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Avec Fashionomics, la BAD entend imposer l'économie africaine de la mode et du textile sur la scène internationale

24/08/2016

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Envoyée spéciale pour les questions de genre de la Banque africaine de développement (BAD), Geraldine Fraser-Moleketi a dévoilé le nouveau projet **de l'initiative** Fashionomics**, lancée l'an dernier sous son** égide : un site Internet B2B dédié aux acteurs de la mode et du textile en Af**rique, sur le point d'éclore.**

À New York, Londres, Milan ou Paris, les podiums que parcourent les défilés de mode en témoignent : le pagne africain a la cote, qui inspire de plus en plus de designers célèbres. Or la mode n'est pas qu'affaire de création ou d'inspiration éthérée. C'est aussi, avec le textile et l'habillement, un secteur qui draine des millions de dollars et d'emplois.

En Afrique, l'industrie de la mode pourrait générer 15,5 millions de dollars EU d'ici à cinq ans. Certes, ces chiffres sont encore loin du 1,3 milliard de dollars EU que celle-ci pèse à l'échelle mondiale. Mais le marché du textile-habillement dans son ensemble pèse d'ores et déjà plus de 31 milliards de dollars EU en Afrique subsaharienne et s'avère le deuxième plus gros pourvoyeur d'emplois dans les pays en développement – après l'agriculture. En outre, l'écrasante majorité de la main d'œuvre est composée de femmes et de jeunes.

Fort de ces constats, le Bureau de l'envoyée spéciale sur les questions de genre de la BAD avait lancé, en **marge des Assemblées annuelles 2015 de la Banque à Abidjan, l'initiative Fashionomics** (« économie de la mode »), une initiative destinée à offrir le soutien de la Banque aux micro, petites et moyennes entreprises (MPME) œuvrant dans le secteur de la mode et du textile en Afrique (lire ici la brochure de présentation qui en expose tous les détails). Dans ce cadre, la Banque a d'ores et déjà investi 10 millions de dollars EU à Madagascar, dans le Projet d'appui à la promotion des investissements (PAPI) qui cible les MPME du secteur et les femmes et les jeunes en particulier.

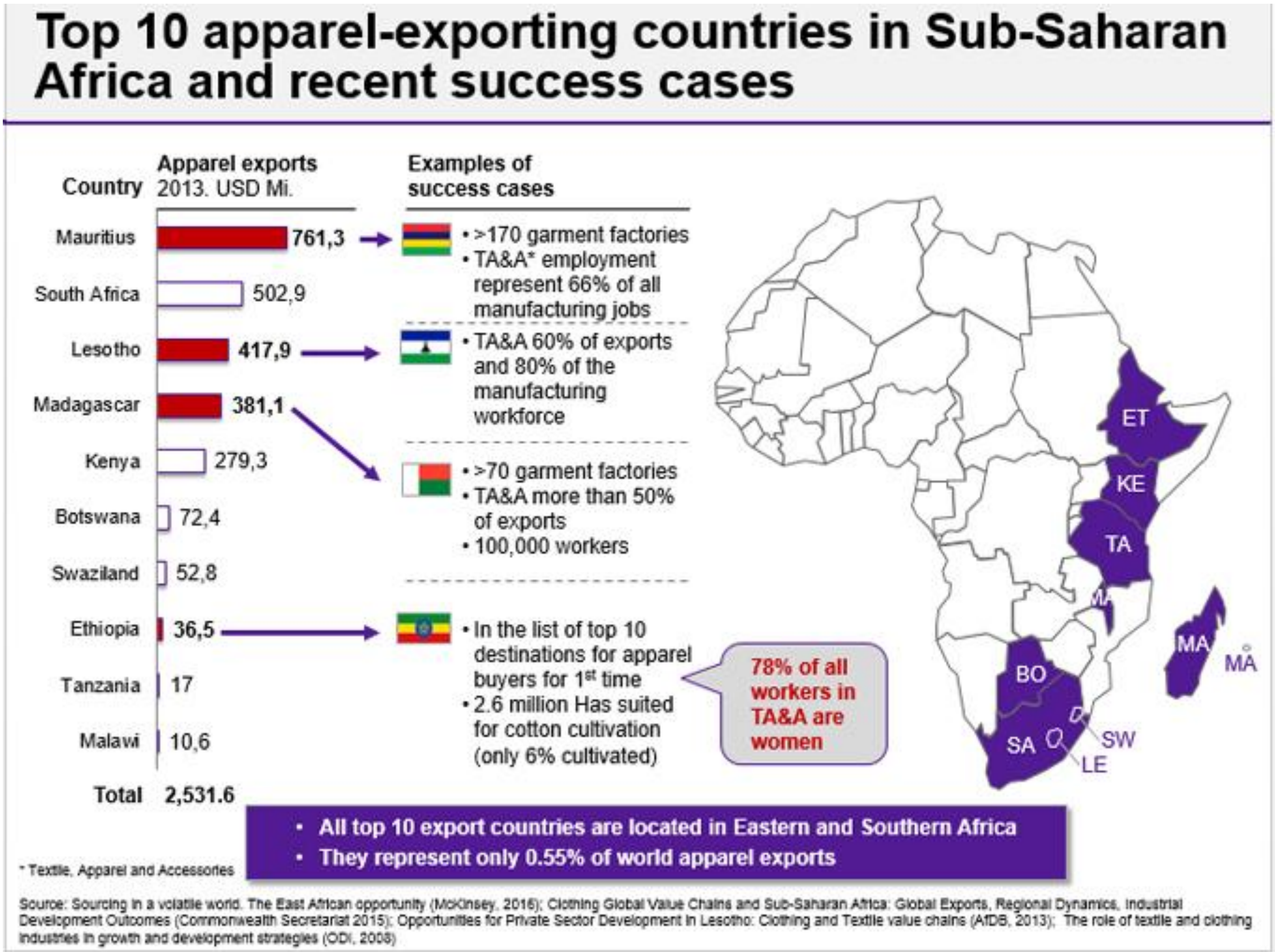
Deux études dévoilées **: le secteur passé au crible en Côte d'Ivoire et Éthiopie**

Une nouvelle étape a été franchie avec la présentation, mardi 23 août 2016 à Abidjan, des conclusions de deux études de cas, menées respectivement en Côte d'Ivoire et en Ethiopie, sur l'industrie du textile et de la mode. De nombreux créateurs et designers renommés en Côte d'Ivoire voire au-delà (Pathé'O, Nadia Druide, AngyBell, Ananine…) ont répondu présents à l'invitation de Geraldine Fraser Moleketi, qui avait également convié pour l'occasion des représentants du gouvernement ivoirien – en l'occurrence Esther Kouassi, directrice du Département des industries créatives et culturelles au ministère de la Culture et de la Francophonie, et Diamande Moussa, dépêché par le ministère de l'Artisanat et des PME.

La Côte d'Ivoire et l'Éthiopie ont été choisis pour entamer ce vaste*benchmarking* auquel s'emploie Fashionomics en Afrique, parce que les différences de leurs secteurs et marchés respectifs du textile-habillement illustrent en partie les disparités et spécificités qui émaillent le continent. L'un est d'expression française et situé en Afrique de l'Ouest, l'autre a pour langue officielle l'anglais et appartient à l'Afrique de l'Est ; leur secteur de la mode n'est pas atteint au même niveau de sophistication ; et il en va de même s'agissant de l'accès aux technologies (Internet, GSM, smartphone…). Les données et chiffres disponibles ont été recensés, des dizaines de créateurs et acteurs de la chaîne de valeur du secteur ont été interrogés dans l'un et l'autre pays pour ces deux études de cas, dont les résultats ont été exposés en détails.
Quelques chiffres dressent un état des lieux du secteur dans chacun des deux pays, tout en illustrant leurs différences. En Côte d'Ivoire, 80 % des entreprises du secteur appartiennent à des femmes et près de la moitié des entrepreneurs ont moins de 35 ans. Ce sont aussi pour la plupart des PME, puisque 65 % comptent moins de dix employés. Et seules 33 % travaillent avec des fournisseurs locaux. En Ethiopie, pionnier du secteur textile dans la région qui emploie plus de 40 000 personnes dans le pays, les salaires sont trois fois plus faibles qu'en Côte d'Ivoire, le coût de l'électricité demeure modique grâce à l'hydroélectricité et les intrants sont à un prix abordable. Le pays, où 36 % des entreprises du secteur comptent plus de 500 employés, exporte pour l'essentiel vers les Etats-Unis et l'Union européenne. Surtout, il bénéficie d'un soutien institutionnel dont ne peuvent se prévaloir les acteurs ivoiriens.

Une industrie en plein essor…

En Côte d'Ivoire comme en Ethiopie, une grande partie des entreprises du secteur sont encore jeunes, affichant moins de dix ans d'âge (46 % et 51 % respectivement). La croissance moyenne du secteur éthiopien du textile-habillement s'est élevée à 51 % ces six dernières années et 60 000 emplois ont été créés depuis que la chaîne H&M s'est implantée dans le pays, en 2013, pour y sous-traiter une partie de sa production.



C'est dire le potentiel et l'essor que vit le secteur, une dynamique qui se vérifie dans plusieurs autres pays d'Afrique subsaharienne. Ainsi de l'île Maurice qui, avec plus de 250 entreprises et quelques 761,3 millions de dollars de chiffre d'affaires, occupe le premier rang des exportateurs du textile habillement en Afrique subsaharienne. Autre exemple : le Lesotho, où le nombre d'entreprises dans le textile-habillement a plus que doublé depuis 1999. Le secteur, qui représente 60 % des exportations du pays, concentre 80 % de la main d'œuvre manufacturière.

Au total, l'industrie du textile habillement pourrait générer en Afrique subsaharienne 400 000 emplois et les exportations pourraient doubler dans les 10 ans, a révélé l'équipe de Fashionomics durant la présentation.

… Mais encore à ses balbutiements

Toutefois, cet essor n'en est qu'à ses débuts. Les dix plus gros exportateurs africains du secteur textile-habillement ne représentent que 0,5 % de la production textile mondiale. Et si l'Afrique produit 10% du coton mondial, « nous avons peu d'usines textile », ainsi que l'a souligné Geraldine Fraser Moleketl au cours de la présentation. Faute d'industrialisation suffisante, le tissu est importé en grande partie d'Asie. En Côte d'Ivoire, par exemple, les intrants peuvent représenter jusque 50 % du coût du produit. Quant à l'Ethiopie, le secteur a misé jusqu'ici sur des produits de base (T-shirts, polos…), aux coûts de production faibles. Et seules 5 % de terres qui pourraient être dédiées à la production de coton sont cultivées dans le pays.

Et les défis qui se posent au secteur en Afrique sont autrement plus nombreux : problèmes de compétence, difficile accès aux financements, cherté du foncier, manque de valeur ajoutée, proximité des fournisseurs, compétitivité, lourdeurs administratives, infrastructures et capacités de production insuffisantes, accès aux marchés, marketing, problématique du paiement en ligne dans une région faiblement bancarisée…

Comment répondre à ces défis et permettre à l'industrie du textile et de la mode en Afrique de s'inscrire dans la chaîne de valeurs mondiale ? C'est précisément pour cela que la BAD a lancé Fashionomics, adoptant pour ce faire une approche axée sur la chaine de valeur. Objectif : mettre en relation et renforcer tous les maillons de la chaîne, depuis les producteurs et fournisseurs de matière première jusqu'aux distributeurs, en passant par les fabricants – sans omettre non plus les investisseurs. Il s'agit de développer le secteur pour libérer son plein potentiel en termes de revenus et de création d'emplois notamment

Objectif de Fashionomics : renforcer la chaîne de valeur du secteur

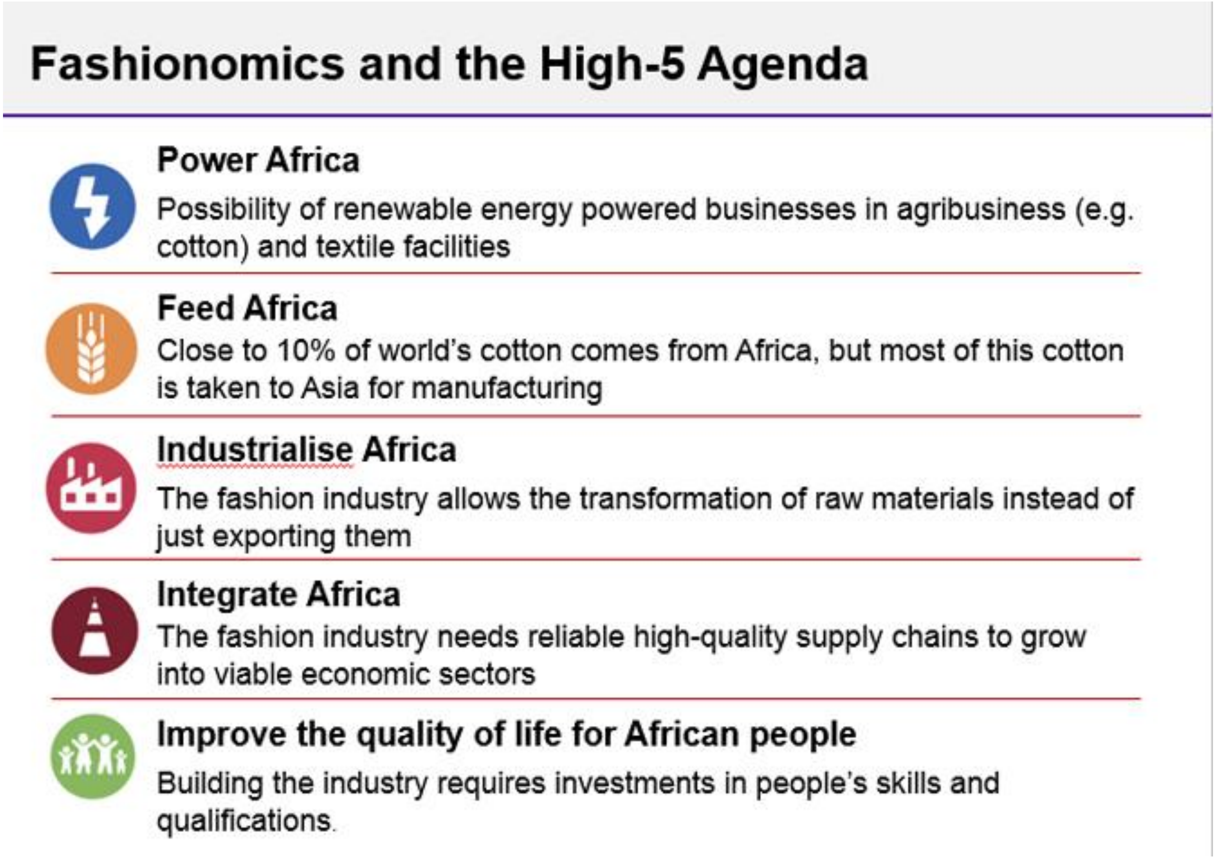
Chaque année, 13 millions d'Africains débarquent sur le marché du travail, sur un continent où la problématique du chômage et de l'emploi des jeunes est rendue d'autant plus aiguë par un véritable boom démographique. Or l'industrie textile requiert une main d'œuvre intensive.

L'initiative Fashionomics s'inscrit dans la droite ligne du Top 5 de la Banque (voir infographie), mais fait aussi écho à la nouvelle stratégie 2016-**1025 pour l'emploi des jeunes en Afrique** (*Jobs for Youth*).

Une première en Afrique **: la création d'une plateforme B2B dédiée au secteur**

Les deux études de cas présentées sur la Côte d'Ivoire et l'Ethiopie sont l'amorce d'une vaste étude de marché qui embrassera à terme l'ensemble du continent. Surtout, cette première étude de faisabilité a permis de concrétiser un projet ambitieux : la création d'un site Internet dédié, véritable plateforme de réseautage pour tous les maillons de la chaîne de valeur (créateurs, fournisseurs, négociants, distributeurs, mais aussi investisseurs) et de partage des connaissances (données, mais aussi tutoriels, opportunités de marché…) du secteur du textile et de la mode. Objectif final : leur permettre de développer et de faire croître leur projet/ entreprise.

Opérationnel et bilingue (français/ anglais), ce site Internet, intitulé Fashionomics comme l'initiative dont il est le fruit, a fait l'objet d'une présentation ce mardi 23 août. Après une séance de travail à laquelle le Bureau de l'envoyée spéciale pour les questions de genre a convié les bénéficiaires du secteur, mercredi 24 août, afin de leur présenter plus en détails toutes les fonctions de cette plateforme en ligne, celle-ci sera testée auprès des nombreux créateurs-entrepreneurs et acteurs approchés à travers le continent dans le cadre de Fashionomics, afin d'être finalisée dans les prochains mois.



ALLEMAGNE / RISQUE CLIENT : DES RETARDS DE PAIEMENT COURANTS SURTOUT DANS LE TEXTILE-HABILLEMENT, SELON COFACE


© François Pargny

« Malgré la solidité de l'économie allemande, les retards de paiement restent courants », note Coface dans une récente enquête (en anglais) réalisée auprès de 850 entreprises ayant des activités en Allemagne. Elles sont ainsi **près de 84 %** à être touchées par ces retards et, parmi ces sociétés, 90 % exportent.
Pour autant, selon l'assureur crédit export, « les retards de paiement demeurent d'une durée raisonnable. D'éventuels risques de liquidité liés à des créances impayées de longue durée sont donc relativement faibles ». La durée moyenne des retards de paiement atteint **41,4 jours**.

Les bons et les mauvais secteurs
La fréquence des impayés diffère en fonction des activités. Ainsi, explique Coface, « le secteur **Textiles/Cuir/Habillement** est le plus concerné par les retards de paiement (94,4 % d'entreprises concernées), suivi par celui du **Papier/Emballage/Impression** (avec 87,5 %) », alors que « les moins touchés sont le secteur **Mécanique/Usinage de précision** (avec « seulement » 75 %), suivi par le secteur **Automobile** (78,8 %) et le **Commerce de gros** (81,8 %) ».

