable position to reach US \$ 39 billion (current fiscal year's target). March's inflows take the receipts so far in fiscal 2018-19 to US \$ 30.9 billion, which means the shipments have to bring US \$ 3 billion each for next 3 months to achieve the year's target. It is imperative to note that apparel shipments, which constitute over 80 per cent of export receipts, collected US \$ 2.8 billion, which is a jump of 9.73 per cent y-o-y. More on the same, Siddiqur Rahman, the former President of the Bangladesh Garment Manufacturers and Exporters Association (BGMEA) said, "We hope that the garment export receipts will be at least 10 per cent more than what it was there in last fiscal year even if the shipment falls for any reason."

Recycling gaining currency in Bangladesh

► Once discarded, fabric cutting wastage is now being recycled by many. Thanks to popularity of circular fashion among global buyers

Wastage is a major challenge towards attaining sustainability and business profitability. As per some estimates, wastage from production falls between 10 and 30 per cent from intake materials, and that leftover percentage can rarely be pushed below 10 per cent. Unless the product is designed for zero-waste production, one can hardly avoid cutting scraps and defects. What's more, bigger the production volume more is the waste.

Bangladesh, the second biggest apparel exporter globally, is no exception. According to some, if China produces about 26 million tonnes of textile wastage annually, fabric wastage in Bangladesh is not insignificant either. In 2017, Bangladesh reportedly produced around 16,356 tonnes of knit fabric cutting wastage, which was 12,512 tonnes in 2013.

However, a study by Reverse Resources – an Estonia-based software company that has set up an online track and trace system and an intelligent management process of garment waste in Bangladesh, ensuring maximum utilisation and better value for wastes – found that the country could significantly benefit from adopting more initiatives for recycling wastes from RMG industry for reuse as export-ready product, which could generate substantial revenue if wastes are repurposed into higher grade textiles.

So why is the industry not working towards it?

“It's not that the RMG sector is not utilising the wastes. As to what I know, there are some mills that successfully recycle wastes. However, large-scale commercial endeavours are yet to gain popularity in Bangladesh,” maintained **Md. Abdul Mottaleb, Managing Director, Global Sustainable Certification Services Limited (GSCS)**, speaking to *Apparel Online* over phone. Mottaleb attributes this to lack of awareness more than anything else.

GSCS is a well-known entity that offers comprehensive services in Social/ETI/Technical Auditing, Certification, Inspection and Training business at all sectors focusing on RMG industry.

As per media reports, many textile mills in Bangladesh are slowly but steadily warming up to the idea of recycling wastes, with a handful already successfully trying their hands in recycling wastes, bulk of

which otherwise used to make its way to landfills or to countries like India and China (technically well-equipped) after changing a series of hands to be recycled and introduced to the supply chain in form of fabrics again.

A very small portion of the waste is also reportedly used in making low-end garments for the local markets as well as filling materials in furniture, mattresses and car seats.

According to reports, Bhaluka-based Simco Spinning and Textiles Ltd. is one such name to have taken up recycling to produce yarns. Established in 2010, Simco reportedly has capacity to produce 15 tonnes of yarn/day from ‘cotton clips’ cut out during the garment stitching process. The eco-friendly yarn is then said to be used for knitting and weaving products like T-shirts, socks, gloves, towels, home textiles, denims, sweaters, etc. for global clients.

Filotex Ltd., a sister concern of Mosharaf Group, is another name which is reportedly playing a pioneering role in turning ‘cutting waste’ into luxurious recycled products to be used for home furnishing and upholstery since 2014.

The concept of circular fashion gaining currency amongst global buyers, Filotex reportedly turns the waste into fashionable products like doormats, table mats, terry towels, carpets, etc. Considering the economic viability of such an approach, leave alone the sustainability aspect, it is perhaps time for the industry to nurture a healthy recycling culture and set new benchmarks for others to follow.



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B'desh to make RMG factories 'decent place to work at'

The Bangladesh Government has established a loan fund of US \$ 56 million for financing the country's readymade garment (RMG) sector especially for its safety and environmental upgradation.

The loan fund has been established in Bangladesh Bank with the aid of Agence Francaise de Developpement of France. The objective is to make the RMG factories safer, greener and, importantly, a 'decent place to work at' in terms of social compliance. The fund will help the RMG factories invest in safety

retrofits and environmental upgrades. The eligible garment factory will get a loan of US \$ 1.12 million from the loan fund at an interest rate of 7 per cent. Those going for larger upgrades could even be eligible for loan up to US \$ 3.37 million.

Besides, technical assistance worth US \$ 16.04 million will be provided to successful garment factories, which is an initiative between the KfW Development Bank (Germany) and the European Union. This programme also focuses on training RMG



managers in the areas of safety remediation and technical

upgrades as well as on available financial options.

Government 'hesitant' to assume responsibility for factories under Bangladesh Accord

The Government of Bangladesh has shown strong unreadiness to assume responsibility for all the garment factories under Bangladesh Accord on Fire and Building Safety.

This was highlighted in the recently released report issued by the Clean Clothes Campaign, the International Labour Rights Forum, the Worker Rights Consortium as well as the Maquila Solidarity Network.

Last year, the Supreme Court of Bangladesh had ordered the Accord to leave the country and had stated that the Remediation Coordination Cell was capable enough of taking up the responsibility of Accord.

However, the Accord, which was signed by 200 firms in the aftermath of 2013 Rana Plaza disaster, had



appealed against the court's decision. Reportedly, each of the 745 factories under Bangladesh Government's inspection programme are yet to remove the high-risk safety hazards that include lack of adequate fire alarms, exposed electrical wires as well as lockable exit ways.

What is appalling is that 346 out of 400 factories, for which information is available, have completed less than 20 per cent of necessary renovations. Reportedly, on the other hand, 89 per cent of necessary renovations required at factories under Accord have been completed.

The report also claimed that Bangladesh has not shut down factories that were deemed unsafe for the garment workers. It is worth noting that Accord had identified 114 factories as unsafe but more than half, as per reports, are still operational.

While the Accord's fate in Bangladesh is yet to be decided, Clean Clothes Campaign is collecting support statements from international brands operating in the country. According to one such renowned sportswear brand Adidas, "Despite significant progress on safety measures for garment workers, the Accord's work is not completed. Moreover, the Government's Remediation and Coordination Cell neither has the capacity nor has it demonstrated the willingness to inspect factories to the same standards."

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Turkmenistan showcases best of textile and apparel at JITAC 2019

The best of Turkmenistan's textile and apparel products were showcased at the recently concluded JITAC 2019 in Tokyo.

Known for their exceptionally high quality and original colour, there was an exquisite display of a variety of fabrics, cotton yarn, apparel and home textile samples at the event.

One of the principal objectives of the event was to further boost the co-operation between garment manufacturers and importers of garment industrial products in Asia. Besides, the event intends

to develop the textile market by uniting the efforts of participants.

There was also a special presentation on Turkmenistan's textile industry for all the participants at JITAC 2019. The three-day exhibition, organised by the Japan Imported Textiles Agency Council, is known worldwide for being an international platform for all textile industries. Turkmenistan has around 70 large enterprises, which not only have highly advanced machines but also have the potential to manufacture high-quality products that have huge and



consistent demand overseas. The textile industry has been key to the

growth of the country's national economy.

Kenya's Kitui County Textile Centre expresses pleasure over manufacturing clothes for Government officials

The Kitui County Textile Centre, or KICOTEC, in Kenya, has full capacity to manufacture quality Government uniforms, especially for Chiefs and Assistant Chiefs.

This was confirmed by Charity Ngilu, Kitui Governor, during her visit to a highly advanced apparel production unit.

The Governor also said that the people of Kitui were grateful to President Uhuru Kenyatta for giving them an opportunity to manufacture uniforms for Government officials.

"The opportunity given by the President to KICOTEC for manufacturing Government uniforms will ensure sustainable employment for our



youth and enhance the economic growth of the country," averred Charity Ngilu, Kitui Governor.

KICOTEC is reportedly equipped with state-of-the-art machines

that can manufacture a variety of quality garment products appropriate for different styles and preferences. The Governor said that KICOTEC has not only

given employment to 400 youths from Kitui but has also ensured they are trained well for their job. Notably, KICOTEC has a daily capacity of producing 5,000 units.

The facility has the capacity to make all types of garments ranging from trousers, shirts and skirts to track suits, uniforms and jumpers.

"Since we didn't have a uniform making facility here, more than 90 per cent of money used to go out of Kitui to other countries. The fabric, materials and accessories needed for the factory will be sourced from Kitui, thereby helping enhance our local distributors," said the Governor.



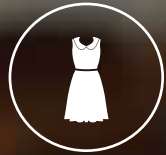
Mens
Wear



Children's
Wear



Pants



Ladies
Wear

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are suggested by the buyer, and the other with more number of in-between micro activities (in-house activities) to exercise control over macro activities. To decide upon which all activities should be there in TNA calendar, one must prepare either PERT network or Gantt chart mandatorily and the resultant critical path should be the activity chain for TNA calendar, all activities falling in critical path are critical activities. Critical activities should always be on focus, a single minute delay in any of the critical activities may lead to final shipment delay. In case some of the buyer-suggested milestone activities are part of the critical activities, then well and good; other non-critical activities will have slag time anyway.

