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The New Kid on the Block: Africa Is Vying for a Larger Share of the Global Textile and Apparel Pie

By Manik Mehta — December 01, 2014



For many U.S. and European textile and apparel companies, China is losing its allure. As production and labor costs continue to rise, importers and big-label subcontractors of low-end manufacturing in particular are working to identify new suppliers in Africa, which is emerging as the “new kid on the block.” Many U.S.- and European-based buyers are also trying to hedge the risks of relying on only one or two supplier countries by diversifying their supply sources, viewing African countries as an additional choice, and not necessarily as an alternative, to existing Asian suppliers.

Ethiopia, in particular, seems well positioned to reap the benefits of this shift.

Ethiopia takes its spot on the apparel stage

Ethiopia, which until recently maintained a low-key profile in the international supply chain, is now aggressively courting Turkish textile manufacturers to establish manufacturing operations in the country, where Indian and Chinese textile manufacturers already have built up a strong presence.

Recognizing the potential of the country’s textile and apparel industry to grow the national economy, Ethiopia’s President Mulatu Teschome declared in late August that Turkey and Ethiopia had reached a “mutual understanding” to cooperate with each other — another sign of the increasing liberalization and loosening of restrictions that have in the past few years created a more attractive environment for outside investors.

Ethiopia is looking to attract foreign direct investment (FDI) in three industries in particular: the textile/apparel industry is the priority for national development, followed by the leather industry and finally the food processing industry. According to Teschome, advantages for

companies investing in the apparel/textile sector include both the availability and low cost of raw materials and labor, as well as the emphasis the sector places on high-quality manufacturing as the key to remaining competitive in international markets. These factors, coupled with attractive incentive packages for foreign investors, are attracting increasing numbers of Turkish textile companies, he says.

Indeed, the growing Ethiopia-Turkey cooperation has attracted 200 Turkish companies to various industrial sectors in Ethiopia, with those in textile and garment manufacturing standing out for their success, noted Teschome. Turkey's leading textile company in Ethiopia, Ayka Addis, provides jobs to nearly 10,000 Ethiopian workers. Although the country is still in the infant stage of development, the arrival of large-scale textile and apparel suppliers from Turkey, India, the United Arab Emirates (UAE) and China suggests that the shift could become a trend.

According to the International Monetary Fund's (IMF) economic forecast for Ethiopia, the country's GDP is expected to grow 8.5 percent this year, making it one of Africa's fastest-growing economies. The country does not have a minimum wage, which allows companies to pay salaries of up to \$70 a month — a rate that is still higher than the average per capita income. The government is keen to attract labor-intensive investment and jobs for its population of 90 million.

India strengthens presence in Ethiopia

Recently, India's textile industry held an exhibition in the country's capital, Addis Ababa, to promote a wide range of products. The exhibition, the first of its kind for the Indian textile industry in Ethiopia, was organized by the Synthetic & Rayon Textile Export Promotion Council (SRTEPC) and the Exposition UK Ltd. with the support of the Ethiopian Chamber of Commerce & Sectoral Associations (ECCSA). For Ethiopian fashion designers, who rely on imported fabrics, it was an opportunity to find new materials and to get a sense of pricing.

Of the 140 textile factories in Ethiopia, seven are Indian-owned companies, according to the Ethiopian Textile Industry Development Institute (ETIDI); some of the exhibitors at the show were reportedly considering setting up plants in Ethiopia.

Currently, the value of India's synthetic and rayon textile exports is nearly \$4.6 billion, with the Middle East and the Gulf, Asia and the European Union accounting for 25 percent, 23 percent and 22 percent of total exports, respectively. India's total synthetic and rayon output is approximately 21 million square meters, according to the SRTEPC.

India's 2013 exports of textile and clothing products totaled \$40 billion dollars; the country plans to double exports to \$80 billion by 2020. In 2013, India lagged far behind China's \$274 billion.

Chad Schofield of the Kenya-based East African Trade Hub (EATH) says that Ethiopia has become the fastest-growing supplier in Africa because of the strong presence of Indian and Turkish textile companies in the country, and says that Kenya is also showing great promise, with a new industrial park just outside of Nairobi that is prospering due to the textile business. "Kenya has a long history of forming joint ventures with Indian and Chinese factories," he says.

China sets up shop in Africa, too

As China's production and labor costs soar, and with financial incentives such as capital subsidies offered to foreign-owned factories, many Chinese manufacturers are shifting their manufacturing operations to Africa.

The Chinese have maintained a foothold in Africa since the time of Mao Zedong; they built up the infrastructure in many areas of the continent and along the way gained first-hand exposure to local sourcing and market conditions, which has stood them in good stead.

Sun Qiaoming, who operates a trading company in Jiangsu, on the east coast of China, has decided to set up a factory in Ethiopia, to be equipped with imported materials and machinery from China, but staffed with Ethiopian workers, allowing the factory to be "adding value locally." When that local added value hits about 20 percent to 30 percent of the content of the garments, the company's clothing will officially be categorized as 'Made in Ethiopia,' making it easier for him to sell to the United States and the EU. By producing in Ethiopia, Sun can also circumvent the limits placed by Western importing nations on apparel imports from China.

Sun's company is one of the many Chinese companies flocking to the African continent. Along with the Indians, the Chinese are increasing their presence in some parts of Africa, although the former have an advantage in many African countries due to longstanding historical ties: Mauritius, for example, has a very large population of citizens who are of Indian origin.

AGOA's role in boosting textile and apparel exports to the United States

The U.S. textile and apparel industry is also very keenly following developments taking place in Africa. The continent's importance for international buyers is growing, as the traditional suppliers in China, Bangladesh, Vietnam and Pakistan have been gradually hiking prices. At the maiden U.S.-Africa Business Summit, held in August, attention turned to the Africa Growth and Opportunity Act (AGOA), which was passed in 2000 with a view to implement trade benefit provisions for sub-Saharan Africa. Under the AGOA, duty-free imports of textile and apparel materials are allowed into the United States from certain African countries granted the beneficiary status. Both buyers and exporters of textile and industry products in the United States and Africa are, meanwhile, calling for the extension of the AGOA provision which is valid until September 15, 2015.

Of special interest for suppliers is the AGOA's so-called "third-country fabric provision," which enables suppliers in 27 least-developed countries (LDCs) that have signed the agreement to make use of fabric not produced within these countries, but still receive duty-free access to the U.S. market. According to Arvin Boolell, Minister of Foreign Affairs, Regional Integration and International Trade, Mauritius, apparel exports to the United States increased 16 percent to \$907 million under the AGOA from 2000 to 2013. Other positive effects of the AGOA: it has attracted \$500 million in new investments and created about 40,000 new jobs in Ethiopia; attracted \$20 million in new investment and created 25,000 jobs in Kenya; brought \$10 million in investment and 2,000 jobs to Uganda, and overall has created 352,000 jobs in Africa's apparel and textile industry, benefitting countries including Nigeria, Chad, South Africa, Angola and Gabon. AGOA also has enabled U.S. companies to source affordable, quality apparel products for their customers.

In view of this, the U.S. Fashion Industry Association (USFIA), the African Cotton and Textile Industries Federation, the American Apparel and Footwear Association (AAFA), the Footwear Distributors and Retailers of America and other affected industry groups have urged the U.S. Administration to expedite the renewal program for another 15 years and, in fact, extend it to

all the AGOA beneficiaries and not just to the current 27 LDCs. There has also been some discussion of excluding South Africa from the AGOA because, as some U.S. lobbyists have said, that country is “better off” than other African countries and should “graduate” out of the program.

Not everyone agrees. A Cape Town-based supplier, who asked to remain anonymous, told Apparel, “You cannot ignore the fact that South Africa is still a developing country or, to use the jargon, a ‘middle-income’ country. It is part of Africa and there is widespread poverty among the locals. Giving support to the local textile and apparel industry will also help uplift the earning capacity of the poor workers who can benefit from textile and apparel manufacturing.”

Vietnam buying raw cotton from Africa

Some Asian countries are quietly carrying out trade with Africa in raw cotton. Vietnam’s textile and garment industry, for example, has become overly dependent on foreign raw materials, and is incurring high expenses on imports.

According to the Africa and South West Asia Market Department in Vietnam’s Ministry of Industry and Trade, most of the raw materials for the sector originate in Africa and are sold to Vietnamese through intermediary French, Swiss and Indian wholesalers. Vietnamese officials say that the country’s textile and apparel sector would benefit by developing a direct international supply chain with African nations, thus eliminating the extra cost of the middleman and promoting the sector’s competitiveness in the global marketplace.

Vietnam currently imports raw cotton from 19 of the 55 African states, mainly Tanzania, Mozambique, Zimbabwe, Zambia, Uganda and Malawi. African cotton is considered to be of fairly good quality, reasonably priced and suitable for yarn production.

According to the Vietnam Cotton and Spinning Association (VCOSA), the industry currently has 5.1 million spindles with annual production capacity of roughly 700,000 tons of fibers.

Meanwhile, the Africa Cotton & Textile Industries’ Federation (ACTIF) is organizing the ORIGIN AFRICA 2014 Trade Expo, to be held Nov. 10-12 in Nairobi, Kenya, aimed at raising awareness of Africa as a business and sourcing destination, and making the continent a more visible source of supply of cotton, textile products, fabrics and other products.

Cotton use to rise fast, led by textile growth

Leaders of International Cotton Association talk about global trade, Bangladesh's future in garment business

Refayet Ullah Mirdha and Md Fazlur Rahman



Second from right, ICA President Jordan Lea speaks during an interview with The Daily Star yesterday. Photo: Star

Bangladesh's annual cotton consumption will accelerate 50 percent to six million bales in four years as garment exports are on the rise, the International Cotton Association (ICA) said yesterday.

Bangladeshi spinners now consume more than four million bales of imported cotton a year, with the growth in consumption rate being between 10 percent and 15 percent per annum.

Jordan Lea, president of the ICA, the Liverpool-based policymaking body for cotton trade, said Bangladesh's garment industry is growing very fast. "If the current growth

continues, it will move Bangladesh to a different category from India and China," he said while talking about the country's future in garment business.

The garment export-led growth will make Bangladesh the third, fourth or fifth largest cotton consumer in the world, Lea told The Daily Star in an interview at the newspaper's office in the capital.

Lea, along with his colleagues, is in Dhaka now to hold meetings with the spinners of Bangladesh.

Bangladesh's garment market has a bright future, while markets like Korea, Japan and Taiwan are shrinking, he said.

Bangladesh is the second largest garment exporter and second biggest cotton importer worldwide.

The ICA began its journey more than 170 years ago when a group of cotton brokers created a set of bylaws and rules to help regulate the sale and purchase of raw cotton.

Today, 85 percent of the world's cotton is traded internationally under ICA bylaws and rules. The rules have changed with time, but their aim remains the same -- to create a safe trading environment.

The ICA now has more than 550 members and its membership spans all corners of the globe and represents all sectors of the supply chain. It offers a range of services -- arbitration, training, trade and networking events, plus cotton testing and research.