Pour le **textile-habillement**, la situation est sérieuse. Alors même qu'il est considéré par l'assureur français comme un secteur à haut risque, les sociétés allemandes interrogées estiment que, dans les douze mois à venir, les retards de paiement vont s'y creuser encore. A l'inverse, elles considèrent qu'ils devraient diminuer sensiblement dans le papier, l'emballage et l'impression, tout comme dans la mécanique et l'usinage de précision.

Le mauvais comportement payeur des opérateurs constaté en Allemagne dans le **textile-habillement** est également lié à la mauvaise santé du secteur dans toute l'**Europe de l'Ouest**. Ce n'est pas seulement outre Rhin, de Berlin à Düsseldorf (notre photo), mais aussi dans l'ensemble de cette zone, notamment en **France** et en **Italie**, qu'il est ainsi placé par Coface dans la catégorie « haut risque », dans le contexte d'une consommation au ralenti ou en baisse.
François Pargny

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American firms in Asean Put Vietnam as Preferred Expansion Location

By Michael Tatarski on August 24, 2016No Comment

After playing second fiddle to Indonesia for the past two years Vietnam has returned to the number one location in Asean where American businesses operating in the region plan to expand.

According to the 2017 *Asean Business Outlook Survey* 40 per cent of American firms in Asean nominated Vietnam as their preferred location to expand into, compared with 38 per cent who nominated Indonesia, 34 per cent who favoured Myanmar and 30 per cent who nominated Thailand. At the opposite end of the field only 6 per cent of respondents nominated Brunei as being a desirable place to expand, 1 percentage point higher than last year, while American firms in Asean planning to expand their presence in Singapore increased 6 percentage points to 18 per cent.

Conducted annually by Amcham Singapore in collaboration with the US Chamber of Commerce and other Amchams in the region, the *Asean Business Outlook Survey* polls the business sentiment of some 500 senior executives representing US firms in all ten Asean member countries.

Vietnam's attractiveness to US firms is no secret. America is the Vietnamese textile industry's largest market, while tech giants like Microsoft and Intel have expanded aggressively in recent years. Additionally, reports surfaced earlier this month claiming that Apple may establish a US$ 1 billion data centre in Da Nang, though local authorities have subsequently denied the rumours. Such a move would be Apple's first in the country.

The 2017 *Asean Business Outlook Survey* highlighted strong optimism among leaders of American firms in Asean for Vietnam with an impressive 80 per cent of respondents already present there saying they plan further expansion, second only to Myanmar where 96 per cent said they intended to beef up their presence. Further, 61 per cent of US firms in Vietnam expect their workforce to grow this year, second only to Myanmar for bullishness where 87 per cent of respondents are planning the same.

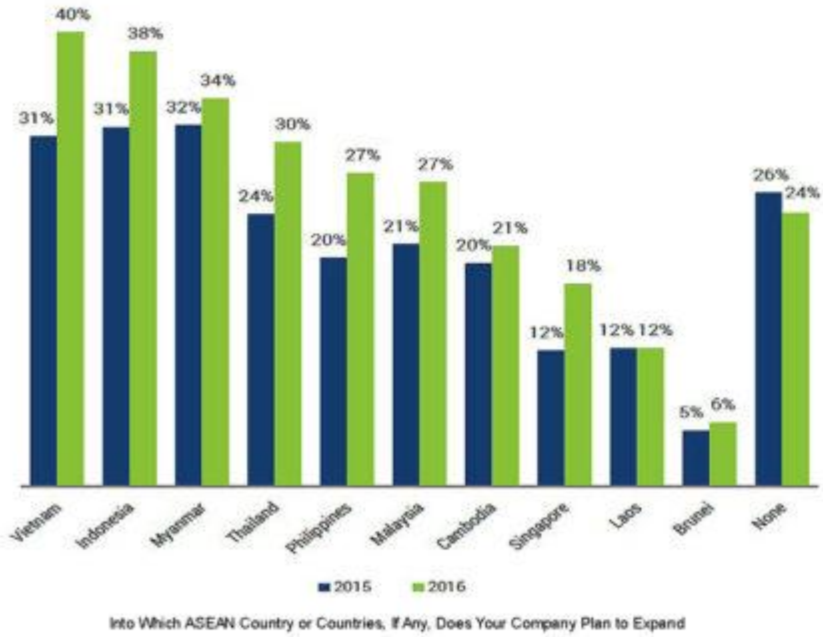


Chart: Courtesy Amcham Singapore

40 per cent of American firms in Asean nominated Vietnam as their preferred location to expand into

When it comes to the local investment environment 72 per cent of American companies in Vietnam described it as improving, marginally behind the the 77 per cent of respondents in the Philippines who said the same thing. In the quest for additional profits American firms in Myanmar were the most bullish with 91 per cent forecasting increased profits in 2017, marginally ahead of the 87 per cent of respondents from Vietnam.

Malaysia was the top pick for 2017 for American companies with operations in China planning to diversify some investments or businesses over the next two years into Asean, with 19 per cent of respondents nominating it as their planned location. This was marginally ahead of Vietnam and Lao PDR at 17 per cent, and Cambodia as the third favoured with 15 per cent.

When it came to the Asean Economic Community (AEC) which came into effect on December 31, 2015, 93 per cent of American firms in Asean believe the AEC is important to their companies' future investment plans, with respondents in Indonesia and Laos giving it a unanimous thumbs up. Only 21 per cent of respondents felt that full implementation of the AEC will have an effect on their companies' operating locations, while only 19 per cent said their expansion plans will be affected by the still under negotiation Regional Comprehensive Economic Partnership (RCEP).

TPP’s Impact on Asean Investment

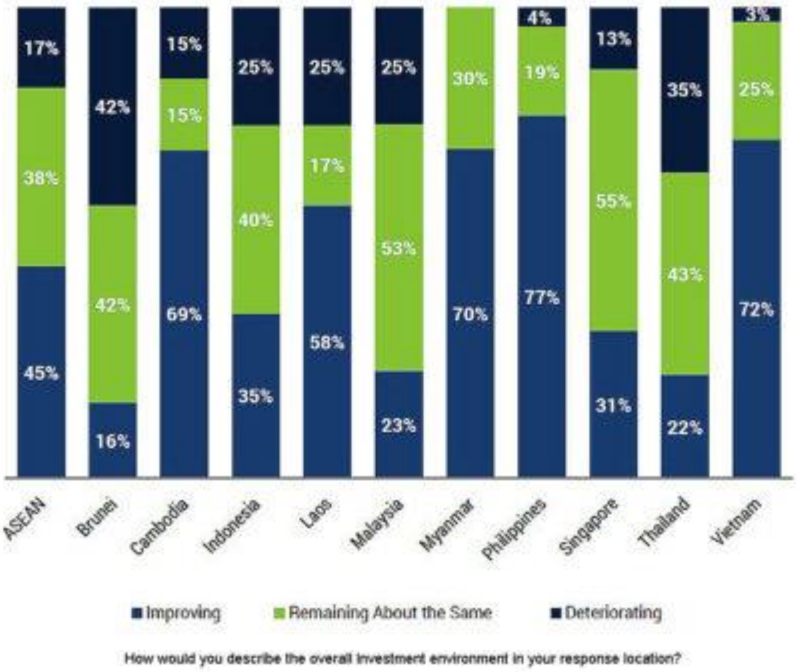


Chart: Courtesy Amcham Singapore

US firms in Asean said the investment environments in the region are improving the most in the Philippines, Vietnam and Myanmar

The 2017 *Asean Business Outlook Survey* also notes the importance of the Trans-Pacific Partnership (TPP), a wide-ranging agreement between 12 Pacific Rim countries, including Vietnam, that represent 40 per cent of global GDP. While the TPP has been signed by all members, none have as yet ratified it; including the US who became the TPPs driving force after joining the trade pact talks in 2008.

Until at least six states representing more than 85 per cent of the GDP of the signatories – more specifically Japan and the US – ratify it, the TPP remains dead in the water.

This is bad news for supporters of the TPP as both major candidates in the US presidential election have come out in opposition to the agreement. Although President Obama remains confident in getting approval for the TPP before he leaves office in January 2017, there is no guarantee given the current political climate in the country.

Nonetheless, American firms in Asean remain upbeat over the TPP. Fifty-six per cent of respondents in Asean TPP member countries – Brunei, Malaysia, Singapore and Vietnam – believe the trade deal will benefit regional trade and investment, while 75 per cent of American business leaders in Vietnam think the TPP will help their company’s’ trade and investment. Only 1 per cent said it will hinder their business.

In a solid vote of support for the TPP 61 per cent of the 2017 *AmCham ASEAN Business Outlook Survey* participants in Vietnam said the trade deal will impact the location of their future investments, by far the highest figure among respondents from other Asean countries.

Downsides: Corruption & Skills Shortage

	ASEAN	Brunei	Cambodia	Indonesia	Laos	Malaysia	Myanmar	Philippines	Singapore	Thailand	Vietnam
Accounting	15%	8%	20%	13%	42%	19%	45%	16%	17%	12%	3%
Customer Service	25%	38%	30%	19%	58%	19%	36%	22%	33%	18%	20%
Data Analytics	27%	15%	20%	29%	33%	39%	18%	31%	37%	22%	20%
Foreign Language	24%	8%	10%	23%	83%	16%	45%	6%	10%	46%	25%
Information Technology	33%	54%	25%	32%	50%	35%	45%	44%	42%	28%	13%
Management & Leadership	56%	54%	50%	65%	75%	42%	64%	50%	52%	56%	62%
Sales & Marketing	37%	38%	30%	32%	67%	32%	36%	38%	40%	38%	32%
Other	27%	8%	25%	29%	0%	42%	9%	38%	21%	34%	27%

American firms in Asean also reported a shortage of employees with suitable skills in creativity and innovativeness, analytical and problem solving, and technical skills

Chart: Courtesy Amcham Singapore

American firms in Asean also reported a shortage of employees with suitable skills in creativity and innovativeness, analytical and problem solving, and technical skills

However, despite the positive business sentiment in Vietnam, notable shortfalls remain.

Although the Vietnam government has attempted to curb corruption, it remains widespread and endemic. As a result only 6 per cent of respondents said they are satisfied with the lack of corruption in the local business environment, only marginally better than Indonesia, Cambodia, and Myanmar where 5 per cent, 4 per cent and 0 per cent respectively said the same, just one percentage point behind Thailand at 7 per cent. Those most pleased with the lack of corruption in the business environment were American firms in Singapore and Brunei where 95 per cent and 53 per cent respectively said they were happy.

Bureaucratic red tape remains problematic as well, in addition to anemic regulations and the rule of law. No American firms in Vietnam indicated that they are satisfied with Vietnam government agencies, while 46 per cent said they were dissatisfied with Vietnam Customs and 42 per cent with the Vietnam tax department. Just 8 per cent of American firms in Vietnam expressed satisfaction regarding the prevalence of local protectionism, while a dismal 9 per cent are satisfied with laws and regulations. A massive 89 per cent of American firms in Vietnam believe laws are not enforced fairly.

Photo: Courtesy Wikimedia contributor Hieucd

Vietnam is the number one location American firms in Asean plan to expand into
American firms in Asean also reported a shortage of employees with suitable creativity and innovativeness skills (45 per cent), analytical and problem solving skills (44 per cent), and technical skills (44 per cent). Lao PDR suffers most from a shortage in employees with technical skills (83 per cent), while finding staff with suitable analytical and problem solving skills is most difficult in Myanmar (74 per cent). In Cambodia and Singapore employees with creativity and innovativeness are the most difficult to find according to 58 per cent of respondents there.

Despite this, foreign investment in Vietnam is moving forward at full steam. Vietnam FDI hit $11.2 billion in the first half of 2016, according to the Foreign Investment Agency, a 105 per cent increase over the same period in 2015. The confidence in Vietnam which US firms showed in the *2016 Asean Business Outlook Survey* has been borne out by the numbers. Even with its glaring corruption and flawed rule of law, Vietnam is cementing its position as one of Asean's strongest investment magnets.

So long to the Asian sweatshop

September 6, 2016

For 30 years, the word “sweatshop” has conjured up a very specific image: low-wage Asian workers making branded clothes in crowded, unsafe factories for consumers overseas. The power of that image has launched human rights campaigns, altered how major companies source their products and informed (often incorrectly) how politicians in rich countries shape their trade policies.

Now that image is fading into history. In Asia, at least, the factors that made sweatshops an indelible part of industrialization are starting to give way to technology.
A recent report from the International Labor Organization found that more than two-thirds of Southeast Asia’s 9.2 million textile and footwear jobs are threatened by automation — including 88 percent of those in Cambodia, 86 percent in Vietnam and 64 percent in Indonesia. Whether that will be good for workers in general is debatable. But one thing is certain: The heyday of the Asian sweatshop is coming to an end.

Nowhere is that shift clearer than in Cambodia. Since the mid-1990s, global manufacturers have off-shored production there to take advantage of the country’s low wages, loose regulation and large population of rural residents eager for wage-paying jobs in the city. The result was a boom: By 2015, textile and footwear exports had become a $6.3 billion industry. They now account for about 80 percent of Cambodia’s export revenue.

Under the best conditions, textile and footwear jobs are monotonous and uncomfortable (as they’ve been since the Victorian era). Under the worst, they can be degrading and life-threatening. Nonetheless, Cambodia’s 630,000 textile and footwear workers have prospered. From 2014 to 2015, their average wage rose from $145 a month to $175, in a country where per-capita income is about $1,000 a year. That trend has repeated itself across Asia, especially in the great garment-making centers of China and Vietnam.

And that’s where things get sticky. Increasing competition from low-wage economies has pushed down garment prices worldwide. The average cost of clothing exported from Cambodia to the U.S. fell by 24 percent between 2006 and 2015. For a manufacturer, that’d be hard to swallow if wages were static; when wages are rising, it threatens to become a crisis.
In response, some factories have simply closed up shop. Some Chinese producers have moved to Southeast Asia, where they hoped the low-wage good times would persist. But they haven’t. And that leaves two options: Negotiate better prices from

Nike, H&M and other companies that outsource to Asia (unlikely), or increase productivity.

With little leverage against the brands, Asia's garment-makers have pursued the latter option — largely by investing in automation, the ultimate productivity booster. Of the new technologies they're putting to work, perhaps the most common are machines that automate the tedious process of cutting fabric, a staple task in every garment factory. The estimated time to break even on such technology — 18 months — pretty much ensures that the days of low-wage workers hand-cutting fabric are dwindling. Adidas Indonesia wants to reduce the proportion of manual labor in its cutting process to 30 percent. Hung Wah Garment Manufacturing in Cambodia has eliminated manual cutting outright.

And that's just the start. Three-D printing and other emerging technologies should allow manufacturers to meet customer specifications with unmatched quality, at speeds not previously imaginable in sweatshops, and with far less human labor. Even worse, for Asia's workers at least, is that Western companies can bring those same customizable technologies back home, and eliminate their overseas factories altogether.

The good news is that Asia's upwardly mobile factory workers are becoming consumers themselves, especially in China, and they should have more to spend on shoes and clothes in the years ahead. The bad news is that there's no obvious way to absorb the less fortunate workers who will lose jobs to automation. That's no reason to mourn the passing of sweatshops. But it is reason to worry that Asia has yet to find a good replacement for them.

** Adam Minter is a Bloomberg View columnist. He is the author of "Junkyard Planet: Travels in the Billion-Dollar Trash Trade." The opinion expressed is his.*

Bangladesh : au moins 29 morts dans l'incendie d'une usine textile

08h02, le 10 septembre 2016, modifié à 17h55, le 11 septembre 2016

Faute de normes de sécurité correctement respectées, accidents et incendies sont fréquents au Bangladesh.

Une usine d'emballage vestimentaire des environs de Dacca s'est embrasée samedi après l'explosion d'une chaudière.

Au moins 29 personnes ont été tuées samedi et 70 blessées dans un énorme incendie provoqué par l'explosion d'une chaudière dans une usine d'emballage au nord de Dacca au Bangladesh, ont annoncé samedi des responsables policier et hospitalier. Une centaine d'ouvriers travaillaient au moment de la déflagration dans ce bâtiment de quatre étages de Tongi, une ville industrielle à quelques kilomètres au nord de la capitale bangladaise.

Des blessés dans un état critique. De nombreux blessés sont à déplorer. "La plupart présentaient des brûlures. Nous avons envoyé ceux qui sont dans un état critique dans les hôpitaux de Dacca", a déclaré Parvez Mia, un médecin de l'hôpital public de Tongi. Des policiers ont dit craindre que des victimes soient toujours piégées à l'intérieur du bâtiment. "L'incendie n'est toujours pas sous contrôle", a déclaré l'inspecteur Sirajul Islam, disant craindre que le bilan ne s'alourdisse. Le feu s'est déclaré vers 06H00 a précisé Tahmidul Islam, un haut responsable de la police bangladaise.

Des produits chimiques. "Ce que nous avons compris, c'est qu'il y avait des produits chimiques stockés au rez-de-chaussée, ce qui a fait que les flammes se sont propagées très vite", a-t-il dit en précisant que de nombreux pompiers étaient mobilisés. L'usine, a-t-il détaillé, fabrique notamment des emballages plastiques pour les produits vestimentaires et alimentaires.

1.100 morts en 2013. Faute de normes de sécurité correctement respectées, accidents et incendies sont fréquents au Bangladesh, deuxième exportateur de produits textiles au monde après la Chine. Un incendie dans l'usine de Tazreen à Dacca, non loin de Tongi, en 2012, avait tué 111 salariés, nombre d'entre eux n'ayant pu s'échapper faute d'issue de secours. Six mois plus tard, plus de 1.100 personnes avaient trouvé la mort lors de l'effondrement du complexe textile du Rana Plaza de Savar, un faubourg de Dacca, le 24 avril 2013, une catastrophe qui avait mis au jour les conditions de sécurité effroyables au Bangladesh.

