EVALLIANCE

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Sommaire / Summary

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La coopération algéro-turque est une opportunité pour relancer la filière textile, estime le vice-président de la CACI

26/02/2018 - 17:02

Actualité oblige, la coopération algéro-turque a été au menu de l'émission L'Invité de la rédaction de la Chaine 3 de la Radio Algérienne, qui a reçu, lundi matin, Abderrahmane Hadef, vice-président de la Chambre Algérienne de commerce et d'industrie (CACI).
M. Hadef voit dans la coopération algéro-turc, une opportunité de relancer la filière textile, qui a connu par le passé une véritable saignée avec pas moins de 250.000 postes d'emplois perdus et une centaine d'entreprises fermées.

« Le textile c'est l'une des filières pour développer la coopération avec la Turquie. C'est une occasion de relancer cette filière qui a souffert ces dernières années », a affirmé M. Hadef, qui dit avoir constaté « une volonté de nos partenaires turcs de s'installer sur le marché algérien et de développer d'autres partenariats sur d'autres marchés ».

Le vice-président de la CACI donne l'exemple du grand projet de l'usine de filature de Relizane, à l'Ouest du pays, réalisé en partenariat algéro-turc, « qui va entrer en production très bientôt pour la filature, qui passera ensuite au tissage et à la confection », précise M. Hadef, qui cite, également, un autre projet dans le domaine du textile, qui sera réalisé à Oum El Bouaghi, à l'Est du pays, toujours en coopération algéro-turque.

M. Hadef en est convaincu du fait que ces projets vont avoir « un effet boule de neige » sur le développement du secteur, en relançant notamment l'intérêt et la formation dans certains métiers qui ont disparus, comme ceux de styliste oe de modéliste. Ce qui permettra, pense-t-il, à nos entreprises d'arrêter d'importer des modèles de l'étranger.

Le modèle turc
La Turquie qui était, il y a 25-30 ans, un pays en rade en matière de développement est devenu une puissance économique et un pays exportateur par excellence, avec 80 milliards de dollars de produits vendus à l'étranger. Faut-il s'en inspirer ? Oui, répond M. Hadef qui voit dans « le modèle turc », un « cas d'études » pour développer notre économie, surtout dans certaines filières comme le textile, l'agroalimentaire, la pharmacie et l'électronique. « Ce qui est intéressant dans le modèle turc, c'est qu'on n'a pas besoin d'avoir de grandes usines pour devenir exportateur », note le vice-président de la CACI.

Par ailleurs, M. Hadef propose de mettre à profit la forte présence des entreprises turques en Algérie, au nombre de 796, employant près de 28.000 personnes, pour développer des projets de co-production.

Même si, actuellement, la quasi-totalité des exportations algériennes vers la Turquie est constituée des produits pétroliers et dérivés, M. Hadef pense qu'il y a un potentiel pour l'exportation de produits agricoles, de la laine et du verre, à condition, insiste-t-il, de « s'ouvrir sur le monde et d'élever nos capacités de commercialisation et de marketing ». Pour placer nos produits à l'étranger, on a besoin d'encourager et de développer les « traders », « un métier très important mais rare en Algérie », fait-il remarquer.

Diplomatie économique

Pour M. Hadef, «il ne faut pas avoir peur de la venue des étrangers en Algérie, ni avoir peur aussi d'aller vers les marchés extérieurs. On a besoin d'interagir avec le monde pour élever notre niveau de compétitivité ».

Il mentionne, à ce propos, les efforts de l'institution économique qu'il représente. Laquelle institution a, selon lui, tracé tout un programme de « diplomatie économique », qui commence, dira-t-il, à donner des résultats sur le terrain, avec tout ce qui a été réalisé comme Road show et déplacement de délégations à l'étranger.

Autre mesure, M. Hadef annonce la réactivation, en cours, de tous les conseils d'affaires. « On a actuellement une trentaine de conseils d'affaires au niveau de la CACI, dont celui algéro-turc qui est l'un des plus anciens », relève-t-il.

M. Hadef se déclare aussi favorable à la création de « zones franches » pour développer les régions et certaines filières.

A propos des régions, le vice-président de la CACI pense qu'elles doivent être le moteur du développement économique. « Il faut donner aux régions la possibilité de créer de petits tissus de PME qui vont s'intégrer progressivement pour former des pôles de compétitivité et d'excellence », souligne M. Hadef.

Enfin, M. Hadef, informe qu'un travail de recensement économique, en collaboration avec le Centre de développement des technologies avancées (SDTA) est en cours de réalisation. « Il permettra de recenser les potentialités économiques des régions et donner de la visibilité aux opérateurs », conclut-il.

The Sydney Morning Herald

Falling off the sheep's back: Why Australia can't capitalise on record wool prices

By Jonathan Barrett & Colin Packham
9 March 2018 — 11:51am

Talking points

- Australian fine wool prices hit record high of $18kg
- Farmers unable to fully capitalise amid shearer shortage and low sheep count
- Parts of Australia are in peak shearing season
- Australia dominates export wool clothing market with 90% share

Sheep farmers in rural Australia waited more than half a century for wool prices to come roaring back, only to find there aren't enough shearers to trim their golden fleeces.

"Once upon a time, you could go down to the local pub and arrange for some fellas to come in and start almost immediately - those days are gone," said Alan Rae, a wool producer in Bungunya, a town of about 200 people in Queensland.

The industry shackles mean suppliers in Australia, which provides about 90 per cent of the world's exported fine-wool used in clothing manufacturing, are struggling to meet demand. That has forced some garment makers to sell at a loss or reduce their wool content.

Prices for very fine wool used for clothing hit a record high $18.30 a kilogram this week, thanks in large part to ferocious demand from Chinese garment makers. That's more than three times the price during the early 1990s when a massive oversupply led the government to offer indebted farmers $2 for every sheep they shot.

The high prices coincide with the peak shearing season in some parts of Australia, but some in the industry think things are as good as they will get.

"My concern for the future of the market is how opaque the Chinese market is," said Phin Ziebell, an agribusiness economist at National Australia Bank, who expects prices to fall to around $16/kg by the end of the year.

"It was chilly today so I put on my $50 Uniqlo jumper, which is super-fine Merino wool. I can't see how that product can be manufactured at the price levels we have today."

Signs of stand-off

There are early signs of a stand-off between buyers and sellers emerging at wool auction houses, according to the country's dominant wool storage and export house AWH. Weekly pass-in-rates have topped 10 per cent in some states - double usual levels.

"Some of the sellers are putting too high a reserve on their wool and the buyers are obviously trying to keep the rate down," said AWH chief executive Michael Jones.

Those who can shift their wool are still making hay. Unlike most agricultural commodities, wool can hold its value for many years if properly stored.

"We had some wool that had been sitting here for 14 years," said Jones. "It's high-value wool that farmers had put in and it was like their [pension] fund, sitting there paying a low storage rate. Even that is now being cleaned out."

Australia famously "rode to prosperity on the sheep's back" during the 20th Century, fine tuning Merino breeds to produce a soft, durable and natural fibre popular in Europe. That demand has now extended to Asia, and China in particular.

But high wool prices are having an impact on clothing makers, according to woolgrower body Australian Wool Innovation (AWI).

"There are those selling fine wool products as loss-leaders and others blending down, but we also have people putting wool into their garments for the first time replacing synthetic materials," said AWI chief executive Stuart McCullough.

China in 2016 surpassed Australia as the top wool producer.

While prices remain susceptible to a China-led pullback, there is less danger of oversupply.

Flock increases in China, which in 2016 surpassed Australia as the top wool producer, are expected to pressure coarse wool prices, according to Australia's chief commodity forecaster ABARES, but not significantly impact fine wool prices in the medium term.

Australia's wool output is set to grow just 1.4 per cent over the next 12 months, ABARES said, despite record prices.
Australia's modest growth is still expected to outpace global competitors, according to industry body International Wool Textile Organisation. It expects world-wide wool output to increase 0.5 per cent this year amid unfavourable weather conditions in competitors Argentina and South Africa.

New Zealand production is also forecast to be stagnant as farmers cull sheep and lambs to capitalise on high meat prices, according to ABARES.

Meanwhile, Australia's sheep count is at 70.4 million, representing the fourth lowest level on record. That is still well under half the flock in the early 1990s, when Australian sheep numbers soared under a government-backed reserve price scheme that proved unsustainable.

Now, beef prices are high so cattle farmers are not switching, while grain farmers that previously had sheep have lost the fences and shearing sheds they need to return to livestock, let alone the shearing labour.

Too hot and too hard

"We should have been prepared for it because this has been talked [about] heavily for the last five years, the shearing shortage," said shearing contractor Emma Morvell, whose company has had to turn down work.

"The guys have been seven days a week since mid-October and we've just about burnt them out."

The guys have been seven days a week since mid-October and we've just about burnt them out.

Sheep farmers are responding by shearing outside of traditional peak seasons but the problem remains a lack of workers entering the back-breaking industry.

Most shearers in Australia are paid a standard rate of just over $3 a sheep, which adds up for top-performing shearers who can get through more than 200 fine wool sheep a day.

But downsides include long, hard hours in old shearing sheds during Australia's hot summers, where the temperatures regularly exceed 40 degree Celsius.

"I can't imagine any vocation tougher," said AWI's McCullough.

"There has been a very vibrant resources sector so it was easy for many young guys to say, 'I'll just go work on the mines where the money is just as good and conditions are a lot easier'."

SOURCING JOURNAL

Bangladesh Introduces New Digital Labor Inspection App in Effort to Improve Working Conditions

by Sabrina Bovell

Posted on March 8, 2018 in Labor, News

The Bangladeshi labor inspectorate has gone digital with the launch of a new Labour Inspection Management Application (LIMA).

It marks a major move in improving the working conditions for all workers in industrial sectors in Bangladesh as, according to the country's government, it will upgrade the collection, storage and analysis of data collected during labor inspections. The app was officially introduced this week by the Ministry of Labour and Employment.

“LIMA is a milestone in the march toward digital Bangladesh and testament to the commitment of the government to ensure that every workplace is a safe workplace and that the rights of workers are respected,” state minister for Labour and Employment Mujibul Haque said during the launch.

Roughly 250 Android tablets were distributed to the Department of Inspection for Factories and Establishments (DIFE) at the event, which will be used during inspections.

The aim of the app is to help organizations run more efficiently by combining key data gathering and management in one platform. It’s also expected to improve data accessibility and transparency by making certain information, like factory license applications and the submission of complaints, more readily available.

“The launch of LIMA marks the beginning of a new chapter for the labor inspectorate,” DIFE inspector general, Md. Shamsuzzaman Bhuiyan, said. “It will make our operations more effective and thereby help to enhance the welfare and safety of working people and also improve productivity of industries. It will also help DIFE to generate a variety of reports.”

The app consists of four modules: a Factory/Establishments Database module that allows for online application of factory layout plans and licenses; a Labor Inspection module that can be used for planning inspections, collecting data and reporting (information gathered during inspections is put directly into the LIMA database, where it can be used to inform management decisions); an Occupational Safety and Health module that will be used for notification of workplace accidents; and a module used for tracking remediation work of garment factories under the National Initiative, as well as for following up on DIFE’s internal operational activities.

LIMA also contains a DIFE Complaint Box for making complaints about workplace issues either through the LIMA website or via a smartphone app.

Poor working conditions and low wages have long been major concerns in Bangladesh, which employs roughly 4 million garment workers. And the concern was escalated when in 2013, the Rana Plaza factory complex in Bangladesh collapsed, killing more than 1,100 workers and injuring 2,500. Since the incident, 41 people have been criminally charged in connection to the collapse, including the factory owner.
The LIMA app has been supported by the International Labour Organization’s (ILO) “Improving Working Conditions in the Bangladesh Ready Made Garment Sector” program, funded by Canada, the Netherlands and the U.K.

KHMER TIMES
Insight into Cambodia

March 8, 2018

GMAC honours female workers

Prime Mininster Hun Sen poses with pregnant garment workers. Fresh News

The Garment Manufacturers Association in Cambodia yesterday said women working in the garment and textile sector were heroines, adding that it supported efforts to prevent and fight against all forms of rights abuses toward women.

For the 107th anniversary of International Women's Day today, GMAC said the rights of women in Cambodia were protected and all forms of abuse and exploitation of women were fought against.

"About 90 percent of the workforce in the garment and textile sector, the country's number one export revenue earner, is women," a GMAC statement said.

"The female workers in this sector are earning incomes to support their families and as a result, are helping grow other supporting industries, creating and increasing business activities for about two million Cambodian people."

It added that the women working in this sector are heroines who are making an important contribution to the economy and in reducing poverty.

“Women working in the garment industry are heroines, promoting the national economy and helping reduce poverty in Cambodia,” it said. “GMAC wants to continue promoting women’s rights and supports all efforts to prevent and fight against all kinds of rights abuses.”

The theme for International Women’s Day this year is “Women together to protect the peace for national development”.

Labour Minister Ith Samheng, whose ministry celebrated International Women’s Day on Tuesday, said peace was important to allow further development of all sectors.

He added conflict and violence were obstacles to the country’s economic and social progress, and also affected people’s physical and emotional well-being.

“I observe that nowadays, women can develop and improve themselves in order to join in social work, from workers to the highest positions and roles in the government, National Assembly and also the Senate,” Mr Samheng said.

According to the minister, 21 percent of Cambodian women have been on the receiving end of physical and sexual violence while another 32 percent have been abused psychologically.

“In order to have sustainable peace and to prevent violence in society, we need to eliminate all forms of violence, and work together to maintain a culture of non-violence,” he added.

Minister of Women’s Affairs Ung Kanthaphavy said in a video posted on the ministry’s website that women were necessary to make society prosper.

She said Cambodia was far ahead in the process of empowering women, and the country was on the right track in making men more aware of women’s contributions to society.