Kai Hughes, managing director of the ICA, said: "We look forward to strengthening the bonds between the ICA and the Bangladeshi spinning and textile sectors."

Bangladesh is one of the top 10 cotton consumers worldwide. The ICA wants to support Bangladesh in the way of bigger garment business, he said.

"Bangladesh needs undisrupted supply of cotton so its tremendous growth continues. It is also important for Bangladesh as it does not produce cotton. So, Bangladesh needs protection from the ICA," said Jean-Marc Derossis, first vice president of the association.

Derossis said a number of Bangladeshi groups have established very good production facilities in the last few years investing a huge amount of money.

The total investment in the country's primary textile sector is around four billion euros. Local spinners can supply 90 percent of yarn for knitwear sub-sector and nearly 40 percent of fabrics for the woven sub-sector.

Derossis said China absorbed all the surpluses of cotton in the last three years. However, import to China is going to be reduced this year because of a change in domestic policy in the biggest consumer of cotton.

"So, there will be a lot of surplus available which will provide more options to countries such as Bangladesh."

He said cotton prices have gone down by 25 percent in the past five months because of the surplus as well as the shift to staple fibre or polyester by garment makers from cotton due to sudden volatility in cotton market worldwide.

Derossis agreed that the cotton prices were kept artificially high in the last three years. As a result, cotton has lost its market share to polyester to a bit, especially after 2010-11.

"As prices have come down, spinners are shifting back to cotton again. Despite the shift to polyester, the future of cotton is bright."

India, the second largest cotton producing country in the world after China, supplies 35 percent of Bangladesh's total demand.

A few years ago, like many other cotton exporters, India imposed a ban on cotton exports without any prior notice, which created volatility in Bangladesh market.

On the issue, Derossis said: "The rules are here to protect everybody. The rules are here to protect Bangladeshi spinning and textile mills so they receive quality products and make shipments in time."

He said the association encourages the spinners and shippers and others involved in the supply chain to follow the right path and rules.

Lea, the ICA president, talked about the stockpiling by a number of cotton producers that led to volatility in the global market a few years ago and pushed the cotton prices up.

He said the practice also troubles the association because it makes cotton less competitive as more and more users have opted for polyester and the synthetic form of fibres.

"We favour the situation where markets react to the forces of supply and demand."

He said, for the last four to five years, the world has been producing more cotton than it has consumed.

"So, there has been a surplus. Going forward, it is good news for the whole industry. The supply side is good."

Because of this surplus, spinners from Bangladesh and other countries will have a lot of options to import cotton.

"There is surplus in China and outside China. It is now a more balanced situation," Lea said, adding that the drop in prices will increase consumption, which might again pull the prices up.

By 2020, global consumption will go up to 130 million bales per year and production will rise at the same rate.

Lea said fibre consumption has soared because of the rising middle class across the world, especially in China and India.

"As a result, the opportunity for Bangladesh as a garment exporter has also become brighter."

At present, 115-117 million bales of cotton are produced worldwide every year, while the world consumes 110-113 million bales, according to Lea.

However, two years ago the surplus was 25 million bales, he said.

Lea praised Bangladesh for allowing its garment factories to go through rigorous inspection by foreigners following the Rana Plaza building collapse.

"There is no country in the world where every factory in every sector is 100 percent compliant."

As the Accord inspection shows that 98 percent of the factories are safe, it means Rana Plaza building is not typical of Bangladesh, he said.

"The most important fact is the way you have responded: you have not locked the gate when inspectors came in and rather opened it. Other standards have also been imposed. You are also meeting them."

During their meetings with the ICA leaders, Bangladeshi spinners have complained that inadequate power is holding their growth back, according to Derossis.

"If the power shortage is sorted out then there will be tremendous growth in the textile industry," he said, adding that other infrastructure and port facilities have to be improved as well.

Hissam Khandker, a director of Delcot Enterprises Ltd, a local cotton trader, said the ICA also ensures that shippers sell quality goods at the right price and at the right time and honour their commitments with Bangladesh spinning mills.

He said the visit of the ICA leaders is itself a testimony to their trust on the Bangladesh's textile sector.

Derossis said the ICA is also working with the Better Cotton Initiative as part of an effort to ensure that cotton is grown in a sustainable way, which complies with agrifood practices, environmental standards and social responsibility.

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CAMBODGE

SYNTHESIS

POPULATION 15,407 MILLIONS	D COUNTRY RISK ASSESSMENT	D BUSINESS CLIMATE	UNDER WATCH LIST SINCE 24/10/2014
GDP 15,642 MILLIARDS \$US			

SYNTHESIS

CHANGE COUNTRY

COMPARE COUNTRIES

PRINCIPAUX INDICATEURS ÉCONOMIQUES

	2011	2012	2013	2014(p)
Croissance PIB (%)	7,1	7,3	6,7	7,2
Inflation (moyenne annuelle)	5,5	2,9	2,9	3,4
Solde budgétaire / PIB (%)	-7,3	-6,6	-6,1	-5,7
Solde courant / PIB (%)	-8,1	-11	-10,6	-8,7
Dette publique / PIB (%)	29,5	28,8	28,2	28,4

(p) Prévisions

STRENGTHS

- Industrie textile flexible et secteur touristique au fort potentiel
- Potentielles réserves en hydrocarbures offshore (pétrole et gaz)
- Pays bénéficiant du soutien financier des donneurs bilatéraux et multilatéraux
- Intégration régionale (ASEAN)

WEAKNESSES

- Part importante de l'agriculture dans le PIB ; vulnérabilité aux aléas climatiques
- Sous-développement de la filière électrique et des réseaux de transports
- Manque de main d'œuvre qualifiée
- Dépendance aux financements concessionnels en raison de la faiblesse des revenus budgétaires
- Lacunes importantes en termes de gouvernance
- Niveau de pauvreté élevé

APPÉCIATION DU RISQUE

Accélération de la croissance en 2014, sous réserve d'apaisement social et politique

En 2014, la croissance devrait s'accélérer, portée par la reprise aux Etats-Unis, premier partenaire commercial du pays. La demande extérieure sera plus soutenue et la demande domestique notamment liée aux investissements dans les projets d'infrastructures restera importante. Le projet d'expansion des aéroports de Phnom Penh et Siem Reap contribuera à soutenir le secteur de la construction tout comme les projets d'infrastructures énergétiques. Les investissements seront également portés par la croissance rapide du crédit. Le secteur textile restera robuste et exportateur (il représente 75% des exportations)

Cependant, le manque d'infrastructures, notamment en ce qui concerne les réseaux de transports et de distribution d'électricité, contraindront l'activité. De plus, les revendications salariales des ouvriers du textile, qui ont débouché sur des grèves de grande ampleur fin 2013 et en janvier 2014, se poursuivront, et seront susceptibles de perturber la production. Enfin, sous réserve que le pays retrouve rapidement une stabilité politique, l'économie cambodgienne continuera de bénéficier de l'augmentation du tourisme notamment des pays d'Asie, dont la Chine.

Fragilité des comptes courant et public, dépendants de l'aide extérieure

La balance commerciale restera déficitaire en 2014, les importations de bien d'équipement et de produits pétroliers restant importantes. Par ailleurs, la hausse du tourisme, le niveau élevé de l'aide internationale et les transferts de revenus des travailleurs expatriés compenseront largement la hausse des rapatriements de dividendes des sociétés étrangères, prépondérantes dans le secteur du textile.

De plus, d'importants IDE viendront financer le déficit courant. En effet, ils sont en hausse depuis 2011 portés par les projets de partenariats publics-privés lancés par le gouvernement notamment dans le domaine des infrastructures énergétiques.

Le déficit public devrait continuer à se réduire dans un contexte de croissance forte et de réduction des dépenses, et ce malgré l'augmentation des dépenses sociales (notamment une hausse des salaires minimum), ainsi que des dépenses liées au renforcement du budget alloué aux forces de sécurité.

Les finances publiques resteront fortement dépendantes de l'aide extérieure (3% du PIB).
Par ailleurs, le secteur bancaire reste fragile en raison du manque de supervision.

Dans le même temps, le pays enregistre une croissance du crédit au secteur privé de l'ordre de 30% par an entre 2010 et 2013, dans un contexte de réduction des marges des banques, soumises à une forte concurrence.

En outre, l'économie dans son ensemble est très dollarisée et les dépôts en devises représentent la quasi-totalité des dépôts. Ainsi, les banques sont fortement exposées au risque de change.

Risque d'instabilité politique et protestations sociales

La scène politique a longtemps été dominée par le Parti du Peuple Cambodgien (PPC) dirigé par le premier ministre Hun Sen. Néanmoins, aux élections législatives de juillet 2013, le parti a vu son nombre de sièges fortement reculer.

Le Parti du Sauvetage National du Cambodge (PCNC), parti d'opposition dirigé par Sam Rainsy revenu d'exil, refuse depuis de siéger à l'Assemblée Nationale. Il bénéficie de la lassitude à l'égard de Hun Sen, au pouvoir depuis 28 ans et des tensions sociales importantes, concernant les expropriations abusives, ainsi que les conditions de travail dans le secteur textile, donnant lieu à des manifestations de grande ampleur depuis les élections. Elles ont été fortement réprimées par le pouvoir en place, provoquant la mort de 5 personnes au mois de janvier, ainsi que de nombreuses arrestations. Les manifestations se poursuivent en 2014, et de nouvelles violences sont à craindre.

En matière de relations extérieures, la répression exercée à l'encontre des manifestants, ainsi que l'instabilité politique, pourraient entraîner des sanctions de la part des Etats-Unis et de l'Union Européenne.

Par ailleurs, les relations devraient s'apaiser entre le Cambodge et la Thaïlande, la Cour Internationale de Justice ayant attribué la souveraineté du temple Preah Vihear et du terrain qui l'entoure au Cambodge après deux années de tensions. Enfin, l'environnement des affaires reste marqué par un manque de transparence, une forte instabilité juridique et un niveau élevé de corruption.

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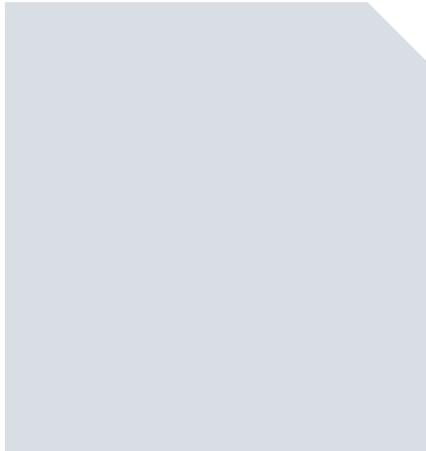
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Percée des exposants indiens à Apparelsourcing Paris

Le Fashion on Display, vitrine de l'offre et outil de promotion pour les exposants

Apparelsourcing Paris ouvrira ses portes aux visiteurs du 17 au 20 février prochains, pour sa 8ème édition. En nombre d'exposants, le salon prévoit une augmentation de +20% comparé à février 2014 ! Plus de 135 fabricants sont attendus ; ils viennent des plus grands pays fabricants dont le Bangladesh, la Chine, Hong-Kong, l'Inde, le Pakistan, le Vietnam, la Turquie et le pourtour méditerranéen avec la Tunisie.