By Jozef De Coster | 12 September 2016

At first glance, Cambodia's garment sector is doing fine. ANZ Bank recently predicted 7.2% GDP growth in 2016, mainly fuelled by rising clothing exports. And just-released data from the International Labour Organization (ILO) points to a 14.7% jump in the country's clothing shipments to US$1.605bn during the first quarter of this year. But dig deeper, and it seems the overall situation of the Cambodian garment industry is less optimistic.

Despite rising exports, Cambodia's garment industry is trying to juggle higher wages, falling profits and the need for more productivity

For Ken Loo, secretary general of the Garment Manufacturers' Association in Cambodia (GMAC), the key problem is that the sector is not competitive.

He points out that Cambodian garment exports are only growing in markets with beneficial access, like Canada, Japan and especially the EU – its largest export market, accounting for 45% of the total, where imports have duty-free access under the Generalised Scheme of Preferences (GSP) Everything But Arms (EBA) arrangement.

In contrast, garment exports to US have been falling for the past five years, dropping 14.2% to US$1.2bn in the six months from January to June.

At last month's edition of the Cambodia International Textile & Garment Industry Exhibition in Phnom Penh, suppliers of machinery and materials unanimously complained that demand for their products is weak.

Gary Yap, regional senior sales executive at Juki, the market leader for sewing machines in Cambodia, says across Southeast Asia's low labour cost region comprising Vietnam, Cambodia and Myanmar, Cambodia is currently the weak spot.

The main reason, Yap argues, is a sharp rise in wages in recent years, which makes manufacturers' margins too slim to invest in new equipment. In the last four years, Cambodia's minimum wage has more than doubled from US$61 in 2013 to US$140 in January 2016.

Several exhibitors say they expect turmoil due to upcoming elections for Cambodia's commune councils in 2017 and national elections in 2018.

Also the diverging views of employers and trade unions on two thorny issues – the imposition of the new Trade Union Law of May 2016 and an increase in the minimum wage from 1 January 2017 – could spark clashes. Due to these issues, many investment programmes have been put on hold.

Disputed Trade Union Law

Cambodia's Law on Trade Unions, which was promulgated on 17 May 2016, is welcomed by Van Sou Ieng, president of GMAC. "A law was necessary to rein in the country's unions. How can a factory with 25 unions survive?" he asks rhetorically. According to GMAC, last year there were 3,166 unions for the more than 500,000 workers employed in the country's 557 garment and textile exporting factories, and 58 footwear factories.

Cambodia approves controversial trade union law

Larry Kao, general manager of Manhattan Textile & Garment and other companies, adds: "The law will hopefully improve the situation for employers. In the past, establishing a union was way too easy. Also, strikes didn't follow the rules. All of them were illegal."

GMAC's Ken Loo is wondering what the real effect of the law will be. He says: "Just like the unions, GMAC also had some objections. But now we at least have a comprehensive legal framework. In the past it was not always clear for unions and employers how to proceed. The big challenge will be to enforce the law. I actually don't expect that the government will be able to impose the law immediately and completely."

Ath Thorn, president of the Coalition of Cambodian Apparel Workers' Democratic Union (C.CAWDU) sees three main points of concern.

First, the law makes it very difficult for workers and unions to assert their right to strike. Secondly, in future all trade unions must provide the Ministry of Labour with an annual financial report. Thirdly, the law contains burdensome mandatory registration requirements, which severely restrict the ability of unions to carry out their activities.

Divergent views on the minimum wage

Employer and trade union representatives who have a seat on the Labour Advisory Committee (LAC) are also bracing themselves for the next round of negotiations on the new minimum wage to be applied from 1 January 2017.

With a decision expected in October 2016, both parties have strong arguments: either to limit wage increases to a strict minimum or, in the case of the unions, to push for a new leap forward towards a real living wage.

In fact, the unions have just disclosed their hand, revealing they will push for an increase of almost 30% to US$180 a month for the year ahead.

Cambodian garment unions seek $180 minimum wage

GMAC warns that 70 of its member factories have closed down this year, with only 35 new ones opening.

Ken Loo remarks that the unions tend to comment on the current minimum wage of US$140 but that companies actually pay their workers a lot more. Salaries include a number of legal allowances, which together amount to US$17 per month and, when overtime, attendance and productivity bonuses are also added in, Loo says most workers take home US$220-230, some even US$250.

The C.CAWDU president doesn't agree. He contends that the real average pay for garment workers is in the range of US$180-200 a month. "Instead of working 8 hourss per day, by doing overtime people often work 10-12 hours. To save money, they eat less, share a room with more people, and do not live a healthy life.

"GMAC, which tries to destroy the unions, is lying about factory closures. Many closures are not real closures. Factories shift from Phnom Penh to other areas, often paying the workers only part of the legal severance compensation or nothing at all. The current minimum wage is not a living wage. How could workers afford to eat beef, which costs US$10/kg or buy gasoline at US$1/litre?"

According to an ILO-report the average take-home pay of garment workers rose to US$175 per month in 2015, up from an average of US$145 in 2014 – and has reached US$187 in the first quarter of this year.

Sokny Say, secretary general of the Free Trade Union of Workers of the Kingdom of Cambodia (FTUWKC), reacts bitterly. "There may even be workers who by toiling 15-16 hours per day can earn up to US$250-300 per month. Anyway, in order to earn a living wage, workers must live like slaves."

High on the modern slavery index

Cambodia, along with North Korea and Uzbekistan, is among the countries that scored worst on the latest "modern-slavery index" released by Australia's Walk Free Foundation.

Sokny Say feels workers and the few independent garment unions are overlooked by the brands that source from Cambodia as well as by ILO's Better Factories Cambodia (BFC) Programme.

She also laments that the Arbitration Council, whose role is to resolve labour disputes through conciliation and arbitration, doesn't seem to want to help the workers. "The others still win the case, because workers don't have the ability of critical thinking like them."

Commenting on why she believes the ILO's BFC fails to support workers, she argues: "BFC is essentially a marketing tool of the Cambodian garment industry. One example among many: in June 2013, when some 4,000 workers rallied for wage demands in front of Sabrina Garment factory, a supplier to Nike, a brutal crackdown by military and paramilitary forces left 20 workers injured and two pregnant women suffering miscarriages. Eight of our union representatives were sent to jail for more than four months. Around 300 FTUWKC members were dismissed. Do you know what BFC wrote in a report a few months later? That Sabrina Garment factory had been perfect! It was like a hammer on my head."

FOB dream is not dead

What does the future of Cambodia's garment industry look like?

Both GMAC and the unions seem to understand the sector is part of a global system that needs cheap labour but – in spite of edifying company Codes of Conduct – is unwilling to pay the true cost of it.

So, in order to be able to pay higher wages, companies will need to increase productivity. Therefore, GMAC is currently building a Garment Training Institute in Phnom Penh's Special Economic Zone (SEZ) that is to start in 2017.

One of the goals of the Cambodian Government for the period 2016-2020 is to develop an upstream textiles and accessories industry to help Cambodia compete with countries with a more integrated textile and garment production base. Is this the right strategy? "No," says Ken Loo: "Developing a textile industry in Cambodia is a window that is closed."

Some other sector observers are more optimistic.

Mona Tep, representative for Cambodia and Laos at the France-led Europe-Vietnam Alliance (EVAlliance), says the planned creation this year of a Fashion Institute of Cambodia (FIC), a combined project of GMAC, EVAlliance and the government, "can make a difference in developing FOB-production in Cambodia, thanks to the development of specific skills."

And Esther Germans, programme manager at Better Factories Cambodia, firmly believes there's still a window of opportunity for FOB (free on board) production in Cambodia.

"I see here a number of modern garment manufacturers who do really good [work]. They are not suffering from regional competition. They prove that the industry can become more productive by investing in skills and technology and can grow beyond CMT (cut, make, trim).

"Some vendors are now setting up CMT factories with dyeing and laundry facilities across the border in Vietnam. Because Vietnam is not big enough alone, Cambodia will also get FOB opportunities. As for new competitor Myanmar, I see that most brands are still careful [before stepping] into this emerging production country."

The Cambodian garment industry also stands to gain from the recent formation of the Association of Southeast Asian Nations' (ASEAN) Economic Community in December 2015, getting easier access to inputs from Vietnam, Thailand and other ASEAN-countries.

And last month Switzerland-based Panalpina Group, a world-leading provider of forwarding and logistics services, and a specialist in supply chain management solutions, opened its own office in Cambodia. Its presence is expected to help freight forwarding charges in Cambodia – which are currently double those in Vietnam and Thailand – become more competitive.

Cambodia garment factories close amid political uncertainty

23 Aug 2016 at 11:18 10,045 viewed1 comments

Garment workers rest inside a factory after their lunch time in Phnom Penh on Oct 8, 2015. (Reuters photo)

Political uncertainty in Cambodia has forced the garment and footwear industry to look to alternative countries to meet production needs, forcing more than 70 factories to close and a sharp drop in orders, a senior official from the Garment Manufacturers Association in Cambodia (GMAC) said.

Speaking at a press conference before the 6th Cambodia International Textile and Garment Industry Exhibition and Machinery Industry Fair in Phnom Penh on Monday, Ly Tek Heng, the GMAC operations manager, painted a worrying picture of the first eight months of the year, the *Khmer Times* reported on Tuesday.

"I think the political situation has affected business, both businessmen and investors. When one country has instability in politics, it is difficult to make investments and there are concerns, especially from buyers," he said.

"The political issues, illegal demonstrations and competition from the other garment and footwear exporting countries such Vietnam, Bangladesh and Myanmar has deterred investors from investing in Cambodia and has made buyers reluctant to order products from Cambodia."

He said that in the first eight months of this year, more than 70 factories had been shuttered, while only 20 new ones had opened. This came as orders from buyers for footwear and clothing made in Cambodia dropped by almost 30%, forcing not only closures, but the slashing of hours for workers.

The decline in orders has had a knock-on effect within the industry, leading to a decline in orders for machinery used to make clothing and footwear, warned Akai Lin from Chan Chao International, which organised the fair.

"For the last few years, the demand for machinery in manufacturing has been great, but now it is decreasing slightly due to factory closures, leading some buyers to wait for the political situation to improve before making orders," he warned.

Commerce Ministry spokesperson Soeng Sophary on Monday downplayed the news, telling the *Khmer Times* that the closure of factories did not mean the industry was under threat. She blamed global insecurity for the closures, citing the upcoming presidential elections in the United States, the recent referendum in the United Kingdom where just over half the population voted to leave the European Union, as well as the high price of electricity. "Cambodia is a small country which depends on garment exports, and as such is affected by outside issues as our export market focuses on the UK and US. The factory closures are maybe due to changing demand in the EU and US. The economic waves in foreign countries have an impact on Cambodia," Sophary said.

"However, it is not only the impact from outside the country, but also domestically, since investors are looking for profit with low operational costs. So if the operational costs in other countries are lower than Cambodia, they could turn to those countries. We have an issue on electricity and labor costs that we be must be alert to," she said.

She stressed that it was too early to judge whether the industry was in trouble, as the 70 closed factories need to be compared with the 20 which have opened, which may be bigger or more important.

In contrast to GMAC's figure of a 30% drop in buyer's orders suggesting trouble in the garment sector, recent figures released by the ministry paint a far healthier picture. The ministry stated that total garment and footwear exports in the first quarter of this year have increased by 39% to $2 billion.

The EU was the largest market, taking $717.8 million in goods, followed by the US at $419.2 million and $41.7 million to Canada.

In 2015, total exports in the sector were $6.3 billion, a 7.6% growth over 2014, with 699 factories – from 73 in 2014.

KHMER TIMES/MOM KUNTHEAR FRIDAY, 16 SEPTEMBER 2016 705 VIEWS

Another Factory Owner Flees Country

More than 200 workers from the Lian Yi garment factory protested yesterday after the owner of the factory fled. Supplied

More than 200 employees of the Lian Yi garment factory in Phnom Penh's Por Senchey district protested yesterday, demanding the government and relevant ministries intervene after the owner of their factory fled the country without paying them their final month's wages and benefits.

The workers have been protesting since Saturday, claiming the factory owners suspended work and used the time to clear out the factory's inventory – including supplies and factory equipment – before fleeing the country.

Seang Rithy, president of the Cambodian Youth Union League, said the 225 workers were forced to endure a cruel ruse by the factory owners, who told them all to return to the factory on Saturday to receive their last paycheck. When they arrived, they found the factory cleared out and no sign of the owners.

"The workers were shocked when they came to the factory to get their money. Unfortunately, they got nothing," he said.

Mr. Rithy said the factory employees came to his union for help on Tuesday and he said he will do everything in his power to get them what they deserve.

"We want to find a resolution through legal procedures because the workers really need their wages. If we solve this through the law, it will take a long time. It will take about 6-7 months to resolve it," he added.

Yoy Ra, a 31-year-old employee of the factory for more than four years, said the group marched to the Por Senchey district hall, but their petition was brushed off by government officials.

"The district official received our petition, but they did not tell us when we will get results," he said, adding that workers planned to gather in front of the Labor Ministry this morning.

Mr. Ra said workers were seeking their last month's wage from August and were willing to wait for the rest of the bonuses and benefits to which they are entitled.

It is now becoming common for factory owners to flee the country and leave their workers in the lurch, with thousands of factory employees suffering in the process. The government often ignores worker complaints about the practice, but Labor Ministry officials last month claimed they were working on a solution to the now-rampant problem.

For years, unions and civil society organizations have asked the government to force those opening factories here to leave a large deposit in a Cambodian bank to deal with instances like these. Studies on garment worker activity have shown that many are living paycheck to paycheck, and without ample notice ahead of time, are left scrambling for money when they lose their jobs.

A senior official at the Garment Manufacturers Association in Cambodia said the garment and textile industry is in dire straits, with 70 factories closing in the first eight months of this year due to the "uncertainty of the political situation, the tension of competition from neighboring countries and some illegal demonstrations."

Only 20 factories have been opened this year. The Lian Yi factory was open for eight months.

SUNDAY, 18 SEPTEMBER 2016 23:15:58 GMT (ICT)
Editorial and News Contributions welcome >>

KHMER TIMES/MOM KUNTHEAR THURSDAY, 15 SEPTEMBER 2016 665 VIEWS

Unions Stand Firm as Factories Blink

Garment factory workers are hoping for a substantial pay raise. KT/Chor Sokuntea

Unions participating in the tripartite negotiations for the new minimum wage in 2017 revealed yesterday that employers and factory owners have budged from their initial stance of nothing more than $144 per month – agreeing to raise the figure by only $2.

Pav Sina, president of the Collective Union of Movement of Workers, told reporters yesterday after bilateral meetings that negotiations had been suspended and will continue today. The outcome of the meeting was positive, he said, because employers decided to move their figure up to $146.37.

Employers have based their figure for next year's minimum wage for garment and textile workers on a variety of factors, including the rate of inflation in Cambodia, which is now at three percent.

"Last week, the employers said they only would increase the wage by three percent, or to $144.20. But today, employers increased it from three percent to 4.55 percent, which is $146.37 per month," he said.

Mr. Sina added that the union also agreed to drop its figure – which was $180 at the beginning of negotiations last week – but would not say how much lower it would be.

President of the National Trade Union Confederation Fa Saly backed Mr. Sina's statement, but told reporters yesterday that unions had to make sure the minimum wage figure did not drop too far below $180 per month.

“If the employers increase their figure for the minimum wage, the unions will continue to negotiate to drop our figure so that it can be accepted by each party. But it cannot go lower than what we expect will benefit workers. We can’t weaken the union side,” he said.

Unions, he said, would hold firm on their stance of $180 until employers raised their figure to at least what the government suggested: $148.19 per month representing a 5.85 percent raise.

Mr. Saly told Khmer Times that unions had still not even accepted the government’s figure, but wanted employers to at least raise their number to a similar level because during the presentations given by each side on how they calculated their figure, employers failed to provide any research that looked into the living standards of workers.

Unions conducted their own study on worker spending habits and constraints and included it in their calculations for the new minimum wage.

“This year, unions studied from the International Labor Organization, the Labor Ministry as well as the research done with specific technical methods. So we have very specific evidence to discuss with employers,” he said.

This discrepancy is a sticking point for unions, he said, and they will not budge from their figure unless employers look into how the minimum wage affects the day-to-day life of employees in these industries.

The Garment Manufacturers Association in Cambodia (GMAC) said in a statement last week that the textile, garment and footwear sector has fallen on hard times, due to political instability and a surplus of closing factories, and subsequently, the minimum wage had to be “reasonable enough” to ensure “competitiveness and sustainability in the sector.”

Specifically, they were concerned about a drop in the number and monetary value of orders from buyers and brand owners, the majority of which come from outside Cambodia. In July, GMAC said more than 70 factories had closed and only 20 had opened this year alone.

To construct their initial figure of $144 per month, they used seven economic and social criteria, including the “family situations” of workers – something unions are claiming employers are actually not taking into account – the inflation rate, cost of living, productivity, national competitiveness, the labor market situation and the level of profitability in the sector.

Tripartite negotiations on the minimum wage for 2017 will continue today and resume on September 26. The final announcement from the government on the wage figure will be in early October.

La technique préserve la marge de Lectra

FRANK NIEDERCORN Le 15/09 à 06:00

La technique préserve la marge de Lectra – *dr*

Le prix de l'entrepreneur de l'année

Le Prix de l'Entrepreneur de l'Année organisé par EY et « L'Express », en partenariat avec Edmond de Rothschild France et Verlingue, avec le soutien de bpifrance, « Les Echos » et Widoobiz a été remis le 14 septembre à Daniel Harari, le directeur général de Lectra, pour la région Sud-Ouest.