KNITTING TRADEJOURNAL
The Leading Magazine for Hosiery & Knitting Technology

Yiwutex to benefit from 'Belt and Road' development initiative

Written by Haydn Davis

Published: 08 March 2018

Yiwu - The China Yiwu International Exhibition on Textile Machinery, which aims to promote smart and sustainable textile development with the help of the 'Belt & Road' initiative, will see its 2018 edition renamed as "China Yiwu International Textile Fair".

The show will be held at Yiwu International Expo Centre (Hall East 1 and 2) from 17-19 May 2018 and will be jointly organized by Adsale Exhibition Services Ltd., Yiwu China Commodity City Exhibition Co., Ltd. and Jinhua Printing Industrial Association.

The three day event will include four thematic zones catering to the knitting and garment and printing industries including: Exhibition on Knitting & Hosiery Machinery; Exhibition on Sewing & Automatic Garment Machinery; Textile Printing Industry Fair; and International Textile Expo.

According to organisers, the Yiwu region offers huge opportunities for overseas traders, with many attracted by geographical and commercial advantages offered by the "Belt and Road" initiative in Yiwu and Zhejiang Province. The Belt and Road is an immensely ambitious development campaign through which China wants to boost trade and stimulate economic growth across Asia and beyond.

According to the latest figures, around 15,000 foreign merchants currently reside in Yiwu with the "leading to the opening of nine railway lines and the nurture of trading partnerships with 64 surrounding countries and regions.

Illustrating its effectiveness, total exports from the Yiwu region increased by 11.3% to RMB 91.25 billion from January to May 2017.

The region has also benefitted from a raft of government support initiatives.

Textile manufacturing is currently included in the implementation of "Upgrading of Traditional Industries Strategy 2017-2020" in Zhejiang Province with Yiwu acting as a pilot city for a RMB 30 million upgrading of the garment industry.

"Riding on the geographical advantage brought by the Belt and Road, and commercial support from government, YiwuTex 2018 will provide an outstanding platform for the textile industry to develop and thrive," organisers said.

At the Yiwu, visitors will also be able to attend a series of seminars and conferences aimed at dealing with issues facing local manufacturers such as weak brand awareness, low design levels and a lack of professional employees.

Scheduled event topics include:

- The Prospect of Functional Knitting Technology in Multiple Applications
- Smart Manufacturing of Textiles
- Sustainable Future of Printing Textiles
- The Latest Applications and Trends in Digital Printing Technology
- More Textile Technology Applications at Knitwear Display Zone

The Belt & Road project involves the building of massive amounts of infrastructure connecting it to countries around the globe. By some estimates, China plans to pump $150bn into such projects each year. A recent report from ratings agency Fitch said an extraordinary $900 billion in projects were planned or underway. There are plans for pipelines and a port in Pakistan, bridges in Bangladesh and railways to Russia - all with the aim of creating what China calls a "modern Silk Road" trading route that Beijing believes will kick start 'a new era of globalisation'.

US | EUROPE | AFRICA | ASIA | 中文 | 双语 24 février, 2018
La Chine au bout des doigts

L'intelligence artificielle au service du prêt-à-porter

Par He Wei(China Daily) 23-02-2018

Une acheteuse de Tianjin vérifiant l'allure d'un nouveau vêtement à l'aide d'un miroir virtuel. [Li Shengli/for China Daily]

L'application de l'intelligence artificielle (IA) va bien au-delà des voitures sans chauffeur ou de la robotique futuriste qui se montre plus habile que les humains au jeu de stratégie Go.

En Chine, l'IA joue un rôle vital dans l'évolution des comportements en matière d'achats, en utilisant des algorithmes pour suivre à la trace, analyser et satisfaire les besoins spécifiques de chaque consommateur.

Le dernier exemple en date se situe dans la province du Guangdong où la clientèle constitue le premier groupe à faire l'expérience de recommandations sophistiquées dans le domaine de l'habillement, telles qu'elles sont fournies par une cabine d'essayage intelligente dans des magasins de vêtements comme Jack & Jones et Vero Moda.

Par le biais de technologies de reconnaissance faciale, un système de « miroir magique » permet aux clientes et aux clients de se voir instantanément dans les vêtements qu'elles ou ils ont choisis, selon Bestseller A/S, la société qui opère derrière les marques. Compte tenu du sexe, de l'âge, du climat ou des prédilections manifestées, les vêtements initialement choisis peuvent être remplacés selon d'autres recommandations, ce qui élimine le besoin de faire constamment la navette entre les présentoirs et les cabines d'essayage.

Pour bénéficier de l'avantage que constituent de tels services, le consommateur doit d'abord activer la carte d'adhésion virtuelle des marques par l'intermédiaire de WeChat, l'une des deux applications de paiement électronique les plus utilisées en Chine avec Alipay, et autoriser le paiement par reconnaissance faciale.

Les grandes sociétés technologiques chinoises n'ont pas perdu de temps pour placer leurs puces électroniques dans la distribution aidée par l'intelligence artificielle.

Au cours du festival commercial annuel du 11 novembre, l'Alibaba Group Holding Ltd a aidé la marque Shiseido à installer un miroir électronique permettant aux clientes d'essayer virtuellement des rouges à lèvres et de finaliser leurs achats en tapotant quelques touches sur l'écran.

La boutique de vêtements de couturier Alain De qui était équipée de tels miroirs depuis octobre a reçu un vif accueil, selon Chen Huaiyu, une responsable du magasin de la marque à Joy City, un centre commercial de Shanghai. « Si vous choisissez un jean, la machine vous présentera cinq autres modèles dans 10 tons différents », explique Mme Chen.

« Elle peut aussi recommander les hauts les mieux adaptés, les sacs et d'autres accessoires pour aller avec votre choix, ce qui stimule nos ventes sensiblement ».

Les recommandations intelligentes et les cabines d'essayage virtuelles sont appelées à constituer une très grosse affaire qui refaçonnera le secteur du commerce de détail, affirme Huang Zhongsheng, co-fondateur et directeur général de Haomaiyi, qui fournit la technologie en question au site Tmall d'Alibaba.

SJ SOURCING JOURNAL

Growing Demand for Customized Clothing Leads to Supply Chain Advancements in Men's Wear

by Sabrina Bovell

Posted on February 27, 2018 in News, Retail

Companies that offer customized-menswear services are experiencing major opportunities and revenue growth. And they're responding by investing in upgrades to their supply chain policies.

InStitchu, the affordable custom-tailored menswear brand, recently received a $2.5 million investment from Dayang Group, the world's largest suit manufacturer. The investment comes on the heels of InStitchu's positive performance in 2017, when the company opened its first U.S. storefront in New York City, had a 114 percent year-on-year growth and tripled staff to more than 60 worldwide.

“InStitchu has achieved great success building an incredible brand, a beautiful shopping experience and a loyal customer base of fans all around the world,” Dayang Group CEO Dongmei Hu, said. “We’re looking forward to working closely with…the team to help InStitchu create a menswear experience custom-built for the 21st century.”

With the investment, InStitchu will continue elevating efforts to serve its loyal customer base by continuing its global showroom expansion, and enhancing online and in-store experiences. Dayang will become a production partner for InStitchu’s, offering its decades of expertise to further support the company’s growth.

“The Dayang team share our vision that the future of menswear is made-to-measure, and in the belief that a meticulously crafted suit should be affordable,” said James Wakefield, InStitchu’s cofounder and co-CEO. “Dayang’s support will increase efficiencies across production and operations cycles, allowing us to be even more customer-centric. Their expertise coupled with our top-notch product and focus on retail expansion will allow us to bring InStitchu into the hands of even more customers.”

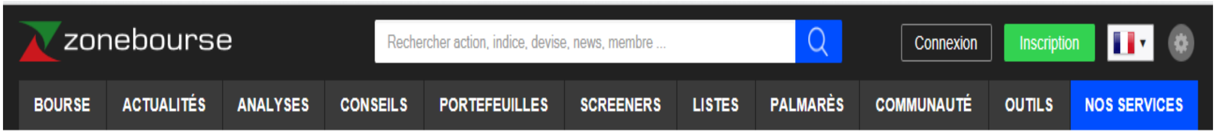
InStitchu is equally as enthusiastic about the partnership, believing it will both benefit from focusing on the shared beliefs that shopping enhancements, both online and in-store, are the keys to long-term growth.

“We share a similar philosophy that men want more from their shopping experience, and strongly believe that an equally appealing online and offline approach is the key to long-term, sustainable growth,” Robin McGowan, InStitchu’s cofounder and co-CEO said. “Working with our new partners, we’ll be able to help more men around the world dress better, look better, and feel better.”

In another move forward for customized suiting, Men’s Wearhouse and JoS. A. Bank, subsidiaries of Tailored Brands, recently announced plans to improve its speed to market to cater to growing consumer demand for custom tailoring.

The company announced last week that it will narrow its delivery timeframe on premium custom suits from four weeks to just three. The decision came in response to increasing interest in personalized men’s goods, which drove more than $100 million in sales for Tailored Brands in fiscal 2017.

“As one of the largest and fastest growing custom clothing retailers for men, we strive to continuously delight our customers with the highest level of customer service,” Doug Ewert, Tailored Brands CEO, said. “Our brands have a distinct competitive advantage in that we can deliver beautifully constructed custom suits to our customers faster through our Made-in-America manufacturing process.”



Coton: le cours profite de fondamentaux solides aux Etats-Unis

09/03/2018 | 18:28

NEW YORK (awp/afp) - Le prix du coton coté à New York a progressé cette semaine, atteignant même lundi un plus haut depuis juin 2014, aidé par une baisse des prévisions sur la production et les stocks ainsi que par une hausse des exportations américaines.

Lors de la semaine achevée le 1er mars, les ventes de coton américain se sont affichées à 383.000 balles, soit une hausse de 5% par rapport à la moyenne des quatre semaines précédentes, selon un rapport hebdomadaire du ministère américain de l'Agriculture (USDA).

Les expéditions de fibre blanche ont quant à elles culminé à 524.000 balles, soit une hausse de 53% par rapport à la moyenne des quatre dernières semaines.

"Le rapport américain sur les exportations a dépassé toutes les attentes", ont commenté les analystes de Plexus Cotton qui ajoutent que "le chiffre élevé des expéditions est la preuve que les Etats-Unis sont capables d'envoyer plus d'un demi-million de balles par semaine malgré des ennuis logistiques".

Le même ministère a publié jeudi des prévisions très encourageantes pour le cours de la fibre blanche dans un rapport mensuel.

Les conclusions de ce rapport prospectif ont fait état d'un recul anticipé de la production américaine de 233.000 balles à 21 millions de balles cette année.

Les prévisions d'exportations ont quant à elles été revues en hausse de 300.000 balles à 14,8 millions de balles, en raison d'une "demande mondiale plus forte et d'anticipations d'expéditions plus élevées que la moyenne au cours de la deuxième moitié de l'année", a observé l'USDA.

Les stocks américains ont par ailleurs été réévalués à la baisse, passant à 5,5 millions de balles, soit une baisse de 500.000 balles.

Après avoir connu un passage à vide depuis la fin janvier, le cours du coton s'est nettement repris, atteignant même lundi un nouveau plus haut depuis juin 2014 à 85,41 cents.

La livre de coton pour livraison en mai, le contrat le plus actif sur l'Intercontinental Exchange (ICE), a clôturé vendredi à 84,52 cents, contre 82,09 cents à la clôture vendredi dernier (+2,96%).

L'indice Cotlook A, moyenne quotidienne des cinq prix du coton les plus faibles sur le marché physique dans les ports d'Orient, s'affichait à 92,20 dollars les 100 livres jeudi, contre 92,40 dollars la semaine précédente (-0,22%).

Lectra : De nouvelles perspectives pour l'industrie de la mode, impulsées par les technologies de l'Industrie 4.0

27/02/2018 | 17:56

De nouvelles perspectives pour l'industrie de la mode, impulsées par les technologies de l'Industrie 4.0

Les participants de la table ronde de la chaire Lectra - ESCP Europe "Mode & Technologie" soulignent la nécessité pour les entreprises de mode d'adopter les principes de l'Industrie 4.0

Paris, le 27 février 2018 - Lectra, le partenaire technologique des entreprises utilisatrices de tissus et de cuir, l'ESCP Europe et leur chaire commune d'enseignement "Mode & Technologie" ont étudié l'impact de l'Industrie 4.0 sur la chaîne de valeur de la mode lors d'une table ronde organisée récemment sur le campus londonien d'ESCP Europe.

Les participants Robert Diamond, fondateur et président-directeur général de Fernbrook Partners ; Dan Hartley, directeur e-commerce monde, AllSaints ; Laëtitia Hugé, directrice marketing produit, Lectra ; Pierre Mercier, senior partner et managing director, Boston Consulting Group ; et Evelthon Vassilou, président-directeur général, Alison Hayes, sont formels : l'Industrie 4.0 offre des opportunités inédites pour faire avancer l'industrie de la mode.

Des marques aux fabricants, les panélistes - acteurs de l'ensemble de la chaîne de valeur - ont souligné la nécessité pour l'industrie de favoriser la collaboration entre l'homme et les machines, et tirer ainsi parti d'avantages considérables, allant d'une prise de décisions plus rapide à une réduction des coûts.

Explorant les bénéfices apportés par les technologies de l'Industrie 4.0, Evelthon Vassilou commente : « Interpréter les données de ce qui se vend, et ce qui ne se vend pas, devrait aider à accélérer la prise de décision, à chaque étape de la chaîne d'approvisionnement, pour arrêter ou accroître la production selon les résultats. Les données et leur analyse ne suffisent pas pour réussir : il faut également parvenir à un degré élevé de confiance et d'intégration entre les distributeurs et leurs fournisseurs ».