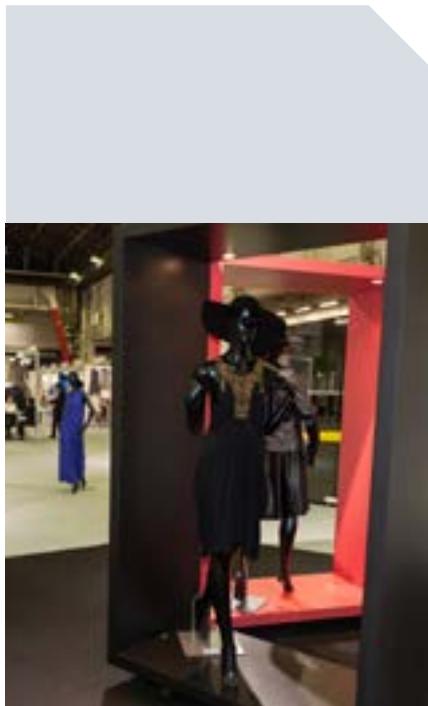
Mention spéciale pour l'Inde qui renforce sa présence avec plus de 30 sociétés. Les exposants indiens se sont inscrits rapidement après leurs bons résultats lors de l'édition de septembre. Ils pourront connaître le même succès car les donneurs d'ordre développent plus de pièces estivales en février. Les fabricants indiens y excelltent avec une offre de l'entrée au moyen de gamme, de plus en plus variée : notamment du casualwear mixte ; des pièces du bas pour Homme/Femme/Enfant ; du sportswear et des accessoires, comme les écharpes, les sacs en cuir, les sacs en tissus rebrodés, où ils développent un savoir-faire particulier, fait-main, ciblant le haut de gamme.

Pour cette 8ème édition, Apparelsourcing Paris déployera une offre qualitative, multigamme et mettra en avant des solutions pour faciliter la fabrication des collections des marques, mais également des créateurs.

Une offre unique en Europe avec le cycle court du bassin méditerranéen pour les collections à livrer en boutique dans un délai record. Avec des spécialités reconnues : la maille, le flou, le shirting, le denim, le sportswear, le casualwear et l'outerwear.

Et le sourcing de long terme pour le volume, de l'entrée au moyen&haut de gamme, pour le prêt-à-porter féminin/ masculin/enfant ainsi que les accessoires avec toutes les solutions de l'ODM au private label.

«Le multi-sourcing reste incontournable pour les marques et les créateurs pour pouvoir livrer les collections à temps aux meilleurs coûts. Apparelsourcing Paris est l'unique salon européen où les professionnels trouvent toutes les solutions de sourcing et une offre de qualité aux meilleurs prix.» souligne Michael Scherpe, Président de Messe Frankfurt France.



LE FASHION ON DISPLAY, VITRINE DE L'OFFRE ET OUTIL DE PROMOTION POUR LES EXPOSANTS

Lancé en septembre 2012, le Fashion on Display est une vitrine composée de mannequins habillés de pièces des exposants, sélectionnées par les directeurs artistiques du salon dans toutes les familles de produits.

Les exposants sélectionnés bénéficient ainsi d'une visibilité auprès des visiteurs qui ont maintenant intégré Fashion on Display dans leur circuit de visite. Car les pièces sont présentées avec toutes les informations utiles: nom de la société, pays, numéro de stand, descriptif et prix. Pour l'édition de février prochain, les directeurs artistiques choisiront de pièces très pointues et intemporelles.

Les acheteurs manquent de temps et cherchent toujours à enrichir leurs collections ; ils apprécieront cette vitrine où ils trouvent des pièces imprévues et des nouveaux fournisseurs.

La prochaine édition d'Apparelsourcing Paris aura lieu du lundi 9 au jeudi 12 février 2015 à Paris Le Bourget.

Toutes les informations sur les salons textiles organisés par Messe Frankfurt dans le monde sont disponibles sur: www.texpertise-network.com

Messe Frankfurt en chiffres

Avec un chiffre d'affaires d'environ 543* millions d'euros et une équipe de 2026* employés, Messe Frankfurt s'inscrit parmi les premiers organisateurs de salons professionnels à l'échelle mondiale. Le groupe possède un réseau de 28 filiales et environ 50 partenaires de distribution internationaux. Messe Frankfurt est ainsi présent au service de ses clients dans plus de 150 pays. Plus de 30 sites dans le monde accueillent des manifestations « made by Messe Frankfurt ». Messe Frankfurt a organisé

114* salons en 2013, dont plus de la moitié à l'étranger. Le parc des expositions de Messe Frankfurt avec 578 000 mètres carrés de surface, comporte actuellement dix halles et un centre de congrès. L'entreprise est détenue à 60 pour cent par la ville de Francfort et à 40 pour cent par le Land de Hesse.

Pour plus d'informations : www.messefrankfurt.com

* Chiffres provisoires (2013)

**FEMME, HOMME
ENFANT,
ACCESSOIRES**

Habillement : analyse d'une rentrée difficile par l'IFM

Depuis la rentrée, les distributeurs français de mode sont 42,2 % à avoir noté une chute de leur chiffre d'affaires par rapport à la rentrée de 2013. Ils sont même 22 % à évoquer un "fort recul".



Journée de conférences de l'IFM le 4 décembre 2014 à Paris
C'est ce qu'indique l'étude Perspectives 2015 de l'Institut Français de la Mode (IFM), présentée à l'occasion de sa journée de conférences ce 4 décembre à Paris. Il en ressort quand même que 14,6 % des acteurs revendiquent en parallèle un chiffre d'affaires stable. Tandis qu'ils sont 23,2 % à évoquer une hausse, dont 6,1 % parlant d'une "forte hausse".

En 2014, la consommation d'habillement devrait s'inscrire au final en baisse de 0,9 %. "Ce n'est pas un effondrement de la consommation", pour Dominique Jacomet, directeur général de l'IFM. "Ce qui est préoccupant, c'est que cela s'inscrit dans une longue période de résultats négatifs. Mais, si on regarde de près, on voit que l'ampleur du recul est de plus en plus modéré, bien que cette amélioration soit moindre que ce que l'on pourrait espérer".

Autre signe autorisant un certain optimisme : depuis le début de l'année, quelque 33 % des ménages estiment avoir renforcé la part de leur budget dédié à l'habillement. Ils sont en outre 31 % à avoir renforcé celle dédiée aux achats de chaussures.

Les prix barrés, dont la part grandissante dans les ventes reste un sujet de préoccupation, connaissent en 2014 un affaissement d'intérêt. Là où l'an passé femmes et hommes étaient respectivement 33 % et 25 % à n'acheter qu'à prix cassés, ils ne sont plus que 28 % et 22 % sur l'année en cours.

En 2014, la part des promotions dans les ventes reste stable à 20 %, son niveau des deux années précédentes. Egalement stable entre 2012 et 2013, la part des soldes s'est renforcée cette année pour atteindre 21 %, repassant ainsi devant la part de marché des promotions pour la première fois depuis 2010. Reste à connaître l'impact du passage à six semaines de soldes en 2015.

De leur côté, les enseignes mettent un frein à la hausse des prix. Il y a un an, 40 % des entreprises interrogées faisaient partie d'une hausse de leurs prix de vente. Ils ne sont cette année que 22 %, dont 21 % pratiquant des hausses inférieures à 5 %. Un recul "loin d'être négligeable" pour le directeur de l'Observatoire économique de l'IFM, Gildas Minvielle, qui souligne par ailleurs que 27 % des marques ont pratiqué des baisses, et que 51 % ont maintenu leurs prix.

Quid de l'année à venir ? En se basant sur les données Eurostat, l'IFM table pour 2015 sur un recul de 0,5 % des dépenses européennes d'habillement. Contraction moindre que les -0,6 % attendues pour 2014, et surtout que les -2,1 % constatés en 2013.

Par [Matthieu Guinebault](#)

Quechua, la marque modèle de Décathlon

Publié le 04 décembre 2014 par LA RÉDACTION



Christian Ollier, directeur général de Quechua

Rando, ski et escalade. Des trois secteurs de Quechua au départ, il ne reste plus que la randonnée. Mais la griffe de Decathlon est devenue si connue et légitime qu'elle pourrait – presque – vivre... sans le groupe.

Quechua existe à part entière, c'est dit et ça se voit. Dans les allées du « magasin laboratoire » de 3 000 m² que la marque a ouvert le 26 novembre à Sallanches, en Haute-Savoie, la doudoune X-Light s'affiche partout, en bleu, rose, orange, à un prix digne de ses concurrents sur ce produit, les Uniqlo, H & M et autres. Elle est le résultat de dix-huit mois de recherche des équipes de la marque de randonnée de Decathlon installées dans les 10 000 m² du siège attenant à l'unique magasin de Quechua, avec celui de Chamonix. Montant de l'investissement : 20 millions d'euros.

Car, lorsque designers, ingénieurs et chefs de produit, au nombre de 170 pour Quechua, mettent au point un produit, c'est toujours avec le consommateur. « Nous descendons en magasin faire essayer la doudoune par exemple, pour qu'ils nous aident à choisir les bonnes couleurs, nous disent si elle est assez légère », explique Fabien Brosse, ingénieur conception pour la marque de randonnée. Chaque année, six à sept brevets sont déposés par Quechua, qui s'enorgueillit de 710 modèles différents, avec un renouvellement de moitié tous les deux ans.

“

« Avec Quechua, nous essayons de couvrir le spectre le plus large possible, en partant toujours du primo-accédant, du consommateur qui commence à marcher ou à skier, pour aller jusqu'au spécialiste. C'est la clé de notre succès : partir des besoins non exprimés des gens, comme nous l'avions fait pour la tente 2 Seconds. » **Christian Ollier, directeur général de Quechua**

DANS LA VALLÉE DU MONT-BLANC

Pour tenir la note globale de satisfaction des consommateurs (4,31 sur 5), qui fait la fierté de son patron, **Christian Ollier**, toutes les équipes ont donc été réunies au pied des pistes de ski, dans la vallée du Mont-Blanc, à quelques kilomètres de l'appartement où six passionnés de montagne ont créé Quechua en 1997. Depuis, la marque a fait son chemin, auréolée du succès de la tente 2 Seconds, qui fête ses dix ans l'an prochain. Huit millions de tentes ont été vendues. La croissance a été telle que Wed'ze et Simond ont été fondées au milieu des années 2000 pour le ski et l'escalade.