Critical activities in any TNA remain unchanged throughout order execution process

WRONG

Generally TNA is prepared as proposed plan of execution. The planned duration and sequence of activities decide the critical path. However, during actual execution of order, duration of any activity may stretch beyond planned duration, which may change the critical path. If duration of any non-critical activity extends beyond the slag time, then that particular activity may become critical and critical path will change accordingly. This phenomenon happens frequently during order execution and therefore specialised software is necessary for tracking TNA which automatically and dynamically changes the critical path during order execution process.

Manpower resource dependency is not so important in preparing critical path or TNA

WRONG

It is a common practice to estimate the duration of activities in days or hours rather than in 'man-days' or 'man-hours'. In the given four task example assignments, both B and C can work concurrently as per

dependencies concerned. However, if same manpower is to be used for both B and C, the dependency relation will change accordingly and B and C will become sequential processes.

In a typical scenario, one order may have 40-50 activities to be tracked/ followed up/managed (from order receipt to delivery) by 5/6 people, which obviously means one resource person is responsible for more than one activity. Therefore, resource dependency is very important in TNA.

Different orders should be followed up using separate TNA

WRONG

It is a common practice to have one merchandiser responsible for multiple orders. Prevalent practice is to prepare separate TNA for different orders and track in isolation. Since resource utilisation for more than one order is not synchronised, and since it is calculated separately, situations will arise when same resource is expected to work on more than one place, which is impossible. Therefore, when common resource is to be used for multiple tasks, it is logical to combine all TNAs into one integrated to avoid confusion of priorities.

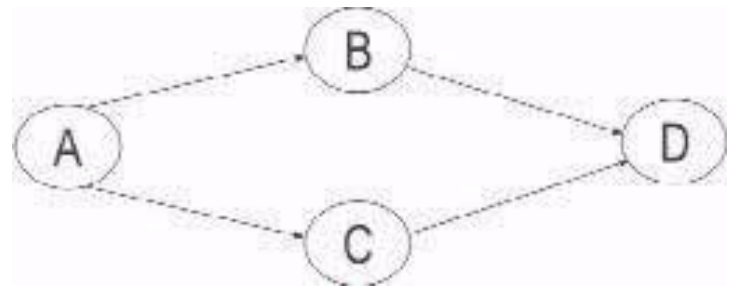
Spreadsheet software is enough to manage TNA

WRONG

It was found that majority of the organisations use spreadsheet (e.g., MS Excel) to schedule activities against target date, which they call TNA or critical path. With full potential of spreadsheet being used, all requirements of TNA still cannot be managed. Firstly, existing use of spreadsheet is merely typing activities and dates in tabular form. Hardly anyone uses formula, macros or conditional formatting of spreadsheet to calculate variations and get alarms. Therefore, the purpose of using spreadsheet is virtually defeated. Secondly, spreadsheet cannot



Linear activity sequence



Parallel activity sequence as PERT network



To decide upon which all activities should be there in TNA calendar, one must prepare either PERT network or Gantt chart mandatorily and the resultant critical path should be the activity chain for TNA calendar, all activities falling in critical path are critical activities. Critical activities should always be on focus, a single minute delay in any of the critical activities may lead to final shipment delay.

generate automatic Gantt chart or calculate critical path and many other requirements that are necessary for managing TNA. Spreadsheet when used cleverly can generate linear calendar dates, calculate variance between planned and actual completion date and raise visual alarms.

Specialised softwares are required to manage TNA

RIGHT

Managing TNA requires automatic Gantt chart preparation, automatic critical path preparation, automatic resource utilisation calculation, automatic integration of more than two Gantt charts with resource constraints automatically reflected, different options of task relationships like start-start, finish-finish, as well should be able to change all synchronised activities during any change of plan during progress of the order. Further, the software should help or guide the user with several visual/colourful benchmarks and alarm systems. Generally specialised project management software is capable of providing maximum of these features, thus ideal for managing TNA.

WR TECHNOLOGIES FOR COTTON SHIRTS

Functional properties are gaining importance in garments and an increasing number of buyers are asking for specialised finishes in different product categories. For shirts, the most common finish that high-end buyers are looking for is wrinkle-free finish. Major buyers/retailers, who are sourcing wrinkle-free shirts, include Columbia Sports Wear, Marvins, TJ Maxx, Eddie Bauer, Timberland, C&A, Tom Tailor, JCPenney, Banana Republic, Shopko and Gap. In fact Timberland is asking for nano finishes like water, dust and oil repellence along with wrinkle resistance in yarn dyed solids. Buyers who specifically ask for wrinkle-free finishes, are willing to pay the cost for such treatment which can vary from 50 cents to US \$ 1 depending on the brand and the treatment. India has lot of catching up to do, but some major players who are already providing wrinkle-free shirts, include Shahi, Opera Clothing, Ambattur Clothing, SM Apparels, Bhanu Gartex, K Mohan, Roverco Apparels, Medident India, Leela Scottish to name a few. **Axel Baumanns of Kannegiesser** provides some answers to the wrinkle-free process of cotton shirts.

The idea of a shirt which does not have to be ironed anymore is as old as the cotton shirt itself. All attempts, which started decades ago to establish a shirt of polyester or any other artificial fibre, failed as the consumer understood from the beginning the positive attributes of the cotton fibre. By its ability to hold moisture and to release it in a controlled manner, cotton is one of the most ideal fibres among all. It is breathable and provides a good feeling for the garment wearer. This may have changed by today's new developments of artificial fibres, which have nothing to do with those from the sixties of the last century. But cotton fibre is still number one in people's mind when they think of comfort.

In the last decade, new technologies have been established to prepare the cotton fabric by chemicals, to make them almost wrinkle-free or, as some manufacturers call it wrinkle resistant (WR). Basically, four different technologies are known today to do so:

- Pre-curing
- Post-curing
- Dip-spin
- Vapour-phase

All four systems have one issue in common: the cotton fibre is made to swell artificially and, by this process, it is losing its memory. Instead of being curled as it naturally is, it becomes straight. And as it has increased its diameter, it is almost impossible to crease. The negative aspect is that by this process it loses a part of its tensile strength and the tendency to absorb moisture.

Pre-cured fabric process

Fabric can be a 100 per cent cotton fabric or a cotton blend. Contrary to all the other WR processes, by this system the fabric does not need any further heat treatment as the curing process is done before the shirt is manufactured. The finished



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fabric is already resistant to wrinkles. Unfortunately, no crisp and sharp creases can be realised for collars, cuffs and front placket edges, as the fabric does not accept any final pressing. This process requires a shirt finisher with steam and air.

Problems faced during garment making

- No crisp edges on collars, cuffs and pockets
- No special thread or interlining required

Post-cured fabric process

Fabric can be a 100 per cent cotton fabric or a cotton blend. The fabric roll is delivered with the curing chemical inside the post-cured process sealed in a polyester bag. Once the bag is opened, the fabric has to be utilised entirely, as it cannot be stored for a long time. After the shirt is manufactured, it has to be pressed fully and put on a hanger. The shirt is then cured in a hanging position on a cloth rack inside an oven for 3 to 5 minutes at about 130°C to 150°C (depending on the chemical used). Now the shirt is ready for folding and bagging.

Problems faced during garment making

- Shelf life of fabric is very limited, once sealing is opened
- Difficult to find the right curing time in the oven
- Risk of yellowing effect, due to high temperature in the curing oven
- Special thread and interlining required, because of heat treatment in the oven

Dip-spin process

This process is the most popular process for wrinkle-free shirts and can be used for 100 per cent cotton fabrics or cotton blends. After the shirt is manufactured as usual, it is dipped into a mixture of chemicals, which is absorbed by the cotton fibres. After the treatment in a tumbler, the shirt is still moisturised and has to be pressed entirely. Importantly, during the pressing operation on the various Veit-Kannegiesser collars, cuffs and body-presses, the curing process starts. After pressing, the shirt will be put on a hanger and can be cured in a curing oven at about 140°C for about 3 to 5 minutes. One of the key factors for a perfect appearance is the pressing quality, as after the curing operation in an oven, all wrinkles will stay for life. Retouching with an iron is impossible.

Problems faced during garment making

- Washing process is done by the shirt manufacturer
- Difficult to find the right curing time in the oven
- Risk of yellowing effect, due to high temperature in the curing oven
- Special thread and interlining required, because of heat treatment in the oven

Vapour-phase

This curing system is used in some countries only as very aggressive

chemicals are used. Similar to the Dip-spin system, the shirt is manufactured as usual. After the final pressing, a special curing oven is required as, instead of liquid chemicals, gas is used to make the shirt resistant to wrinkles. The gas circulates through the oven and penetrates into the cotton fibre. After a while, the gas has to be evacuated from the oven. Before the shirt is folded and bagged, it needs to be washed in order to remove any residual chemicals.