« L'objectif est d'utiliser la technologie pour améliorer en permanence le travail quotidien », déclare Robert Diamond. « Les humains ne sont pas faits pour gérer un grand nombre de d'opérations répétitives qui intègrent des paramètres multiples ». Identifier les étapes auxquelles les machines et les personnes apportent de la valeur ajoutée est une étape importante de la transformation vers l'Industrie 4.0. « Si la décision, ou l'orientation stratégique retenue demain, est à peu de chose près, la même que ce celle d'hier, alors il y a une chance pour que l'apprentissage machine apporte une amélioration ».

Pour Pierre Mercier, les technologies s'appuyant sur les principes de l'Industrie 4.0 redistribuent les cartes en matière d'avantages concurrentiels, « ce qui oblige les entreprises à repenser la façon dont elles veulent se démarquer dans leurs industries respectives et utiliser les données pour se positionner différemment vis-à-vis de la concurrence. Le dénominateur commun à l'écosystème de la mode est que tous ses acteurs font face à l'opportunité que représente ce bouleversement et doivent déterminer où il convient d'investir pour accélérer leur transformation ».

« L'agilité et la flexibilité sont de plus en plus importantes pour les acteurs de l'industrie de la mode.

Les technologies de pointe les soutiennent à l'aube de leur mutation vers l'ère 4.0. Elles leur permettent de disposer de solutions adaptées, propres à leurs écosystèmes, afin d'exploiter efficacement les bonnes données, pour prendre les bonnes décisions », déclare Laëtitia Hugé.

Pour la marque de mode britannique AllSaints, les données exploitées à partir du net promoter score sont primordiales dans la conduite des opérations. « Nous prenons les retours des clients très au sérieux et nous les utilisons pour orienter notre feuille de route interne : en matière de technologie et de développement, jusqu' à la conception et au bien-aller, le client est au cœur de tout ce que nous faisons », précise Dan Hartley.

Ce dernier souligne également que l'utilisation de la technologie pour tous les échanges d'information « aura un énorme impact pour AllSaints à l'avenir. De la chaîne d'approvisionnement à la force de vente, nous visons à utiliser un système adossé au cloud qui fonctionne dans notre propre écosystème, améliorant ainsi notre modèle agile ».

La table ronde était animée par Valérie Moatti, co-directrice de la chaire Lectra-ESCP Europe "Mode et Technologie".

Apparel Sourcing Paris gets 81 pc foreign visitors

08
Mar '18

Courtesy: Messe Frankfurt

France, United Kingdom, Turkey, Spain and Italy contributed maximum visitors to the Apparel Sourcing Paris and Shawls & Scarves – the accessories showcase – the shows held during February 11-14, 2018 in Paris. There were 81 per cent visitors from abroad. Overall, the Paris shows, organised by Messe Frankfurt France, recorded 13,606 visitors.

There were new visitors from North America (over seven per cent) and the African continent (over 26 per cent), led by the countries who are major suppliers for Europe such as Morocco (over 25 per cent) and Tunisia (over 15 per cent), which came for sourcing. In addition there were the emerging markets such as South Africa and Ethiopia, which was the guest of honour this season.

However, the shows recorded a six per cent drop in attendance from Asian countries, apparently due to the Chinese New Year.

Number of visitors from Eastern European countries grew compared with February 2017, with Russia showing over 38 per cent increase, Poland, more than 15 per cent and Hungary, over eight per cent increase.

“This February 2018 show was a new experience for us with our initiative for a Sunday opening, the aim of which was to reach out to a different audience and to take the dates of Chinese New Year into account. This was therefore a trial run for us. The gamble of a Sunday opening for the trade fair yielded an interesting result with attendance by 18 per cent of our total visitors. Monday has again proven to be our busiest day and, as already announced, we will return to our usual timetable in September 2018. So we will begin on a Monday," explains Michael Scherpe, president of Messe Frankfurt France. "As regards Apparel Sourcing, I am delighted to see that the countries representing new alternatives for sourcing that we discovered have proved to be an attraction."

This was a session where casual wear was under the spotlight, accounting for 80 per cent of the show, with a marked tendency towards relaxed urban looks and a substantial range of children's wear. There was a slight breakthrough in exhibitors' skills when it came to underwear.

The wider choice of countries for sourcing clothing, something that is organisers' constant aim, continues to convince prime contractors. Apart from the pavilions of Bangladesh and Pakistan, which always attract a lot of visitors, the trade fair was host to four other countries in particular.

Ethiopia, the guest country eagerly anticipated by European visitors, presented eight companies with different skills but with some special features (100 per cent organic cotton, dyes based on coffee or wine) that certainly attracted the attention of prime contractors.

Camillo Calami, director of Village Industry, whose collection of bags was very popular with visitors, summed up the general feeling shared by the pavilion: "Visitors to the trade fair were targeted exceedingly well. We met those we were hoping to see, tending towards European brands. We spoke with a great number of French and Spanish visitors but with British, German and Dutch ones too. Contacts have proved to be very interesting and above all very varied: fashion labels, consultants for sourcing and even retail chains!"

The Ethiopian pavilion was organised in conjunction with the German agency for international cooperation GIZ (Gesellschaft fûr Internationale Zusammenarbeit). The Ethiopia on Stage fashion show, epitomising Ethiopian design, met with resounding success.

Two other countries also attracted substantial interest. The eight firms from Myanmar were extremely well received with a very steady stream of visitors during the entire show, who were mostly European but included Americans as well.

Jordanian companies at show were associated with a World Bank integration programme for Syrian refugees. They achieved their goals in meeting not only fashion labels but also independent designers, who were mainly from Europe. Adel Tawileh, board member at the Jordanian Chamber of Commerce, explains "Our firms were especially surprised by the success of the uniform and workwear segment, men's suits and women's clothing with Middle Eastern embroidered outfits."

For regular attendees at Apparel Sourcing Paris, like China and Hong Kong, India, Turkey, Pakistan and Bangladesh, the first choice of prime contractors was clothing manufacturers who are already very familiar with the customs and practices of Western fashion labels.

Shawls&Scarves – the accessories showcase recorded a busy session, in particular for the Indian manufacturers. Cotton fabrics and linen products were among the most sought-after. The Hong Kong knitwear firm Forever Century charmed visitors with their very on-trend and fresh collection. As regards actual accessories themselves, embroidered bags made of plant fibres from the Indian firms Enkay Exports and FF drew special attention. (SV)

Lectra : 'devenir un acteur incontournable de l'industrie 4.0'

vendredi 2 mars 2018 à 15h21

(CercleFinance.com) - Directeur général adjoint de Lectra, Jérôme Viala s'est confié à notre rédaction après la publication des comptes annuels.

Cercle Finance: Quels enseignements tirez-vous de cet exercice 2017, qui a été marqué par des résultats record ?

Jérôme Viala: Avec une progression de 8% du chiffre d'affaires à 277,1 millions d'euros et une hausse de 10% du résultat opérationnel à 39,3 millions, les résultats de l'année 2017 constituent en effet un nouveau record historique. Ils sont également en ligne avec les objectifs pour 2017 que nous avions communiqués le 9 février de l'année dernière.

Sur le plan des commandes de nouveaux systèmes, la dynamique a été bonne pour l'ensemble de nos lignes de produits, avec une croissance de 14% sur les logiciels et de 9% sur les équipements de CFAO. On soulignera en outre que le marché de la Mode et de l'Habillement a été particulièrement dynamique en 2017, avec une croissance dans toutes les régions et une augmentation globale de 15%.

Parallèlement, la première année de la feuille de route 2017/2019 a été exécutée avec succès. La société a notamment poursuivi en 2017 le développement et le test auprès de clients pilotes de ses nouveaux services cloud, qui seront inclus dans de nouvelles offres logicielles progressivement commercialisées à partir du deuxième trimestre.

C.F.: Le recul du bénéfice opérationnel au titre du dernier trimestre vous inquiète-t-il ou peut-on parler de baisse régime passagère ?

J.V.: Le résultat opérationnel du quatrième trimestre 2017, qui s'est élevé à 10,2 millions d'euros, a en effet diminué de 4% à données réelles, mais il a augmenté de 13% à cours de change constants. Cet écart provient de l'effet mécanique des parités de change, en raison de la forte appréciation de l'euro.

Au cours de change de 2016, la marge opérationnelle du quatrième trimestre 2017 aurait atteint 16,2%, en progression de 0,8 point par rapport à la même période l'année précédente. Nous réalisons donc une performance très solide au quatrième trimestre et le léger recul affiché est simplement lié à l'évolution des cours de change.

C.F.: Comme indiqué dans votre communiqué, la vigueur de l'euro est de nature à vous pénaliser. Envisagez-vous de nouvelles mesures pour tenter d'en limiter l'impact ?

J.V.: L'appréciation de l'euro a un effet mécanique négatif sur la rentabilité du groupe, le poids du chiffre d'affaires réalisé dans des devises comme le dollar ou le yuan étant beaucoup plus important que les charges dans ces devises. L'impact compétitif de cette vigueur de la monnaie unique est toutefois très limité, car nous continuerons d'une part à facturer dans ces devises dans les marchés concernés, et d'autre part nos parts de marché très importantes nous protègent en Europe.

Au-delà de décisions de couverture de notre risque de change par des produits dérivés, nous n'envisageons pas de mesures majeures pour limiter l'impact d'une appréciation de l'euro sur nos comptes. Nous n'envisageons notamment pas de délocaliser tout ou partie de notre production ou de notre R&D en zone dollar ou yuan, la décision prise en 2005 de maintenir notre fabrication et notre R&D en France ayant contribué de façon importante à la forte amélioration des résultats de Lectra ces dernières années.

C.F.: Vous venez d'acquérir la société Kubix Lab. Pouvez-vous nous en dire plus sur cette entreprise et sur les raisons qui vous ont amenés à la racheter ?

J.V.: Kubix Lab est une start-up italienne créée en septembre 2015 et basée à Vicence, en Italie. Elle a développé une offre technologique particulièrement innovante, baptisée 'Link', qui en quelques mois a convaincu plus d'une dizaine de marques italiennes haut de gamme.

Link permet à l'ensemble des acteurs impliqués dans le développement, la fabrication et la vente des produits de collaborer simplement, efficacement et en temps réel autour des mêmes données. Via une application unique, les entreprises de mode et d'habillement peuvent gérer de bout en bout l'ensemble des informations produit.

Les utilisateurs peuvent quant à eux créer, modifier ou enrichir les données tout en sachant qu'elles resteront synchronisées sur l'ensemble des systèmes d'information (ERP, PDM, PLM etc.).

Nous avons été particulièrement impressionnés par la pertinence de Link. En capitalisant sur leur connaissance des meilleures pratiques, les fondateurs de Kubix Lab ont en effet su développer une offre parfaitement adaptée aux attentes des entreprises de la mode.

Nous sommes convaincus qu'en combinant notre offre et celle de Kubix Lab, nous serons en mesure de proposer à nos clients de la mode une plateforme révolutionnaire de gestion des informations produit.

C.F.: Cette opération de croissance externe en appelle-t-elle d'autres à brève échéance ?

J.V.: Nous avons l'intention de mener un ou plusieurs rachats ciblés d'ici 2019. Ces opérations nous aideront à atteindre notre ambition d'être un acteur incontournable de l'industrie 4.0.

Nous nous intéressons donc à la fois à des sociétés de taille moyenne qui pourraient venir compléter notre portefeuille produit aussi bien en amont et en aval, mais également à de petites sociétés similaires à Kubix Lab, ayant développé des logiciels innovants que nous pourrions intégrer ou commercialiser au travers de notre réseau de 32 filiales dans le monde.

Nous avons des moyens pour atteindre cette ambition: dépourvu de dettes, nous disposons en effet d'une trésorerie nette approchant la centaine de millions de d'euros et qui pourrait être abondé par un recours à l'endettement à hauteur de la moitié de nos fonds propres (au 31 décembre 2017, ceux-ci s'élevaient à 151 millions d'euros).

C.F.: Sur le plan boursier, votre début d'année est assez délicat. Cela vous inquiète-t-il ?

J.V.: Du 1er janvier au 31 décembre 2017, le cours de bourse a progressé de 40%. Sur cette même période, les indices CAC 40 et CAC Mid & Small ont augmenté de respectivement 9 et 22%. Cette hausse du cours de bourse de Lectra a récompensé la qualité des résultats 2016, publiés en février 2017, l'annonce de notre nouvelle stratégie et de la feuille de route 2017/2019 et la solidité des publications trimestrielles 2017.

Depuis le début de l'année, le cours a il est vrai baissé en même temps que l'euro continuait son appréciation contre le dollar américain et de nombreuses autres devises. Après la publication des résultats du quatrième trimestre et de l'exercice 2017, le 12 février dernier, le cours a légèrement diminué avant de s'apprécier à nouveau et de se stabiliser.

Au-delà d'une 'donne' monétaire moins favorable, avec la vigueur de l'euro, il me semble que les investisseurs conservent une grande confiance concernant la capacité de la société à atteindre les objectifs qu'elle s'est fixée à l'horizon 2019.