À l'échelle d'un marché qui représente 40 à 50 milliards de dollars, Quechua pèse peu avec 1,7 milliard d'euros de chiffre d'affaires par an, selon les estimations de **LSA**. Mais, rapporté aux 9 milliards du marché du sport en France, ce n'est pas mal. « Quechua, c'est une marque technofriendly, qui met la technologie au service des besoins clients, s'amuse Yves Marin, consultant chez Kurt Salmon. Et qui a un cran d'avance par rapport aux autres marques de Decathlon, en termes de notoriété et d'image. »

LA PÉPITE DU GROUPE

- La première marque de Decathlon, avec un chiffre d'affaires estimé à 1,7 milliard d'euros en 2013, devant Tribord(sports nautiques)et B'Twin (vélo).
- Un siège à sa mesure, inauguré à Sallanches, en Haute-Savoie, le 27 novembre, de 10 000 m² et d'un coût de 20 millions d'euros.
- 350 personnes, les effectifs avec les deux autres marques de montagne, Wed'ze (ski) et Simond (escalade).
- Un éventail large de produits (1 500 modèles), avec une sophistication de plus en plus grande pour toucher les passionnés et techniciens de la randonnée.

Depuis deux ans, Quechua est montée en gamme, soignant sa communication en s'offrant les services de Fred & Farid, puis de l'agence de pub Orès. Toujours pour plaire aux spécialistes de la rando, un trimestriel tiré à 30 000 exemplaires s'arrache dans les magasins.

Et, pour clore le cercle vertueux, les produits Quechua se veulent plus techniques. Comme le Quechua Phone 5, smartphone destiné aux randonneurs, sorti il y a un an avec l'aide du fabricant Archos. La première application vient de voir le jour, et une nouvelle version de ce joujou est en préparation. Impossible de savoir si les ventes ont été satisfaisantes, mais les extensions prévues, comme une tablette, ont été annulées. Signe que Quechua doit parfois s'y reprendre à deux fois, surtout lorsque le produit est technique.

Magali Picard

First textile tech show GTTES 2015 set up to open up in Mumbai next month

YarnsandFibers News Bureau, 04-12-2014 06:28 - Coimbatore



The first Global Textile Technology & Engineering Show (GTIES) 2015 is all set to open up with focus on the post-spinning segment and provide a one stop solution for every business in the textile sector.

More than 300 exhibitors are expected at this event, with strong representation from countries such as China, Taiwan, Korea, Japan, the US and India. Seven companies from Coimbatore are also expected to participate, according to International Textile Machinery Exhibitions Society, India (ITME) organizer of this event.

This event is also supported by the Heavy Industries Ministry (Government of India) and the Textile Department (Maharashtra Government).

With the constant development of technology, ITME felt it would be appropriate to hold a complementary event between the ITME series, said the Vice-Chairman of ITME Senthil Kumar, justifying the reason for organizing such an event.

The organizers are planning a special session on the Government procurement process and information relating to subsidies available to SMEs.

Apart from the live demo during the expo, the exhibitors will have an opportunity to promote their brands and services online for three months in the run-up to the event which is now on.

Overseas delegations from Ethiopia, Sudan, Pakistan, Bangladesh, Korea, Mozambique, Egypt, China, Taiwan and Sri Lanka are expected to visit GTIES 2015, he said.

GTIES would be a complementary show to the India ITME series, held once every four years.

GTIES 2015 is scheduled to be held between January 20 and 22 at the Bombay Convention and Exhibition Centre, Mumbai

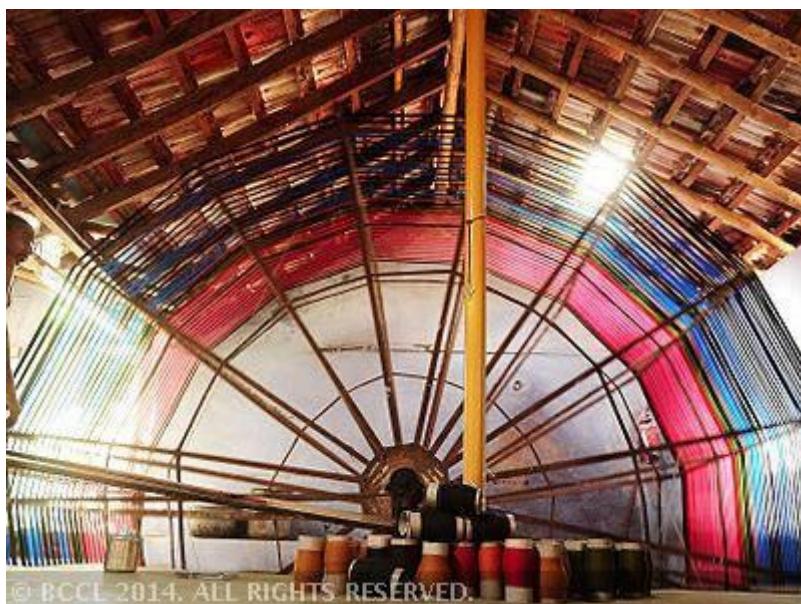
THE ECONOMIC TIMES

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'Indian textile sector has potential to cross \$500 bn by 2025'

PTI Nov 24, 2014, 09.43PM IST



MUMBAI: The country's textile industry, which is currently estimated at \$108 billion, has potential to cross \$500-billion mark by 2025 if the sector gets adequate support from the government, says a report.

"If the Indian textile industry takes the right steps and gets adequate policy support from the Government, it could cross \$500 billion by 2025 from its present size of \$108 billion. This will also catalyse another 35 million jobs and \$200 billion of investments," according to a study report by leading textile and polyester consulting firms Wazir Advisors and PCI Xylenes & Polyesters.

The \$500 billion market figure consists of domestic sales of \$315 billion and exports of \$185 billion. The current industry size comprises domestic market of \$68 billion and exports of \$40 billion, Wazir Advisors Joint Managing Director [Prashant Agarwal](#) told reporters here today. "We have belief that India is a goldmine for growth of textiles and apparel value chain, whose potential is yet to be fully tapped," he said.

Agarwal said the government needs to give more support to the industry with specific focus on manmade fibre based textile value chain.

Immediate GST implementation to remove differential tax treatment to manmade fibres, creation of mega textile parks, single window system for FDIs, labour law reforms, extension of loan period in case of TUFS (Technology Upgradation Fund Scheme) and R&D promotion are some of the policy measures needed to boost the industry, he said.

Implementation of these suggestions will help to attract investment, technology upgradation, innovation and healthy growth of the industry, Agarwal said.

With 5.2 per cent share of global trade, the Indian textile industry ranks second in the world, but far behind China. This is likely to change, with China's share in global textile trade expected to go down by 5 per cent which will help India to push up its exports to \$185 billion, the report said.

Indian textile industry needs to effect a major shift in its fibre mix, which is presently tilted towards cotton (55 per cent), while the fibre consumption of the world is tilted towards polyester fibre (50 per cent), it maintained.

Indian market is also consuming more manmade fibre-based products as cotton prices are fluctuating unpredictably.

Also global brands are setting up more shops here and market share of women's wear is increasing and private labels are gaining prominence in organised retail, the report said.

India may start consuming more polyester than cotton in the next five years, which will increase the market size of polyester fibre by 1,500 thousand tonnes, it said.

Wazir & PCI have decided to set up Polyester Textile Investment Promotion Cell, which will support Indian and overseas manufacturers to know more about the sector, identify investment opportunities and form JVs.

Call for incentives as Indonesia aims high in textiles

by Paulius Kuncinas. Posted on November 22, 2014, Saturday

The textiles industry in Indonesia is growing steadily, nudging Jakarta closer to its long-term goal of rivalling China as a global leader in garment exports. However, sector players say stronger trade pacts are needed as well as more investment to maintain a competitive edge in the regional and international marketplace.

A surge in demand for football shirts during the 2014 World Cup helped Indonesia post textiles sales of US\$5.3 billion in the period from January to August – representing a 4.8 per cent rise on last year's total of US\$12.6 billion –with an export target of US\$13.3 billion for 2014.

Competitive advantage

The export target for 2014 is part of national plans to become the number one globally in textile exports by overtaking China, which is shifting its economy from textiles to services. Jakarta is aiming for total exports of garments and textiles to reach US\$75.4 billion by 2030 while raising the contribution to global textile exports from 1.8 to five per cent.

"We see huge upside potential for the country's exports given highly competitive labour costs and attractive demographics, as well as infrastructure reforms under the new government post the election," said Citi in a note published in April.

Momentum towards that ambition was underlined by profits from the largest Indonesian garment maker, Pan Brothers on October 1. The firm, which manufactures brands such as Nike, North Face and Lacoste, reported a 33.5 per cent rise in net profit for the first half to US\$6.9 million. Its revenue rose two per cent to US\$162.9 million largely thanks to export sales, which hit US\$151.6 million.

The firm recently outlined plans for a US\$70 million, three-year expansion to help it tap the growing demand for garments in Southeast Asia's emerging markets.

This trend is also evident in Indonesia, where a growing middle class is expected to fuel a surge in local textiles consumption in coming years. Domestic sales are forecast to increase by seven per cent this year to a value of US\$7.5 billion, according to the Indonesian Textile Association (API) following a 10 per cent decline in 2012 to 2013.

"Strong domestic demand for Indonesian textile products remains, despite competition from lower-priced, high-quality imported textile and textile products," wrote the US Department of Agriculture (USDA) in an annual report released in April.

Tough competition

Indonesia currently ranks ninth in global textiles exports. The industry, combining textiles, leather goods and footwear, employs about 1.5 million workers and is expected to contribute 10.7 per cent of non-oil and gas exports in 2014.

However, Indonesia faces tough competition from players emerging in Southeast Asia that have lower production costs and cheaper labour. Vietnam, for example, has managed to carve out a 3.3 per cent share of global textiles and garments exports and expects to attain a US\$23.6 billion export target for 2014.

In 2013 the US was the largest importer of Indonesian textiles and clothing, at a value of US\$4.1 billion, followed by Japan and Turkey with imports of \$1.2 billion and US\$620 million, respectively.

However, while Indonesia has maintained its position as the sixth-largest textile exporter to the US, unchanged since 2000, Vietnam has jumped to third position from as far back as 82nd in the same period.

Industry leaders say new trade deals are needed with countries around the globe to secure a long-term future for Indonesian textile exports. To this end, Indonesia has expressed interest in joining the multilateral Trans-Pacific Partnership, a proposed regional free trade agreement (FTA) with 12 members so far including the US. However, the government is still waiting for approval to participate in an FTA that would open opportunities for higher Indonesian textile exports to Europe.

Challenges to achieve this aim remain. A senior official at Pan Brothers said the government needed to do more to tackle the challenges for textile exporters.

"Indonesia has the potential to become a global supplier of garments. Policies, however, should be revised in order to attract more investments in this sector and build local competition, as well as facilitate exports to capitalise on Indonesia's strategic location," vice-chief executive Anne Patricia Sutanto told OBG.

High costs

Indonesia's infrastructure costs are high compared to new players mushrooming in the region, such as Vietnam and Cambodia.

For example, domestic textile manufacturers saw production costs jump nearly 15 per cent as a result of Indonesia's electricity tariff hike in May.

Electricity now accounts for up to 35 per cent of total production costs for textile companies, a factor that industry leaders say may erode their competitiveness.