Daniel Harari est en effet l'homme d'une seule entreprise qu'il a hissée au sommet de son secteur : les machines de découpe de tissus, cuir et textiles techniques. Pourtant en 1990 lorsqu'il rachète la firme avec son frère André, aujourd'hui son président, celle-ci est très mal en point. *« Je suis un entrepreneur pas un manager. Je n'ai donc pas peur de prendre des risques »*, a-t-il l'habitude d'expliquer.

Des paris gagnants

Diplômé de Polytechnique, d'HEC et de l'université Stanford, Daniel Harari, bon mathématicien et excellent joueur de bridge, a fait une succession de paris qui se sont révélés gagnants sur le long terme. D'abord en élargissant son activité de la mode à l'ensemble de l'industrie utilisant le textile et le cuir. *« Si nous pouvions habiller quelqu'un nous pouvions habiller l'intérieur d'une automobile »*, résume-t-il.

L'automobile génère aujourd'hui une bonne partie des revenus, Lectra ayant, il y a dix ans, développé sa propre technologie de découpe du cuir. Puis, au milieu des années 2000, il a fait étudier la possibilité d'une délocalisation en Chine, comme son principal concurrent. Résultat : une baisse des coûts de production de quelque 28 % que l'entreprise a choisi de réaliser en France en pariant sur l'innovation et en investissant notamment à Cestas, dans la banlieue de Bordeaux, où sont installés le centre de recherche, le showroom et l'usine. Lectra continue d'ailleurs depuis des années à investir 9 % de son chiffre d'affaires dans la R&D.

Autre pari en 2008-2009 quand la concurrence baisse ses prix pour faire face à la crise. Au contraire, Lectra lance sa stratégie 3.0 et choisit de monter en gamme avec des machines toujours plus sophistiquées qui lui permettent d'atteindre un taux de marge brute de 75 % et un résultat net de 23 %. Lectra ayant investi 50 millions d'euros sur les trois dernières années. Avec pour l'industriel un modèle économique qui a évolué puisque près de la moitié du chiffre d'affaires (238 millions d'euros en 2015, en progression de 13 %) est désormais généré par la vente de logiciels et de services.

F. N., Les Echos

Dimanche 18 septembre 2016

Les Français plébiscitent le "fabriqué en France" avec de plus en plus de marques sur le créneau, mais qu'est ce que cela change en réalité ?


Bobines de fil © Getty / Handoko Suman / EyeEm

Les Français plébiscitent le made in France en général

- Pour plus de 90% acheter français est un acte citoyen et cela procure l'assurance qu'il a été produit selon des normes sociales respectueuses des salariés

- Une majorité de Français voient dans le "made in France" un gage de qualité, ils sont même prêts à payer un peu plus cher

S'agissant de l'habillement, même tendance : à la question pour quel produit la fabrication française compte-t-elle d'avantage ? 74% répond l'habillement, juste après l'alimentaire selon un sondage TNS Sofres.

Impact social et environnemental

Le drame du Rana Plaza au Bangladesh en 2013 a marqué les esprits : plus de 1100 morts suite à l'effondrement d'un bâtiment vétuste qui abritaient des ateliers de confection travaillant pour des marques internationales. Ce sont les conditions de production des vêtements à bas coûts qui étaient mises en cause. Chaque année 700 000 tonnes de vêtements sont consommées en France et chacun d'entre nous jette 12 kilos de vêtements alors que 70% de notre garde-robe reste au placard. Pour enfoncer le clou sachez qu'il faut plus de 2000 litres d'eau pour fabriquer un T-Shirt.

1083, un exemple à suivre ?

1083 ce sont des jeans à 89 euros ou des chaussures à 69 euros fabriqués dans un rayon de 1083 km, les deux points de France les plus éloignés : Porspoder (Nord de la Bretagne) et Menton (Sud Est)

L'entreprise est installée à Romans et a déjà vendu en trois ans 15 000 jeans et 5000 paires de chaussures ce qui lui a permis de multiplier par cinq son chiffre d'affaires.

S'y retrouver dans les étiquettes, il suffit de les lire ?

Malheureusement non puisqu'il suffit que la dernière transformation ait été réalisée en France pour en faire un produit made in France. Un jean fabriqué en chine et assemblé en France pourra se dire « made in France ». Mais des labels peuvent vous guider comme « origine France garantie » qui impose deux critères aux vendeurs :

- entre 50% et 100% du prix de revient unitaire est français

- le produit prend ses caractéristiques essentielles en France

Après si toutes les marques ne sont pas parfaites on peut voir le verre à moitié plein et se dire que se revendiquer « fabriqué en France » implique de changer progressivement son modèle et ça c'est un bon début !

FASHION NETWORK

8 septembre 2016

Texworld/Apparel Sourcing : édition renforcée avec 1 547 sociétés

Le rendez-vous textile Texworld et celui du sourcing habillement Apparel Sourcing rassembleront respectivement 997 et 550 exposants pour leur édition qui se tiendra du 12 au 15 septembre au parc d'expositions du Bourget.

Texworld - Apparel Sourcing

Les deux rendez-vous aux offres largement asiatiques affichent ainsi des progressions de 5 et 37,5 % de leur offre. « Il faut le faire par les temps qui courent », souligne Mickael Scherpe, président de Messe Frankfurt France, qui évoque les craintes quant aux attentats. « Nous avons su, je pense, trouver les mots pour calmer les craintes et amener les professionnels à voir au-delà des craintes. »

Pour sa 39ème édition, Texworld s'offre un nouveau secteur « ambassadeur de la précellence », Elite. « C'était dans l'air depuis un certain temps », explique le président. « Un nombre d'exposants souhaitait un regroupement d'entreprises en mesure de livrer à la carte des produits de qualité. »

L'espace pensé par Olivier Lapidus réunira 22 entreprises venues du Turquie, de Taïwan, du Pakistan, d'Inde et autres. Une approche supplémentaire qui vient compléter celle des parcours respectivement dédiés aux Petites Quantités et aux sourcing responsable (My Sustainable Sourcing).

Le rendez-vous accueille également un pavillon coréen réunissant une cinquantaine d'entreprises, notamment sous l'égide de la Kofoti, fédération coréenne des industries du textile. Un espace doté de son propre espace tendance pour la délégation du 3ème pays le plus représenté du rendez-vous.

Texworld sera également le cadre de plusieurs défilés. Avec les collections de José Luis Gutierrez et Clément Dollet, lauréats du Fesival International des Jeunes créateurs de mode de Dinan. Mais aussi les créations d'Eymeric François et des Masters de 4ème année de l'école Esmod.

Apparel Sourcing connaît pour sa part un étoffement rapide de son offre, avec notamment l'arrivée de nouveaux pays, comme le Guatemala, les organisateurs se faisant fort d'aller chercher des productions n'exposant pas encore sur le marché européen. Seront également bien représentées les filières de l'habillement pakistanais, bangladais, tunisien et marocain.

Mais la Chine et l'Inde resteront parmi les pays les plus représentés. Le premier avec pas moins de 138 sociétés venant de la région du Zheijiang et 426 exposants présents venus avec la Chambre de commerce chinoise du textile (CCPITTEX) pour les 10 ans de CTAF

(China Textile and Apparel Fair).

L'Inde renforce pour sa part sa présence de 20 %. Et, parmi les offres, ressort également un net renforcement du nombre de fabricants proposant du made to measure, désormais porté à 13. Installé à la conjonction des deux salons, l'espace Shawls&Scarves proposera écharpes et foulards, mais aussi bonnets, bretelles, casquettes, ceintures et autres accessoires de mode.

Texworld et Apparel Sourcing avaient réuni 13 075 visiteurs de 109 nationalités pour leur édition de septembre 2015. Une fréquentation à 88 % internationale qui n'avait connu qu'une légère inflexion dans un contexte économique international difficile.

Last Modified: Sep 16 2016, 04:48 PM IST

Government initiatives, increasing export to provide strength to textile sector

Indian Textiles Industry has a vast presence in the economic life of the country and contributes substantially to its exports earnings. Textiles exports represent almost 14 per cent of the country's total exports. Globally, India has the 2nd largest textile manufacturing capacity after China; the Indian textiles industry accounts for about 24 per cent of the world's spindle capacity and eight per cent of global rotor capacity. It is the world's third largest producer of cotton-after China and the USA-and the second largest cotton consumer after China.

The textile industry can be broadly classified into two categories, the organized mill sector and the unorganized mill sector. Considering the significance and contribution of textile sector in national economy, initiative and efforts are being made to take urgent and adequate steps to attract investment and encourage wide spread development and growth in this sector. The sector provides direct employment to over 15 million persons in the mill, powerloom and handloom sectors.

Industry performance

The Indian textiles industry, currently estimated at around $108 billion, is expected to reach $223 billion by 2021. The industry is the second largest employer after agriculture, providing employment to over 45 million people directly and 60 million people indirectly. The Indian Textile Industry contributes approximately 5 per cent to India's gross domestic product (GDP), and 14 per cent to overall Index of Industrial Production (IIP).

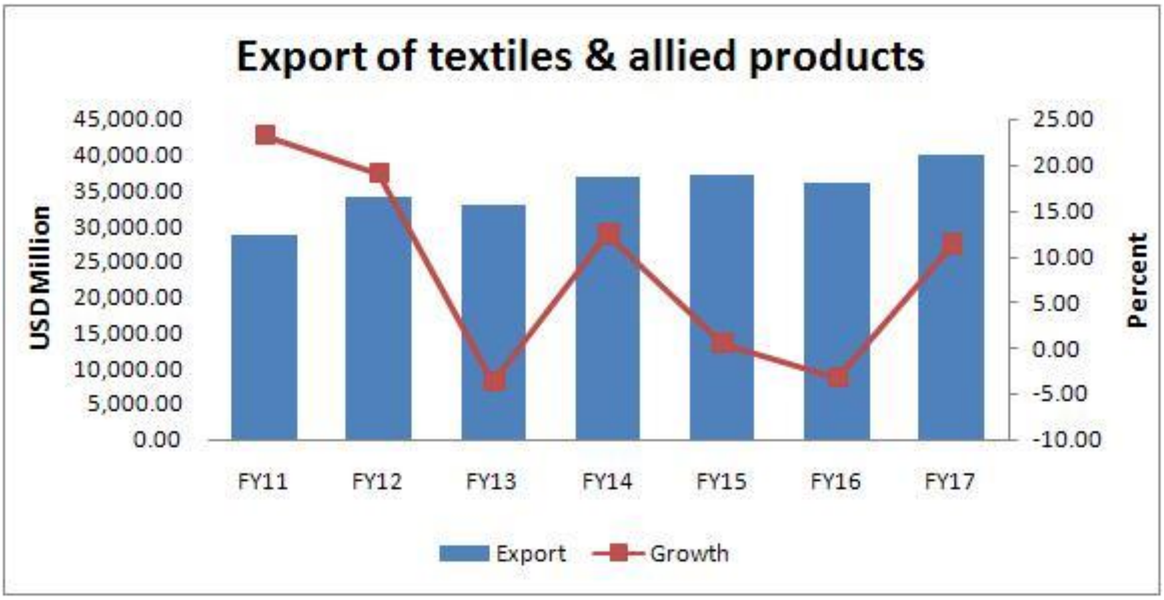
India has its own textile raw materials; in fact, the country has a surplus of textile raw materials whether it is cotton or man-made fibres. The spinning/weaving capacity built over the years has resulted in low cost of production per unit in

India’s textile industry. This has given a strong competitive advantage to the country’s textile exporters in comparison to key global competitors.

The sector has also witnessed increasing outsourcing over the years, as Indian players adjusted themselves up in the value chain from being mere converters to brand partners of global retail giants. The same is getting reflected in increasing value of exports. The Indian textile industry has enjoyed parity between international and domestic cotton prices.

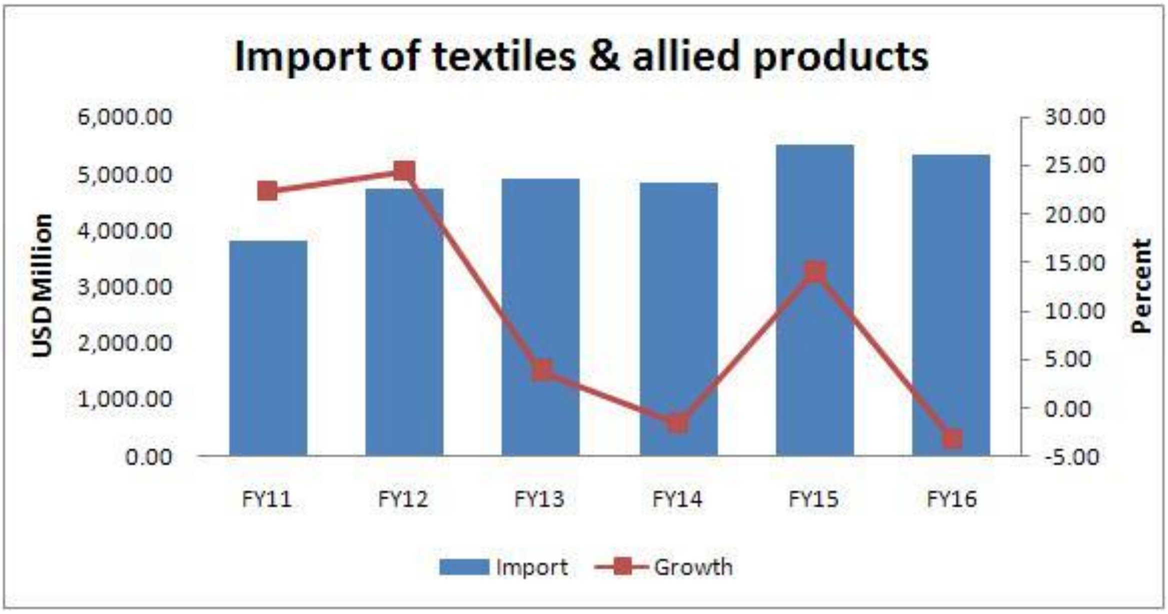
Exports

India’s textiles and clothing industry is one of the mainstays of the national economy. It comprises almost than 14 per cent share in total Indian export. The export of textiles and its allied products have declined by 3.20 per cent in FY16 to $35,952.65 million as compared to $37,140.74 million in FY15. The fall was mainly due to slump in export of manmade yarn, fabrics, madeups and cotton yarn. Manmade yarn, fabrics, madeups exports reported a negative growth of 12.39 per cent as exports reached $4,621.63 million in FY16 as against $5,275.03 million in FY15, while export of cotton textiles declined 8.36 per cent to $3,608.12 million in FY16 as against $3,937.41 million in previous year. The textile exports are expected to grow at $4000 million in FY17, on expectations of growth in the apparel segment and higher fibre prices. Export of raw-cotton is likely to see decline in FY17, while other segments, especially apparels may witness positive volume growth, especially due to improved export competitiveness supported by the recent financial package for the textile industry.



Imports

India is major exporting country as far as textile sector is concerned and not dependent on import. Majority of import takes place for re-export or special requirement. The import of textiles and its allied products have declined by 3.26 per cent in FY16 to $5,332.57 million as compared to $5,512.44 million in previous year. The fall in import of textile is mainly on the back of 22.54 percent fall in Cotton import and over 8 per cent fall in Manmade Yarn, Fabrics, Madeups.



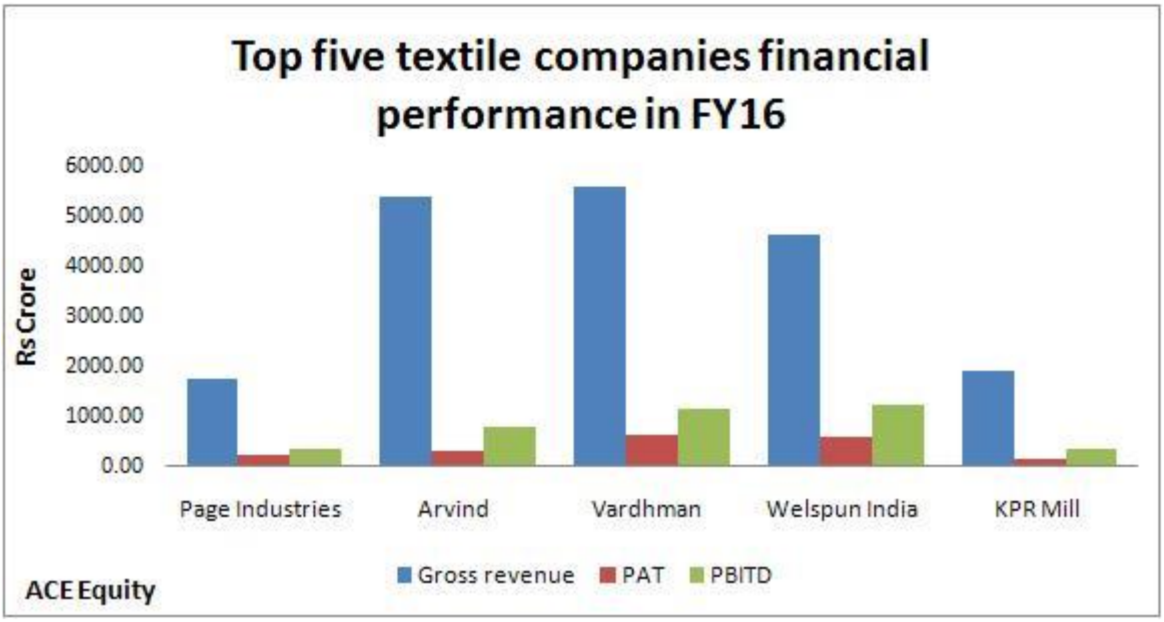
FDI in textile

The industry (including dyed and printed) attracted Foreign Direct Investment (FDI) worth $42.31 million or Rs 285.40 crore during in January- march 2016, as compared to $65.32 million and Rs 406.67 crore in corresponding quarter previous year. In previous quarter i.e. October-December 2015 the sector has attracted FDI worth $39.10 million or Rs 255.72 crore.