India's apparel exports may dip in FY18 over GST, global challenges

Growing uncompetitiveness, lack of refunds and incentives post GST may push back exports from $17 billion

Vinay Umarji | Ahmedabad Last Updated at March 6, 2018 23:45 IST

Apparel export falls 10% in NovemberApparel export body to investigate as UAE pips US, UK for top spotQuarterly results analysis: Apparel export gains over domestic salesIndian textile and apparel exports fall 13% to Rs 186 billion in January

If the 10-month data from April 2017 to January 2018 is anything to go by, India's apparel industry may post a rare decline in exports for the current fiscal 2017-18, let alone meeting the $20 billion target. While India may have reported a 6-20 per cent growth in apparel exports to different destinations such as the US, UK, Germany, France and Spain during November-December 2017, overall exports in the sector are down by one per cent for the 10-month period of this year. Global factors such as free-trade agreements of competing nations with key markets like Europe, the UK and the US had already been posting a challenge to Indian ready-made garments (RMG) exporters. However, post Goods and Services Tax (GST) implementation in July 2017, reduced export incentives coupled with delay in input credit refunds have further accentuated the industry's woes. Data shared by industry body Apparel Export Promotion Council (AEPC) shows that India's RMG export to world in the April-January of 2017-18 was to the tune of $13,783.4 million. down 1.27 per cent compared to the same period of previous financial year. During April-January 2016-17, India's apparel exports were to the tune of $13,960.2 million. According to AEPC and rating agency Icra, the decline has been primarily driven by the sharp decline in exports to the UAE market. This has been augmented by dismal global apparel trade which remained subdued at a mere one per cent growth in calendar year 2017, following a decline of two per cent and five per cent in 2016 and 2015, respectively. As per Icra, particularly for the ten-month period ending June 2017, India's apparel exports to UAE had grown at a sharp pace of 56 per cent year on year (YoY). "Thereafter, apparel exports to the UAE have fallen at an equally fast pace, by as much as 45 per cent since June 2017. Excluding the trade with the UAE, India's apparel exports are estimated to have stood 3-4 per cent higher in 10 months of FY2018," Icra stated. HKL Magu, chairman of AEPC told *Business Standard* that the industry will not be able to reach the target of $20 billion of apparel exports. *India's ready-made garment Exports (figures in $ million)* "The implementation of GST since July has resulted in blockage of funds for the export community due to lack of input credit refunds.

Except for a few exporters, hardly anyone has received refunds since last eight months. Exporters don't have money to pay to suppliers. Secondly, export incentives such as duty drawback and rebate on state levies (ROSL) have been reduced," said Magu. While duty drawback rate and rebate of state levies (ROSL) were lowered to two per cent from 7.5 per cent and 3.9 per cent, respectively in the post GST era, incentive under merchandise exports from India scheme (MEIS) was increased from two to four per cent. However, with the MEIS deadline expiring on June 30, 2018, the industry is uncertain of taking orders beyond the date on the basis of a higher incentive. "If they don't renew it then we will be unable to book orders beyond June because we are unsure if MEIS will continue after that. We will lose money if we assume four per cent incentive beyond June and the government does not extend it," said Magu. Already, global factors have been rendering Indian RMG exporters uncompetitive. "While China has vacated the apparel export space, India is unable to encash on the opportunity unlike Vietnam, Bangladesh or Cambodia who have free trade agreements. India is emerging as an expensive affair in the global apparel market," Magu stated. Supported by its duty-free access to the EU market, Bangladesh retains its status as the second-largest apparel exporter after China. Vietnam remains the fastest growing amongst large apparel exporting nations, maintaining its growth in the US market despite the latter backing out of a proposed trade agreement. Further, Jayanta Roy, Senior Vice-President and Group Head, Icra is of the view that the competitiveness of the Indian apparel exporters will also remain contingent upon the movement in foreign exchange rates. "This remained a key challenge last year, with the Indian rupee appreciating by three per cent (vis-à-vis US$) in calendar year 2017 compared to 1-3 per cent depreciation in currencies of other key apparel exporting nations (i.e China, Bangladesh and Vietnam)," said Roy.

First Published: Tue, March 06 2018. 23:45 IST

Arvind expands Gap in India with shop-in-shop model

05
Mar '18

Courtesy: Gap Inc

Continuing a national expansion, Arvind Lifestyle Brands Limited, Gap's franchisee in India, has announced the launch of 17 Gap shop-in-shops through multi-brand retailers. The expansion accelerates the availability of Gap products around the country, including several locations in tier II and III markets, catering to India's appetite for the American brand.
This is the first time Gap's shop-in-shop format will be introduced in India. Each of the locations will offer one of three product configurations: family destinations with adult, kids and baby assortments; adult only locations; and dedicated kids and baby layouts.

The shop-in-shops will launch with partners Kapsons Group, Iconic India and All That Jazz, bringing the internationally renowned brand to customers in new cities of Jammu, Amritsar, Ludhiana, Patiala, Chandigarh, Jaipur, Ahmedabad, Bhopal, Bhubaneshwar, and Ranchi; as well as existing Gap markets of Pune, Noida, and New Delhi.

"Since Gap launched in India in 2015, the brand has witnessed strong growth in the country driven by its fans. Our latest expansion ensures that more people are able to experience Gap's iconic American style through modern wardrobe staples – an ideology that’s welcomed in our market. We are confident that we will receive a great response from the people in these cities and we are incredibly excited about this journey," Parag Dani, Gap business head at Arvind Lifestyle Brands said.

Arvind currently has 11 standalone Gap stores in the National Capital Region, Mumbai, Bangalore, Pune, Chennai and Indore. In addition, Gap products are available online on nnnow.com and Amazon.in/gap, garnering larger visibility and access to the brand across the country. (RR)

How China Built $150 Billion Lead Over India In Textile Exports

by M R Subramani

- Mar 02, 2018, 4:53 pm

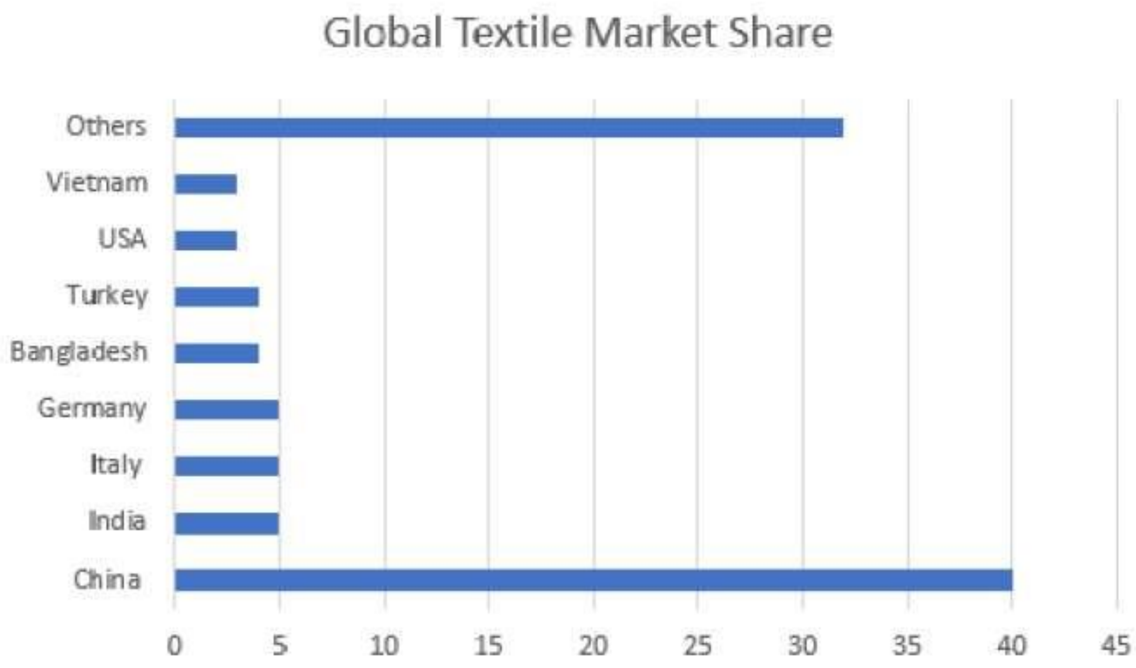
Workers at an apparel unit. India has been left behind by countries like Bangladesh and Vietnam in the apparel sector.

Snapshot

- ***China is racing ahead of other countries, including second-placed India, in the global textile and apparel sector.***
  Several factors have led to China's rise as a leader in the market, but it all began when the country accorded priority to the sector in the late 1970s.

Between 2001 and 2015, India's textile and apparel exports nearly quadrupled from $10.7 billion to $41 billion. It actually doubled to $20 billion in 2005 from 2001 and then took another 10 years to touch $40 billion.

During that time, China's textile and apparel exports rose from $50 billion to nearly $200 billion. In the global market, China enjoys a 40 per cent market share and India is a distant second with a meagre 5 per cent share.



Source: UN Comtrade

How has China managed to become the leader in the global textile and apparel market?

China treated the textile sector as a priority industry, while Indian textile industry has had to compete with its hands tied to its back, facing various problems. These problems have cropped up mainly from faulty government policies. We will come to that later.

1979 Open-Door Policy

In 1979, China began its open-door policy and kick-started economic reforms. It chose to restructure its textiles industry, identifying it as a priority. With over 100 years' experience in textiles, China had the basic infrastructure for the industry in place. So, it only needed a sharp focus, which began by raising capacities in each segment of the sector. The textiles industry is a labour-intensive one, and China chose to exploit its low-cost human resources, what with a huge population looking for sources of income.

China came up with six priorities to promote the textile industry – giving it a favourable treatment from supply of raw materials, to power, modernisation, bank loans, foreign exchange, and import of advanced technology.

From around 18 million spindles in the 1980s, China's capacity in spinning mills went up 120 million spindles by 2015, or 48 per cent of the total capacity in the world. (In comparison, India has 51 million spindles, making up 20 per cent of the world capacity.) Again, the capacity of looms that is important for producing fabric increased rapidly during this period. China's global share of the shuttle-less looms that help weave fine fabrics increased from a mere 6 per cent to 46 per cent in 2010. (India's share, in fact, decreased to 3 per cent in 2015!)

While taking these measures, China primarily targeted its production for the export market. It took advantage of a bilateral pact that it had signed with the United States (US) in 1980. This got Chinese textile products a good market and the testimony to this fact is that the agreement underwent modification four times, the latest in 1997. This helped China export nearly 50 per cent of its total domestic production at one point of time in the 2000s. The initiatives also gave China the advantages that a first-mover usually gets in any industry.

Encouragement to Private Sector

One of China's key features in restructuring the textile industry was encouraging the private sector to set up new modern units. It changed the landscape of the industry forever. Next, this helped China to dismantle the old machinery and increase productivity.

According to the EU SME Centre – a European Union (EU) initiative to support small and medium-sized enterprises so they can do business in China, even when the world was going through tough economic conditions during 2008-11, China's exports to the EU, US, and Japan increased.

China also chose a policy mix that suited its national interests. It opened up its textile industry to foreign direct investment (FDI) that helped the rapid expansion. Between 1979 and 1999, China received FDI worth $360 billion with 60 per cent of it going towards labour-intensive industries like textiles. It came up with lucrative offers to foreign investors and devalued its currency against the dollar, thus managing the foreign exchange market. In 1994, the yuan was devalued by 50 per cent, making Chinese products highly competitive in the global market.

China, as a result, garnered a major share in the global market when other countries suffered from the effects of the Mexican peso crisis.

What Ails India's Textiles Industry?

India, in contrast, has always lagged behind. Currently, its situation is such that countries like Bangladesh and Vietnam have now left India behind, especially in the readymade garments shipments.

So what is ailing the Indian textile industry when it often looks to emulate the Chinese industry?

A few things in particular have always been hurting the Indian textile industry. First, Indian infrastructure, at least until a few years ago, was a hurdle the textiles industry had to overcome day and night. Next, until Indian farmers began growing genetically modified or Bt cotton, the cotton-based textile industry faced a shortage of raw material. In 1994, spinning mills bled after the cotton crop failed and traders hoarded cotton. The third hurdle that the sector has been facing and had been complaining about at least until 2015, has been the hank yarn obligation. Since India has three million handlooms, the government has always been of the view that the sector should get a continuous yarn supply. Therefore, it is mandatory for a textile mill to ensure that 40 per cent of its production is in hank form. (This was 50 per cent until 2003, when it was reduced.)

The textile industry has been seeking some sort of relief from this obligation, but in vain. The handloom sector is a huge vote bank that political parties dare not touch. However, the textile industry's argument is that most of the handlooms have given way to powerlooms and, therefore, a review of the law is necessary.

According to the Federation of Indian Chambers of Commerce and Industry (FICCI), successive governments have come up with various schemes to help the textile industry move forward. Currently, at least 10 schemes are active.

Small, Unorganised Units A Bane

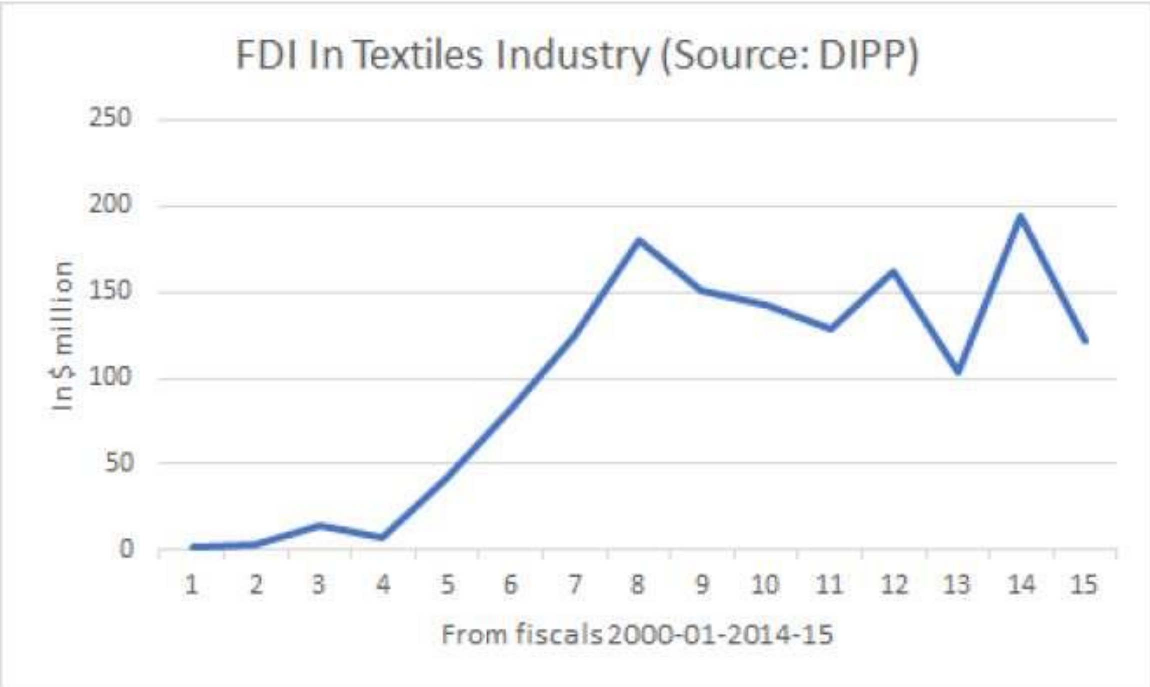
One of the major ills of the industry is the unorganised units that are smaller in size. In fabric manufacturing and processing, these units use secondhand machinery that is imported. Shuttle-less looms that help weave fine fabrics make up only two lakh of the nearly two million looms in the country – a clear indication of Indian inefficiency. Dismantled looms in China find their way into India and it is no surprise that Chinese machines make up nearly one-third of textile machinery imports into India.