The government needs to invest more in the industry to fulfil local demand and reduce dependency on imported raw materials, textiles manufacturers say. Investment is also needed in improving human capital through better training of skilled workers and managers.

"The quality of education and training of skilled workers and managers has a direct impact on the financial results of our companies," said Sutanto. "More needs to be done in this area from the public sphere in order to help us reach higher levels of business performance."

Ade Sudrajat, general chairman of the Indonesian Textile Association (API), told local media that the country should be doing more to take advantage of a surge in global textile products, highlighting the advancement of other regional players such as Vietnam

Textiles industry in Indonesia is growing steadily

- NOVEMBER 25, 2014-

The textiles industry in Indonesia is growing steadily, nudging Jakarta closer to its long-term goal of rivalling China as a global leader in garment exports. However, sector players say stronger trade pacts are needed as well as more INVESTMENT to maintain a competitive edge in the regional and international marketplace.



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Textile : le grand décollage des exportations n'est pas encore au rendez-vous (Aziza Belouas)

2014-11-27 : Une petite hausse des expéditions est enregistrée à fin octobre. La confection est en hausse de 6% mais la bonneterie a baissé de 4,9%. Le retard dans la mise en œuvre de la stratégie industrielle pénalise le secteur.



Evolution molle pour le secteur du textile. Les exportations ont augmenté, selon les dernières statistiques de l'Office des changes, de 3,5% à fin octobre 2014 par rapport à la même période de l'année dernière, à 27,4 milliards de DH. La

confection a progressé de 6% puisque son chiffre d'affaires a atteint 16,9 milliards de DH contre 15,9 milliards à fin octobre 2013. La bonneterie a, par contre, vu ses ventes baisser de 4,9%. La valeur de ses exportations est ainsi tombée de 5,8 milliards de DH à 5,6 milliards. Au vu de ces chiffres, on peut dire que le secteur se contente simplement de maintenir ses exportations et n'arrive pas, depuis plusieurs années, à dépasser la barre des 30 milliards de DH.

Pour les industriels, le secteur a besoin d'un sérieux coup de pouce pour décoller. Ils restent optimistes mais ne peuvent cacher leurs inquiétudes quant au manque de visibilité actuel, imputé au retard pris sur le calendrier de mise en œuvre de la stratégie sectorielle, en discussion depuis plusieurs mois avec les pouvoirs publics, et à la situation qui prévaut sur le marché européen, principal débouché des exportations textiles marocaines.

Les donneurs d'ordre allemands et anglais veulent revenir au Maroc

Pourtant, d'après une récente étude réalisée par l’Institut français de la mode (IFM), une réorientation des commandes vers le Maroc est bien en cours. La part du Maroc dans le sourcing textile européen a en effet augmenté de 9% durant les huit mois de 2014 par rapport à la même période de 2013. En valeur, les importations textiles européennes en provenance du Maroc ont atteint 1,4 milliard d'euros contre 1,3 milliard pour l'année antérieure. Une petite amélioration certes comparée à la hausse de 21 à 26% enregistrée par le Pakistan, le Cambodge ou encore le Vietnam, mais elle atteste cependant, estiment les professionnels, de l'intérêt que portent les donneurs d'ordre au Maroc dont la part dans les achats européens est passée de 3,48% à 3,52%. De plus, certains donneurs d'ordre, en particulier allemands et britanniques, ont émis le souhait de revenir au Maroc alors que les Espagnols entendent consolider leur présence sur notre marché. Illustration de ce choix, le groupe Inditex ouvre un bureau commercial à Tanger. On relève également que les exportations marocaines vers ce pays ont augmenté de 15% à fin octobre 2014. Autant d'opportunités que le secteur se doit de saisir en améliorant son offre via un développement de la production à forte valeur ajoutée.

Les industriels inquiets pour 2015

Car «le Maroc ne peut continuer à vendre de la sueur uniquement, même si l'on reste dans le fast-fashion, il faut innover et faire émerger des sites et des régions textiles spécialisées», commente un industriel de la place. Il ne manque pas de souligner, dans ce contexte, l'actuel dynamisme de Tanger où plusieurs investissements ont été réalisés, permettant la modernisation de la production dans des créneaux précis comme l'impression digitale, le finissage et la sérigraphie... On peut citer également le cas de Fès qui pourrait se spécialiser dans le T-shirt et le denim par exemple. C'est ce qui est recherché, il faut le rappeler, via la stratégie des écosystèmes. En attendant, les industriels attendent 2015 non sans appréhensions. Leur crainte est d'abord motivée par la baisse de la consommation d'habillement en Europe. Les statistiques de l'IFM confirment la régression de la demande d'habillement sur les marchés allemand (-1%), italien (-2%) et espagnol (-2,5%). Sur le marché français, traditionnel débouché du textile national, l'IFM souligne une très petite reprise de 0,2%. Ce qui explique le recul de 1% des importations françaises en provenance du Maroc dont la valeur est passée de 509 à 505 millions d'euros. Le second facteur d'inquiétude est le retard des mises en boutique des collections hiver en raison du prolongement des périodes de chaleur dans plusieurs pays européens. Ce qui se traduit par des perturbations des livraisons des commandes et une baisse des achats des donneurs d'ordre européens. Ces contraintes pourraient persister, selon les prévisions des industriels, jusqu'en février 2015

COMMERCE Jeudi 04 décembre 2014

La nouvelle crise du coton ravive les tensions à l'OMC

Dejan Nikolic



Les prix de la fibre blanche ont chuté à des niveaux inédits depuis 2009. Le phénomène ranime le débat de certaines pratiques jugées illégales. Plusieurs Etats membres, qui veulent en avoir le cœur net, exigent des compléments d'information de leurs partenaires

Certains membres de l'Organisation mondiale du commerce (OMC) veulent en avoir le cœur net. Depuis vendredi, ils exigent que toute la lumière sur les politiques commerciales suspectées de faire baisser les prix du coton soit faite.

«Nos informations sur les pratiques en vigueur sont incomplètes et datent de plusieurs années. Nous voulons plus de détails quant à leurs effets sur les échanges», résume un groupe de pays africains, inquiets de la rentabilité de cette industrie qui fait vivre plus de 15 millions de personnes sur leur continent, et représente, selon les pays, plus de la moitié des exportations.

Si l'appel a été lancé maintenant, c'est en raison de l'élan offert par la récente sortie de crise historique de l'institution basée à Genève. Mais aussi, et plus directement, à cause des cours du coton ayant atteint la semaine dernière des plafonds jamais vus depuis 2009 (-30% en un an à la bourse de New York).

Cette dégringolade des prix répond à l'annonce récente de la Chine – le plus gros consommateur au monde – d'émettre de nouveaux quotas d'importation en 2015. En octobre déjà, les achats chinois de coton – en baisse pour la 4e année consécutive – ont chuté de 42% sur un an.

«Pékin vise pour l'heure le seuil légal de 894 000 tonnes fixé par l'OMC», soulignent des experts interrogés par Les Echos. Avec pour objectif d'encourager les consommateurs chinois à puiser dans les stocks nationaux. A savoir, 58% des réserves mondiales qui s'annoncent par ailleurs en forte hausse à cause d'une récolte abondante attendue aux Etats-Unis et en Inde.

«L'offre de coton disponible sur le marché est à présent si importante que l'été prochain, il y aurait assez de fibre pour confectionner 13 t-shirts ou quatre jeans à chaque habitant de la planète», résume une source interne à l'OMC.

Un différend historique

New Delhi et Washington sont les deux plus gros exportateurs de coton au monde. Mais l'Inde est en passe de ravir la place de plus important producteur à la Chine (6,5 millions de tonnes) l'an prochain, avec 6,7 millions de tonnes, contre 3,6 millions pour les Etats-Unis.

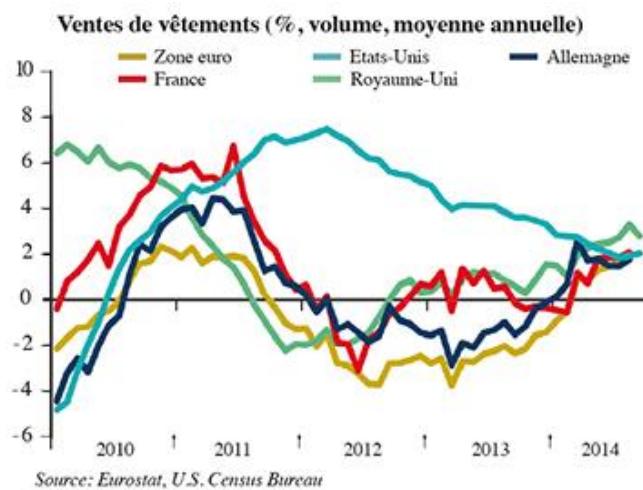
La question du coton à l'OMC ne date pas d'hier. Aux origines du débat: les subventions américaines et européennes pratiquées depuis des décennies. Le Brésil, qui s'est toujours estimé lésé, a plusieurs fois déposé plainte devant l'OMC. Tout comme les petits producteurs du Burkina Faso, le Mali, le Tchad et le Bénin, baptisés «The Cotton-4», revendiquant une compensation financière de 250 millions de dollars sur quatre ans.

Il y a pourtant deux mois, le différend vieux de dix ans entre les Etats-Unis et le Brésil s'est soldé par un accord, évitant à Washington des sanctions, mais assorti d'une aide financière de 300 millions de dollars pour développer le secteur du coton au Brésil et en Afrique. Ce dénouement s'inscrit dans le cadre d'une légère «percée» sur ce dossier – une décision toutefois qualifiée de principe par de nombreux observateurs – en décembre 2013 à Bali.

Édition N° 4405 du 2014/11/24

L'INDUSTRIE DU TEXTILE-HABILLEMENT REDÉMARRE EN TROMBE

4% DE CROISSANCE AU 1ER SEMESTRE, SELON EURATEX
LES MAJORS EUROPÉENS (H&M, HUGO BOSS ...) RELANCENT LEUR DÉVELOPPEMENT



Les industriels du textile et de l'habillement du pourtour méditerranéens devraient profiter de la reprise en Europe. Sur le 1er semestre 2014, les industriels européens ont enregistré une hausse de leur activité de 4% par rapport à la même période en 2013

La situation en Europe pourrait donner le sourire aux textiliens marocains. Après deux années difficiles, 2014 a été l'année de la reprise, indique Coface

dans son baromètre trimestriel du risque sectoriel. L'analyse de l'assureur-crédit français a touché trois grandes régions à savoir l'Europe de l'Ouest, l'Asie émergente et l'Amérique du Nord.

L'évaluation du risque sectoriel demeure moyenne à modéré, note la Coface. Chez nos partenaires européens, la consommation de l'habillement reprend avec une croissance des ventes. Sur le 1er semestre 2014, les industriels du textile et de l'habillement ont enregistré une hausse de leur activité de 4% par rapport à la même période en 2013 (selon Euratex). Si les exportations ont augmenté de 1,4%, les importations elles ont bondi de 7,7%. Le bon exemple vient du géant suédois H&M qui a réalisé une croissance de 16,5% de son chiffre d'affaires sur les neuf derniers mois (décembre à août), contre 3,8% seulement sur l'ensemble de l'année 2013. De son côté, le groupe de prêt-à-porter allemand Hugo Boss a présenté une nouvelle stratégie, basée sur le développement de ses magasins propres et la pénétration de nouveaux marchés notamment certains pays d'Asie, du Moyen-Orient et d'Europe de l'Est.