Financial performance of top companies

The textile industry has performed significantly well in FY16, as Profit after tax (PAT) (top twenty companies according to market cap) grew 28 percent to Rs 3021.08 crore as compared to Rs 2365.30 crore in FY15 on the back of spurt in domestic as well as international cotton prices. Among the top performers were, Vardhman Textiles with a net profit of Rs 653.06 crore, followed by Welspun India Rs 601.74 crore and Arvind Rs 318.85 crore. However, Bombay Dyeing & Manufacturing Company reported a net loss of Rs 85.24 crore in FY16.

The industry's top-line (top twenty companies according to market cap) improved modestly by around 4.27 percent to Rs 37793.70 crore in FY16 as compared to Rs 36245.66 crore in FY15 on the back of volume growth in most of the segments. Further, the industry's EBIT surged almost 13 percent to Rs 7076.11 crore in FY16 as compared to Rs 6267.56 crore in previous year.



Impact of GST on Textile sector

Indian government is taking all steps to bring in much needed tax-reforms which will facilitate industrial sector the required competitiveness internationally. Textile industry, so far for many decades enjoyed an excise exemption, comes into the spotlight with the government's agenda of implementing GST. There is no tax on natural fibers and cotton, but due to duties at the petrochemical level synthetic ones are taxed. However, with the execution of the GST, an input credit will lead to lower input costs and reduce prices of the finished synthetic textile at the consumer level. On the contrary, for the natural fibers which are tax-exempt, much-awaited bill will be an extra cost to the companies and the consumers.

Since exports under GST would be zero rated, this would give a competitive edge to textile exports in India which is facing strong competition from Bangladesh, Pakistan etc. Hence, integrated companies should see this as an opportunity, as the advent of GST will spur the textile sector with major capital investments bringing the cost of capital goods down. Further, ease of compliance will provide sigh of relief to the textile units as most of them are covered in Micro, Small Medium Enterprise (MSME) segment. Textile manufacturers will be encouraged to setup integrated facilities with tax consideration not becoming a hindrance in their decision making process.

Government initiatives

The government has approved a special package for employment generation and promotion of exports in Textile and Apparel sector. The move comes in the backdrop of the package of reforms announced by the Government for generation of one crore jobs in the textile and apparel industry over next 3 years. The package includes a slew of measures which are labour friendly and would promote employment generation, economies of scale and boost exports. The steps will lead to a cumulative increase of $30 billion in exports and investment of Rs 74,000 crore over next 3 years. The majority of new jobs are likely to go to women since the garment industry employs nearly 70% women workforce. Thus, the package would help in social transformation through women empowerment.

Salient features of the package:

Employee Provident Fund Scheme Reforms: Govt. of India shall bear the entire 12% of the employers' contribution of the Employers Provident Fund Scheme for new employees of garment industry for first 3 years who are earning less than Rs 15,000 per month. At present, 8.33% of employer's contribution is already being provided by Government under Pradhan Mantri Rozgar Protsahan Yojana (PMRPY). Ministry of Textiles shall provide additional 3.67% of the employer's contribution amounting to Rs. 1,170 crores over next 3 years.

Increasing overtime caps: Overtime hours for workers not to exceed 8 hours per week in line with ILO norms and this shall lead to increased earnings for the workers.

Introduction of fixed term employment: Looking to the seasonal nature of the industry, fixed term employment shall be introduced for the garment sector and a fixed term workman will be considered at par with permanent workman in terms of working hours, wages, allowanced and other statutory dues.

Additional incentives under ATUFS: The package breaks new ground in moving from input to outcome based incentives by increasing subsidy under Amended-TUFS from 15% to 25% for the garment sector as a boost to employment generation. And a unique feature of the scheme will be to disburse the subsidy only after the expected jobs are created.

Enhanced duty drawback coverage: In a first of its kind move, a new scheme will be introduced to refund the state levies which were not refunded so far. This move is expected to cost the exchequer Rs 5500 crore but will greatly boost the competitiveness of Indian exports in foreign markets.

Enhancing scope of Section 80JJAA of Income Tax Act: Looking at the seasonal nature of garment industry, the provision of 240 days under Section 80JJAA of Income Tax Act would be relaxed to 150 days for garment industry.

Recent developments

Textile Ministry plans policy intervention for jute sector

The Union Textile Ministry is considering policy intervention, both long-term and short- term, to address the issues impeding the growth of the jute industry upon which the economy of West Bengal is highly dependent. The company will find out what can be done through long-term policy intervention to promote the sector and the separate brainstorming sessions will be held with mill owners and farmer. The government would also try to devise solutions for short-term issues affecting the sector. Earlier, jute mills raised issues like intense competition and cheap Bangladeshi import while jute balers said they were receiving late payments from mills and in turn farmers' compensation was also being delayed.

Lok Sabha clears Taxation Laws (Amendment) Bill, 2016

The Lok Sabha has passed the Taxation Laws (Amendment) Bill, 2016 paving way for employers in the textile sector to avail of the income tax benefit on additional employment provided the employee has worked for 150 days and not 240 days as mandated earlier. The bill will now be taken up by Rajya Sabha following which the changes will be notified. Union Cabinet had on June 22 approved a special package for employment generation and promotion of exports in textile and apparel sector, in line with its commitment to generate one crore jobs in the textile and apparel industry over next three years. One of six incentives announced included enhancing the scope of Section 80JJAA of Income Tax Act. Looking at the seasonal nature of garment industry, the provision of 240 days under Section 80JJAA of Income Tax Act would be relaxed to 150 days for garment industry. Section 80JJAA of the Income-tax Act, 1961, was substituted by the Finance Act, 2016, so as to provide that in the case of certain assessees, in computing profits and gains derived from business, deduction shall be allowed of an amount equal to 30% of additional employee cost incurred in the course of such business in the previous year for the specified period, subject to the fulfillment of certain specified conditions.

Outlook

Outlook for the Indian textiles industry is looking positive in the coming time, as the textile exports has increased rapidly in recent years supported by higher fibre prices and currency depreciation, making textile sector one of the important sector for Indian economy, having almost 14 percent of market share in total exports. The sector will get some support with implementation of GST, as Zero rating on exports under the GST will facilitate the textile exports to increase without the need for explicit subsidy schemes and India can essentially increase its share of the export market as far as textiles are concerned. Government approval of a special package for employment generation and promotion of exports in the Textile and Apparel sector too will provide much needed support to the sector. The focus of package mainly on employment generation in garment sector has given it a high labour strength, while increased overtime cap of 8 hours per week will improve flexibility of units to increase production with same labour count as well increase earnings of labour.

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Last updated: September 17, 2016 at 11:45 am

Automation Strikes Textile – Raymond Will Replace 10,000 Employees With Robots

Mohul Ghosh
3 Min Read

91 year old Raymond, the iconic branded fabric and fashion retailer has embraced automation in a massive way, sending shock-waves across the legendary textile industry in India. In a landmark decision which will have tsunami like effect across the industry, they have decided to replace 10,000 employees with robots.

This incredible transformation will be implemented across the next 3 years.

Clearly influenced by automation developments in countries like China and Europe, where robots are increasingly replacing human beings, Raymond has made this decision to cut costs, and increase efficiency.

There are 30,000 employees of Raymond, working in 16 manufacturing plants across India. By reducing 33% of its workforce, Raymond is sending a strong signal across various manufacturing verticals in the country.

Raymond CEO Sanjay Behl said, "Roughly 2,000 work in each plant. Through technological intervention we are looking to scale down the number of jobs to 20,000, through multiple initiatives in technology. One robot could replace around 100 workers. While it is happening in China at present, it will also happen in India"

In China, Foxconn has already decided to replace 60,000 employees with robots, and the trend is now sweeping across all manufacturing niches.

We had predicted that textile industry in India may lose around 70 lakh jobs in the next few years. We couldn't predict the swiftness with which this turnaround will hit India.

When a company like Raymond, which is as old as the textile industry itself, controlling 60% of Indian textile manufacturing, adopts automation, then it means that the scare is real.

And automation is here is stay.

Move Over IT: Automation Will Impact Every Industry

As of now, the threat of automation in India was perceived only for IT industry. The confirmation by industry veterans such as Vishal Sikka regarding massive automation and reduced dependency on human beings for mundane tasks were not taken lightly.

In fact, as per various analysis, automation is all set to wipe out 50% of all IT jobs in India; a fact which was confirmed when we reported that top 5 IT firms in India hired 24% less employees in 2015 due to automation and robots.

In July this year, we reported a depressing news that automation will drive more than 3.5 lakh engineers out of job even as campus recruitment fell to 7-year low pan-India.

As if to endorse all such theories, World Economic Forum has said that automation, tech and robotics will collectively kill 50 lakh jobs by 2020.

As we are witnessing the sting of automation in IT and Engineering jobs, robots are slowly but gradually conquering other verticals as well.

HDFC Bank has already introduced robots for customer service; meanwhile ICICI Bank has automated 10 lakh banking operationsusing robots.

Even Pizza order has been automated now.

And now, Raymond's automation drive to kill 10,000 jobs has hit the Indian manufacturing industry; and it will certainly be one of those permanent changes which will alter the job scenario for ever.

If you are working in manufacturing industry, then we would love to hear your views on this news.

Indian textiles to get greater access in Chinese market

13
Sep '16

Commerce and industry minister Nirmala Sitharaman briefing the media on the Cabinet decision. Courtesy: PIB

Indian textile exporters are set to get greater market access in China and South Korea, as the Union Cabinet has approved the exchange of tariff concessions, on Margin of Preference basis, under the fourth round of negotiations under the Asia Pacific Trade Agreement (APTA) and related amendments. Bangladesh, Sri Lanka and Laos are also members of APTA.
The APTA (formerly the Bangkok Agreement) is an initiative under the United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP) for trade expansion through exchange of tariff concessions among developing country members of the Asia-Pacific region.

“Many of the sectors where we benefit are of critical value to us. Particularly, China and Korea have offered textiles, chemicals, pharma, heavy engineering machine tools, gems and jewelery, iron and steel, agri and marine products for us," commerce and industry minister Nirmala Sitharaman told reporters after the Cabinet nod.

"On its part, India will give market access to the other members in sectors like railway locomotives, rolling stock, nuclear plants, fissile material, aircraft and spacecraft. These are the items which are procured only by government agencies in India," she added.

However, no product will come into the country at zero duty as APTA is a preferential trade agreement. "The duty will be around 7 per cent," she said.

The latest decision of the Union Cabinet would be implemented after it is ratified during the fourth session of the ministerial council of APTA, which is due in January 2017.

Since APTA is a preferential trade agreement, the basket of items as well as extent of tariff concessions are enlarged during the trade negotiating rounds which are launched from time to time. Till date, three rounds of trade negotiations have taken place.

"Up to the third round, India has offered tariff preferences on 570 tariff lines at an average Margin of Preference (MoP) of 23.9 per cent and an additional 48 tariff lines to LDC members at an average MoP of 39.7 per cent at the 6-digit HS level. The third round, with respect to all participating states, cumulatively covered concessions on 4,270 products with MOP of 27.2 per cent," an official statement said.

The Cabinet also gave its approval to amend the preamble of APTA to effect accession of Mongolia as the 7th APTA Participating State. Other amendments to incorporate the Sectoral Rule of Origin to the Agreement were also approved. (RKS)

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Chinese textile firm may invest $100mn in Indonesia

07

Sep '16

Jiangsu Dongqun Investment Holding, a China based textile and apparel manufacturer has articulated interest in investing $100 million to build and start a textile production facility in Indonesia. This was informed by Indonesian industry minister Airlangga Hartarto, after a meeting with Jiangsu Dongqun officials at their headquarters in China.

According to the minister, he offered various options to the company to set up the factory, including the Kendal Industrial Park in Central Java, since the park has lots of land and also offers skilled labour.

"We also persuaded them to partner with Indonesian companies, while being committed to boost textile industry prospects with tax holidays, subsidies and lower gas prices," Airlangga said. (AR)

REVUE DE PRESSE INDONÉSIE - 6 SEPTEMBRE 2016

Indonésie : la Chine va investir massivement dans le textile

Un groupe chinois est prêt à investir 100 millions de dollars pour installer une entreprise textile en Indonésie.

Tempo – 100 millions de dollars. Voilà la somme que l'entreprise chinoise Jiangsu Dongqun est prête à investir pour construire une usine textile en Indonésie. *« Nous leur avons demandé de coopérer avec des partenaires locaux »* a expliqué le ministre indonésien de l'Industrie, Airlangga Hartarto, incitant le groupe à s'implanter dans le parc industriel de Kendal, au centre de l'île de Java, afin de bénéficier d'une main-d'oeuvre qualifiée. La décision a été prise alors que le ministre de l'Industrie était en déplacement avec le président Joko Widodo en Chine pour le G20.

Lors de ce sommet, le président indonésien a aussi évoqué les conséquences du terrorisme et de la crise des réfugiés sur l'économie mondiale, rapporte le *Jakarta Globe*. *« Les attaques terroristes qui touchent plusieurs pays du monde ne devraient pas exister. Récemment, j'ai vu ces attaques se multiplier dans les pays membres du G20 comme la France, la Turquie ou l'Indonésie. Cela n'est pas possible »*, a t-il déclaré demandant aux dirigeants d'adopter une approche *« intelligente »* et de lutter avant tout contre les racines du terrorisme : la pauvreté, les inégalités et la marginalisation. Il a aussi appelé à s'unir. *« Un échange intelligent d'informations et à une coordination est nécessaire pour éliminer la source même du financement du terrorisme. »*

This Is China, Not Italy

09/06/2016 04:11 pm ET

Simone Cipriani Head and founder of the International Trade Centre's Ethical Fashion Initiative

A normal day in Prato, home to one of the largest Chinese communities in Europe

"This is China, Not Italy" was written on a banner during a protest staged by 600 Chinese illegal migrant workers in Prato, Italy in early July 2016. The clashes between protesters and Italian forces escalated to the point anti-rioting measures were put in place using tear gas to re-establish order (see article on the South China Morning Post) One of the demonstrators, sweating heavily after confrontation with local police, voices his plea: "All we get is inspections. We are assaulted and robbed. The inspectors only want to get paid, but nobody protects us." On the other hand, Enrico Rossi, the regional governor known for his social engagement offers a different point of view. According to him, many of these businesses are not paying taxes and operate illegally. Rossi sees inspections as a way to monitor working conditions are up to standards and to formalise these production centres which operate on Italian soil.
One major issue and two visions.

Chinese Advantages with (Almost) No Flaws
Conversely, this event also reveals something about migration and economic development in general. Three decades ago, large waves of migrants from China

started flocking to Tuscany along the Prato to Florence stretch. Most of them were employed as tailors by the local textile and garment industry that, in its heydays, employed 40,000 people and was an important source of income for a very wealthy community. Very quickly, the most entrepreneurial of these new immigrants started incorporating their own companies, offering the same services *at a cheaper price*. Cheaper because they breached employment and safety laws, and often dodged tax obligations. The Italian businesses sourcing from them turned a blind eye, as these manufacturers were not competitors: they were supplying cheap production inputs as local suppliers. No need to go to China or India anymore: Asia was here, at hand.
By the end of the nineties, the textile industry crisis hit Prato severely and companies started closing down. Yet, the Chinese community kept growing. They started connecting to mainland China, offering the prized *Made in Italy* label. They diversified production by launching into garmenting and accessories. They enlarged the boundaries by reaching the frontiers of Florence (where the above mentioned protest took place) and entering the lucrative business of leather goods. Of course, most of them kept working illegally. The Chinese triad saw a business opportunity in this for human trafficking and launched a scheme whereby they sponsored workers to travel to Italy and work with no pay: a form of modern slavery. Participants were allowed to leave the system after working a certain number of years to launch their own activity. Many people were incentivized to come from China and work in awful conditions and soon enough, this created a small Chinese town in Italy. Today in Prato, you have 50,000 Chinese people out of which no more than 16,000 are registered (*Guardian*, July 2016.) Officially, the others don't exist!

Luxury Fashion Trimming the Cost of Labour
Despite this, plenty of European distributors and brands carried on working with the Chinese community. Why? Because things were cheaper. As an example, over the ten years this has been taking place, the cost paid by a fashion brand to manufacture a luxury leather bag went from €28 to €19, and today it is around €13, excluding the cost of materials. Knowing a bag requires at least 2 hours of labour to accomplish, once you add the production overheads, what is the hourly remuneration of workers?
Clearly, this scheme created a competitive business. I recognise a few of these businesses adhered to local laws and respected employment conditions, thus revitalising the local community. Unfortunately, these are a minority. And everybody remained silent, until 2015 when one of those ghost companies - usually hidden in the back of formal factories or in an old warehouse - burnt down. Those inside perished, unable to escape from a building that didn't have any safety provisions for workers. This horrific accident triggered a big debate, leading the local police to inspect and close factories. Tensions increased and were brought to a head at the last showdown, two months ago.

Migration Crisis, Economic Development, Revitalising Communities
Beyond the breach of responsible manufacturing, this clearly reveals a lesson on migration and economic development. If migrants are enabled to work and enter a system of employment and business based on respect and law enforcement, they can become a resource. When not formally integrated into the workforce, migrants are exploited by somebody who wants to make money on their backs, until the problem becomes something too big and bad to be managed.
Those who arrived from China migrated to Italy over a long period of time and settled in specific locations. Today, the same number of people reach Europe every six

months. Unless we do something to frame these human beings emerging from the migrant crisis into a formal channel of life and work, we are going to pay a huge price in the future. Education, vocational training and employment are some of the solutions for the crisis caused by the biggest displacement of people in modern history. Not walls. This is something we need to take action on, now.

Football unites! A local football fan

Photos courtesy of Francesco Arese Visconti as part of his *Hidden Identity* work.

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Les professionnels de Denim en conclave à Munich

Des entreprises marocaines participent actuellement au Salon international Fabric Trade -Blue Zone-

C'est aujourd'hui que s'ouvre à Munich la grand-messe regroupant tous les professionnels de Denim et auquel participe le Maroc. Un seul mot d'ordre pour la partie marocaine lors du Salon international Fabric Trade -Blue Zone- : chercher un positionnement fort par la mise en avant du savoir-faire des entreprises en matière d'offre globale de Denim.