Despite these disadvantages, the textile industry offers direct employment to 45 million people directly and another 20 million indirectly. It is the second-largest employment-generating industry after agriculture.

Other issues worrying the textile industry, according to FICCI, are higher capital costs, absence of fibre neutrality, poor technology, and a lack of access to credit. Capital costs are higher in India, as also power costs. Absence of fibre neutrality is affecting the availability of man-made fibres at competitive prices, while outdated technology of machines is another impeding factor. Access to credit has always been an issue since the industry in India has to pay a high interest rate, ranging from 11 per cent to 12.5 per cent, compared with 5-7 per cent in competing countries.

The Indian textile industry is also hurt by the absence of free-trade agreements with major markets like Europe. While lesser developed countries such as Bangladesh can export to Europe at zero duty, others like Pakistan enjoy an advantage under a general system of preference plus system. Indian imports to Europe attract 9.6 per cent duty.

If India has to compete on equal terms in the global market, it has to first increase productivity and efficiency. That can be achieved only if it encourages the setting up of more integrated textile units. While skilled manpower is the need of the hour for the sector, a technology upgrade should be given priority. The quality of products should improve and FDI should be made attractive. According to the Department of Industrial Policy and Promotion, foreign investment in the textile sector hardly touched 5 per cent of the total FDI inflows between 2000 and 2015.



Textiles took root in Asia since the Western nations couldn't help the sector sustain. A similar scenario is now unfolding with China's rate of growth declining in the last couple of years.

India's growth can certainly improve and even outpace China's. But all indications are that it is unlikely to overtake China in the near future. For that matter, China has now turned its attention to technical textiles.

India, too, has set up a technology mission under its “Make In India” programme. How far can India give the Chinese a fight is something that we will know only in the next decade or so.

M.R. Subramani is Executive Editor, Swarajya. He tweets @mrsubramani

Mar 05, 2018 08:20 PM IST | Source: PTI

Apparel exports face global, domestic headwinds: ICRA

The agency also pointed out that uncertainty on the apparel exports to the UAE looms, in light of inexplicable trends witnessed in the recent months.

The pace of growth in country's apparel exports will depend on the industry's ability to wade through the new taxation and export incentive regime and intense global competition, says a report.

While transition to the new taxation and export incentive regime has posed liquidity challenges for the industry, intense competitive pressures in the global market, particularly in light of impending trade agreements and foreign

currency movements, pose additional challenges, rating agency Icra said in its report today.
The agency also pointed out that uncertainty on the apparel exports to the UAE looms, in light of inexplicable trends witnessed in the recent months.
"The accommodative stance taken by the government by way of upward revision in export incentives in November 2017, has addressed one of the issues that the segment is facing. However, sustainability of growth remains contingent on how the scenario on the other fronts pans out," said Jayanta Roy, senior vice-president and group head, ICRA

Measuring Up

The fashion industry welcomes the Textiles Ministry's move to have a standardised Indian size for ready-made garments

Written by Divya A | Published: March 9, 2018 12:15 am

India Size will help consumers and clothing brands

In an effort to come up with a standardised 'India size chart' for ready-made garments, the National Institute of Fashion Technology (NIFT) recently announced a pan-India sizing survey, which will sample 25,000 people (both male and female) and use high-tech body scanners for the same. Called India Size, the project has been sanctioned by the Ministry of Textiles under its Research and Development Scheme, and is being spearheaded by Professor Noopur Anand from NIFT. It will be carried out in the age-group of 15-65 years in six regions: Kolkata (East), Mumbai (West), New Delhi (North), Hyderabad (Central India), Bengaluru (South) and Shillong (Northeast), according to the Ministry.

Once the uniform India size is arrived at, "even foreign brands in India will have to carry it", says Rajesh Shah, Chairman of the Board of Governors at the NIFT, "Our diaspora can then also order any wear, based on that standard size". Veteran designer Ritu Kumar, who retails ready-made designer wear under two brands — Ritu Kumar and Label —

says that the move was long overdue. “The kind of population and country size we have, it was very important to have our own sizing structure,” she says.

A large percentage of shoppers face difficulty in finding clothes that fit perfectly according to their body measurements. The reason is differences in anthropometric built of people in different geographical regions across the country. After the uniform size chart is available, the whole country will have a “standard reference point” for ready-to-wear garments. “That means, all India brands will have the same size for a person,” said NIFT Director-General Sarada Muraleedharan.

The move is also likely to help online fashion retailers who are currently grappling with a huge volume in exchange and return owing to size issues. According to a statement released by the Textiles Ministry, “The Indian apparel industry uses size charts which are tweaked versions of other countries. The return of garments are in the range of 20 to 40 per cent and is increasing with the growth of e-commerce. The main reason for returns are poor garment fits.”

Till date, 14 countries including US, Canada, Mexico, UK, France, Spain, Germany, Korea, China and Australia have successfully completed national sizing surveys. India has been using some variant of Indian sizing. “This is mostly based on our experience in the market. Once the official Indian sizing comes into being, it will greatly help the consumer as well as the clothing brands,” says Kumar. The survey will cost nearly Rs 30 crore and the project will be conducted over the next two-three years.

Rivals make best of India-EU FTA deadlock

08
Mar '18

Clockwise from top right: Nocolas Deverwerre, U Myint Soe, Angel Ostroviecki, Artur Aliev, Ashish Agrawal, Dilara Begum. Left: A view of Apparel Sourcing Paris 2018; courtesy: Apparel Sourcing Paris

Chinese representation at the Apparel Sourcing trade fair in Paris from February 11 to 14 this year vastly outnumbered that from India. Meanwhile, Pakistani and Bangladeshi exporters too seem to be doing well, reports Jozef De Coster

Negotiations for an ambitious and broad-based free trade agreement (FTA) between India and the European Union (EU) were launched in June 2007. The negotiations were the EU's first attempt to engage a large developing country in a reciprocal bilateral trade opening exercise.

But after 12 rounds of talks, and several technical meetings and discussions, parleys came to a standstill in the summer of 2013 following a mismatch of ambitions and expectations. Discussions resumed in January 2016, but have made no headway thereafter. In the meantime, several emerging countries have seen their chance to strengthen their position in the EU market.

The Apparel Sourcing trade fair in Paris from February 11 to 14 provided a snapshot of the textile trading lanscape in Europe, particularly the European Union markets.

India was represented at the event by as many as 30 firms (31, if you also count Ethiopian subsidiary Kanoria Africa Textile). Not bad, one might say; but then, China sent a multifold of that number to Paris. As Apparel Sourcing consolidated its position as the European leading sourcing trade fair, Indian exhibitors felt that over the next few years increasing competitive pressure won't come so much from export giant China as from the South Asian neighbours Bangladesh and Pakistan, and a number of emerging low-cost countries. Vietnam and Sri Lanka were not represented at the fair.

Garment companies from several emerging countries, supported either by the EU or other sponsors, displayed garment products at the trade fair. Among them were companies from Jordan, Kyrgyzstan and Myanmar, countries which are currently enjoying zero-duty access to the EU market. Sure, it will take some time before these countries can grab even a modest share of the large EU market. However, as long as India and EU don't succeed agreeing on the terms of an FTA, emerging garment countries with zero-duty access to the EU market have an edge.

Asian neighbours corner India on European turf

Chinese garment exporters are well aware that their price weapon has become less sharp and that they should focus more on the other Ps of Philip Kotler's classic marketing mix (Price, Product, Place, Promotion). Angel Ostroviecki, sales representative of the European division of the Chinese HongDou Group (12,000 workers), says his group is working on the P of Place by not only manufacturing garments in China but also in a cheaper place, Cambodia. As for the P of Promotion, a smart move of HongDou Group was the establishment in January 2018 of a sales subsidiary in Barcelona. Ostroviecki is sure that the European sales subsidiary will offer the group's customers, like C&A, Kappahl, Billabong, a superior service compared with that of the usual independent sales agents in Europe.

If it were to depend on sales manager Sarah Ouyang of Chinese garment company Wingtas, from Xiamen (with exports of up to 500,000 pcs/month), the company's exports will be increasingly destined for Europe. Why? “American customers order bigger quantities, but they press for lower prices. You can more easily negotiate with Europeans about prices and delivery times,” Ouyang contends. Among the European brands for which Wingtas is working are Mango, Fila, Kappa.

Meanwhile, Bangladesh has succeeded in beating all other countries, except China of course, as a global exporter of garments. The main comparative advantage of the Bangladeshi exporters is still the country's low labour cost. In some parts of China, the monthly minimum wage for clothing workers reached $321 in 2016, nearly five times higher than the minimum wage of $68 in

Bangladesh. The official minimum wage in the Bangladeshi garment industry may shortly be steeply increased .

Yet, CEO Enamul Kabir of Ensa Clothing, Dhaka (2.4 million knitted garments per year) is not afraid to predict growth for his own exports and those of Bangladesh, especially to Europe. His explanation: “The Chinese do business with their mind, we Bangladeshi think with our heart. Bangladesh is better in social compliance than China. This is important for the Europeans. By the way, did you know that seven of the ten ‘green’ garment companies in the world can be found in Bangladesh?”

Dilara Begum, commercial counsellor of the Embassy of Bangladesh in Paris agrees: “The Bangladeshi industry is indeed caring for the environment. Our country will nevertheless be a victim of climate change. Bangladesh is also caring for the workers. After the 2013 hike of wages there’ll again be a hike in 2018. In spite of that the garment industry will continue being a pillar of our country’s strongly growing economy. One thing is sure: the population of Bangladesh is very resilient.”

On othe other hand, in spite of Euratex’s (European Apparel and Textile Confederation) furious efforts to prevent Pakistan from acquiring the EU GSP+ status, Pakistan got it in December 2013. This status has been extended to the three-year period 2018–2020, which means that Pakistani textile products will continue being imported duty-free in EU.

Senior manager (innovation & marketing) Iftikhar-ul-Hassan of Masood Textile Mills Ltd, from Faisalabad, points out that Pakistani exporters like Masood enjoy several competitive advantages making the competition with India and China somewhat easier. Masood is operating an integrated plant ‘from cotton knit yarn to finished garment’. With more than 20,000 workers it’s one of the largest textile mills in South Asia. Masood is still on a growth path. Among its European customers are Puma, Celio, KIK, and among its American customers are Walmart and Levi’s. Hassan stresses that the Masood factories are WRAP and ISO 9001 certified. He boasts that the Pakistani textile and apparel industry is doing well in the field of sustainability. The government is pushing the industry to drop the use of coal as a source of energy; it wants Pakistan to rely on hydro, thermal and nuclear energy.

Another trump card of the Pakistan textiles sector is the presence of as many as five textile universities. “The largest of these five is located in our city, Faisalabad,” smiles Hassan. He also remarks that since this year Pakistan has, besides Karachi Port and Port Qasim, a third deep sea port: Gwadar Port, which is part of the ambitious Chinese Sea Belt project.

Myanmarese companies try their luck in Paris

The Dutch Centre for the Promotion of Imports from developing countries (CBI) presented eight handpicked companies from Myanmar at Apparel Sourcing. All of them were locally owned companies which aim at making a sustainable move from CMP (cutting, making, packaging) to FOB (free on board). Some of them are considered role models by their colleagues. This is especially the case of Unique HTT (winner of the national Compliance Award 2017), the highly efficient SMC Group of companies, and the sustainability-oriented knitwear manufacturer Shwe Sakar.

The SMC Group of companies is one of the largest locally-owned garment manufacturers in Myanmar. For producing outerwear, woven garments, knitwear and sportswear, SMC employs 2,340 workers in three factories. Among its customers are Inditex and C&A.

Unique HTT, a manufacturer of knitwear and technical sportswear (1,200 workers), was the first Myanmarese garment company in August 2016 to get a BSCI certification. Three cousins started Unique HTT in December 2013. They are keen on innovation. For instance, they use $C0^2$ dyed fabrics. Around 70 per cent of Unique's production is exported to supermarkets in Europe and the US, and the rest to upmarket brands. The company has a sourcing team (for fabrics and other inputs) in China. Incidentally, India doesn't currently play a significant role as a textiles supplier to Myanmar.

The owner of Shwe Sakar (1,300 workers), U Myint Soe, is also the chairman of the Myanmar Garment Manufacturers Association (MGMA). He believes that Myanmar's minimum wage of 3,600 kyat per day should not be increased to 4,800 kyat per day as the national wage panel has proposed. However, as long as the government does not take a final decision, MGMA will continue defending a more "realistic" increase up to 4,000 kyat per day. (This week, the Government has set new daily minimum wage at 4,800 kyat per day)

Jordan aims for 20,000 more garment jobs

In a region troubled by armed conflict, the Hashemite kingdom of Jordan has remained an oasis of peace and safety. The population consists of around 6.6 Jordianan nationals and nearly 3 million refugees. Fortunately, Jordan gets a lot of support from the international community. Especially important for the garment industry are the FTAs with the US, EU, Turkey and Canada.