Le Maroc où ces deux enseignes sont présentes à travers des franchises, devrait profiter de sa proximité du marché européen. Les données préliminaires de l'Office des changes à fin octobre 2014 indiquent une forte reprise des exportations des principaux secteurs: textile et cuir +

3,5%, soit 900 millions de dirhams. Ce résultat provient de la hausse des exportations de vêtements confectionnés (+6% ou 1 milliard de DH) atténuée toutefois, par la baisse des ventes d'articles de bonneterie (-4,9% ou 300 millions de DH).

En Amérique du Nord, la croissance du secteur textile-habillement ralentit et semble se stabiliser autour de 2% en rythme annuel avec abondance et une demande constante. Les récoltes de coton dans cette région (3e producteur mondial) pourraient atteindre les niveaux de 2012/2013 avec une progression attendue de 24% en volume à 3,5 millions de tonnes, selon les projections de Coface. Le risque sectoriel s'améliore grâce à la conjoncture bien orientée et à la baisse des prix du pétrole.

La reprise aux Etats-Unis (prévue à 2% en 2014 et 2,5% en 2015) explique en grande partie l'engouement. Les entreprises profitent aussi de la dynamique de la consommation et de l'investissement.

Pour sa part, l'Asie émergente demeure une zone dynamique. Toujours supporté par la demande, le secteur enregistre une solide progression comme en témoigne l'ouverture de 51 nouveaux points de vente en Chine d'H&M (+25%). L'e-commerce soutient également cette croissance (Inditex vient de lancer les ventes en ligne en Corée du Sud et H&M en Chine). Coface fait référence à des obstacles. En effet, le marché du coton est bousculé en Asie émergente par l'annonce des autorités chinoises de réduire le quota d'importations de coton libre de droits de douane.

La Chine va réduire en 2015, le volume de coton exonéré de taxes au seuil minimum exigé par l'OMC à 894. 000 tonnes contre environ 1 500 000 tonnes en 2014. Au-delà, les importations seront taxées à hauteur de 40%. D'ores et déjà, sur les neuf premiers mois de l'année, la Chine a importé 38% moins de coton qu'un an auparavant.

L'Inde devance la Chine

DANS les autres pays d'Asie émergente, la production indienne devrait atteindre des records cette année, supportée par des conditions climatiques clémentes permettant à l'Inde de devenir le premier producteur mondial devant la Chine.

La production de vêtements au Bangladesh devra rester très dynamique. Elle présente un coût horaire de la main d'œuvre le plus faible de la région (68 dollars par mois contre 70 au Vietnam ou 74 en Indonésie).

Avec une demande forte et des récoltes abondantes de coton, le secteur demeure solide, mais les effets sur les coûts de productions locaux de l'affaiblissement des importations chinoises de coton reste à surveiller, avertit Coface.

GSP Plus status: APTMA chairman says textile exports have risen

By Our Correspondent

Published: December 5, 2014



Pakistan's exports to the European Union have increased 29% during January to September 2014, Aptma Chairman S M Tanveer. PHOTO: AFP

LAHORE: All Pakistan Textile Mills Association (Aptma) Chairman S M Tanveer said Pakistan's exports to the European Union have increased 29% during January to September 2014, after receiving the Generalised Scheme of Preferences Plus from the EU.

However, he said, the real potential of the facility could not be materialised due to a severe energy crisis since April 2014. There was surge in exports to the EU during the first three months followed by a continuous decline, he added.

” Pakistan’s exports to the European Union have increased 29% during January to September 2014

Aptma Chairman S M Tanveer

He was speaking during the visit of Punjab Governor Chaudhry Mohammad Sarwar and members of the European Parliament.

The chairman said the industry is presently facing challenges of energy availability and affordability, leading to the high cost of doing business.

“It is unfortunate that the cost of energy for the textile industry is far more expensive at around 16 cents/ kilowatt-hour (kWh) compared to the textile industry in the region, which costs at 7-9 cents/kWh,” he said.

According to him, Aptma has undertaken a number of initiatives to keep the industry at par with the global standards and expectations. The latest initiatives include setting up of a Sustainable Production Centre for energy efficiency, renewable energy and environment besides ensuring Corporate Social Responsibility, and water conservation.

Speaking on the occasion, the Punjab governor expressed hope that the textile industry would avail the full potential of the GSP Plus status.

He said the Ministry of Water and Power should prioritise the textile industry in energy supplies on affordable price to get maximum benefit of the market access facility.

EU Committee on Overseas Development and Cooperation Coordinator Nirj Diva said the committee was planning to provide grant for clean water projects in Punjab. He said he met the Punjab chief minister to extend cooperation in education, health and other social sector projects.

Published in The Express Tribune, December 5th, 2014

GSP Plus: Opportunities for textile exporters abound

By Farhan Zaheer

Published: December 7, 2014



Country on track to increase exports to EU by \$1 billion. PHOTO: AFP/FILE

KARACHI:

For the exporters who are looking for more trade avenues, the European Union's Generalised Scheme of Preferences (GSP) Plus has opened new doors of opportunities.

Since January, the month when Pakistan qualified for the GSP Plus, exporters of finished garments have seen a surge in enquiries and orders from the EU.

"We have noted an increase of 20-25% in enquiries and orders from European countries in the last 11 months," Multinational Export Bureau CEO Babar Khan says in an interview with *The Express Tribune*.

“ The GSP Plus can bring many positive changes in the textile industry; our exports can grow further if we arrest the rising cost of production

Multinational Export Bureau CEO Babar Khan

Khan, who runs two textile factories in Karachi that export most of their knitwear to the EU and United States, is not the only one who has benefited from the duty concessions. Most of the garment exporters have achieved growth in their exports but of varying degrees.

“Today, we not only have new customers but we also have been able to retain the old ones from the EU,” says Khan while talking about how new business is continuously coming to factories in Pakistan.

The growth that his business has recorded is very close to the overall rise in knitwear exports from the country.

Knitwear exports jumped by a handsome 25% from July to October this year compared to the same period of previous year, according to the latest government data.

Similarly, readymade garment exports rose 10% whereas cotton cloth and cotton yarn shipments dropped 36% and 10% respectively.

The government expects to achieve its target of \$1 billion in additional exports to the EU by the end of December. Looking at the data of the first eight months, the goal seems realistic. Textile exports to the EU jumped to \$3.512 billion from January to August, up 21.4% compared to \$2.894 billion in the same period of previous year.

Reflecting the government’s optimism, Khan believes Pakistan will succeed in increasing exports by \$1 billion by the year-end.

A record decline in international oil prices, recent 0.5-percentage-point cut in benchmark interest rate, five-year low cotton prices and 11-year low inflation are some of the factors that will support textile exporters in coming months.

However, there are worries as well as the rupee has appreciated against the euro.

SALES RISE

25%

is the increase in knitwear exports from July to October this year

Since July this year, the rupee has strengthened over 6% against the euro, which is eroding profit margins of exporters. However, a significant increase in volumes may help offset the negative impact to some extent.

For instance, when Khan took orders a few months ago, euro was trading at Rs130, but now it stands at Rs125, which is going to affect profit margins.

Diversification

Speaking about the lack of product diversification in the textile sector, Khan says diversification happens where the exporter sees some stability. In this scenario, he can plan for the long run.

Unfortunately, overall uncertainty in the market and fluctuations in export orders depending on the season have always discouraged the investors from long-term planning.

Also the country has experienced serious security and energy challenges, resulting in shrinking of the textile industry over the last few decades, he adds. Bangladesh, which is a major competitor in the EU market, has remained relatively undisturbed by such challenges.

Visionless bureaucracy

Khan is of the view that successive governments have never taken export industries seriously and the attitude of a visionless bureaucracy has compounded the problems as it has failed to give any direction to the key export industry.

However, he believes that Pakistan can recoup the lost ground against regional competitors including Bangladesh and India, but it will be a long and painful journey.

“The GSP Plus is a gateway and it can bring many positive changes in the textile industry. Our exports can grow further if we arrest the rising cost of production especially the cost of power production.”

The writer is a staff correspondent

Published in The Express Tribune, December 8th, 2014

Post-GSP Plus status: Despite hurdles, textile exports rise considerably

By Farhan Zaheer

Published: November 30, 2014



Pakistan's textile exports to the EU increased to \$3.512 billion in the first eight months of 2014, up 21.4% compared to \$2.894 billion in the same period of previous year. PHOTO: ONLINE

KARACHI: Is Pakistan really taking full benefit of the European Union's (EU) Generalised System of Preferences (GSP) Plus scheme?

Apparently, the answer is no, especially if one goes through recent news stories about acute energy shortages and security challenges. But the situation is not as bad as it may seem.

Despite all difficulties, Pakistan's textile exports – constituting more than 50% of total overseas sales – to the EU have grown considerably since January 2014, the month when the country got the GSP Plus status.

SURGE

25%

is the overall growth in exports of knitwear during the period July-October 2014 in comparison to the corresponding period of previous year

Though exports of bed wear and cotton cloth have dropped, textile mills, especially those that produce knitwear and garments, have significantly increased shipments to the EU in the last 11 months. Therefore, those who are portraying the dismal picture, especially people from the textile industry, are not showing the complete picture.

Our friends in Europe have done their part by giving us the opportunity to export at preferential import duties until 2017. Now is our turn. However, for that we first need to change the attitude as we always blame the external factors or our internal structural weaknesses.

Pakistan is going to complete a whole year in December since it started enjoying the advantages of zero or low import duty structures under the scheme. It is high time the exporters and government sit together to find out what is pulling them back.

Pakistan's textile exports to the EU increased to \$3.512 billion in the first eight months of 2014, up 21.4% compared to \$2.894 billion in the same period of previous year, according to the recent government data.

This \$600-million jump in textile exports means Pakistan can easily achieve its target of adding \$1 billion every year to total exports to the EU that it set after receiving the GSP Plus status.

"Our exports to the EU have jumped by 10-11% in the last 11 months," said Babar Khan, CEO of Multinational Export Bureau, a Karachi-based factory which exports over 50% of its knitwear products to EU states.

During the last four months (Jul-Oct), overall knitwear exports have jumped by a handsome 25% compared to the same period of previous year. Similarly, readymade garment exports have increased by 10% in the same period.

However, what is worrying for the industry is the drop in cotton cloth and cotton yarn exports that declined by 36% and 10% respectively.

Despite energy shortages, security challenges and delay in sales tax refunds, Khan is optimistic that knitwear exports to the EU will remain significantly higher in the next 12 months.

But sales of some garment exporters have remained stagnant despite getting all the positives of the duty preference.