Anyway, all parts have to be pressed before curing. Nearly all chemical suppliers insist on accurate pressing and curing temperatures. Pressure and timing also matters a lot. As the cotton fabric starts to cure in the pressing operation itself, the evenness of pressing temperature and dwell time is important. The advantage of reliable pressing equipment like the Veit-Kannegiesser system lies in its accuracy of temperature and pressure.

The longer the pressing time, the shorter the time in the oven for curing later. After pressing, the shirt should not be touched to avoid fingerprints and impressions. Usually, the shirts are cured in the oven on a hanger on a cloth rail. The curing time and temperature is specified by the chemical suppliers and have to be met under all circumstances.

It is important to talk to the interlining and thread suppliers before the WR shirt is manufactured to maintain the quality after curing and to avoid bubbles for the interlining and puckering for the seams.

Problems faced during garment making

- Extremely aggressive chemicals which can harm health
- Banned in a number of countries
- Risk of yellowing effect, due to high temperature in the curing oven
- Special thread and interlining required, because of heat treatment in the oven



A collage of wrinkle-free apparels



Veit- Kannegiesser H-PV2, for pressing the entire body of the shirt in one operation. It is equipped with an automatic unloader.

Process sequence of WR shirts



USA apparel import kicks off 2019 with surge in both values and volumes

January 2019

USA started 2019 with a positive apparel import figure both in value-terms and volume-terms by 8.31% and 8.66%, respectively. In January 2019, all major Asian manufacturing countries noted surge, and this surge was steered by Vietnam and India which marked double-digit growth value-wise. India and Bangladesh offered higher unit prices in the month than what they offered in corresponding month last year. Despite this rise in unit prices, US buyers did not stop placing their orders in these countries which signals a positive year ahead for India and Bangladesh.

Global apparel imports by the US: January 2019

Change in Quantity

↑ 8.66%

Change in Value

↑ 8.31%

Change in UVR

↓ 0.34%

(Average UVR in the review period was US \$ 2.90 as against US \$ 2.91 in the same period last year)

Change in Quantity

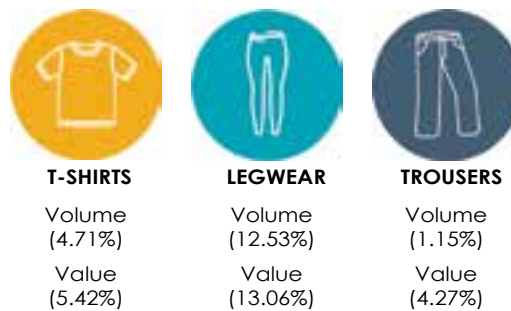
Cotton ↑ 4.38%	Wool ↓ 0.12%
MMF ↑ 11.55%	Silk & Veg ↑ 30.98%

Change in Value

Cotton ↑ 6.93%	Wool ↑ 5.22%
MMF ↑ 9.33%	Silk & Veg ↑ 24.36%

[The information has been extracted from US custom site and further analysed.]

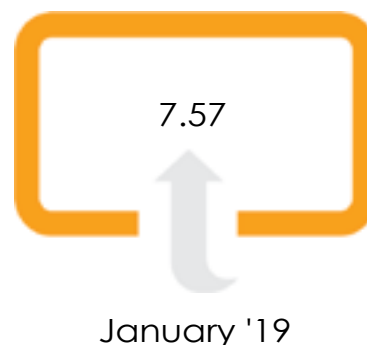
Percentage change in top 3 product categories imported by USA



UVR change in apparel imported by USA (3-year comparison)

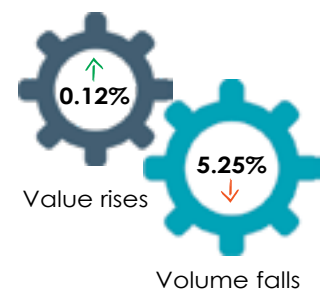


Month-wise USA apparel import trend



[Value in US billion \$]

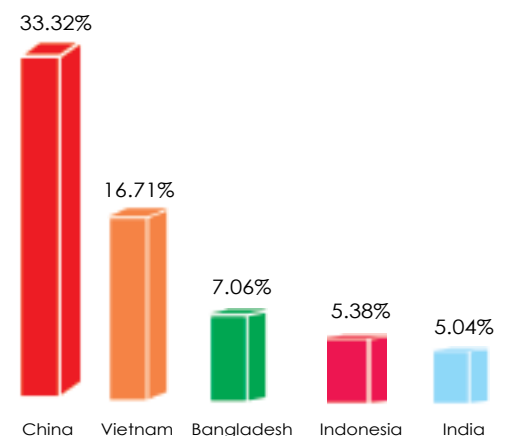
Percentage change in Bangladesh's top product category export (Trousers) to USA



Fact: In 2018, US customers expected Amazon to deliver products under 24 hours.



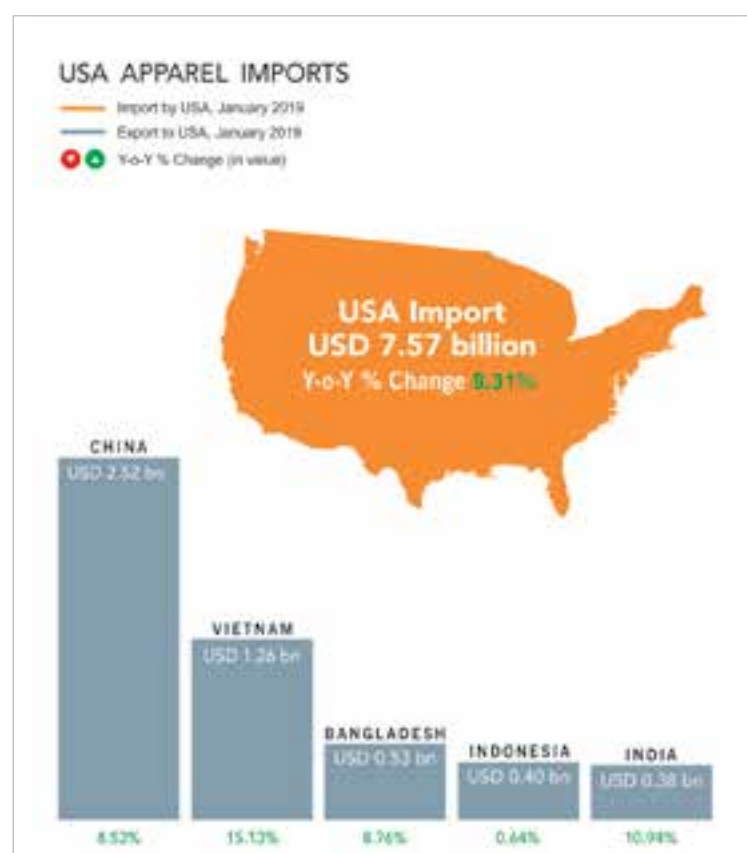
Value-wise share to USA by top 5 apparel exporters



Total global apparel imports by the US: January 2019

(Qty in mn SME & Value in US mn \$)

Type of Apparel	January 2018		January 2019		% Change	
	Qty	Value	Qty	Value	Qty	Value
Cotton	1028.68	3400.62	1073.68	3636.39	4.38	6.93
Wool	9.09	165.88	9.08	174.53	-0.12	5.22
MMF	1332.51	3311.55	1486.36	3620.53	11.55	9.33
Silk & Veg	29.06	113.63	38.06	141.31	30.98	24.36
Total	2399.34	6991.68	2607.19	7572.76	8.66	8.31



Total apparel exports to the US by 7 major manufacturing destinations: January 2019

(Qty in mn SME & Value in US mn \$)

Countries	January 2019		January 2019		% Change	
	Qty	Value	Qty	Value	Qty	Value
India	103.23	344.38	106.62	382.07	3.28	10.94
Bangladesh	188.12	491.81	199.62	534.92	6.11	8.76
China	992.70	2324.92	1105.54	2523.21	11.37	8.53
Pakistan	49.12	128.09	52.09	130.55	6.04	1.92
Sri Lanka	37.41	173.02	42.34	186.19	13.18	7.61
Vietnam	348.31	1099.11	402.45	1265.42	15.54	15.13
Indonesia	111.36	404.99	111.72	407.57	0.32	0.64

Item-wise quantity increase/decrease in apparel imports by the US: January 2019 (Qty in doz, legwear in dpr, babieswear in kg)