Since 1998, under the QIZ or Qualified Industrial Zones Agreement with US, Jordan (and since 2005 also Egypt) can export duty-free goods like textiles, apparel and footwear to the US, with relaxed rules of origin. However, the goods must contain Israeli inputs. Because at the start of the QIZ system most Jordanian companies were reluctant to participate, some Chinese and Indian companies quickly took advantage of the vacuum to set up factories in Jordan and gain quick access to the US market.

As of July 2016, manufacturing exporters in Jordan have also benefited from duty-free access to the EU. The EU agreement, which offers relaxed rules of origin, requires that at least 15 per cent of the export production lines be staffed with Syrian refugees. Manager Moncy Mathew of Jerash

Garments & Fashions Manufacturing in Amman claims that his company was the first to train and employ Syrian refugees. Today, 18 companies employ Syrians and thus enjoy duty-free access to the EU market.

Jerash Garments, a Hong Kong investment, which caters to brands like The North Face and Columbia, is not a small manufacturer (2,700 employees). But the heavy-weight among the Jordanian garment exporters is Classic Fashion Apparel Industry. This giant is employing over 20,000 workers according to its own website (17,000 workers according to Jordan Garment Alliance), for manufacturing men's and women's clothing for GAP, Under Armour, Walmart, JC Penney. Also, some small and medium enterprises want to try their chance as exporters. The small Jordanian knitwear producer Noorway, who until now was only working for the local market, participated in the Apparel Sourcing fair in Paris with hopes to start exports to UK and other EU markets.

With around 80,000 employees and exports of $1.8 billion in 2017, the garment industry is a key economic player in Jordan. Because of its potential to create a lot of new jobs, it is supported by the World Bank and other organisations. The International Labour Organisation (ILO) and Better Work Jordan were instrumental in taking compliance to a high level. Now, they'll focus on helping to create jobs for both Jordanian and Syrian refugees. Better Work Jordan is also participating in an ambitious GAP Inc's social initiative (P.A.C.E: Personal Advancement & Career Enhancement) that will target Jordanian and Bangladeshi migrant workers. It's noteworthy that not Jordanians but Bangladeshi, Sri Lanka and Nepal migrant workers make up the majority of the garment industry's workforce.

Eng Adel Tawileh, secretary-general of the leather and garments industry section of the Jordan Chamber of Industry, argues that the industry needs 20,000 more workers. They should be recruited mainly from Syrian refugees and Jordanian women. As of December 2017, Jordanians made only around 25 per cent of the sector's total workforce. The government is now providing incentives to motivate companies to build factories in rural areas. “There are hardly any jobs for women outside the cities,” explains Adel Tawileh.

Kyrgyzstan exporters supported by USAID

The Bishkek Garment Industry, a group of 15 Kyrgyzstan apparel firms, exhibited at Paris, professionally assisted by the well-known American consulting firm Deloitte.

Kyrgyzstan garment producers may have experience with exports to Russia, Kazakhstan and other former Soviet republics, but they are still inexperienced as global exporters. Since Russian garment demand was falling in recent years, Kyrgyzstan exporters started eyeing other markets, especially Europe. Their efforts are supported and coordinated by USAID which contracted Deloitte to attract buyers offering them professional CMT services.

According to Deloitte consultant Arthur Aliev, team leader of the four-year USAID Apparel Sector Development Program, Kyrgyzstan is a promising newcomer in the European market. The main advantages of Kyrgyzstan are the low labour costs, the GSP+ status (0 per cent duties), the readiness to accept small orders and the speed of delivery (10–12 days by truck to Western Europe, five days to Russia). But, in spite of its large pool of textiles and garment workers (estimates run from 150,000 to 300,000, which is a considerable number for a country of 6 million people), Kyrgyzstan is not a very cheap production country. Unskilled workers may accept basic salaries of $30 –40 a month, skilled workers needed in factories targeting European customers earn $200–300/month.

Kyrgyzstan acquired the EU GSP+ status in January 1, 2016, and also enjoys 0 per cent duty access to Russia. A number of foreign companies, mainly from China and Turkey, recently visited the mountainous Central Asian country in order to examine export possibilities to EU and/or Russia. However, up to now, no big foreign investments have been announced. The Kyrgyzstan government itself declared it will create two technopolises, one in Bishkek and one near the capital, which together will create 10,000 new jobs and boost national garment production by 30 per cent. In 2016, the Kyrgyzstan garment industry production was estimated at $375 million. Before the collapse of the Soviet Union, it reportedly exceeded $1 billion.

Aliev points out that after the collapse of the Soviet Union in 1991, Kyrgyzstan's textiles and clothing industry drastically transformed from an industry with large state companies to one with 500 private small and medium-sized manufacturers. Most of them are located near the capital Bishkek. Thanks to cooperation formulas, these SMEs can also handle large garment orders.

A surprising characteristic of Kyrgyzstan is that it is one of the top five organic cotton growing countries (along with India, China, Turkey and the US). Unlike Uzbekistan, Kyrgyzstan is said to do fine in the field of compliance: no forced labour, no child or prison labour. Kyrgyzstan garment factories reportedly also use clean energy; around 80 per cent of the country's energy comes from hydro-power. On the other hand, in spite of being an important producer of wool and cotton, Kyrgyzstan has not an integrated textile-garment supply chain (except for the vertical production of cotton knitwear). So, the hoped-for future transition from CMT garment manufacturing to FOB-exports could be tough.

Moldova can't find garment workers

Moldova, a poor and small country (3.5 million inhabitants), located between Ukraine and Romania, is potentially interesting for export-oriented garment industry investments, because it has signed an association agreement (AA) with the EU, which entered into force in July 2016. According to Nicolas Deverwerre, general manager of lingerie manufacturer Astroline in capital Chisinau (100 workers), the biggest comparative advantage of the Moldovan industry is its location, close to Western Europe. Products that are finished on Friday evening can by Monday morning be on sale in European shops.

However, the main problem today is finding workers. Roughly one million Moldovans are working in Europe, Russia, and other former Soviet Bloc countries. New investments in the country tend to suck workers away from the garment industry which now employs some 15,000 people.

Moldovan wages are still much lower (at around $200/month for sewing operators and $300/month for skilled garment workers) than in neigbouring Romania. Moldovan CMT garment manufacturers rely on imported, mostly Turkish fabrics. Recent frictions between EU and Turkey have stalled EU-negotations with Turkey for a duty-free triangle trade between EU, Moldova and Turkey. (WE)

Stable outlook for cotton textiles, synthetics in India

27
Feb '18

India Ratings and Research has maintained a stable outlook for cotton textiles and synthetics for fiscal 2018-19 as margins may expand due to softening in cotton prices, better consumer spending outlook and the low base effect of the last fiscal. However, the possible impact of pink bollworm on cotton and rising crude prices on synthetics are the constraints.

Better margins, modest reduction in working capital requirements and subdued capital expenditure in the next fiscal will lead to an improvement in the overall credit profile in India, according to a press release from the Fitch Group company.

The slowdown in domestic demand growth for textiles due to demonetisation and the implementation of the goods and services tax seems to have bottomed out in the second half of the current fiscal.

A higher-than-expected rise in cotton acreage at 19.0 per cent and a consequent 11.0 per cent increase in crop production in the current and last fiscals are likely to moderate cotton prices in the next fiscal, although domestic cotton prices increased in the last few months due to the pink bollworm issue.

The global stock-to-use ratio for cotton, excluding China, increased to 56.0 per cent in fiscal 2017-18 from 47.0 per cent in the precious fiscal, although Chinese inventory declined by 17 per cent year-on-year.

An increasing crude price is likely to narrow the spread between cotton and synthetic yarns, thereby moderating the pace of switch to synthetics from cotton textiles. Operating margins of synthetics manufacturers may witness volatile margins due to fluctuations in crude price and delays in passing on cost inflation, the company said. (DS)

Fibre2Fashion News Desk – India

Textile industry seeks sourcing curbs to check rising apparel imports

March 3, 2018 189 Views

Coimbatore: Increasing apparel imports — particularly from Bangladesh — is slowly and silently killing the entire domestic textile value chain from fibre to apparel, according to the textile industry. The industry has sought immediate government intervention to impose sourcing restrictions in order to cut the damage.

"This no doubt would be a timely and temporary intervention. We need to come up with a permanent solution," said Prabhu Dhamodharan, Convenor, Indian Texpreneurs Federation (ITF).

ITF representatives met Suresh Prabhu, Union Minister for Commerce and Industry, in Delhi to highlight the plight of the textile industry.

He later told BusinessLine that apparel imports into India had risen from $10.94 million in 2009 to cross $100 million-mark in 2015 before soaring to $136.43 million in FY2016.

India allowed duty-free import of readymade garments from Bangladesh under SAFTA in 2006. This facility was initially limited to 8 million pieces. But in 2010, this quantitative restriction was lifted. The Made-in-Bangladesh garments import surged. From a Compounded Annual Growth Rate (CAGR) of 67 per cent between 2006 and 2010, it rose to 98 per cent between 2011 and 2014.

There was a marginal drop in imports in FY2017 because of the overall slowdown, but they resumed pace in FY18 and are proving to be a killer.

Bangladesh does not produce enough fabrics domestically. The duty-free, quota-free facility extended to Bangladesh (in view of it being considered a Least Developed Country (LDC)) benefits China's export of textiles.

Bangladesh imports fabrics from China, converts them into garments and exports the stuff to India. Since import of Made in China fabrics is meant for export, Bangladesh does not impose any import duty on the fabric import and this facilitates backdoor entry of Chinese textiles into India.

India has not imposed any sourcing restrictions. To make matters worse, the duty-free quota facility has now been extended to all 49 LDCs on a non-reciprocal basis and without any sourcing restrictions.

This could cause more harm to the domestic textile manufacturing sector as some of the LDCs such as Ethiopia, Cambodia and Myanmar, which have duty-free access to the EU, Japan and US markets might dump garments here.

ITF also refuted the charge that India's textile exports (of denim in particular) to Bangladesh is on the rise. "It is not correct as most of the textile exports from India is routed through Bangladesh because of the cheap labour available there for conversion into apparel," he said.

Tweaking SAFTA rules

On the way forward, ITF suggests tweaking SAFTA (South Asian Free Trade Area) rules of origin to make use of yarn and fabric of Indian origin mandatory for allowing duty-free quota-free market access.

"This would boost our export of yarn and fabric to Bangladesh and other LDCs," Dhamodharan said, adding "we will not be the first to impose sourcing restrictions as the US has imposed it under NAFTA (North American Free Trade Agreement) for duty-free import of garments from Mexico and other NAFTA members."

"We have accepted sourcing restrictions imposed by Japan. This has hurt our apparel exports to Japan under India-Japan CEPA (Comprehensive Economic Partnership Agreement). The Government can do something similar to help the domestic industry without really denying duty free market access to Bangladesh and other LDCs."

The federation has appealed for a fibre neutral policy.

ITF has, in the meanwhile, decided to engage an expert to prepare a report on the textile industry's competitiveness, FTAs and growth prospects. "This would be ready in the next 8 weeks. We plan to submit this report to the government," the ITF Convenor said.

The Indian size chart will make online shopping easier

Shamayita.Chakraborty and Divya Kaushik | TNN | Mar 8, 2018, 17:21

Womanhood is as much about making personal fashion statements as it is about feeling empowered or breaking through the socio-economic glass ceiling. And speaking of fashion, the average Indian woman has several choices — ranging from flowy, airy drapes and custom ornate top-wear to mass-produced western and branded traditional wear. While there's hardly any issue with custom traditional garments, the same can't be said for factory-produced one-cut-fits-all branded wear. "The only time I get a perfect fit is when a designer makes me a dress. But it's practically impossible to wear designer outfits every day, so obviously, we have to rely a lot on retail stores. Though I'm not exactly a shopaholic, retail therapy does work for me. But every time I shop for clothes, the size bug starts getting on my nerves. Nothing seems to fit, and I usually walk out of a store carrying a compromise. Even online, the confusing size charts drive me nuts," said model-actress Sauraseni Maitra.

Sauraseni is not alone. Millions of people, especially women, face the same problem with readymade garments in India, where the apparel industry uses tweaked versions of international size charts. And that's exactly why the National Institute of Fashion Technology (NIFT) recently announced that India will finally have its own size chart by 2021. In doing so, it will join the ranks of countries like the US, Canada and Mexico, which have their own standardised size charts. Moreover, 14 countries have successfully completed national sizing surveys. In India, a group of professors and teachers from NIFT, Delhi, has already started working on a survey under the aegis of the ministry of textiles. As part of the research, 25,000 men and women across six major cities will be measured using 3D whole-body scanners.

Noopur Anand, a professor from the department of fashion technology, NIFT, Delhi, and a principal investigator of the project, told us, "The Indian apparel industry uses size charts that are tweaked versions of the ones from other countries and made from the manufacturer's instinct and experience, rather than proven scientific study. This usually results in fits that leave a lot to be desired. Providing well-fitted garments in the absence of a standardised size chart is proving to be a big challenge for the domestic textile and apparel industry. India is attempting to undertake its own anthropometric survey to take care of disparities and inconsistencies in apparel sizing systems and provided fits."

Revealing more about the `31-crore Size India survey, Siddhartha Sankar Ray, associate professor, NIFT Kolkata, who's handling the project in the city, said, "We are getting three 3D scanners within four months, following which we'll start the survey. These scanners can measure body dimensions in 20 minutes. While one scanner will be used in Kolkata and Shillong, the other two will be used in Delhi, Mumbai, Chennai and Hyderabad." The Indian size chart will not only help desi buyers identify their accurate size, but also serve as a blueprint for apparel designers and retailers. Most women are already looking forward to the chart, as they think it might help breaking stereotypes around the ideal body type and will also make online shopping easier.

City-based fashion designer Abhishek Dutta said even the small, medium and large sizes used by Indian retail brands are not standardised. "That's why the fit varies from brand to brand. Though we designers usually customise clothes for our clients, we make readymade garments following the UK size chart, in which size eight is roughly medium. But Indian body shapes don't match those of people in the UK. Standardisation will help us solve this problem," he said.