"Our exports have not grown in the past 11 months despite garment shipments to the EU markets," Jawed Suleman, CEO of Sun Textiles, told *The Express Tribune*.

"After receiving benefits of the scheme, Pakistan's textile exports should have been doubled in the last 11 months. But we cannot achieve this until we reduce our cost of production and improve the tax collection machinery," added Suleman, who is also chairman of the Pakistan Readymade Garments Manufacturers and Exporters Association (PRGMEA).

However, the double-digit growth in exports of knitwear and other garments despite impediments such as the appreciation of the rupee is a healthy sign for the textile industry.

With relative stability in the exchange rate in recent months, strong macroeconomics and declining oil prices, Pakistan has many positives on its side. The winners will be those who innovate and diversify their products according to the market needs. Let's see how smart the exporters are.

the writer is a staff correspondent

Published in The Express Tribune, December 1st, 2014.

Textile sector: NGO offers 1.7 million euro project to improve social standards

November 27, 2014

BUSINESS RECORDER The GIZ, a German-based international NGO has offered a project with the cost of around Euro 1.7 million for supporting social standards in the Textile & Garment Industry in Punjab, duly funded by German Federal Foreign Office, Berlin. This was disclosed by Punjab Minister Labour & Human Resource, Raja Ashfaq Sarwar, while addressing the concluding session of a workshop on Implementation of Social Standards Support Program to the textile and garment industries in Punjab held here on Wednesday.

The Minister said that this project has been developed in the context of GSP plus status granted to Pakistan for support in the implementation and ensuring greater compliance with the International Labour Standards in the Textile & Garment Industry. Duration of the project is two years, he maintained.

The Labour & Human Resource Department, Punjab will be an implementing partner in this project and will work in close collaboration with the concerned stakeholders including ILO Office to achieve targets of the project, he added.

The project aims to bring about change in three areas of intervention ie improving working conditions through pilot projects at various levels that have been identified together with partners, developing appropriate platforms for dialogue and suitable structures for co-operation that promote regular information and knowledge sharing and facilitate co-operation between government, employers and workers along with providing reliable data on the pilot measures at factory level, which are required to convince employers, he further informed.

The project partners of this venture will be Labour & Human Resource Department, Government of the Punjab, Ministry of Textile, Government of Pakistan, Trade Development Authority, SMEDA, Ministry of Overseas Pakistanis, ILO, PRGMEA and APTMA. Jirgen Herinrich Schilling, Country Director GIZ Pakistan and Farhan Aziz Khawaja, Secretary Labour & Human Resource, gave the opening speeches at the workshop. Presentation of the project on the background and purpose of workshop were given by Principal Advisor GIZ, Ms Romina Kochlus while discussion, feedback and comments from the participating sites were discussed along with clarification of roles and responsibilities of the participating sites for the realisation and steering of the project approach was made.

18th edition of TITAS textile show ends successfully

December 05, 2014 (Taiwan)



The 18th edition of Taipei Innovative Textile Application Show (TITAS 2014), which was held from October 15 to 17, 2014 at the Taipei World Trade Center Nangang Exhibition Hall, Taiwan, ended on a successful note.

Organized by the Taiwan Textile Federation (TTF), with the support of the Bureau of Foreign Trade, Ministry of Economic Affairs, Taiwan, around 367 exhibitors, from 11 countries and regions including Taiwan, Japan, South Korea,

United States, the Netherlands, Singapore, Switzerland, Sweden, Vietnam, China and Hong Kong, presented their latest products at the show.

The textile show featured comfortable, lightweight, breathable, dust-proof, stain-resistant, odour-free, and temperature-regulating including heat-proof and cooling textiles. On the eco-front, non-toxic, sustainable, biodegradable, safely processed and PFOS-free materials were also presented in addition to fashion fabrics incorporating performance as well as finishing technologies for functionality.

Some of the latest products and technologies featured at TITAS 2014 from Taiwan's exhibitors include Formosa Plastics Group's "Green Technologies for Innovative Fashion" to show the group's commitment to a greener life, Far Eastern New Century's advanced sustainable polyester materials, Eclat's premium quality functional knitted fabrics, Texray's textiles fulfilling the functional needs in modern life, Singtex's bio-friendly S.Café yarn, etc.

More than 80 international brands and retailers had face-to-face business talks with exhibitors. Representatives of fashion brands from Victoria's Secret and Jones New York from the U.S., Hope from Brazil, Lily from China also formed a part of the textile show.

Buyers from Speedo PVH, the North Face and Tommy Bahama from the U.S., Roots from Canada, Adidas and Alpargatas from Brazil, Peak Performance from Sweden, Helly Hansen from Norway, Salewa from Italy, Scott from Switzerland, O'neill from the Netherlands, Millet from France, etc were present at the show.

Around 15 seminars and product & technology presentations covering topics such as new textiles, development in functional fashion textiles, trends in digital prints, energy/resources management in textile industry, were also arranged.

TITAS 2014 proved to be an important sourcing occasion for sports, outdoor, and casual apparel brands. (GK)

Taiwan : Functional Textile Sourcing Hub

December 4, 2014

Taiwan Functional Textiles Certification System

To start the new millennium in 2000, the Taiwan Textile Federation (TTF) implemented a broad based certification system the "Taiwan Functional Textiles Certification System," providing a greater level of quality assurance in value added textile development and new product implementation.

Since TTF is in charge of helping those firms which produce innovative and fashionable textiles, the Taiwan Textile Industry has put their efforts on researching and developing synthetic textile in order to make the market more functional and compatible. They represent a collection of value added products from industry to consumer, adding performance throughout the supply chain. The Taiwanese company, as a leader in technology industries such as smartphones, LED, computers and batteries, is trying to integrate their strengths into the textile industry in order to breakthrough the old concepts in the future.

What's next? When facing issues like global warming, requirements of efficient materials, lacks of energy, different kinds of pollution and so on, Taiwan Textile Industry takes over leadership to make sure the industry will maintain sustainable development. Ranging from the most basic ideas of recycling and production efficiency, the Taiwan Textile Industry takes the lead. One of Taiwanese innovative company helps in the collection of plastic bottles to be converted in to yarn and ultimately garments without dyeing the fabric and the color of yarn, which is available in white, green and mineral colors.

Check out the Taiwan Export Promotion Project. A direct and focused International Consulting program was started in Taiwan in 1998. The goal of The Taiwan Export Promotion Project (TEPP) is to consult Taiwanese suppliers how best to merchandise their innovative products to the world, visit new customers and invite customers to meet them in Taiwan. Each year the premium companies are selected from a long list of vetted Taiwanese firms, which are brought up to the world for an intensive customer visits, opening new doors and an exchange of valuable information.

4 décembre 2014

Mode: Italie et France unies pour protéger la création

L'Italie et la France s'allient pour faire entendre leur voix à Bruxelles, alors que devrait être abordée ces jours-ci au sein des instances européennes la question du "Made in" et de la traçabilité des produits du marché intérieur européen.



De gauche à droite, Yves Dubief et Emmanuelle Hofmann (UIT), Mario Peserico (Indicam) et Claudio Marenzi (SMI)

Ensemble, les représentants des associations du textile et de l'habillement des deux pays ont signé un mémorandum d'entente "pour la défense de la mode et de la création", annoncent-ils dans un communiqué.

Parmi les signataires, réunis mercredi 3 décembre au siège d'Euratex à Bruxelles, les principales associations représentatives du textile, de l'habillement et de la couture avec, côté italien, le SMI, l'association patronale du secteur, et l'Indicam (association italienne pour la lutte contre la contrefaçon), et côté français, l'UIT (Union des industries textiles), l'UFIH (Union française des industries de l'habillement), la Fédération Française de la Couture et l'Unifab (Union des fabricants).

Le texte souhaite porter six points à l'attention des autorités publiques française et italienne, et aussi de la Commission européenne et du Parlement européen, en les appelant à s'engager plus fermement en faveur du secteur du textile et de l'habillement.

Les six priorités sont les suivantes: renforcer la lutte contre la contrefaçon, rendre plus efficaces les décisions de justice, sensibiliser les consommateurs, adapter les outils du droit au nouveau monde numérique, intensifier la coopération entre autorités compétentes au sein de l'UE, et mettre en œuvre une politique volontariste de défense des droits de propriété intellectuelle vis-à-vis des pays tiers, notamment à travers des accords bilatéraux.

"Avec plus de 180.000 entreprises, dont la plupart sont des PME, et près de 1,8 million de salariés générant environ 5 millions d'emplois, les industries européennes du textile-habillement-couture représentent environ 3% du PIB de l'Union européenne, rappellent les représentants du made in France et du made in Italy qui, malgré leurs poids économiques, ont souvent bien du mal à se faire entendre.

Par [Dominique Muret](#)

ACIMIT promotes Italian textile machineries in Vietnam

December 05, 2014 (Italy)



The Association of Italian Textile Machinery Manufacturers (ACIMIT) participated in the recently held business mission ‘Italy to Vietnam 2014’, to meet Vietnamese textile manufacturers and promote Italian textile machineries and training centers in Vietnam.

The business mission was promoted by Italy’s Ministry of Economic Development and Ministry of Foreign Affairs, and was organized by Italian Trade Agency.

During the business mission, ACIMIT senior management was able to ascertain the strong focus of Vietnamese textile sector on maximizing energy savings during production, while reducing pollution. The Vietnamese textile sector also expressed its interest in undertaking training from Italian textile machinery manufacturers.

ACIMIT’s president Raffaella Carabelli said, “Vietnam represents one of the most promising markets of the future for our companies. The local authorities have invested in the textile and garments industry, and are very much aware of the added value that Italian technology can bring to their production. The meetings held over the past few days with local counterparts confirm this.”

“We believe that Italian machinery manufacturers can strengthen their partnership with Vietnam’s local textile producers. The ACIMIT “Sustainable Technologies” project ensures that manufacturers using our machinery solutions will be rewarded with energy savings and industry leading, advanced environmentally friendly technology,” she added.

Rafaella said, “The creation of a technology training center is a concrete possibility, and will provide a further stimulus towards developing business opportunities between Italy and Vietnam in the textile industry.”

Vietnam’s textile sector is already a major buyer of Italian textile machine technology among Asian markets. Over the first six months of 2014, Italy exported €14 million worth of textile machinery to Vietnam (+159 per cent over the same period for 2013), confirming the growth trend in recent few years, according to reports.

ACIMIT is a private non-profit making body and its main purpose consists in promoting the Italian textile machinery sector throughout the world. (GK)



COMMERCE

Newsletter - Revue de presse hebdomadaire

Bulletin du commerce extérieur de l'UE: Viêt Nam et OMC

05/12/2014

Viêt Nam

Accord UE Viêt Nam: les négociations progressent

Les négociateurs de l'UE et du Viêt Nam se sont réunis la semaine dernière à Bruxelles pour une série de consultations «intersessions» en vue d'un accord de libre-échange entre les deux parties. Les consultations, organisées du 24 au 28 novembre, ont couvert un large éventail de sujets: services, marchés publics, aspects liés à la concurrence et droits de propriété intellectuelle, notamment. Elles avaient pour but de maintenir le rythme des négociations avant le prochain cycle complet prévu du 19 au 23 janvier à Bruxelles. Les deux parties ont jugé les consultations fructueuses et restent convaincues qu'un accord pourra être conclu au début de l'année prochaine.