APPAREL TYPE	Total Imports by USA			Exports to USA														
				China			India			Bangladesh			Vietnam			Indonesia		
	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change
Babieswear	11,678,982	10,783,064	-7.67	5,559,415	5,097,225	-8.31	793,756	1,081,076	36.20	1,020,372	1,046,229	2.53	1,130,812	1,231,023	8.86	416,022	290,542	-30.16
Foundation Garments	5,432,762	6,059,097	11.53	3,062,427	3,361,064	9.75	123,008	141,464	15.00	513,409	520,520	1.39	445,091	500,192	12.38	339,134	491,768	45.01
Jackets & Blazers	3,069,938	3,616,769	17.81	1,504,432	1,688,428	12.23	51,353	51,370	0.03	193,773	286,359	47.78	607,062	799,600	31.72	166,182	174,340	4.91
Ladies Blouses	5,181,954	5,339,572	3.04	2,196,354	2,334,949	6.31	686,320	787,093	14.68	170,209	165,415	-2.82	942,171	980,514	4.07	649,127	602,247	-7.22
Ladies Dresses	6,212,761	6,336,622	1.99	2,867,452	3,144,354	9.66	501,366	450,610	-10.12	117,112	101,642	-13.21	1,343,843	1,363,816	1.49	401,021	392,711	-2.07
Ladies Skirts	1,288,485	1,499,092	16.35	584,528	707,241	20.99	47,671	62,388	30.87	81,169	111,118	36.90	289,409	270,885	-6.40	78,019	65,095	-16.57
Legwear	32,024,776	36,037,199	12.53	22,588,354	27,057,896	19.79	1,025,812	578,293	-43.63	0	0	0	410,521	596,733	45.36	63,091	65,009	3.04
Men's Shirts	3,663,705	3,800,223	3.73	722,007	713,097	-1.23	340,884	293,164	-14.00	1,069,575	1,249,243	16.80	496,142	490,568	-1.12	298,990	295,476	-1.18
Nightwear	4,354,339	4,632,582	6.39	2,516,244	2,721,910	8.17	221,978	274,027	23.45	256,508	256,065	-0.17	487,918	560,251	14.82	73,605	65,626	-10.84
Suits / Ensembles	1,056,985	1,182,725	11.90	531,421	659,227	24.05	33,516	71,908	114.55	6,811	6,614	-2.89	234,004	229,042	-2.12	55,617	43,811	-21.23
Sweaters	616,551	824,339	33.70	472,962	654,372	38.36	4,286	2,028	-52.68	29,199	36,096	23.62	11,084	22,636	104.22	2,461	2,825	14.79
Trousers	29,552,276	29,892,944	1.15	9,041,855	9,060,578	0.21	544,513	593,689	9.03	5,058,095	4,792,721	-5.25	4,859,828	5,517,589	13.53	1,943,742	1,647,904	-15.22
T-Shirts	48,167,458	50,437,757	4.71	9,201,423	9,929,550	7.91	2,447,527	2,448,799	0.05	2,198,549	2,210,124	0.53	7,518,732	8,148,487	8.38	2,425,785	2,318,401	-4.43
Undergarments	20,668,236	23,179,360	12.15	4,922,161	5,791,696	17.67	1,644,234	1,554,570	-5.45	2,612,592	2,657,375	1.71	3,839,878	4,771,474	24.26	164,986	269,891	63.58

Item-wise value increase/decrease in apparel imports by the US: January 2019 (Value in US mn \$)

APPAREL TYPE	Total Imports by USA			Exports to USA														
				China			India			Bangladesh			Vietnam			Indonesia		
	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change
Babieswear	236.13	234.25	-0.80	104.97	100.37	-4.38	18.07	26.41	46.18	19.14	20.76	8.48	23.70	28.42	19.93	12.67	8.61	-32.05
Foundation Garments	223.54	239.60	7.18	92.61	108.84	17.53	8.13	8.58	5.51	10.26	10.88	5.99	30.10	32.45	7.82	16.32	17.43	6.82
Jackets & Blazers	454.06	520.16	14.56	185.84	205.78	10.73	7.39	7.72	4.47	23.53	29.33	24.61	103.27	126.85	22.83	26.78	28.06	4.78
Ladies Blouses	344.02	344.79	0.22	131.50	140.33	6.71	51.82	58.17	12.26	9.09	10.13	11.35	51.08	50.14	-1.85	45.95	42.96	-6.52
Ladies Dresses	495.57	504.77	1.86	220.15	236.97	7.64	41.95	42.93	2.34	4.60	3.81	-17.21	87.37	91.93	5.22	32.68	31.79	-2.72
Ladies Skirts	73.68	89.70	21.74	30.65	37.36	21.90	3.23	4.52	39.85	3.30	4.49	36.30	3.30	4.49	36.30	4.94	3.91	-20.83
Legwear	158.57	179.28	13.06	99.61	122.12	22.59	2.21	2.45	10.48	0	0	0	1.72	2.37	38.34	0.26	0.33	26.46
Men's Shirts	290.86	307.27	5.64	63.85	60.01	-6.00	24.33	21.04	-13.52	55.24	70.79	28.15	40.18	40.46	0.69	25.47	26.56	4.27
Nightwear	162.31	191.38	17.91	91.61	101.87	11.20	7.92	12.65	59.61	6.58	7.57	15.06	17.33	23.81	37.41	3.62	4.43	22.35
Suits / Ensembles	108.90	120.60	10.75	26.87	34.54	28.53	5.37	8.68	61.51	1.20	0.63	-47.53	21.33	18.98	-11.04	7.34	7.51	2.33
Sweaters	65.94	80.41	21.93	47.16	58.83	24.75	0.35	0.25	-27.75	1.60	2.45	53.22	0.95	1.31	38.37	0.31	0.33	4.15
Trousers	1,730.48	1,804.31	4.27	445.70	455.08	2.10	37.38	42.37	13.36	249.96	250.27	0.12	290.40	333.45	14.82	102.15	92.41	-9.54
T-Shirts	1,778.85	1,875.30	5.42	392.119	391.68	-0.11	92.497	98.981	7.01	56.69	62.46	10.17	301.87	339.15	12.35	101.71	100.96	-0.74
Undergarments	304.05	343.03	12.82	80.12	96.06	19.90	30.18	26.78	-11.27	25.31	27.84	10.02	50.32	60.34	19.91	3.34	6.72	101.23

Continuous hike in unit prices haunts EU apparel import even in February '19

January to February 2019

EU marked another month with significant escalation in unit prices of its apparel imports. Similar to January, the Union spent more euros on apparel imports even in February, volumes of which were down on Y-o-Y basis. India, Bangladesh, China and Cambodia saw growth in value-wise exports to EU as unit prices were hiked; however, volumes dropped. While Turkey, which is known for high-end garment manufacturing, surprisingly plunged in its unit prices offered to EU, and probably, this was the reason Turkey noted growth in both volumes and values of its exports.

Global apparel imports by the European Union: January to February 2019

Change in Quantity

↓ 1.54%

Change in Value

↑ 6.29%

Change in UVR

↑ 7.94%

(Average UVR in the review period was Euro 18.48 per kg of fabric equivalent as against Euro 17.12 in the same period last year.)

Change in Knitted Segment

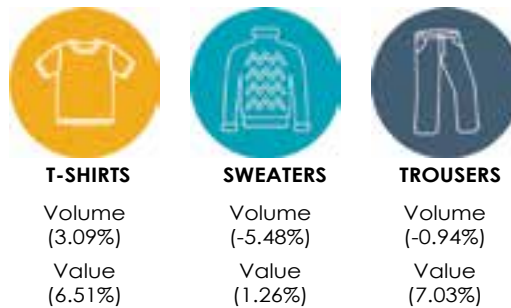
Quantity	Value
↑ 0.15%	↑ 6.92%

Change in Woven Segment

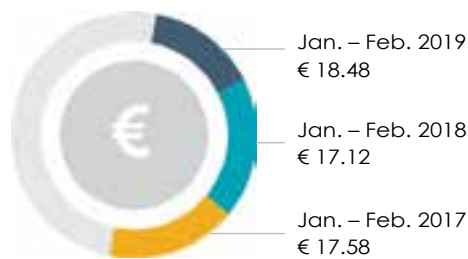
Quantity	Value
↓ 3.49%	↑ 5.72%

[The information has been extracted from EU custom site and further analysed.]

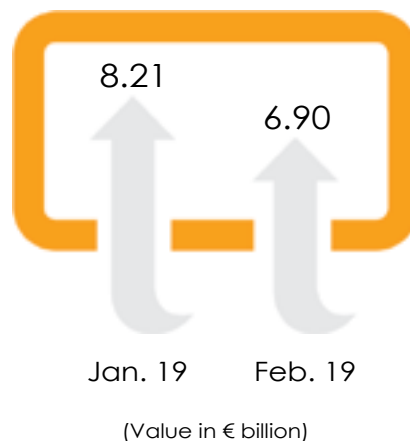
Percentage change in top 3 product categories imported by EU



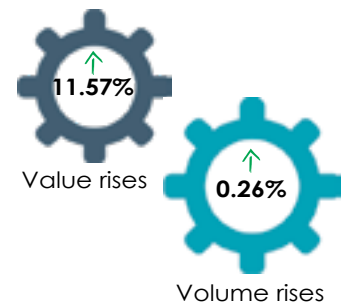
UVR change in apparel imported by EU (3-year comparison)



Month-wise EU apparel import trend



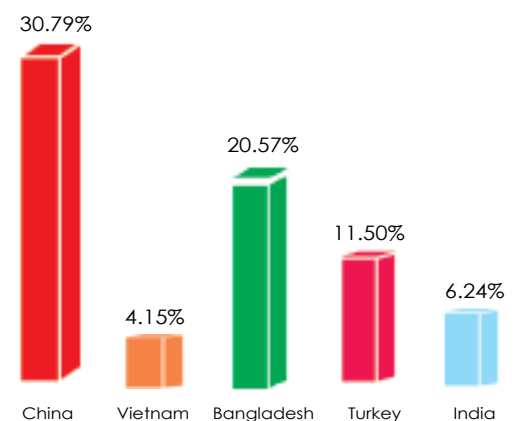
Percentage change in Bangladesh's top product category (Trousers) to EU



Fact: 1 in 3 consumers in top 5 European markets consider sustainability while shopping.