Most garments designed for mannequins

Though the project is still in its initial stage, women are already hoping that it will help shatter stereotypes around conventional body structures. Actress Subhashree Ganguly, who tied the knot with filmmaker Raj Chakraborty in a private ceremony on Tuesday, is really happy about the development. "My UK size is six and usually, the garments I buy abroad fit me well. But I once tried a gown and found that it wasn't made for my body type. The reason: our body structures are very different from theirs and so, most international apparels don't fit Indian women. Once the Indian size chart is created, our problems will hopefully end," she said with a smile.

Even models have to go through several fitting sessions because some designers go with the US and UK size charts, and those clothes end up fitting only mannequins. "Nobody is mannequin size, so why design according to that size? No two Indian women have the same body structure. I often fluctuate between UK size six and eight because of my hips and if one thinks that models would fit into any clothes easily, they are wrong. Indian women's bottoms are usually heavy and the UK and US size charts are for women in those countries who have different body structures," said Hasleen Kaur, Femina Miss India Earth 2011.

According to Noopur, identifying the various body structures in India is one of the challenges that has to be overcome after completing the survey and coming up with a size chart that will probably cater to 60-80% women. "When you talk about body shape, it's primarily the ratio between the bust, waist, hip and thigh, so once we get the data, we'll be able to analyse how Indian women fit into those classic descriptions of body shapes. The next step would be to understand body structures and coming up with a more specific size chart with variations," she said.

Ambiguity over size hinders online shopping

At a time when designers and retailers are shifting towards online shows and tying up with online platforms, there are shoppers who can't order their favourite dresses online because they don't know their exact size. Somashree Choudhury, a first year Master's student of Jadavpur University, told us that online size charts confuse her to no end. "My size is medium for western garments, while it's small for ethnic wear. And this disparity is really annoying, especially when I'm shopping online. It's not possible to keep a measuring tape handy and use it every time I check out a dress. And it is almost impossible to get a size that fits me perfectly. Usually the one that fits my body usually has the wrong length and vice versa," she said. Freelance writer Priyanka Saha seconded that. "I buy my dresses online for two reasons — it saves time and offers more variety. But size issues keep bugging me. I once ordered a short dress of my size (small) and had to exchange it twice. Once, because size small wouldn't fit owing to the cut, and then the larger version was too long! We Indian women are usually much shorter than our American counterparts, so the length is an issue," she said.

For Shramana Gupta, a Master's student of St Xavier's College, online shopping took some figuring out. "Garment sizes usually vary from one brand to another, but for me, the small-medium-large set had always been the benchmark. And that went for a toss with online shopping. I would go crazy trying to figure out sizes like eight, 12 and so on till I managed to figure out what these were. So, an Indian standard size chart would truly be a blessing," she said.

Textile & habillement: Les commandes sont de retour!

Par Nadia DREF | Edition N°:5224 Le 07/03/2018 | Partager

Un chiffre d'affaires record à l'export de près de 37 milliards de DH
Forte demande du marché ibérique, britannique…
L'Amith compte renforcer la filière des intrants

Les mesures de protection visant certains produits finis de textile & habillement turcs couvriront toute l'année 2018. Les professionnels se disent satisfaits compte tenu des dégâts causés par le made in Turkey aux marques locales (Ph. Adam)

Regain d'intérêt pour le «made in Morocco». Les textiliens sont aux anges! Les opérateurs ont enregistré des ventes record à l'export en 2017. Avec un chiffre d'affaires de près de 37 milliards de DH, les exportations ont dépassé de loin les 31 à 32 milliards réalisés en moyenne au cours des années précédentes. Les membres de l'Amith, qui avoisinent les 600, accaparent, à eux seuls, 90% de ces flux.

Pour 2018, les opérateurs se frottent déjà les mains en tablant sur une année positive. «Il y a une forte demande du marché ibérique. Nous constatons également un retour des donneurs d'ordre britanniques», souligne Mohamed Alaoui, membre du bureau de l'Association marocaine des industries du textile et de l'habillement (Amith) chargé de la communication et de la promotion, lors d'une conférence de presse organisée le 6 mars à Casablanca.

Le Maroc se place en pole-position sur le «fast fashion» au niveau mondial. Les délais de réalisation des commandes se situent entre 10 et 15 jours. Face à cette performance, les donneurs d'ordres (Inditex, Prime Mark…) commandent jusqu'à 12 collections chacun par an voire plus. Ce succès pousse la filière à se développer en cluster.

Maintenant que le pari de l'exportation est gagné, l'Amith planche sur la redynamisation de l'industrie et du marché locaux sachant qu'il y a un gros déficit en matière d'intrants. «L'amont tissage et filature est presque inexistant. Ce qui nous pénalise sachant que l'ALE avec les USA impose que la matière première utilisée pour les articles finis fabriqués au Maroc soit d'origine locale. L'Amith a engagé un cabinet de lobbying pour demander des exceptions. Nous en attendons encore les résultats», fait valoir Mohamed Alaoui.

Une «short supply list» a été soumise aux départements concernés qui vise entre autres la filière jean. Notons, à ce titre, que la filière denim importe 70% de sa matière première!!

Pour développer davantage la filière amont, l'Amith s'est résolue à attirer des donneurs d'ordre mondiaux (indiens, chinois, turcs…) pour créer des joint-ventures avec des opérateurs locaux afin de développer des investissements dans la fabrication de la matière première (tissage et filature). L'objectif est de favoriser l'émergence de filières intégrées. La seule filière qui est intégrée est celle du textile maison.
Elle sera suivie bientôt par celle du denim qui a démarré le volet tissage. Reste que pour la filière habillement, le plus gros des intrants est importé en admission temporaire (AT). Conjugué à une mauvaise conjoncture, le manque de matière première impacte les marques marocaines qui peinent à se démarquer localement

(Marwa, Flou Flou, Keito, Moroccan Touch, Cobra…) «Le marché local est pénalisé par la concurrence déloyale, les importations frauduleuses, la sous-facturation, la contrebande…», soutient Mohamed Alaoui.

D'ailleurs, pour donner une marge de manœuvre aux marques locales et aux franchises, le ministère de l'Industrie et du Commerce a rétabli le droit d'importation à hauteur de 90% du droit appliqué dans le cadre du droit commun, sur certains produits finis de textile et d'habillement.

«Le segment de l'industrie textile et habillement dont la production est destinée au marché domestique connaît depuis quelques années des perturbations importantes dues à l'accroissement de plus en plus important des importations à prix compétitif originaires de la Turquie», avait expliqué le Département du Commerce extérieur.

Chiffres à l'appui, les exportations turques de produits finis de textile et habillement vers le Maroc ont enregistré une progression de 175% entre 2013 et 2017. Selon le département du Commerce et de l'Industrie, cette progression continue des produits turcs a fragilisé plusieurs unités industrielles orientées vers le marché domestique. Elle a même été à l'origine de pertes d'emplois.

Aujourd'hui, les industriels se disent sereins pour cette année. «Cette restriction devra durer jusqu'à fin 2018», explique l'Amith. L'impact de cette mesure sur le marché local est déjà perceptible. La spéculation bat actuellement son plein causant des hausses de prix de certains produits (ameublement, habillement…).

«Nous avons appris qu'il y a certains fournisseurs turcs qui sont prêts à supporter cette augmentation vu que leur pays leur accorde jusqu'à 30% de subventions», explique un industriel. Rappelons aussi que les responsables turcs ont tenu une première réunion avec le département du Commerce extérieur suite à cette mesure. Une seconde réunion est prévue durant ce mois.

Un salon pour attirer des donneurs d'ordre

L'Amith s'associe pour la première fois à l'organisation du Salon international de la mode, du textile et des accessoires «Morocco Style Fashion & Tex», prévu du 28 au 31 mars à la Foire internationale de Casablanca. Cet événement, qui en est à sa quatrième édition, est organisé par le groupe turc Pyramids et le marocain Atelier Vita. Les promoteurs du salon tablent sur 11.000 visiteurs professionnels issus de 20 pays étrangers dont l'Afrique de l'Ouest, l'Afrique du Nord, le Moyen-Orient, les pays du Golfe et l'Europe. Morocco Style est une occasion pour tisser des liens B2B entre importateurs, exportateurs et transformateurs industriels du secteur. L'événement accueillera plus de 350 exposants venant de 6 pays outre le Maroc (Turquie, Chine, Pakistan, Taiwan, Portugal et Allemagne). L'édition 2017 a réuni près de 300 exposants et reçu 12.433 visiteurs, venant de 11 pays.

Compétitivité industrielle: A peine 1% des entreprises font de l'export

Par Nadia DREF | Edition N°:5218 Le 27/02/2018 | Partager

Le Maroc est loin derrière la Malaisie et la Turquie
Echec de la politique de promotion des exportations
Accès au financement, couverture des risques de change… les freins

Poids des PME

- Les PME représentent **95%** du tissu économique
- Les PME qui exportent sont au nombre de **6.000** dont **1.200** dans le textile
- Les PME génèrent **40%** du PIB
- Elles cumulent **31%** des exportations
- Les PME attirent **46%** d'emplois

- **358** entreprises et **17** consortiums ont profité de mesures d'appui menées par l'Etat
- Insolvabilité: Le coût de recouvrement reste élevé (**18%** du patrimoine) avec un taux de recouvrement très faible **(28%)**

Source: Ministère de l'Industrie et du Commerce, Etude BAD/Iscae/Femise

C'est alarmant! Selon les chiffres du ministère de l'Industrie et du Commerce, à peine 1% des entreprises existantes exportent. Ce qui remet en question l'ensemble de la politique d'accompagnement tant au niveau de la promotion (Amdi, Maroc Export, EACCE, ADA…) que de la montée en compétitivité. Il y a à peine 6.000 entreprises sur un total de 600.000 à avoir écoulé, au moins une fois, leurs marchandises sur les marchés étrangers.

Seules 400 entreprises exportatrices réalisent 90% de ces flux. C'est dire que seuls les grands groupes ou les structures ayant atteint une taille importante qui s'en sortent le mieux, sachant que le tissu économique est composé à hauteur de 95% de PME. Le Maroc se retrouve encore à la traîne malgré les mécanismes mis en place avant et après le Plan d'Accélération industrielle (PAI).

A titre de comparaison, la Malaisie dispose de 90.000 exportateurs représentant 4% des entrepreneurs. Autre exemple, la Turquie compte 61.000 sociétés exportatrices (8% du tissu économique). Ces chiffres montrent à la fois l'incapacité des entreprises, surtout les PME, à franchir le pas de l'export et la faiblesse ou l'inadéquation des dispositifs mis en place pour booster les flux sur les marchés internationaux.

Cette situation impacte directement la part de la valeur ajoutée dans les exportations brutes. Cette proportion a nettement baissé passant de 81% en 1995 à 74,4% en 2011. Par ailleurs, la part de la valeur ajoutée domestique est plus faible que les moyennes nationales au niveau mondial dans le secteur de l'automobile (41%), du raffinage (42%), des produits informatiques, électroniques et optiques (47%), des appareils électriques (58%) et du textile-habillement (58%). Selon l'Office des changes, les volumes à l'export, hors phosphates et dérivés, ont atteint 201 milliards de DH en 2017 contre 184,3 milliards un an auparavant, soit une croissance en valeur de 9,1%.

Corruption, concurrence déloyale du secteur informel, accès au financement, inadéquation de la qualification du personnel, taux d'imposition locaux et parafiscaux, rallongement des délais de paiement, règlement des litiges commerciaux par les tribunaux, accès au foncier, législation du travail… Autant d'obstacles qui freinent le développement des PME et de leurs activités sur le marché domestique et à l'export. Ce qui entache sérieusement le climat des affaires.

Ce constat est corroboré par une enquête réalisée par la Banque africaine de développement (BAD), le groupe Iscae et le Forum euro-méditerranéen des Instituts de sciences économiques (FEMISE), dévoilée le 22 février à Casablanca à l'occasion d'une journée d'étude organisée par le groupe. Réalisée entre le printemps et la fin de l'année 2017, l'enquête relève également que le niveau d'intégration des PME dans les chaînes de valeur mondiales reste faible, en comparaison avec les pays de la région ou ceux à revenu comparable.

Les entreprises interviewées expriment des besoins précis pour relever ce défi. Elles réclament un appui pour la mise en contact avec les entreprises étrangères, un besoin de crédits bancaires ou encore un support pour la mise en conformité des produits et/ou des processus de production aux normes et standards imposés.

«Jusque-là, le seul canal de financement existant est le secteur bancaire. Malheureusement les PME souffrent d'insuffisance en fonds propres et de rallongement des délais de paiement qui avoisinent les 10 à 12 mois», précise Soumya Alami, présidente de la Commission PME à la CGEM. «Malgré les promesses faites par Boussaid pour débloquer les 10 milliards de DH de remboursement de TVA, à ce jour, aucune procédure n'a été entamée», insiste Mme PME à la CGEM.

«Pour pallier la destruction de l'emploi, la hausse du chômage des jeunes et l'augmentation des inégalités économiques et sociales, il s'impose de faire un saut qualitatif à travers la mise en place d'un tissu industriel solide et une meilleure intégration des PME marocaines», préconise Tarik El Malki, directeur du développement, des relations internationales, de la recherche scientifique au groupe Iscae. «Les exportations indirectes peuvent jouer un rôle important en tant que première étape à une future internationalisation», soutient Tarik El Malki.

Les chaînes de valeur mondiales offrent de nouvelles opportunités pour l'internationalisation des PME qui peuvent en tirer des avantages potentiellement positifs. C'est ce rôle d'ailleurs qui est assigné à la série d'écosystèmes lancés dans le cadre du PAI. D'après Patricia Augier, présidente du Conseil scientifique et coordinatrice du Femise, entre 60 et 80% des flux commerciaux sont réalisés au sein des chaînes de valeur globales au niveau mondial (outsourcing, insourcing, coproduction…).