[**En savoir plus sur les relations commerciales avec le Viêt Nam**](#)



PRINCIPAUX INDICATEURS ÉCONOMIQUES

	2011	2012	2013	2014(p)
Croissance PIB (%)	6,2	5,2	5,0	5,5
Inflation (moyenne annuelle)	18,7	9,1	8,8	7,4
Solde budgétaire / PIB (%)	-2,9	-4,8	-4,0	-4,0
Solde courant / PIB (%)	0,2	5,8	5,6	3,3
Dette publique / PIB (%)	47,9	51,3	50,4	50,5

(p) Prévisions

STRENGTHS

- Main-d'œuvre de qualité et peu chère
- Solide potentiel agricole et ressources naturelles
- Stratégie de développement fondée sur l'ouverture et sur la diversification de l'économie

WEAKNESSES

- Spécialisation du pays trop axée sur la compétitivité des produits à faible valeur ajoutée
- Lacunes persistantes en termes d'environnement des affaires
- Manque d'infrastructures
- Réforme du secteur public inachevée
- Creusement des inégalités
- Système bancaire fragile

APPRECIATION DU RISQUE

Croissance soutenue en 2014

La croissance devrait rester dynamique en 2014. Elle restera néanmoins inférieure à sa moyenne historique. En effet, la banque centrale a réduit ses taux directeurs (de 800 points de base entre 2012 et 2013). Un plan de relance budgétaire de 8 Mds USD entre 2013 et 2015 (4,7% du PIB) a été mis en place. Il prévoit notamment des reports de paiements de la TVA, de l'impôt sur les entreprises et un programme d'investissement en infrastructure. En outre, la consommation privée devrait rebondir grâce à la baisse de l'inflation soutenant ainsi les ventes de détail. Par ailleurs, la bonne tenue de la production industrielle en 2013, dans un contexte de reprise des exportations devrait se poursuivre en 2014. Le Vietnam continuera de profiter de la bonne santé de l'économie américaine, les

Etats-Unis étant son principal partenaire commercial. Bien que le pays profite d'une montée en gamme de ses exportations, comme l'illustre la progression des exportations de produits électroniques, il reste un atelier d'assemblage pour les industries d'Asie et le textile : les chaussures représentent encore 20% de ses exportations. S'agissant du secteur agricole, le pays a bénéficié de conditions climatiques favorables et des politiques de quotas de riz en Thaïlande. En 2012, le Vietnam est devenu le 1^{er} exportateur mondial de riz.

En outre, les flux d'IDE entrants restent à un niveau élevé en raison du mouvement de délocalisation qui conduit les entreprises asiatiques à développer des unités de production au Vietnam. Ils devraient continuer de progresser en 2014, sous réserve que l'ouverture de capital de 432 entreprises publiques, dont Vietnam Airlines ou Vinatex (textile), prévue au cours des deux prochaines années par le gouvernement, ait effectivement lieu.

Enfin, l'inflation a fortement décéléré en 2013 et devrait rester contenue en 2014, malgré la hausse du prix du transport, de l'électricité et du logement. Néanmoins, en cas de relâchement agressif de la politique monétaire, une augmentation importante de l'inflation n'est pas à exclure.

Stabilisation des comptes extérieurs, déficit public persistant et système bancaire encore fragile

Après avoir connu des sorties de capitaux importantes forçant les autorités à dévaluer le dong à six reprises entre 2008 et 2011, les comptes extérieurs du pays se sont depuis stabilisés. De plus, les exportations vietnamiennes se sont montrées résilientes face à la conjoncture internationale défavorable et les importations ont progressé lentement permettant ainsi à l'excédent courant de s'améliorer. En 2014, l'excédent courant se réduira en raison de la reprise des importations dans un contexte de demande intérieure plus importante mais il restera significatif. Le dong n'a pas subi de variation majeure depuis juin 2013, les fondamentaux macroéconomiques extérieurs du pays se sont améliorés et les réserves de change devraient représenter 3,5 mois d'importations en 2014. Un niveau encore faible mais en progression.

En 2014, le déficit budgétaire et la dette publique se stabiliseront à un niveau relativement élevé. Cependant, le risque souverain reste élevé. Outre le manque de transparence des comptes publics, la dette publique reste très vulnérable au risque de change car elle est libellée à plus de 60% en devises. De plus, les engagements contingents pourraient remettre en cause la soutenabilité de la dette publique à moyen terme, en cas de défauts d'entreprises publiques ayant un impact sur les grandes banques, à l'instar de Vinashin. Plus de 400 entreprises publiques, sur les plus de 3 000 que compte le pays, majoritairement des filiales de grands groupes comme Vinacomin (charbon et minéraux) ou Vinalines (ferroviaire), ont fait faillite ou ont été dissoutes en 2013.

Enfin, le système bancaire reste fragile car peu capitalisé et fortement dollarisé. Les banques sont aussi vulnérables au risque de change. Malgré la création d'une structure de défaisance, le risque de crédit reste important car celle-ci est sous dotée et son efficacité se heurte à de nombreux obstacles politiques. Par ailleurs, la forte exposition des banques publiques aux entreprises publiques peu transparentes constitue un facteur supplémentaire de fragilités. A cet égard, la banque centrale a encouragé en février 2014 les institutions financières performantes à fusionner avec celles en difficulté, afin de réduire la vulnérabilité du secteur.

Lacunes persistantes en termes d'environnement des affaires

La gouvernance demeure le talon d'Achille du pays et constitue un risque en termes d'attractivité des investisseurs étrangers. Les principales lacunes concernent le respect de la loi et la corruption qui reste, malgré les réformes engagées, très répandue dans le milieu politique et économique, comme en a témoigné l'affaire Vinashin ou, plus récemment, les suspicions sur la gestion de la société d'Électricité du Vietnam (EVN). Par ailleurs, le Parti Communiste continue de contrôler l'ensemble de la vie politique, économique et sociale du pays. Enfin, on note un soutien accru du Japon et des Etats-Unis au Vietnam tandis que les relations avec la Chine continuent d'être tendues.

Jobs for Low-Skilled Workers Moving from China to Vietnam

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There's a saying: A crooked river gets that way by following the path of least resistance.

If we were to delete "a crooked river" and replace it with "cheap labor," we'd have a pretty reliable economic rule of thumb.

Textile and apparel jobs have been following the path of least resistance for decades. They were once a bastion of the New England economy. When workers there started striking for better pay in the 1920s, the industry packed up and moved south, where workers were more pliable.

The industry had a long and prosperous run in the south. In 1960, there were 505,000 textile workers just in North Carolina.

But then, those workers got fed up with the low pay and sub-standard working conditions, so they started unionizing and striking. Industry executives said, the hell with this, and started shutting down their plants and moving the jobs to developing countries – China, Indonesia, Vietnam, Bangladesh, Mexico – where people were impoverished and willing to take any job for any wage.

Georgia, North Carolina, South Carolina, Tennessee, Alabama and Virginia lost an average of 59 percent of their textile manufacturing jobs between 2002 and 2012. Most of those jobs went to China.

But now the river's changing course again. Textile workers in China are earning more money, so the path of least resistance now leads to Vietnam, where textile workers earn 38 percent of what their Chinese counterparts earn.

Vietnam's textile and apparel imports to the United States were \$7.7 billion in 2012, \$8.8 billion in 2013, and \$9.8 billion in the first nine months of 2014, according to International Trade Administration data.

Vietnam is also making inroads into the American footwear market. Exports of shoes, boots, slippers and sandals to the U.S. were valued at \$1.2 billion in 2008 and \$2.9 billion in 2013.

The anti-trade crowd claims that trade agreements are what cause American manufacturing jobs to migrate abroad, but the U.S. doesn't have a trade agreement with Vietnam. Not yet, anyway.

Vietnam is a party to the Trans-Pacific Partnership negotiations. So are the United States and 10 other countries. China, which still rules the roost in textiles, apparel and footwear manufacturing, isn't one of them.

U.S. tariffs on textiles, apparel and footwear range from 0.8 percent to 37.5 percent. If the TPP takes effect, they will all be zero or close to it for the other TPP countries.

You'd think these domestic industries would oppose a trade agreement that would open the floodgates to even more running shoes, capris and sweatshirts from Vietnam. But they don't.

The U.S. textile and apparel industries employ about 373,000 people, but only about 12,000 in manufacturing, according to the National Council of Textile Organizations.

About 300,000 Americans work in the footwear industry, but only 3,000 to 7,500 of them work in manufacturing. Actually, that's just an educated guess by an official of the Footwear Distributors and Retailers of America. No one knows for sure, because the number has fallen so low that the U.S. Labor Department doesn't even bother to count them anymore.

So, what's wrong with these industries? Don't they care about the few manufacturing workers they've got left?

They do, but textile, apparel and footwear manufacturing in the U.S. has gotten so specialized that their jobs can't be off-shored.

The U.S. textile industry doesn't make a lot of shirts and skirts these days. It has moved way beyond that. Today the industry specializes in applications for bio-medical devices, energy conservation, sports injury prevention and other modern necessities.

These are high-tech jobs and the people who have them are highly-skilled.

Eventually, un-skilled Vietnamese textile and footwear workers will start demanding, and getting, more money, and the American companies that pay them will find some other country where people are willing to work for next to nothing.

That will have little if anything to do with the TPP.



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Korean enterprises recruit Vietnamese young talent candidates

Korea Trade-Investment Promotion Agency (KOTRA) and Korean Consulate General in Ho Chi Minh City co-organized Korea – Vietnam Job Fair on December 5.

Attending this year's fair was 45 Korea's leading firms such as Hyosung, STX, Lotte Mart, Daewoo International, Korea United Pharmaceutical and others.

Through the event, Korean investors want to seek Vietnamese young talent candidates.

Many Korean businessmen has invested into Vietnam's textile industry, thus they want to recruit qualified Vietnamese candidates in the fields of production, business and personnel management, marketing, interpretation and strategic planning.

Total recruitment demand is around 180 positions with high requirements such as work experience and internship progress, qualifications, soft skills and two foreign languages (Korean and English).

Recently, the recruitment demand for Vietnamese young talents has increased rapidly belongs to trade and investment relations between two countries. Particularly, series of Korean enterprises' large –scale projects have been licensed in Vietnam such as Samsung, LG Electronics, affirmed KOTRA.

In October, 2014, Vietnam attracted 544 investment projects from Korean enterprises, with total capital of US\$ 3, 6 billion. Until now, more than 700,000 Vietnamese employees have worked for Korean enterprises.

This is the second time that Korea – Vietnam Job Fair was kicked off Ho Chi Minh City with aiming to create chance for Vietnamese youths to seek suitable jobs and help Korean enterprises and Vietnamese exchange partners.

By staff writer- Translated by Huyen Huong