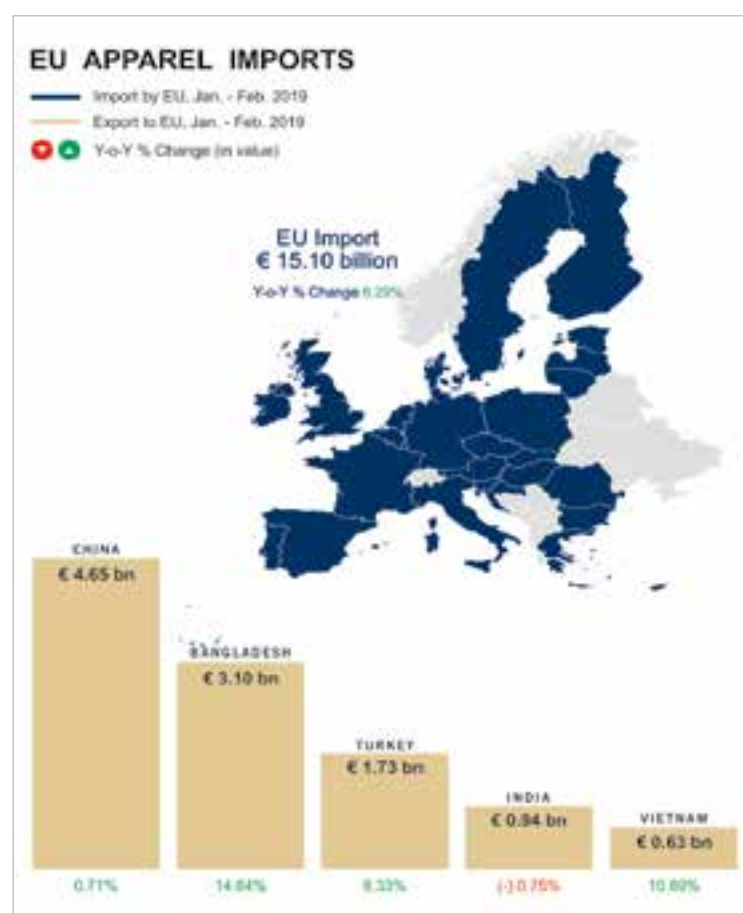


Value-wise share to EU by top exporters (Jan.-Feb. 2019)



Apparel imports of the EU: Selected Countries (Qty in mn Kg & Value in mn Euro)

Country/ Category	Jan.-Feb. 2018		Jan.-Feb. 2019		% change	
	Qty	Value	Qty	Value	Qty	Value
WORLD						
Knitted	445.30	6782.12	445.95	7251.49	0.15	6.92
Woven	384.76	7425.00	371.32	7849.84	-3.49	5.72
Total	830.06	14207.12	817.27	15101.33	-1.54	6.29
CHINA						
Knitted	139.78	2054.45	130.65	2093.34	-6.53	1.89
Woven	144.14	2563.28	130.37	2557.06	-9.55	-0.24
Total	283.91	4617.73	261.02	4650.40	-8.06	0.71
INDIA						
Knitted	29.34	482.32	27.78	478.61	-5.32	-0.77
Woven	18.21	468.39	17.24	464.97	-5.30	-0.73
Total	47.55	950.70	45.02	943.58	-5.31	-0.75
BANGLADESH						
Knitted	128.20	1489.92	135.84	1726.24	5.96	15.86
Woven	84.43	1220.92	86.69	1381.45	2.67	13.15
Total	212.63	2710.84	222.52	3107.68	4.65	14.64
SRI LANKA						
Knitted	7.37	148.96	7.27	158.50	-1.37	6.41
Woven	4.36	104.81	4.54	118.75	4.05	13.29
Total	11.73	253.77	11.80	277.25	0.65	9.25
PAKISTAN						
Knitted	20.50	208.06	21.18	227.71	3.33	9.45
Woven	20.59	273.83	21.82	290.02	5.94	5.91
Total	41.09	481.89	42.99	517.73	4.63	7.44
VIETNAM						
Knitted	8.59	181.10	9.12	215.05	6.17	18.74
Woven	24.56	385.35	15.74	411.97	-35.90	6.91
Total	33.14	566.46	24.86	627.01	-25.00	10.69
TURKEY						
Knitted	45.11	933.86	47.89	991.33	6.16	6.15
Woven	24.26	699.96	26.46	745.99	9.07	6.58
Total	69.37	1633.82	74.35	1737.31	7.18	6.33



Item-wise quantity increase/decrease in apparel imports by EU: Jan.-Feb. 2019 (Qty in mn Kg)

APPAREL TYPE	Total Imports by EU			Exports to EU											
	2018	2019	% change	China			India			Bangladesh			Vietnam		
				2018	2019	% change	2018	2019	% change	2018	2019	% change	2018	2019	% change
Babieswear	20.95	21.40	2.17	6.80	6.46	-4.98	3.45	3.74	8.40	6.05	6.37	5.15	0.25	0.22	-13.53
Foundation Garments	9.95	10.34	3.89	5.83	5.59	-4.09	0.06	0.07	20.95	1.22	1.39	13.76	0.49	0.56	14.93
Jackets & Blazers	22.32	21.58	-3.28	10.60	8.86	-16.42	0.42	0.33	-21.37	2.06	2.88	39.66	1.80	1.68	-6.88
Ladies Blouses	22.76	19.75	-13.24	6.82	5.51	-19.21	4.53	3.47	-23.46	3.66	3.36	-8.05	0.98	0.81	-16.95
Ladies Dresses	32.94	34.72	5.41	13.92	13.13	-5.66	3.89	4.33	11.42	4.15	4.41	6.15	0.75	0.78	3.91
Ladies Skirts	8.15	10.15	24.57	3.10	3.81	22.92	0.58	0.55	-5.04	1.54	1.98	28.45	0.18	0.27	43.93
Legwear	34.16	35.72	4.58	16.90	18.87	11.65	0.38	0.30	-22.49	0.18	0.10	-42.82	0.31	0.32	3.70
Men's Shirts	49.84	50.36	1.05	8.01	7.16	-10.61	4.77	4.68	-1.85	0.18	0.10	-42.82	2.03	2.11	4.03
Nightwear	21.95	21.25	-3.20	6.69	6.48	-3.13	4.97	4.51	-9.18	3.98	4.01	0.75	0.37	0.23	-36.75
Suits / Ensembles	7.60	7.43	-2.29	4.34	4.29	-1.26	0.37	0.33	-9.07	0.49	0.55	10.91	0.07	0.09	25.77
Sweaters	91.04	86.06	-5.48	30.22	24.55	-18.76	2.27	2.39	4.99	26.57	26.55	-0.07	1.43	1.66	15.46
Trousers	212.57	210.58	-0.94	52.25	46.94	-10.16	6.84	6.56	-4.23	69.36	69.54	0.26	6.79	6.30	-7.20
T-Shirts	110.20	113.60	3.09	13.66	13.21	-3.29	9.94	9.15	-8.02	53.43	58.49	9.47	1.41	1.61	14.50
Undergarments	21.46	22.30	3.91	10.25	10.19	-0.61	1.27	1.15	-9.58	4.04	4.65	14.93	0.48	0.53	11.33

Item-wise value increase/decrease in apparel imports by EU: Jan.-Feb. 2019 (Value in mn Euro)