En effet, le Centre marocain de promotion des exportations dévoile dans un communiqué parvenu à Libé que cette manifestation de deux jours représente une plateforme essentielle de rencontres entre fournisseurs de textile et d'accessoires et les acheteurs du marché allemand, nord-européen ainsi que les acheteurs de l'Europe de l'Est et de la Russie.

Maroc Export, qui organise en concertation avec l'AMITH (Association marocaine du textile et de l'habillement) la deuxième participation marocaine à ce Salon, indique que le Munich Fabric Start, dont le visitorat professionnel est estimé à plus de 20.000 visiteurs, est aujourd'hui considéré parmi les Salons les plus sélectifs qui permettent à l'entreprise participante de s'internationaliser et lui offre l'occasion d'aborder et de pénétrer le marché nord-européen.

Et de préciser que le marché de l'importation des jeans en Europe connaît depuis 10 ans une croissance importante, des importations d'une valeur de 4,077 milliards d'euros en 2014 notant que le jean est le basique incontournable du marché de l'habillement européen, avec pas moins de 531 millions de pantalons vendus en Europe rien qu'en 2014. Ce qui constitue un record pour une population de 503 millions de personnes dont 425 millions ont un âge supérieur à 14 ans.

« Avec 114 millions de pièces importées, ce qui représente 979 millions d'euros, le marché allemand est le plus important en Europe », fait ressortir le communiqué soulignant que l'Allemagne est l'un des marchés les plus attractifs, représentant 24% du marché européen. L'on signale de même source aussi que l'Espagne campe à la deuxième position, avec 88 millions de pièces importées pour une valeur de 621 millions d'euros ajoutant que les Pays-Bas arrivent en 4ème position avec 69 millions de pièces importées pour 17 millions d'habitants, soit 4 jeans par personne. Et de relever, en outre, que la France se place 5ème, représentant 10% du marché européen, soit 393 millions d'euros pour 55 millions de pièces importées.

Dans la foulée, le Centre met en exergue que quatre pays représentent plus de 82% des jeans importés en Europe, en l'occurrence le Bangladesh, la Turquie, la Chine et le Pakistan annonçant que la tendance générale est à la régression des importations en provenance des pays méditerranéens contre une augmentation de celles des pays asiatiques. Et de faire savoir que la Méditerranée qui représentait 41,8% des importations européennes en 2008 a baissé à 35,5% en 2014 mettant en relief que le prix moyen du jean importé est le plus cher en Tunisie et en Turquie, avec respectivement 17,06 euros et 13,55 euros et qu'en revanche, le Bangladesh affiche le prix moyen le plus bas avec 5,47 euros.

Le communiqué stipule également qu'après une croissance de 8,8% enregistrée en 2014, les importations d'articles d'habillement de France, d'Espagne, du Royaume-Uni, d'Allemagne et d'Italie en provenance du Maroc ont augmenté de 5% durant 2015 et que leur valeur a atteint 392,3 millions d'euros.

Pour le textile, la variation a été plus importante avec 11% par rapport à l'année 2014, pour une valeur de 35,8 millions d'euros, précise-t-on de même source évoquant que les professionnels du secteur estiment qu'il s'agit d'une bonne performance qui confirme le retour du Maroc dans la stratégie de sourcing des donneurs d'ordre européens.

Le Royaume, fait remarquer Maroc Export, est aujourd'hui, le 7ème fournisseur des cinq pays européens précités alors qu'il occupait la cinquième place en 2014 ajoutant que cela s'explique, par la très forte concurrence de pays comme le Cambodge et le Vietnam qui connaissent une très forte évolution de leurs exportations vers les pays européens.

Le challenge de la participation marocaine, conclut le Centre, est donc d'améliorer et de développer l'offre marocaine qui permettrait un meilleur positionnement sur la carte sourcing des donneurs d'ordre européens.

LE MOCI Moniteur du Commerce International depuis 1883 | La lettre confidentielle

Lettre n°204 du 08/09/2016

TEXTILE / INTERNATIONAL : LA MÉDITERRANÉE EN PERTE DE VITESSE FACE À L'ASIE EN EUROPE

La Méditerranée a des soucis à se faire. Déstabilisée par des conflits à répétition, elle perd pied face à l'Asie dans le textile-habillement, pourtant un de ses pôles d'excellence, et ce, plus encore, dans les pays européens, qui constituent ses débouchés de proximité. Bien sûr, tous les **États** du sud de la *mare nostrum* « ne sont pas touchés de la même manière », explique à la *Lettre confidentielle* **Jean-François Limantour**, rédacteur-en-chef de la nouvelle publication de Messe Frankfurt France, *Textile News* *. Et de dévoiler les fournisseurs qui souffrent le plus.

La pilule est particulièrement amère pour la **Turquie**, au moment où elle s'engage dans la guerre en Syrie et est confrontée à une vague d'attentats. Si pour le textile, derrière la **Chine**, ce pays conforte sa position, au même titre que l'**Inde** et le **Pakistan**, ce n'est pas le cas dans l'habillement, malgré une hausse de ses exportations vers l'Europe de 8 % au premier semestre 2016 par rapport à la même période en 2015. « En fait, il perd du terrain par rapport à une Asie qui va beaucoup plus vite », commente Jean-François Limantour, qui préside aussi le Centre euro-méditerranéen des dirigeants textile-habillement (Cedith) et l'association Europe-Vietnam Alliance (Evalliance).

La Tunisie s'effondre…

Les coûts de production ont bondi en Turquie depuis plusieurs années. Le Smic mensuel y a encore augmenté en janvier, passant ainsi à 572 dollars. En outre, confie Jean-François Limantour, « l'Asie n'est plus seulement sur le bas de gamme et la sous-traitance, mais aussi sur les produits de qualité ». Enfin, l'emploi de milliers d'enfants réfugiés syriens dans les ateliers de confection commencerait à altérer l'image du pays.
Si, toutefois, la Turquie parvient malgré tout à demeurer sur le podium des premiers exportateurs de vêtement en Europe, juste devancés par la Chine et le Bangladesh, la **Tunisie** est, pour sa part, tombée du quatrième au neuvième rang, devancée par l'Inde, le **Cambodge**, le **Vietnam**, le **Maroc** et le Pakistan. « D'ici la fin de l'année, confie Jean-François Limantour, on doit s'attendre à une montée sensible des livraisons du Vietnam avec l'accélération de la mise en œuvre de l'**accord de libre-échange avec l'Union européenne** ».

Moins d'entreprises locales, moins d'exportations et moins d'investisseurs étrangers. Les lendemains du **printemps arabe** sont amers pour le pays du jasmin, dont la situation politique reste incertaine et qui est confrontée à des tensions sociales fortes et à une insécurité constante.

… le Maroc résiste

Pour Jean-François Limantour, le **Maroc**, s'il est en recul relatif, tire néanmoins son épingle du jeu de la concurrence, grâce à une politique nationale d'appui à l'investissement et de soutien de ses exportations, lisible et structurée. Le **Centre marocain de promotion des exportations** (CMPE, ex-Maroc Export) mène ainsi des actions sur tous les continents : Europe, Amérique, Asie. Dans la nouvelle **charte de l'Investissement**, qui prévoit des zones franches pour tous les exportateurs, quelle que soit leur nationalité, il est prévu que même les sous-traitants peuvent bénéficier du statut de point franc, dès que leur production va servir à exporter, ce qui est particulièrement important pour les sous-traitants de deuxième et troisième rang dans le textile-habillement.

En juillet, le français **Decathlon** a conclu une convention d'établissement. Donneur d'ordre de plusieurs sous-traitants marocains, il s'est engagé à construire une plateforme de *sourcing* local pour favoriser l'export et alimenter ses magasins dans le Royaume, au nombre de quatre à l'heure actuelle, mais qui devait passer à 30 au terme de son plan de développement.

François Pargny

HEARTBEAT OF THE NATION
MYANMAR TIMES

Govt to intervene in Panda textile row

By Htoo Thant | Wednesday, 14 September 2016

The industry minister is to step into a long-running dispute involving Panda Textile Factory, whose workers say management has broken an agreement on pay and labour conditions. The management has denied the accusation.

A Panda Textile Factory employee in Singaing township, Mandalay Region, is detained outside a protest against the factory's management. Photo: Pyae Thet Phyo / The Myanmar Times

U Khin Maung Cho, Union minister for industry, told the Pyithu Hluttaw on September 12 that he was prepared to issue an order to settle the issue.

Panda Textile, in Mandalay Region's Singaing township, has been wracked by demonstrations and strikes since it was privatised under an agreement that required the new management to retain its workforce, treating them as government employees.

More than 200 workers have been staging a sit-in outside the factory gates since June to protest against having their pay cut and being forced to work on their days off, in breach of their employment contract. Efforts by labour officials and calls for more patience pending resolution of the dispute have so far yielded no result.

Local MP Daw Kyi Moh Moh Lwin (NLD; Singaing) said the dispute had dragged on for three years despite the involvement of labour officials in the negotiations. "The original contracts were amended. Workers who don't come in on weekends have their pay cut," she said. "The dispute is having a serious effect on the health of more than 600 workers and their 3000 dependents."

Industry Minister U Khin Maung Cho told MPs that the workers were striking in support of their claim under the original contract.

"They want their full entitlement as civil servants, as they were [before the factory was privatised]," he said, adding that the management was worried about relations between the striking workers and those who continued to clock in.

The dispute has taken on new importance with the prospect that Myanmar might be admitted to the United States Generalized System of Preferences, opening up new export markets. International investors are starting to ask the government about the state of labour unrest in the country and dispute resolution procedures under the law, the Union minister said.

"Investors are interested in doing business in Myanmar and are coming to observe the situation here. Meanwhile, disputes between workers and employers are being accepted as normal. But this is a challenge for the country and the government," he said. The minister added that the dispute would be settled under the terms of the employment contract signed in March last year, the Settlement of Labour Disputes Law and related legislation.

Panda Textile took over the factory from the Ministry of Industry in 2012, paying an annual K360 million (US$296,000) for a long-term lease that expires in 2043. The deal involved the transfer of 1467 staff from government service to the company.

In June, the Mandalay Region labour ministry announced that it would sue the factory for breach of contract under the 2013 Employment and Skills Development Law. "The amendment of the contract was one-sided, from the employer's side. A contract can be amended or cancelled, but agreement is needed from both sides under the law. I have submitted the case to the judge, who will decide whether it's a breach of contract or not," said U Min Min, deputy director of the Department of Labour.

Panda Textile had announced in March that it would adopt a 44-hour work week with eight-hour days in accordance with the 1951 Factories Act, according to general manager Daw Tin Tin Shwe. She said at that time that the factory would accept the court's decision, but disputed the accusation that the factory had breached the contract.

HEARTBEAT OF THE NATION
MYANMAR TIMES

New US trade preferences highlight challenges for Myanmar exporters

By Steve Gilmore | Friday, 16 September 2016

Myanmar's business sector has welcomed US plans to lift almost all remaining sanctions against the country and reinstitute special trade preferences, but some industries could find it hard to take advantage of the new environment.

Employees work at a garment factory in Shwe Pyi Thar industrial zone in Yangon. Photo: AFP

US President Barack Obama announced this week that he intends to lift the state of emergency the US declared against Myanmar in 1997, which forms the basis for almost all remaining sanctions.

The US has steadily chipped away at the sanctions regime in recent months, issuing general licences allowing trade to pass through blacklisted ports, permitting transactions with military-owned banks and removing state-owned lenders from a list of Specially Designated Nationals (SDN) with whom business dealings are illegal.

But despite the gradual easing, the presence of the SDN list and the fact that the state of emergency remained in place has made life difficult for Myanmar's business community. US banks have refused to transfer money out of Myanmar – even for US firms – and very few are willing to provide transfers into the country.

The sanctions regime has often made lenders from other countries similarly wary of providing transaction services on behalf of Myanmar banks, all of which has hurt their ability to provide trade financing for local firms.

When the state of emergency is lifted, the SDN list, along with prohibitions on new investment and financial services, will disappear. The US has also announced that in November Myanmar will be made eligible for the Generalized System of Preferences (GSP), which will allow Myanmar to export thousands of products to the US at reduced tariff rates, like many other developing countries.

Senior business officials are hoping this will usher in a new era of trade and closer cooperation with US banks and companies.

"Even though some sanctions were lifted, US banks stayed reluctant [to engage with Myanmar]," said U Mya Tha, chair of Myanmar Oriental Bank. "Now with the GSP there will be more and more trade with the US, and US banks can be involved [in trade transactions]. Hopefully institutions in other countries will become more comfortable [with Myanmar] too."

But whether the potential to ship goods to the US at lower tariffs will prompt a sharp rise in exports is far from clear. The European Union made Myanmar eligible for its own GSP system in 2013. That everything-but-arms initiative allows companies to enjoy duty-free and quota-free exports to the EU market for all products except arms and ammunition.

EU-Myanmar trade increased rapidly in the following years, with the EU importing garments, rice, fishery products and beans. But some sectors struggled to take advantage of the new market. Daw Toe Nandar Tin from Myanmar Fishery Products Processors and Exporters Association said the impact of the EU's GSP had been modest because Myanmar does not produce many fishery products suitable for the EU market.

Myanmar's garment sector was the biggest beneficiary of the EU GSP – accounting for 62pc of the 675 million euro (US$ 758.5 million) in Myanmar exports to the EU in 2015. U Aung Win, deputy chair of Myanmar Garment Manufacturers Association said he hoped the US GSP system would be similarly positive for the sector.

But unlike the EU, the US has strict rules on which textiles qualify for GSP.

"There are relatively few textile and apparel products eligible for [US] GSP," said Eric Rose, lead director at Herzfeld Rubin Meyer & Rose in Yangon.

"But overall, exports of Myanmar textiles to the US reached $500 million annually about 15 years ago," he said, adding that the industry has the potential to return to its heyday prior to 2003 when it was a major employer in the country before it suffered under sanctions.

Myanmar exports to the US have grown from $38,000 in 2012 to $142 million in 2015, according to a spokesperson from the US embassy in Yangon. He noted that the 2015 figure included several GSP-eligible goods including dried peas, rattan products and wood products.

Economist U Khin Maung Nyo welcomed the sanctions relief and GSP reentry, but said that Myanmar will have to "improve the quality of its commodity exports" in order to take full advantage of the US market.

One of the country's biggest agricultural exports is beans and pulses. Myanmar exports mostly raw produce to India, which is then put through Indian mills before being sold. But developed markets like the US are less interested in the raw produce that makes up most of Myanmar exports, said Sunil Seth, chair of the Overseas Agro Traders Association of Myanmar (OATAM).

"They want the finished product and in small packages - [for example] ready-to-eat lentils," he said. Mr Seth has been looking at exporting Myanmar pluses to the Canadian market, but found that Myanmar mills often need to improve quality standards to meet the requirements of North American markets. This is in addition to improving production facilities and logistics chains, he added.

Myanmar is also hoping to boost rice exports, and is in negotiations with countries like Indonesia and China. But some 25 percent of the rice produced in Myanmar is un-milled or "rough" rice, whereas developed markets will typically want finished milled rice for import, said Mr Seth.

"If tariffs come down there will be the possibility to do more value-added agricultural exports," he said, but the country's agricultural industry needs investment and development to produce the necessary products at the required standards.

Other industries in Myanmar could also find it hard to make use of the US GSP. The majority of natural gas and mineral exports go to China, and if there is an increase in exports to the US it is likely to be negligible, said Alexander Jaggard, country representative for Mekong Economics.

"It acts as a signal that the US is interested in establishing solid bi-lateral ties," he said of the GSP. "But in terms of real economic impact I'd be very surprised if it had any substantial effect."

Additional reporting by Myat Noe Oo and Daniel de Carteret

PAKISTAN OBSERVER
EYES & EARS OF PAKISTAN WIDELY READ & TRUSTED DAILY

Technology Upgradation Fund scheme introduced to facilitate textile

September 11, 2016

Islamabad—The government has formulated a Technology Up-gradation Fund (TUF) Scheme to facilitate textile sector and enhance exports. Currently, the scheme is under process in State Bank of Pakistan, sources at Textile Industry Division said. Highlighting the measures introduced to facilitate the said sector, the sources on Saturday said facility of duty free import of textile machinery will continue during 2016-17.

The government had allocated Rs6 billion for Textile Policy initiatives for 2016-17 while support schemes would also continue during this year which include: Sales Tax of five export oriented sectors namely textile, leather, sports goods, surgical goods and carpets had been made part of zero rated tax regime from July 1, 2016 while all the pending sales tax refunds till April 30 whose RPOs have been approved, will be paid. The existing scheme on Drawback of Local Taxes (DLT) will also continue in 2016-17.

The sources said in 2014-15, the government reduced mark-up rate on exports finance from 9.4 per cent to 7.5 per cent. This rate was reduced in February 2015 to 6.0 per cent, and it was further brought down to 4.5 per cent from July 1, 2015. APP

BUSINESS RECORDER
Founded by M.A. Zuberi

High cost of doing business hurting country’s competitiveness in region

Sunday, 11 September 2016 12:42

TAHIR AMIN

ISLAMABAD: The cost of doing business in Pakistan is as high as 10 percent as compared to other regional competitors which has put exports sector at a disadvantaged position in the international market, it is learnt on Saturday.

About 20 percent production capacity of industry in the country is impaired due to high cost of doing business, revealed exports sector’s experts while recently sharing a presentation with the government.

According to the presentation, electricity tariff in Pakistan is 11 cents/kWh against 9 cents/kWh in India, 8.5 cents/kWh in China, 7.3 cents/kWh in Bangladesh, 9 cents/kWh in Sri Lanka while 7 cents/kWh in Vietnam.