APPAREL TYPE	Total Imports by EU			Exports to EU											
	2018	2019	% change	China			India			Bangladesh			Vietnam		
				2018	2019	% change	2018	2019	% change	2018	2019	% change	2018	2019	% change
Babieswear	418.43	445.02	6.35	138.10	138.54	0.32	74.53	83.06	11.44	103.21	116.20	12.59	5.37	4.72	-12.00
Foundation Garments	336.09	365.60	8.78	159.33	157.91	-0.89	2.73	3.28	19.95	36.49	45.01	23.36	23.14	29.73	28.46
Jackets & Blazers	526.10	532.33	1.18	220.14	196.46	-10.76	11.09	8.35	-24.74	30.65	45.65	48.94	37.05	37.61	1.51
Ladies Blouses	653.34	621.29	-4.91	191.06	177.92	-6.88	133.05	111.40	-16.27	74.83	72.35	-3.32	20.14	21.10	4.78
Ladies Dresses	846.16	957.62	13.17	354.09	377.42	6.59	109.36	123.33	12.78	56.92	70.11	23.18	14.97	19.54	30.54
Ladies Skirts	174.94	224.56	28.37	63.61	79.50	24.98	14.82	15.84	6.90	21.93	30.31	38.24	4.06	5.94	46.29
Legwear	331.74	355.88	7.28	128.93	154.69	19.98	4.03	3.60	-10.76	2.17	1.03	-52.36	2.83	3.05	7.53
Men's Shirts	969.56	1061.50	9.48	167.37	170.87	2.09	107.70	111.02	3.09	293.35	334.82	14.14	49.16	56.26	14.43
Nightwear	257.82	273.57	6.11	70.42	77.35	9.84	56.39	56.40	0.02	43.51	48.73	12.01	3.49	3.38	-3.32
Suits / Ensembles	129.44	131.37	1.49	49.59	57.36	15.67	7.70	6.44	-16.43	5.93	6.83	15.14	0.91	2.26	148.37
Sweaters	1560.55	1580.25	1.26	592.26	533.46	-9.93	41.54	43.58	4.91	344.33	372.92	8.30	28.55	35.78	25.35
Trousers	3280.34	3510.83	7.03	659.72	681.51	3.30	113.98	116.62	2.32	859.41	958.86	11.57	131.84	135.94	3.11
T-Shirts	1625.87	1731.63	6.51	230.31	236.89	2.86	167.30	159.33	-4.76	555.76	662.67	19.24	29.50	37.78	28.07
Undergarments	376.10	420.60	11.83	146.71	158.11	7.77	20.62	21.00	1.85	68.68	83.49	21.57	14.63	17.21	17.68

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Canada Apparel Imports

January 2019

Canadian Apparel Import in Jan '19 beats its performance of last year; grows massively

Canada fell (-)0.02 per cent in its apparel imports in January 2018. However, in a major turnaround in January 2019, the North American country grew 16.47 per cent from a year earlier. Bangladesh remained the biggest contributor with tremendous growth of 48.14 per cent in its apparel exports to Canada following Vietnam which gained 29.44 per cent more values than 2018. China, despite all odds due to skyrocketing prices, did quite well and escalated its exports by 16.06 per cent, while India could just manage to grow in single digit.

Canada Imports in Value

↑ 16.47%

The knitted apparel reported 18.01% surge during the review period, whereas the woven segment saw rise of 14.91% in value terms.

B'Desh Exports in Value

↑ 48.14%

Bangladesh registered growth in knitted garment exports to Canada by 54.84%, while woven garment exports too surged 43.93% during the review period.

Japan Apparel Imports

January to February 2019

Japanese apparel imports down significantly in February

Japan tumbled in both volumes and values of its apparel import in February this year. The country kicked off the year on a positive note and marked growth in its import, both value-wise and volume-wise. So this sudden drop in the second month is making negative statement for the nation's apparel trade. Last year in the same period, Japan noted almost 11% growth in value terms which have declined by (-) 3.26% in the same period of 2019. Vietnam, which marks at least double digit growth on an average, just grew by 1.42% in its exports to Japan, while Bangladesh continued rising in its respective exports and escalated by a massive 23.93% in value terms in review period.

B'Desh Exports in Value

↑ 23.93%

Bangladesh grew massively in both knitted and woven segments. Overall, the country escalated by 28.80% in volumes and 23.93% in values.

Vietnam Exports in Value

↑ 6.26%

Vietnam marginally grew by 1.42% in values of its exports to Japan, while volumes increased by 6.26% on Y-o-Y basis.



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Your Insider Access to FALL/WINTER 2019 TRENDS

The shows have concluded, the reviews are out, the merchandise is all set for the grand debut, and the next thing to do is to put it all out there in one concise manner.

Let us take a peep at the key trends that are set to float the boat in Fall/Winter 2019.

Each season, certain references – either from a particular era, decade or political theme – come into the limelight, dictating the colour preferences, silhouettes and details, and fabric choices. But this time around, it was all a little over the place.

We saw a major influx of the '80s – statement sleeves and retro metallics being revisited; a bit of the '70s with the boho vibe and obsession with hats; the '90s – and even the noughties 'Street is King' after all.

Confusing, distracting, we agree, but that's why we analysed and debated the trends worth considering for the next season, hoping to demarcate the pool of opinions seen on the runways.

In the colour domain, purple, yellow and fiery orange are the three tones to consider, whilst beige and white pose as basics for various looks.

In the outerwear category, capes are back – strong, mysterious and bold – we saw bright pops of pink at Chanel, leopard prints at Marc Jacobs and patched floral tiles at ODLR. Outerwear as a whole is longline, reaching the ankles, whilst quilted jackets get a remake with interesting variations of the 'quilting' – technique.

On the feminine front, we have super slinky satin slip dresses making a comeback, along with wearable day options such as blouses and blazers. Skin show is in – but in a suggestive way – asymmetrical off-shoulder necklines, slashed and sliced cut-outs as well as one way cold shoulders are big.

We are also taking a walk down the Renaissance period, with designers and brands revisiting square necklines, corsetry and sheer fabrics.

Read on to know our insights on key fashion themes, colours, silhouettes, fabrics and details for the Fall/Winter 2019 season.



Alexander McQueen



Carolina Herrera



Giambattista Valli

Ankle Affair



Longchamp



Marc Jacobs

The season where grazing the floor becomes passé.

Taking cue from the soaring popularity of ankle-length denim, ankle-grazing hems are the latest development in fashion. Dresses and skirts that skim the ankle are replacing midi-lengths and mini-lengths for the upcoming Fall/Winter season, as seen at Carolina Herrera, Alexander McQueen, Giambattista Valli and Brandon Maxwell.

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Beige Blowout



Boss



Isabel Marant



Burberry



Michael Kors



Hermes

Move over white, there's another subtle in town. As monochromatic and neutrals continue to become a rage amongst street style aficionados and the reign of #ParisianChic over Instagram, designers and brands reel in to feed the demand with this subdued shade.

Spotted as head-to-toe tone-on-tone looks at Jil Sander, Burberry and Max Mara, the colour was everywhere this season.

Teddy Fabric



3-1 Phillip Lim



Burberry



Boss



Cyclas

The bigwigs in fashion have successfully managed to steer out of public wrath by abandoning fur and at the same time, introducing novel iterations of the luxe fabric.

Texture imitating bear fur – 'teddy fabric' – is up on the rise especially under the outerwear category. Think coats, jackets and fluffy knits!

Additionally, as per *Edited*, there has been a 42 per cent increase in Teddy fabric apparel sell-outs since Fall 2017 – proof backed by data.



Dennis Basso

Animal Print



Altuzarra



Andrew Gn



Annakiki



Roberto Cavalli



Kwaidan Editions

Animal-inspired print patterns continue their reign on the runways and street – with growth more than doubling across the board since Fall 2017.

Newness is injected via zebra and tiger stripes and cow hide prints for Fall 2019. Original tones are amped up with bold variations of neons and contrasts over midi-dresses, shoulder bags and bum bags, and belts to appeal the masses.

Shoulder Show



Alexander McQueen



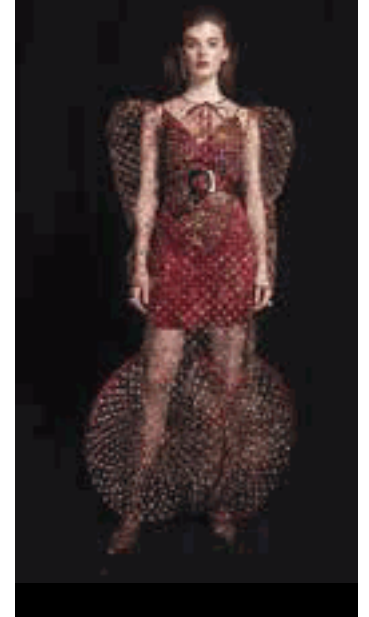
Giambattista Valli

Advocated successfully by Saint Laurent, statement shoulders have reached power status. You would think that year-after-year comebacks would fade the style away, but quite surprisingly, the silhouette has managed to keep its own through it all.

Fall 2019 bids adieu to the fiercer and padded styles of yester seasons, and sees poufy sleeves and the like come into the limelight. Dramatic and cloud-like, this fantastical detail was spotted at Givenchy, Richard Quinn, Giambattista Valli and Alessandra Rich, among others.



Givenchy



Nadya Dzyak



Richard Quinn

| **Scholastic**



Lacoste



Salvatore Ferragamo



Longchamp



Thom Browne



Paul and Joe

It's back-to-school season for designers and brands as they flood the runways with uniform-inspired looks and themes for the upcoming season.

Polo tees, V-neck knits, sweater vests and three piece sets in contrasting stripes, check patterns emerged as sensible options to beat the cold at Thom Browne, Longchamp, Lacoste, among others.

| **The Bitty Bag** |



Alexander McQueen



Carolina Herrera-



Brandon Maxwell



Emilio Pucci

Fashion doesn't always have to make sense, and season after season, the ones-in-charge, ensure to introduce one such impractical detail or product – just to, you know, devise a point of conversation.

Fall 2019 sees the next in the micro-bag trend – the teeny-meeny, itsy-bitsy bag: TBB or *The Bitty Bag*.