Gas tariff is $8/MMBTU in Pakistan against $4.2/MMBTU in India, less than $6/MMBTU in China, $3/MMBTU in Bangladesh and $4.5/MMBTU in Vietnam.

Further duties/taxes/surcharges on exports in Pakistan are more than 5 percent, however these are less than one percent in China, Bangladesh, Sri Lanka, Vietnam and zero percent in India.

According to the presentation, Pakistan share in global textile trade dropped from 2.23 percent to 1.5 percent during 2005-2015 as the sector remains uncompetitive in the region with low power supply, high cost of doing business and desired relief in taxes. However, India share increased from 3.5 percent to 5 percent, China from 30 percent to 38 percent, Bangladesh from 1.6 percent to 3.7 percent and Vietnam from 1.12 percent 3.7 percent during this period.

Pakistan is offering technology up gradation to 25 percent of looms while all other competitors are providing 100 percent. Minimum wage rate in Pakistan is $135/month against $90 in India, $200 in China, $68 in Bangladesh, $66 in Sri Lanka and $90 in Vietnam.

The office bearers of exporters associations said that the reinstating of zero-rated regime for the five major exports-oriented sectors will contribute little to growth in exports as long as problems with respect to security situations, business climate as well as competitiveness losses related to real exchange rate and utilities prices are not addressed.

Fulfilling a major demand of leading export sectors, the government restored sales tax at the rate of zero-percent on five export oriented sectors i.e. textile, leather, carpets, surgical and sports goods from 2016-17. However, the concerns of the industry about the pending sales tax refunds, withdrawal of various surcharges on electricity like tariff rationalization surcharge, gas and power availability at competitive prices with other regional countries, withdrawal of Gas Infrastructure Development Cess (GIDC) are still pending, which they consider as big hindrances to work with full potential.

The International Monetary Fund (IMF) in its 11th review has also stated that the Pakistan’s exports fell by 9.2 percent (y-o-y) during the first three quarters of fiscal year 2015-16, owing to lower international prices of cotton and rice, ongoing security issues, a poor business climate, and competitiveness losses related to real exchange rate appreciation (1.3 percent y-o-y in March 2016 and cumulatively 19 percent over the past two years).

BUSINESS RECORDER
Founded by M.A. Zuberi

Competitiveness on regional matrix: Textile exports Drop

September 16, 2016

HAMID WALEEDPakistan textile industry exports have dropped by $1.4 billion in 2015-16 after losing competitiveness on regional matrix, said industry sources. Besides, they added, a financial impact of 10 percent in terms of incidentals and taxes on exports was also hitting it hard that might lead to a further drop in exports ahead in case no timely action is taken by the government.

On the regional competitiveness matrix, the electricity tariff for textile industry in Pakistan is 11 cents/kilowatt hour against 7 cents in Vietnam, 9 cents in Sri Lanka, 7.3 cents in Bangladesh, 8.5 cents in China and 9 cents in India. On the gas tariff, it is $8/MMBTU in Pakistan against $4.5 in Vietnam, $3 in Bangladesh, $6 in China and $4.2 in India.

Similarly, on the side of minimum wage per month, it is $135 in Pakistan against $90 in Vietnam, $66 in Sri Lanka, $68 in Bangladesh, $200 in China and $90 in India. So far as the percentage of currency change against the US dollar during December 2013 to December 2015 is concerned, Pakistan is the only where local currency has appreciated by 3 percent against a depreciation of 5.6 percent in Vietnam, 9.3 percent in Sri Lanka, 0.6 percent in Bangladesh, 5.1 percent in China and 8.1 percent in India.

Pakistan is also the only country in region where no significant investment promotion scheme or park has been announced in recent past with a meagre technology up-gradation fund of 25 percent against the 100 percent in the region.

Pakistan is again the only country where the impact of duties, taxes and surcharges on exports is above 5 percent against less than one percent in Vietnam, Sri Lanka, Bangladesh and China while a zero surcharge in India. Share of textile and clothing export in the world market has dropped to 1.5 percent in 2015 against 2.23 percent in 2005, which has become 3.7 percent in Vietnam in 2015 against 1.12 percent in 2005, 0.65 percent in Sri Lanka in 2015 against 0.62 percent in 2005, 3.7 percent in Bangladesh in 2015 against 1.6 percent in 2005, 38 percent in China in 2015 against 30 percent in 2011 and 5 percent in India in 2015 against 3.5 percent in 2011.

The textile industry circles have urged the government to withdraw 4 percent customs duty, 5 percent sales tax on import of cotton and remove duties and taxes on man-made fibre imports. It has also sought extension of 5 percent of DLTL to all textile exports from yarns to garments in order to overcome incidentals of taxes/levies/cess and various surcharges etc.

According to the industry circles, NEPRA determined electricity tariff for 2015-16 should be notified without any additional surcharges/innovative taxes and it should not be higher than Rs 8/KWh in any case. So far as the natural gas/RLNG is concerned, they said it should be provided at regionally competitive rates and should not exceed $6/MMBTU.

Similarly, they have sought both tariff and non-tariff measures to curtail imports of synthetic yarns and fabrics entering into domestic commerce for end consumption. The indirect exports should be made eligible under the LTFF scheme to encourage local supply of basic textiles for value addition, they added.

Sri Lanka's textile exports up 4.5% in H1 2016

06
Sep '16

Continuing with the positive trend since the beginning of this year, exports of textiles and garments from Sri Lanka increased by 4.5 per cent year-on-year in the first six months of this year.
During January-June 2016, Sri Lanka's export earnings from textiles and garments stood at $2.514 billion, compared to $2.405 billion earned in the corresponding period of last year, according to the data released by the Central Bank of Sri Lanka.

Export growth in June mainly came from the US and non-traditional markets. “Earnings from textiles and garments exports, which account for around 48 per cent of total export earnings, grew by 1.4 per cent year-on-year to $430 million in June 2016, as a result of higher garment exports to US and non-traditional markets such as Canada, China and UAE,” the Central Bank said.

Textiles and apparel accounted for about 63.15 per cent of all industrial exports and about 49.23 per cent of all exports made by the South Asian nation during the six-month period.

In 2015, the island nation's export earnings from textiles and garments declined by 2.2 per cent year-on-year to $4.820 billion, compared to $4.929 billion in 2014. (RKS)

High hopes for textiles, garments sector

14 Sep 2016 at 04:25

When these workers called at Government House in 2007 for the Inter Moda garment factory to increase wages and benefits, management closed the factory. (File photo by Chanat Katanyu)

The closing of textile and garment factories and the relocation of manufacturing activities to neighbouring countries has been a trend in Thailand. As a labour-intensive industry, reasons for the downward trend of this industry revolve around high wages, labour scarcity and the end of Generalised System of Preferences (GSP) tariff privileges. Thai garments are deemed as not competitive compared with those from neighbouring countries which still enjoy GSP privileges and where low-wage labour is still abundant.

Textiles and garments are generally viewed as a sunset industry. Our research team from Thailand Development Research Institute (TDRI), with support from the Commerce Ministry's Trade Policy and Strategy Office, has been exploring this issue, as this industry still hires many in the Thai labour force and can add value in the domestic market. We found that, with appropriate adjustments and upgrading, this industry might be able to survive and even thrive in the international economic environment.

Experience from other countries such as Japan, Korea, and Taiwan, which entered this industry before Thailand did, suggests similar kinds of problems during the transition period when their textile and garment industries made the transition from a labour-intensive to high-value industry. Higher labour costs and labour shortages compelled these countries to upgrade from labour-intensive, low-value-added garment manufacturing activities to capital-intensive, high-valued-added ones by moving upstream to textiles, fibres and machinery industries.

Chedtha Intaravitak is a Research Fellow at the Thailand Development Research Institute (TDRI).

Countries that we usually associate with high-technology products, such as Taiwan, Japan, or even Germany, still manufacture textiles and garments. The industry in these countries is, however, quite different from the one in Thailand. Taiwan focuses on technical textiles such as fabrics that ventilate heat and moisture, fire-resistant textiles, or special fabrics for use in industries, construction and hospitals.

Some of these textiles have glow-in-the-dark or electricity-conducting properties, something that could be put to use in a wide variety of high-value final products. Japan, in addition to her dominance in automobiles, electronics and other high-tech products, has gone another step upstream, as one of the world's major exporters of weaving and knitting machinery for textiles. Germany, the world's foremost producer of world-class automobiles, is, perhaps surprisingly, the number one world exporter of advanced technical textiles for use in cars and for medical purposes.

The path of moving to higher-value upstream activities such as from garments to textiles and fibres, or even machinery is one way to get out of the labour shortages and problems of high labour costs which Thailand is facing.

Higher value may also come from branding and marketing activities. Interviews with Thai brand owners give us an impression that world fashion circles consider Thai brands to be unique, modern and good value. Branding, being intangible in nature, could add high value to products. Chanel jackets costing 4,000 baht have a retail price around 50,000 baht.

Building brands, however, is no easy task. It involves building a country image and requires collaboration from all stakeholders particularly between the government and the private sector (brand owners). A good place to start is to build a brand domestically, and expand to the regional level (Asean countries). This could bring about the necessary know-how and capabilities for Thai brand owners to finally go global.

These two paths of moving upstream and building brands, especially in fashion, both require an upgrade of the supply chain (production) and demand chain (distribution, sales and marketing, branding). This comprehensive view is necessary as high-fashion clothes are not likely to survive in the long run if they are not made from appropriately high-quality fabrics, not to mention good sewing and production techniques.

The implication is we need strong mid-stream (textiles) and downstream (garment) producers to meet the needs of brand designers. There must be a big enough variety of high-quality textiles, particularly those that could meet a design's specifications at appropriate prices. Good sewing/production techniques are also needed in high-end fashion. The government and brand owners must understand the world fashion system; being able to showcase quality Thai brands at international fashion shows; and to have concept shops that feature unique brand styles in major fashion cities around the world.

Viewing Thai textiles and garments from a business-unit perspective, we see a high variety of types and sizes. In sportswear, we have world-class producers for Nike and Adidas but we also have SMEs in this segment.

We also have brand licensees, who can make products that meet the needs of global buyers and so obtain the rights to use their brands such as Lacoste, Guy Laroche, and so on. We also have medium to low-end fashion producers who can quickly copy the ever changing trends in fashion and sell wholesale. Their products, from places like Bo-bae market and Platinum department store, have done well in Asean markets, especially in neighbouring countries.

Quality and consistency are the keys for these producers to further improve product recognition and market access. Once accomplished, building their own regional brands is likely and feasible. So brand building for Thailand is not necessarily limited to high-end fashion.

We believe that textiles and garments are not a sunset industry at all. However, upgrading and development are needed. Strategic moves led by the private sector must be supported by the government. With a proper transition from labour-intensive, low-value business to high-value activities, Thai textiles and garments could attain a global presence, boosting income and jobs for the country.

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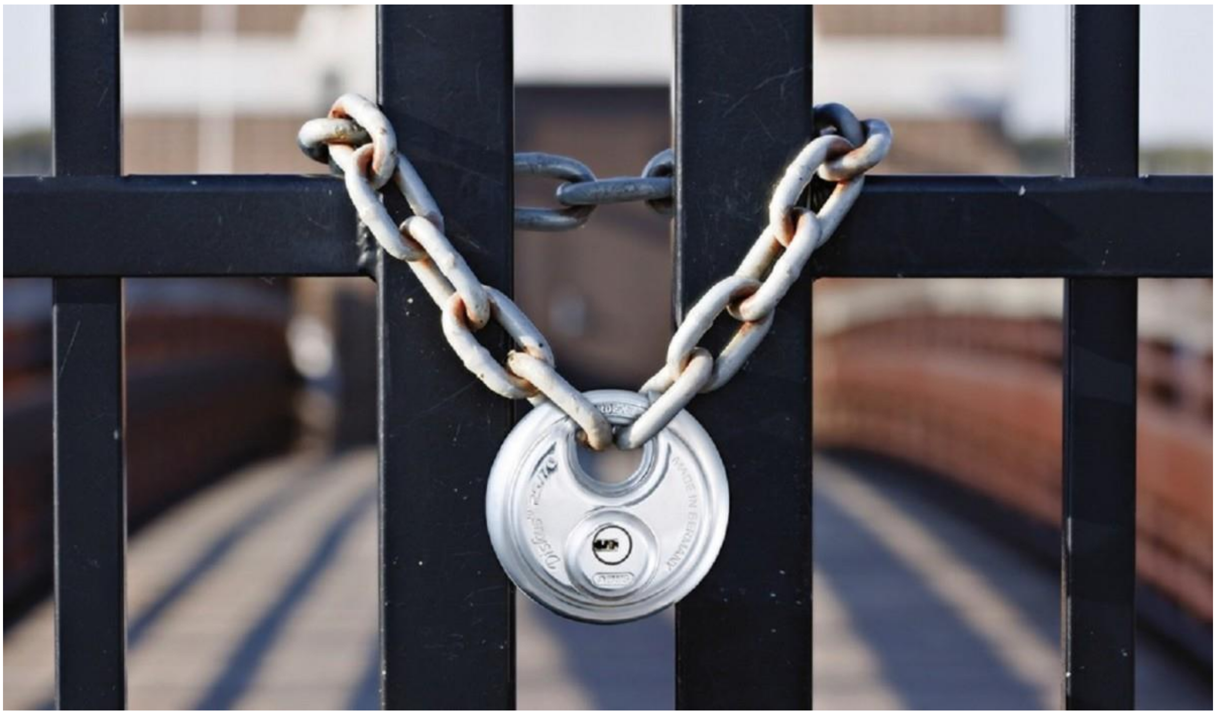

350 entreprises de textile ont quitté la Tunisie causant la perte de 350 mille emplois, d'après Bouali Mbarki, secrétaire général adjoint de l'Union générale tunisienne du travail, lors d'une conférence de presse tenue à Mahdia.

Dans le même contexte, il a affirmé que le secteur en question souffre de plusieurs maux : perte d'emplois, baisse de la participation du secteur au PIB de 5% à moins de 3%. La contrebande et l'importation arbitraire ont lésé ce secteur, toujours selon le même intervenant.

Au titre de l'année 2015, le chiffre d'affaires à l'export a enregistré une baisse de 7%. Idem pour le chiffre d'affaires local qui a reculé de 30%; ce qui a probablement engendré une perte de plus de dix mille emplois supplémentaires, selon les dernières statistiques de la Fédération nationale du textile (FENATEX) relevant de l'UTICA.

Il est à rappeler qu'avant 2011, le textile était l'un des moteurs de croissance de l'économie tunisienne et contribuait à son essor. D'ailleurs, auparavant, notamment pendant les années 2008 et 2009, le secteur du textile et habillement était une source considérable d'emplois à hauteur de 50%. Ce n'est plus le cas depuis 2011.

Appel au Parlement européen à adopter le projet de résolution sur les relations Tunisie-UE

Le président de l'Assemblée des représentants du peuple (ARP), Mohamed Ennaceur, a adressé, mercredi 31 août, un message au président du Parlement européen, Martin Schulz, dans lequel il a souligné l'intérêt qu'il porte au projet de résolution relatif à la relation de la Tunisie avec l'Union européenne dans son environnement régional.

Dans ce message, Ennaceur appelle les eurodéputés à adopter ce projet de résolution lors de la séance du 12 septembre 2016, indique un communiqué de l'ARP.

Le président de l'ARP s'est félicité de l'adoption de ce projet par la commission des Affaires étrangères au Parlement européen saluant, dans ce contexte, le soutien apporté par le Parlement à la Tunisie. "L'ARP est déterminée à renforcer les relations de coopération et d'amitié avec le Parlement européen", a-t-il assuré.

Le projet de résolution relatif à la relation de la Tunisie avec l'Union européenne dans son environnement régional comporte un ensemble de mesures à caractère économique et social au profit de la Tunisie.

Le projet prévoit notamment la conversion de la dette de la Tunisie en projets d'investissement dans le domaine de l'infrastructure de base en vue de réduire les disparités régionales, lit-on dans le même communiqué.

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Newsletter

N°2274 Du 20 Août 206

Le prêt-à-porter et la friperie : La concurrence est rude !

par Nadia Bentamansourt - **19/08/2016 18:16**

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Le secteur de la friperie connaît un réel engouement dans la majorité des villes tunisiennes, et 80% des citoyens s'y approvisionnent. La Tunisie importe annuellement plus de 80 mille tonnes de vêtements usagés, qui sont ensuite ventilés sur plusieurs dépôts répartis sur tout le territoire national.

Ce secteur emploie plus de 50 mille personnes et compte près de 51 dépôts industriels, tous partiellement ou totalement exportateurs, 321 grossistes et 11 000 détaillants, générant un chiffre d'affaires annuel de 88 millions de dinars…

Malgré son importance dans la redynamisation de l'économie tunisienne et la création de postes d'emploi pour les jeunes, ce secteur pèse lourd sur l'avenir des vêtements –prêt-à-porter en Tunisie.

Mohamed Mohsen Ben Sassi, président de la chambre nationale du commerce des tissus et de prêt-à-porter relevant de l'Utica a déclaré à Africanmanager, vendredi 19 août 2016, que les commerçants de la friperie en Tunisie ne respectent pas le quota d’importation et présentent une concurrence et une vraie menace pour les commerçants de prêt-à-porter.

Selon ses dires, les vendeurs de la friperie commercialisent des vêtements neufs, ce qui a poussé plusieurs commerçants à fermer boutique suite à la baisse de leur chiffre d’affaires.

Il a, dans ce contexte, affirmé que le ministère du Commerce est appelé à réviser le statut de ce genre de commerce et de prendre de mesures concrètes pour sauver le secteur du textile et du prêt-à porter, affirmant que le nombre des employés dans le secteur du textile était de l’ordre de 240 mille employés en 2010 contre 170 mille en 2016.

Pour sa part, la fédération nationale de textile avait annoncé en 2016 que 300 établissements du secteur du textile ont fermé leurs portes depuis la Révolution provoquant la perte de 40 mille emplois. D’après la même source, les exportations du secteur ont régressé de 7% en 2015, et la situation du secteur s’est détériorée sous l’effet de l’augmentation des coûts, la multiplication des grèves et des revendications ainsi que la détérioration des services administratifs et logistiques.

L’autre son de cloche !

Le président de la chambre nationale du commerce des tissus et de prêt-à-porter relevant de l’Utica a ajouté qu’il a demandé depuis 3 mois une rencontre officielle entre les professionnels du secteur en question et le ministre du Commerce, cependant aucune réponse n’a été fournie par ledit département.

Contacté, ce vendredi 19 août 2016, par Africanmanager, le chargé de communication auprès du ministère du Commerce, Abdel Monem Baccari a démenti catégoriquement l’indifférence du ministère quant à cette affaire, affirmant que les portes du ministère sont toujours ouvertes pour rencontrer tous les professionnels du secteur du textile et du prêt-à- porter.

On rappelle dans ce contexte que le ministre du Commerce a récemment déclaré à Africanmanager que le secteur de la friperie n’est pas organisé et est dominé par des intrus. La corruption y sévit et l’évasion fiscale totalise 100 millions de dinars. « Nous avons préparé un dossier visant la restructuration de ce secteur et ce en collaboration avec toutes les parties concernées. Ce dossier sera bientôt examiné lors d’un conseil ministériel afin de prendre des mesures concrètes visant le développement et l’organisation de ce secteur mal organisé, a-t-il dit.

Les deux marques espagnoles Springfield et Women’Secret débarquent en Tunisie

AOÛT 26TH, 2016 INVESTISSEMENTS

Les Deux marques internationales de prêt-à-porter et de lingerie féminine Springfield et Women’Secret débarquent en Tunisie.

L’ouverture de ces deux magasins Springfield et Women’Secret, au grand public, est prévue pour le jeudi 1er septembre 2016 au centre commercial Tunis City (Géant).

A noter que Springfield, aussi connue sous le nom abrégé SPF, est une chaîne de magasins appartenant au groupe espagnol Cortefiel, leader en textile et présente dans près de 60 pays à travers le monde (à travers des franchises), est une marque européenne apparue depuis 1988 dans au début le but de vêtir les hommes pour en 2006 s’adresser également aux femmes.

Quant à Women’S Secret, c’est une marque de lingerie pour femmes contemporaines, existant depuis 1993 à Madrid en Espagne. Elle appartient au groupe Grupo Cortefiel, 5ème groupe textile le plus puissant en Europe. Cette marque est présente aujourd’hui dans plus de 61 pays avec 652 boutiques.

Vietnam - 86% of textile workers may lose jobs to automation

07 September 2016

Up to 86% of Vietnamese workers in the textile, clothing and footwear industry are at high risk of losing their jobs to automation in the near future, according to a recent survey by the International Labour Organization (ILO).

Low labour productivity leads to greater automation, as the cost of using an automatic sewing machine will be 4-fold cheaper than using a worker by 2020, according to local media outlet Vietnam Breaking News.

In Vietnam, the fashion sector invested heavily in automation technology in 2015. Accordingly, an automatic cutter can replace 15 workers while businesses can recover the investment cost within 18 months.

Les excellentes perspectives du marché de la grande distribution

SAMEDI 17 SEPTEMBRE 2016 - 09:40:54 IMPRIMER

Hanoi (VNA) – Dans un entretien accordé à l'Agence vietnamienne d'information (VNA), Sebastian Eckardt, spécialiste de la Banque mondiale (BM), s'est montré catégorique : le Vietnam devient une destination de choix pour les détaillants étrangers et drainera un flux de capitaux important dans ce domaine.

Le secteur de la vente au détail du Vietnam enregistre une bonne croissance cette année. Photo: VNA

- Selon la toute récente prévision de la BM, la croissance économique du Vietnam en 2016 ne serait que de 6% (contre 6,2%) en raison du fort recul dans le domaine agricole. Le secteur de la grande distribution sera en revanche complètement épargné. Pouvez-vous nous donner des précisions?

Après une forte croissance en 2015, l'économie vietnamienne montre des signes de ralentissement dans la première moitié de l'année 2016, le PIB n'ayant augmenté que de 5,5%, un taux inférieur aux prévisions de la BM. C'est la principale raison pour laquelle l'institution a abaissé de nouveau ses prévisions de croissance pour l'économie vietnamienne en 2016 à 6% (contre 6,2% précédemment).

Si l'on entre dans les détails de la réalité économique, deux principaux facteurs du ralentissement du PIB ont été observés. Le premier est la chute de l'agriculture en raison des lourdes pertes causées par la sécheresse et la salinisation des terres agricoles dans le delta du Mékong et dans certaines autres régions du pays. Le second est le ralentissement de la croissance de l'industrie en raison de la baisse des cours de nombreux produits - à commencer par le pétrole brut - et de la croissance lente de l'économie mondiale. En outre, les fluctuations du marché européen causées par le Brexit ont des répercussions sur les exportations du Vietnam vers ce marché car actuellement, l'Union européenne représente 18,9% de la valeur des exportations du pays.

Cependant, le secteur de la vente au détail du Vietnam enregistre une bonne croissance, environ 8%, grâce à une forte consommation intérieure.

- Que pensez-vous l'arrivée de plus en plus nombreuse des détaillants thaïlandais et sud-coréens au Vietnam ainsi que des perspectives du marché vietnamien de la grande distribution ?

Textile-habillement, un secteur phare du Vietnam. Photo: VNA

Comme je l'ai dit plus haut, ce secteur s'accélère maintenant et cette tendance se poursuit cette année. Sa croissance pourrait atteindre 8-9% en 2016.

Sur le moyen terme, les perspectives sont excellentes. Avec la forte croissance du pouvoir d'achat domestique, le secteur a besoin des fonds d'investissements nationaux et étrangers. Dans les grandes villes comme Hanoï, Hô Chi Minh-Ville et Dà Nang, de nouveaux centres commerciaux apparaissent et forment un réseau de plus en plus dense pour satisfaire les besoins de la classe moyenne. Je peux dire que le Vietnam devient une destination de choix des détaillants dans le monde. C'est un bon signe.

Comme dans plusieurs autres pays, on craint que l'arrivée de grands distributeurs étrangers écrase les petites entreprises domestiques. Mais je pense qu'il ne faut pas trop s'en soucier car si les entreprises domestiques savent créer des produits qui leur sont propres ou de meilleure qualité, elles pourront faire front.

- L'économie vietnamienne affiche de belles perspectives sur le moyen terme grâce aux opportunités qu'offrent l'Accord de partenariat transpacifique (TPP) et les autres accords de libre-échange. Comment profiter au mieux de ces opportunités tout en relevant les défis qui vont avec ?

Par rapport aux autres pays membres du TPP, le Vietnam a de grands avantages, en particulier dans certains secteurs qui emploient beaucoup de travailleurs parce que la main-d'œuvre vietnamienne est jeune, abondante et qualifiée. Donc, je suis très confiant quant aux perspectives économiques à moyen terme du Vietnam lorsque le TPP entrera officiellement en vigueur.

Le TPP va aider de nombreux secteurs du pays à s'intégrer largement au marché mondial. Parmi eux, le textile-habillement. Les exportations de ses produits vers les grands marchés tels que les États-Unis ou le Japon bénéficieront d'une taxe douanière plus basse par exemple.

Cependant, la plus grande difficulté pour l'industrie textile réside dans l'accès aux matières premières. Actuellement, le Vietnam n'est pas capable d'assurer son approvisionnement et dépend des importations des pays qui ne sont pas membres du TPP.

Si le Vietnam ne parvient pas à s'auto-approvisionner ou à trouver un ou des fournisseurs de matières premières de l'un des pays signataires de cet accord de libre-échange économique, il lui sera difficile de satisfaire les « règles d'origine » (1) du TPP et ne profitera pas pleinement des privilèges fiscaux qu'il offre. - VNA

(1) Les règles d’origine constituent un élément essentiel de tous les accords de libre-échange. Pour le TPP, les règles d’origine portant sur les textiles et les vêtements encourageront les fabricants de tissu et de vêtements des pays membres du TPP à utiliser des matières canadiennes dans la fabrication de produits qu’ils exporteront à destination d’autres pays membres du TPP.

Last update 10:00 | 12/09/2016

Garment export contracts fall to rivals

VietNamNet Bridge - The decrease in orders from foreign partners has dealt a strong blow not only to small textile & garment companies but also to big players in the market.

Thanh Cong Garment has had strong demand from South Korea and the US, its key markets, but it saw contracts decrease considerably in the first six months of the year.

Thanh Cong is one of a few Vietnamese garment companies which list shares on the stock market.

It is the only listed garment company which owns a yarn – fabric – garment production line. The annual revenue from fabric accounts for 10 percent of net revenue, while yarn brings 30-40 percent and garment 50 percent of revenue.

Regarding consumption, Thanh Cong has stable consumption outlets as its large shareholder - Eland Asia Holding Pte Ltd – is usually responsible for 60 percent of the company's output.

However, even with great advantages and support, Thanh Cong, like other enterprises in the industry, is still meeting difficulties.

Its revenue in the first six months of the year increased compared with the same period last year, but its post-tax profit dropped sharply by 42 percent from VND86 billion to VND50 billion.

The decrease in orders from foreign partners has dealt a strong blow not only to small textile & garment companies but also to big players in the market.

The company's business efficiency also fell, with gross margin down. This was the first time the indexes went off the upward trend.

Thanh Cong's problems reflect the difficulties faced by the Vietnamese textile and garment industry.

An analyst commented that Vietnam's advantage of cheap labor costs, an important factor attracting foreign partners, no longer works because other countries even offer cheaper costs.

He doubts if Vietnam still has opportunities to become the ‘garment production base’ of the world.

Thanh Cong’s decline in business performance is attributed to a decline in exports. In the first half of the year, Thanh Cong’s export turnover fell by 12 percent in comparison with the same period last year.

In yarn production, Thanh Cong took a loss with the gross margin of minus 5 percent. The selling price has stayed unchanged for a long time, while input material prices have been increasing sharply since the first quarter of the year.

In garments, Thanh Cong’s key factory in Vinh Long province, continued taking a loss of $250,000-300,000 a month because revenue from the US, its major market, was modest, which could not cover the expenses.

Vietnamese companies are losing orders to the hands of Laos, Myanmar and Bangladeshi companies which can make products at lower prices thanks to preferential tariffs offered by some large markets. Vietnam may have the same preferences obtain by 2018 if the TPP is ratified.

19 September 2016

Italian technology for Vietnam’s garment and textile industry

Monday, 12 September 2016

Ho Chi Minh City - Sock knitting machine builder Busi Giovanni will be showcasing its technical expertise to garment manufacturers in Vietnam this week where the Italian Chamber of Commerce in Vietnam (ICHAM) has organized a series of technical seminars.

In the context of free trade agreements such as the TPP or EVFTA to take effect in 2018, Vietnamese enterprises in general and textile enterprises in particular need to increase production capacity to improve competitiveness and meet strict quality demands from Vietnam’s export markets such as the US, the EU and Japan.

One of the biggest challenges for many enterprises is to upgrade the current production technology, much of which is still retrograde and low-yield. Understanding this need, since 2015, the ICHAM has organised a series of technical seminars in collaboration with leading Italian machinery manufacturers to bring Vietnam closer to the advanced Italian production technology, as well as to connect and promote the trade relations between the two countries.

On 13th September 2016, ICHAM will organize a seminar focusing on the Italian garment and textile technology in Ho Chi Minh City, in collaboration with The Union of business associations of HCMC (HUBA). This is the third seminar organized by ICHAM, following the series of technical seminars to introduce the quintessence of Italian technology to Vietnamese enterprises.

"Mechanical engineering represents one of the strengths of Italy, in which the garment and textile technology Made-in-Italy is highly appreciated worldwide," organisers said. "Coming to this seminar, textile manufacturers in Vietnam will have the chance to explore the Italian production technology as well as to seek potential collaborations to upgrade their technology and improve their production capacity. "

At the seminar, three leading Italian manufacturers of textile machineries will present to the audience the most modern technology available in the market for sock knitting machines, garment finishing and global solutions for cutting room:

- Busi Giovanni Srl specializes in the design and construction of single-cylinder machines with rib needles in the dial for the production of high-quality stockings, socks and tights. Busi is nowadays recognized worldwide as one of the most prestigious manufacturers of machines for elegant, classical, as well as high-performance, high -tech socks.
- Tonello is a leading manufacturer of garment finishing technologies, specializing in high-quality and eco-friendly washing and dyeing machines. Tonally designs their machines in-house and engineers them precisely in terms of efficiency, performance, safety and sustainability to ensure lower water and energy consumption, as well as reduced emissions.
- Morgan Technica provides a wide range of solutions for the cutting room, producing several types of roll loading and handling systems, automatic spreaders, spreading tables, labellers, automatic cutters with different lay thickness, from 2,5 to 9 cm and plotters, software for CAD, Cut Order Planning, PDM and Virtual Fitting.

The event takes place on 13 September at the Ballroom, Nikko Hotel, 235 Nguyen Van Cu, Dist.1, HCMC Vietnam.

VN tops Asian garment sector wage compliance

Update: September, 16/2016 - 10:47

Việt Nam’s rate of non-compliance with the minimum wage in the garment, textile and footwear sector is the lowest among seven garment-exporting countries in Asia, at 6.6 per cent, according to a new report by the International Labor Organisation (ILO). — Photo thoibao.today

HÀ NỘI — Việt Nam’s rate of non-compliance with the minimum wage in the garment, textile and footwear sector is the lowest among seven garment-exporting countries in Asia, at 6.6 per cent, according to a new report by the International Labor Organisation (ILO).

This rate is far better than the second lowest country on the list – Cambodia at 25.6 per cent, and almost nine times lower than the top-ranked violator – the Philippines, at 53.3 per cent.

The rate of extreme non-compliance in Việt Nam, which means wageworkers are paid less than four-fifths of the minimum wage in the country, is 3.8 per cent and moderate non-compliance (workers paid between 80 per cent and less than 100 per cent of the minimum wage) is 2.8 per cent.

In contrast, the Philippines, India, Thailand, Pakistan, and Indonesia each have a large proportion of garment sector workers who are paid far below the minimum wage. The extreme non-compliance rate in the Philippines and

India is 38.8 and 34.9 per cent, respectively. About one fourth of Indonesian garment workers also earn far below the minimum wage.

“The depth of non-compliance is an important dimension because a worker being paid 99 per cent of the minimum is in a very different situation to one receiving only half of the minimum,” said Matthew Cowgill, ILO chief technical adviser on labour standards in the global supply chain, who is the lead author of the report.

In all the countries, women are more likely than men to be paid below the minimum wage in the garment sector. Again, Việt Nam is among the nations with the smallest male-female gaps (at 5.7 percentage points), behind Cambodia and Indonesia, whereas the largest male-female non-compliance gap is found in Pakistan (60.4 per cent).

According to the report, the design of minimum wage systems, including the minimum wage rate and the complexity of the wage structure, are important considerations for improving compliance.

Việt Nam has four regional minimum wages, ranging from VNĐ2.4 to 3.5 million (US$108–157) a month. The minimum wage levels are decided annually by the National Wage Council that includes representatives the Government, employers’ and workers’ organisations.

While praising the compliance rate in Việt Nam’s growing garment, textile and footwear sector, ILO Việt Nam Director Chang-Hee Lee warned that data should be interpreted with caution..

The Việt Nam data used in the study dates back to 2013, whereas minimum wage had significantly increased in the previous three years. New data is needed to see if the high compliance continues even with the significantly increased minimum wages, he said.

Việt Nam’s regional minimum wages increased by about 12-15 per cent on a yearly basis between 2014 and 2016 and will go up by 7.3 per cent next year. — VNS

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France-Vietnam : Forum d'affaires textile-habillement à Ho Chi Minh Ville, du 26 au 28 octobre 2016.

Lundi 5 septembre 2016

En association avec FUTURALLIA et le Ministère vietnamien de l'Industrie et du Commerce (MOIT), la Fondation PROSPECTIVE & INNOVATION organise un Forum d'Affaires franco-vietnamien du 26 au 28 octobre 2016 au Vietnam, à Ho Chi Minh-Ville, avec la participation de Jean-Pierre Raffarin.

Créée en 1989, la Fondation Prospective & Innovation est présidée par Jean-Pierre Raffarin, ancien Premier Ministre et actuel Président de la Commission des Affaires Etrangères et de la Défense du Sénat.

Notre association **EVALLIANCE** est partenaire de ce Forum pour le **textile-habillement,** aux côtés de l'Ambassade du Vietnam en France, l'Ambassade de France au Vietnam, BUSINESS FRANCE, la CCI FRANCE-VIETNAM, la CGPME, VIETNAMNAY et ABVietFrance.

Le Forum d'affaires portera sur divers secteurs dont notamment le luxe, la mode et le Textile.

Le Vietnam est le 6ème fournisseur d'habillement de l'UE (2,8 milliards d'euros en 2015) et le 8ème fournisseur de la France en habillement (595 millions d'euros). Les importations d'habillement en provenance du Vietnam croissent très rapidement : + 67 % vers la France en 2015 !

De nombreuses entreprises françaises industrielles et de distribution sont déjà implantées au Vietnam pour du sourcing compétitif en vêtements ou pour y vendre leurs produits sur un marché vietnamien de plus en plus attractif pour les marques européennes, y compris le luxe.

Le Vietnam importe la quasi-totalité de ses besoins en tissus, fils et fournitures textiles. Ce pays constitue donc un marché potentiel textile très intéressant pour les fournisseurs français de textiles mais aussi de solutions technologiques performantes au service de la compétitivité et de la création pour son secteur textile-habillement qui a l'ambition de plus être dans un avenir proche un simple pays de sous-traitance.

Rappelons enfin que le Vietnam et l'Union européenne ont conclu un accord de libre-échange le 2 décembre 2015, accord qui va éliminer les droits de douane.

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