Post show, Jacquemus has reached cult status, followed by Chanel, Salvatore Ferragamo and Chloe right behind.



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Sustainability consciousness propels growth in 'Second-hand' Apparel Retail Industry

The second-hand apparel retail industry is booming rapidly and is expected to surpass the fast-fashion industry in the coming few years. In the present age, when the consumers are seeking variety and value, second-hand, subscription and rental are the top three fastest-growing retail categories. A recent report by thredUP, an online resale shopping platform, with the research and data from GlobalData, a third-party research and analytics firm, shows that the second-hand industry – currently worth US \$ 24 billion – is expected to double in the next five years to US \$ 51 billion.

“The resale customer is no longer somebody else’s customer, rather they are everybody’s customer. Mass market or luxury, if people can find a high-quality product at much cheaper rate, they’ll unabashedly choose a used product. As the line between new and used apparel blurs for consumers, a powerful transformation in retail will unfold,” the report claims. The growth in the resale market is majorly from the online resale sector. And

ESSENTIALS

The resale industry has attracted all the age groups, but millennials and Gen Z thrive the most, especially women over 65 and between the age groups of 18 and 24.

while the traditional frugality store market is growing by 8 per cent annually, the online resale market is marching upward more than four times faster at 35 per cent a year, and which is 17 times faster than the broader apparel market overall. Simultaneously, over the past three years, resale has grown 21 times faster than apparel retail. As a result, even traditional retailers have started embracing second-hand apparels.

Marching upward

The resale industry has attracted all the age groups, but millennials and Gen Z thrive the most, especially women over 65 and between 18 and 24 age groups. Both the groups are motivated by the savings but the younger group is almost 2.5 times quicker than other age groups and may be influenced by environmental consciousness while shopping for second-hand clothes. Also, the stigma associated with the used clothes has disappeared and a growing number of shoppers are now enthusiastic

to buy second-hand apparels. More than one in every three Gen Z will buy second-hand clothing in 2019. Overall, 64 per cent of women have committed that they’re willing to buy used apparels, shoes and accessories, compared to 45 per cent in 2016.

The report also shows that more than half of these shoppers have shopped second-hand in the past one year and will be shopping in future as well. Over 40 per cent of consumers also confessed that they consider the resale cost of an item before purchasing something new. The shoppers with the highest likelihood to shop second-hand are those with income above US \$ 1,25,000. Seventy-seven per cent of thredUP’s customers are working professionals and 71 per cent own their home. These customers are twice likely to shop second-hand online than opting to buy new products online. Apart from this, there are other reasons for the recent rise of resale apparel business. One is the environmental benefits and the other is the desire for frequent turnover of wardrobes, especially among the Instagram generation. Like thredUP lists 30,000 new items every single day, which are 150 times more than H&M.

“Compared to the overall apparel market, resale’s growth has been phenomenal. As the market uniquely meets consumers’ preference for variety, value and sustainability, we expect the high growth to continue,” stated Neil Saunders, GlobalData Managing Director & Lead Market Analyst for thredUP’s Resale Report.

With the robust growth, almost 9 in 10 retail executives desire to get into the resale apparel business by 2020. Over 96 per cent of senior retail executives are willing to advance their company’s circular fashion efforts by the next year. As these senior retail executives believe the market has a great potential to boost revenue, site traffic, along with customer loyalty

Second-hand market will reach US \$ 51 billion in 5 years



and sustainability, the customers of the future will look for ways to recycle, resell or upcycle and will be drawn to the incredible value of buying second-hand and brands will need to partner with resale sites and support the circular economy.

The challenges...

Despite the upscale, the challenges are many, as the business promises a lot of uncertainties. The financial statements of a number of second-hand clothes stores are not that attractive. Obviously, the store rents are reasonably high and the quality of products and price points which can get overpriced or underpriced, become a challenge.

The online businesses like thredUp, MaterialWorld, TheRealReal, Poshmark and many others, on the other hand, are charming consumers away from many other channels. But the value proposition and experience they offer is more like off-price than any other retail channel; the fun is in the hunt for great stuff at the lowest price. The thredUP report claims that TJ Maxx sells 359 brands, Amazon sells 10,000 brands and thredUp sells 35,000 brands. The value proposition for second-hand is bigger, as the discount from list price is more than in

off-price, which for many consumers is highly compelling.”

Growth in off-price would be higher if the off-price retailers would get into the second-hand business. It's a sensible expansion or acquisition strategy for them as they understand what the customer wants and how to market that to them, but as of now, these companies too have no response to the growth of the second-hand online apparel sales, which will impact their market share.

On the other hand, the online retail leader Amazon also does not have the capacity and system to evaluate each and every garment's price so as to effectively compete with the sector right now. Even eBay that used to sell second-hand products earlier has now moved away from the segment and almost 80 per cent of the products sold on the site are new.

As the market for online second-hand grows, there will be more companies that are threatened. Macy's has expanded its effort in off-price and Nordstrom Rack and Neiman are putting more effort into it too. As companies in larger number enter the off-price market, they will be affected by the increased competition and the new business models like thredUP that are taking up the market share.



Beyoncé is bringing Ivy Park back with Adidas!



Adidas and Beyoncé are hitting the industry with a powerful partnership as the activewear brand is striking a wide-ranging deal with the popular singer and actress for footwear, clothing and an Ivy Park relaunch, causing ripples among the huge fan following of the star.

The German sportswear giant shared that both parties have high aspirations. “Neither ascribes to the typical stereotypes of athletes and what athleisure clothing and footwear should be, and instead, will bring to life a shared vision of inclusion that will forever alter the opportunities and landscape for all.”

The co-collaborator is equally excited about the deal. “Adidas has had tremendous success in pushing creative boundaries,” noted Beyoncé.

She will continue to hold the ownership of Ivy Park as Adidas wishes her to continue ‘her journey as one of the first black women to be the sole owner of an athleisure brand,’ emphasising on the power of women-led fashion brands.

“Beyoncé is an iconic creator and also a proven business leader, and together, we have the ability to inspire change and empower the next generation of creators,” said Eric Liedtke, an executive board member who is in charge of the company's global brands.

Launched three years ago, Ivy Park was a collaborative venture of Beyoncé and Topshop tycoon Philip Green. It had received such a positive response on being launched that the high traffic on the Topshop website caused technical delays at checkout. It was also retailed via Net-a-porter, Zalando and Nordstrom where it captured the market as one of the top brands during the week of its launch.

As Green became target of several sexual and racial harassment allegations last year, Parkwood, Beyoncé's company, gained full ownership of Ivy Park.

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Allen Solly refines trousers' collection with new 'functional' line

Allen Solly, India's pioneer brand from the house of Aditya Birla

Fashion and Retail Ltd., has launched a new set of trousers



that incorporates blends, which provide comfort and mobility.

The collection aims at refining the trouser category and has incorporated innovative detailing and modern construction. The new stylish collection of fashion-forward trousers by the brand comes with sporty side stripes, elastic waistband, lightweight fabric and crop fit adding a touch of vogue to officewear. The contemporary collection will be available in stores across India.

Allen Solly is known to have defined the category of chinos

and has revolutionised the lifestyle of professionals with the new-age workwear collection over the years.

The new collection gives young men a chance to make a fashion statement at work not only with shirts but also with a range of stylish and functional trousers.

Allen Solly has an exclusive network of 2,000 stores, covering 3.05 million sq. ft. retail space. It is present in more than 3,800 premium multi-brand stores and 490 departmental stores.

Superdry sees mass resignations from top management

Superdry Chairman Peter Bamford, Chief Executive Euan Sutherland, Chief Financial Officer Ed Barker and Chairman of The Remuneration Committee Penny Hughes, have all resigned from the business with immediate effect, following Co-founder Julian Dunkerton's re-election to Superdry's board.

Four other directors have announced that they would step down on 1st July 2019. Additionally, UBS and Investec – Superdry's brokers, have also resigned. The shocking development of events came after Julian Dunkerton won an investor vote which reinstates his position in the company.

Shareholders of the company voted by a narrow majority of 50.75 per cent to re-elect

Dunkerton in a major blow to Superdry's Directors, who had previously threatened to resign after warning investors that Dunkerton's reappointment would be 'extremely damaging' for the company.

The move comes after Dunkerton, who stepped down from the board last year, saw the value of his holding plunge by £ 250 million in 2018 following a series of profit warnings and an 80 per cent crash in the company's share price. Being the owner of an 18 per cent stake in the business, he sought to return to the helm to revive the firm's finances.

Things between Dunkerton and Superdry have been sour in the past few months, with both sides accusing the other of leading the



group in the wrong direction. The meeting earlier saw shareholders lashing out at Sutherland and Bamford for their roles at the helm of the group.

Following the results of vote, Dunkerton told City A.M., "We will work with anybody as they long as they do what's the best strategy...

they must not let pride get in the way."

Dunkerton will be taking over as Interim Chief Executive at Superdry, while Peter Williams (former Boohoo chair who also narrowly won a vote to return to the board) has been appointed as Superdry's Chairman.

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VF Corp. begins process to launch Kontoor Brands, announces public filing

VF Corp., on 1st April 2019, announced the public filing of necessary paperwork with the US Securities and Exchange Commission to initiate the processing of separating VF Jeanswear organisation into an independent, publicly traded company.

The new company, named Kontoor Brands Inc., will include Wrangler, Lee and Rock and Republic brands as well as VF's outlet business.

"Our teams across VF have made tremendous progress to prepare for the successful separation of Kontoor Brands from VF and this

filing is a significant next step in this process," said Steve Rendle,

Chairman, President and CEO, VF Corporation.



He expressed optimism that this separation is the best path forward for both companies to achieve greater potential and enhance long-term shareholder value. The separation is reportedly to be completed in May 2019 subject to VF's board of directors, customary regulatory approvals as well as tax and legal considerations.

Expressing happiness, Scott Baxter, CEO, Kontoor Brands, said Kontoor Brands is positioned strongly to prosper as a leader in the global apparel industry and deliver long-term value for all of its stakeholders.

Roots Canada launches its first retail store in Hong Kong

Roots Canada, a premium outdoor lifestyle brand, recently launched its maiden retail outlet in the shopping centre at Harbour City, Hong Kong. The store was launched with the brand's Asian retail operating partner Branded Lifestyle Group.

The unveiling of the Hong Kong store coincided with the launch of the brand's online store on zalora.com.hk, which is a prominent name in Hong Kong's online fashion shopping.

Jim Gabel, President and CEO, Roots Canada, said that to launch a store in Hong Kong's largest shopping centre is the first and very significant step and could go all the way in becoming a multi-store market for Roots.

"Now, with an online store on Zalora, the shoppers can go

beyond the retail stores and can connect with Roots anytime and anywhere from Hong Kong," further elaborated Jim.

Reportedly, the four-decade-old brand, through this new store, brings together cabin comforts and city conveniences to give a feel of home to the shoppers. Also,

each corner of the store exhibits the character and heritage of Roots by engaging the shoppers in the brand's stories and products of over 45 years. The store is curated into four major areas, each telling a unique story of the brand, which also includes a Cooper Beaver Collection that pays tribute to the

Cooper Beaver – the iconic logo of Roots.

"The leisure-and-lifestyle-apparel trend continues its momentum in Asia and we believe that the focus of Roots on comfort and style makes it a perfect fit for the Hong Kong market," stated Sunny Wong, CEO, Branded Lifestyle Group.



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Pineapple relocates its UK flagship store to a better prime location

Pineapple, a renowned apparel brand, has relocated its UK flagship outlet within Covent Garden district at 8 Mercer Walk, which is a more prime location for the brand.

The 700 square feet store, situated opposite the Pineapple Dance Studio, houses best clothing lines for girls and women, including majorly activewear and seasonal collections.

Notably, Covent Garden has been the home to Pineapple Dance Studio as well as to its official clothing brand for many years. Expressing delight over the relocation, Debbie Moore, Owner and Chief Executive,

Pineapple, said, “Our location means a great deal to me as it is embedded in the heritage of the Pineapple brand.”

He said staying in this area was, therefore, a natural choice and what is notable is that Covent Garden, which is the centre of dance in London, has grown to be such a thriving retail destination in last 40 years. 2019, in fact, marks the 40th anniversary of the legendary studio.

Pineapple has, importantly, revealed that it will continue its focus on investing and improving its digital engagement strategy. Later this



year, the brand is expected to unveil a boutique format concept store,

which includes new product display and in-store experience for visitors.

Kering confirms sale of Volcom to Authentic Brands Group

Kering Group has announced the completion of the sale of its US sports and lifestyle brand Volcom. The company said that the intellectual property of Volcom is purchased by Authentic Brands Group (ABG), effective from 1st April 2019.

The move is seen as ABG's focus towards expanding its fashion portfolio, adding to its collection of clothing properties. The recent acquisition will also set the company up to make moves in the skate, surf and snowboarding markets.

Already the owners of Juicy Couture, Nautica, Aeropostale and several celebrity namesakes (including Elvis Presley, Marilyn Monroe and Shaquille O'Neal), ABG's purchase affords the company access to Volcom's massive retail presence, with

nearly 100 stores across the globe.

“For nearly three decades, the Volcom family has created one of the most iconic brands in the skate, surf and snow markets,” affirmed ABG Chairman and CEO Jamie Salter in a statement. One

of ABG's goals with the acquisition has been to promote Volcom's digital campaigns and influencer partnerships, with a focus on expanding its millennial and Generation Z customer base.

Todd Hymel, CEO, Volcom, and his

management team will maintain a majority stake in Liberated Brands, the new operating company of Volcom, continuing to oversee operations in America, Japan, France and Australia alongside retail/wholesale business, product development and athlete marketing. With the acquisition of Volcom, ABG values its own portfolio's value at over US \$ 9.3 billion.

The decision comes months after Kering announced its aim to spin off German sportswear brand Puma to its shareholders. Kering first acquired Volcom, a Californian skate and surf lifestyle brand, in 2011 for US \$ 608 million. The brand has somehow kept a low profile in comparison to Kering's luxury fashion houses, and in 2016, Volcom off-loaded its eyewear brand Electric.



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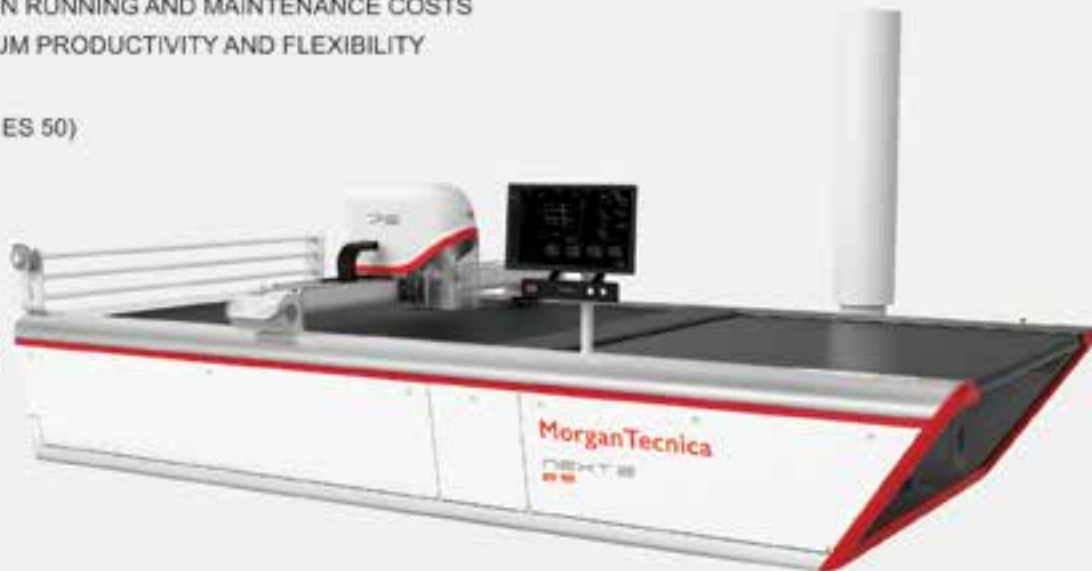
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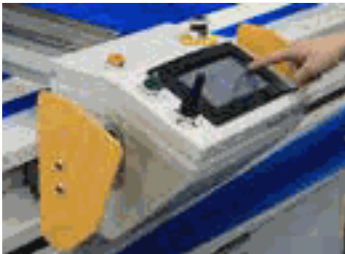


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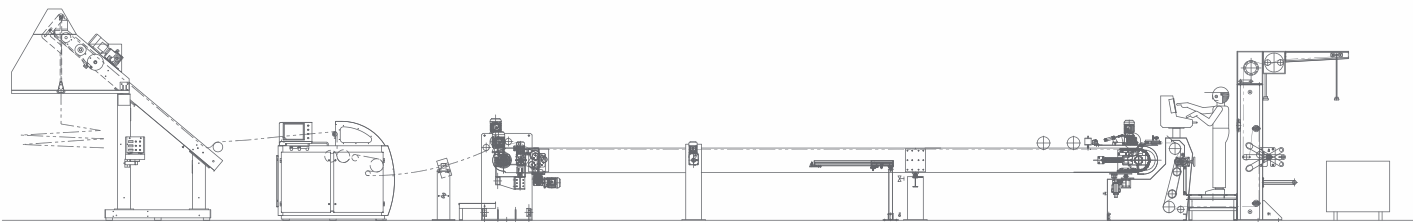
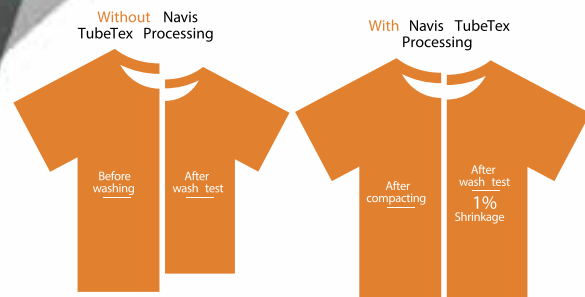
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