La fragmentation de la production donne aux PME une opportunité sans précédent de produire et d'exporter une partie de la chaîne de valeur (process ou inputs) en fonction de leurs avantages comparatifs. Le meilleur modèle est le secteur automobile où des PME locales, grâce aux écosystèmes, sont devenues des fournisseurs des rangs 1, 2 ou 3 auprès des constructeurs mondiaux (vitrage, câblage, coiffes de siège, acier…).

Fortes de cette dynamique, des PME marocaines ont pu améliorer leurs moyens de production pour répondre aux exigences de qualité et aux standards internationaux (amélioration des compétences des salariés, accès aux nouvelles technologies et veille sur les marchés à hauts revenus, accès à de nouvelles organisations de production, transfert de technologie…).

Du côté des entreprises, celles qui ont réussi à exporter leurs produits soutiennent que les impacts sont positifs surtout au niveau de l'amélioration de la qualité des produits, de la capacité à exporter et une meilleure productivité. Les PME qui ont échoué à franchir ce pas évoquent qu'il y a une plus grande concurrence au niveau des coûts, des prix et des délais de livraison.

«Les entreprises qui ne sont pas compétitives sur le marché domestique ne le seront jamais à l'international. Par contre, celles qui sont déjà compétitives, il faut les encourager à aller vers l'export», fait valoir Said Maghraoui Hassani, directeur de la Politique des échanges commerciaux relevant du ministère du Commerce et de l'Industrie.

Obstacles à l'intégration des chaînes de valeur

L'étude a relevé des obstacles à plusieurs niveaux. Du côté des importations, les principales contraintes résident dans la lourdeur des procédures douanières, le coût d'obtention d'une couverture contre le risque de change ou encore l'obtention du financement. Sur le volet export, les entreprises énumèrent plusieurs freins: incapacité à pénétrer les marchés, obtention d'un financement, coûts de transport, lourdeur des procédures douanières, coût de la couverture contre le risque de change, faiblesse de la R&D, difficultés d'adapter les produits aux normes imposées sur les marchés étrangers, voire des difficultés à embaucher de la main-d'œuvre qualifiée. Par ailleurs, les PME font face, dans leurs relations avec les donneurs d'ordre, à 5 types de difficultés : manque de services logistiques efficaces, déficit de compétitivité des produits, difficulté à satisfaire les exigences des donneurs d'ordre, difficulté à mettre le produit ou le processus de production aux normes et aux standards imposés ou encore le manque de main-d'œuvre qualifiée.

Verbatim

■ **Hakim Abdelmoumen, président de l'Amica:** «Les PME se développent à deux vitesses. Celles qui évoluent au sein des zones franches bénéficient d'un appui inégalé. Dans le secteur de l'automobile, toutes les mesures nécessaires ont été prises pour faciliter le travail des équipementiers et constructeurs tant au niveau des procédures douanières que logistiques et administratives. L'objectif est de laisser ces industriels se concentrer sur leur cœur de métier et répondre à leurs commandes dans les meilleurs délais. A contrario, les PME qui évoluent en dehors des zones offshores peinent pour régler les procédures administratives, réduire le retard du passage en douane, obtenir des autorisations… c'est dommage que les administrations bloquent toujours des investissements lourds. Aussi les PME ne peuvent-elles pas faire le poids face à des entreprises étrangères dont les pays ont mis en place des fonds dédiés à l'accompagnement des industriels. Nous avons besoin d'une institution financière qui accompagne les industriels lorsqu'il y a une opportunité commerciale qui se profile. Prenons l'exemple de la France, un fonds de 500 millions d'euros est affecté chaque année pour accompagner les équipementiers. In fine, je suis contre toute mesure de protection, mais je suis pour un marché structuré et clair. Toute entreprise qui n'est pas performante au Maroc ne peut l'être à l'export. Enfin, je ne vois pas l'utilité d'une industrie 4.0 chez les PME».

■ **Mohamed Tazi, secrétaire général de l'Amith:** «Nous assistons à un essoufflement du modèle économique marocain. Le textile constitue une alternative pour booster le développement industriel du pays. La mise en place des écosystèmes a permis d'attirer de grands donneurs d'ordre. Toutefois, le secteur qui compte 1.200 entreprises, dans la majorité des PME, se retrouve confronté à des problèmes liés surtout à l'accès au financement. La sous-traitance reste un modèle d'avenir pour les textiliens, à condition de gagner en productivité, en termes d'accès aux marchés et de diversification. Il y a une urgence à placer l'industrie sous la tutelle du Chef du gouvernement comme c'est le cas en Turquie ou encore en Chine. Certes, nous sommes les champions mondiaux du fast-fashion, mais les concurrents internationaux avancent plus vite que nous».

■ **Soumya Alami, présidente de la Commission PME à la CGEM:** «Les chiffres avancés mettent en lumière la fragilité de nos PME. L'accompagnement des opérateurs sur la compétitivité reste insuffisant par rapport à la concurrence. De son côté, la PME doit produire plus de valeur ajoutée et assurer le transfert d'expertise. Nous réussirons à intégrer les chaînes de valeur si nous réussissons d'abord à créer une équipe Maroc».

■ **Said Maghraoui Hassani, directeur de la Politique des échanges commerciaux au ministère du Commerce et de l'Industrie :** «Nous avons peu d'entreprises qui font de l'export. Une bonne partie exporte de manière irrégulière et réalise un chiffre d'affaires faible. Nous préparons un nouveau programme d'appui aux primo-exportateurs. Nous accompagnerons une cinquantaine d'entreprises au départ avant de généraliser ce programme. Par ailleurs, nous déployons une zone de libre-échange continentale et nous préparons l'adhésion du

Maroc à la Cedeao. Les PME, à leur tour, doivent améliorer leur offre exportable et être compétitives. La création de l'Amdie favorisera également la promotion à l'international».

■ **Vincent Castel, économiste pays en chef à la BAD:** «Pour que les PME puissent intégrer les chaînes de valeur mondiales, le Maroc doit développer une vision multidimensionnelle pour lever les contraintes de financement, l'amélioration du climat des affaires, l'accès au marché et le développement de la compétitivité. L'industrialisation est également importante, cela passera par le développement des PME».

LA VIE éco

A LA UNE | ACTUALITÉ | MAROC | ECONOMIE | VOTRE ARGENT | MONDE | MANAGEMENT | OPINIONS | VIDÉOS

28 février 2018

TEXTILE : IMPACT MITIGE DE LA HAUSSE DES DROITS DE DOUANE SUR LES PRODUITS TURCS

Plusieurs distributeurs ont stoppé leur approvisionnement. Des industriels turcs promettent à leurs clients marocains de prendre en charge le surcoût provoqué par la hausse des droits de douane. Les industriels locaux attendent d'avoir assez de visibilité à moyen et long terme avant d'investir dans la R&D.

Depuis le 8 janvier 2018, les importations de prêt-à-porter et de tissus d'ameublement fabriqués en Turquie sont assujetties à des droits de douane respectivement de 25% et 10% et ce, pour une durée d'un an. Plus de 45 jours après l'entrée en vigueur de cette mesure visant à protéger le textile made in Morocco, aucun impact n'est encore palpable sur le marché. Il existe encore beaucoup de stocks de marchandises turques (en soldes en ce moment) sur les rayons des magasins. « Il faut attendre plusieurs mois avant de ressentir l'impact réel de cette mesure. En tout cas, la mesure a été accueillie favorablement par les industriels du textile», déclare Mohamed Tazi, directeur général de l'Association marocaine de l'industrie du textile et de l'habillement (Amith).
Les industriels font montre d'une réelle prudence dans leurs appréciations. Cependant, des signes de mutation du marché sont bel et bien visibles. En effet, plusieurs distributeurs ne se sont pas approvisionnés depuis la hausse des droits de douane, car les transitaires ont déjà augmenté les frais de dédouanement des importations textile de Turquie. Depuis le 8 janvier, ils exigent 30 DH de plus sur un kilogramme de textile importé de Turquie. «Avant la hausse des droits de douane, on rémunérait le transitaire 80 DH le kilo. Aujourd'hui, il exige 110 DH», déclare un détaillant de foulards à Derb Omar.

Les Turcs avantagés sur le marché international par la dépréciation de leur monnaie

Les autres importateurs déclarent vouloir répercuter la hausse des charges sur les prix de vente. «On n'a pas le choix. On continuera à importer du prêt-à-porter de Turquie et on répercutera la hausse du prix sur le client final», déclare une propriétaire de magasin dans le même quartier. Pour le moment, aucun magasin ni aucune marque low cost telle que DeFacto, LC Waikiki ou autre n'a franchi le pas. Selon le DG de l'Amith, les industriels turcs ont promis à leurs clients marocains de prendre en charge le surcoût dû à la hausse des droits de douane, lors d'un salon international du textile et de l'habillement tenu récemment. Avec les subventions publiques et la baisse de leurs charges, les industriels turcs disposent en effet des ressources nécessaires pour absorber cette hausse. Qui plus est, ils profitent de la compétitivité monétaire découlant de la dépréciation de la livre turque qui a perdu 25% de sa valeur en un an. «Le taux de change de la livre turque par rapport à l'euro est passé de 3,78 livres pour un euro en 2017 à 4,72 livres en 2018. Par conséquent, les exportations turques sont plus compétitives sur le marché international», explique M. Tazi.

Peu d'espoir pour un redressement sur le court terme

En définitive, les industriels marocains du textile arrivent difficilement à s'en sortir. La part du made in Morocco dans le marché local est même tombée à 20% en 2017 (www.lavieeco.com). «Les importations massives nous ont asphyxiés. Aujourd'hui, nous nous contentons des commandes de réassort. Pour nos besoins en tissu, on importait du fil de l'Inde pour la filature. Mais la production de tissu devient de plus en plus problématique à cause du coût de la teinture au Maroc qui dépasse celui des unités européennes. Ce qui nous encourage à recourir à l'importation de tissu de Turquie», déclare Youssef Alaoui, industriel de textile.

« La seule solution pour monter en gamme est d'investir massivement dans la recherche et développement et la création. Pour ce faire, nous avons besoin de visibilité à moyen et long termes », renchérit M. Alaoui. « Je crains qu'une année ne soit pas suffisante pour pouvoir se réapproprier le marché local et consentir des efforts d'investissement nécessaires », abonde
M. Tazi.

Il est clair que les industriels ne bénéficient que d'un répit. La mesure de protection prendra fin le 31 décembre 2018. Reste à savoir s'il faut attendre que la concurrence soit moins rude pour investir dans la recherche & développement et la modernisation de l'outil de production ou s'il faut le faire tout de suite pour espérer inverser la tendance sur le long terme

THE EXPRESS TRIBUNE

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APTMA poised to invest $7b in garment manufacturing

By Shahram Haq

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APTMA to invest in garment manufacturing PHOTO: AFP

LAHORE: The All Pakistan Textile Mills Association (Aptma) has announced that its members are ready to establish 1,000 garment manufacturing plants with a total investment of $7 billion to resolve the crisis the industry has been embroiled in for years.

These garment plants will be established near major textile producing cities like Lahore, Sheikhupura, Faisalabad, Kasur, Multan, Sialkot, Rawalpindi, Karachi and Peshawar. The proposed 1,000 plants will install half a million stitching machines, which will boost annual production to three billion pieces.

According to a proposal presented by Aptma to the government departments concerned, Pakistan's textile industry has witnessed dwindling investments over the last decade as prospective investors are reluctant to make new investment decisions due to high cost of doing business. As a result, the industry has lost technological advantage over its competitors.

"New investments dropped to Rs0.56 billion in 2016-17 compared to Rs1 billion in 2005-06," it said.

The proposal further said currently around 35% of the textile industry's production capacity was impaired which caused loss of approximately $4.14 billion worth of potential exports.

Once the proposal enters the implementation phase, the sector will need an additional 10.3 million bales of raw cotton, 345 million kg of manmade fibre, 1.983 billion kg of additional yarn and an additional 7.928 billion square metres of processed fibre. Cotton-producing area and cotton production, however, have declined 30% and 38% respectively in Punjab since 2011.

Within the textile sector, readymade garments have shown an impressive growth over the years despite the overall poor performance of the textile sector. According to the Pakistan Bureau of Statistics, exports of readymade garments registered 5.55% year-on-year growth against the overall flat growth of the textile sector which stood at $12.45 billion in 2016-17.

In return for the investment, Aptma members demanded corrective and conducive policy measures from the departments concerned.

"The government was only able to implement 15% of the Textile Policy 2009-14 and only 5% of the framework for 2014-19 along with

PM’s export-led growth package of Rs180 billion,” the association pointed out in the proposal.

It also sought a long-term policy which included consistent energy prices across the country and removal of Rs3.50 per kilowatt-hour surcharge on electricity tariff along with extending the duty drawback scheme for five years and drawbacks to be increased every year by 1% for garments (up to 12%) and made-ups (up to 10%) against realisation of export proceeds.

Aptma also suggested that foreign brands should be encouraged to establish buying houses in commercial enclaves in major cities with rent-free space and if the brand fetched a minimum of $100 million of exports per annum, the rent-free space should be extended for another two years.

“The government should allow LTFF (long-term financing facility) to indirect exports, Islamic financing and building of infrastructure for garment plants,” the proposal stated.

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BUSINESS RECORDER
Founded by M.A. Zuberi

Friday, March 9th, 2018

EU team arrives ahead of elections

An eight-member European Union delegation has arrived here to discuss political situation with heads of political parties in the context of coming general elections. The delegation will issue a report regarding the country's political situation ahead of general elections in light of its discussions with the political leaders.

The delegation said this is "our routine, and our reports were also published regarding 2002, 2008 and 2013 general elections". European Union delegation comprises Nicolay Paus, Ms Ann Vanhout, Jean Costedoat, Hans Weber, Ms Hannah Theresa Roberts, Colm Vincent Fahy, Pawel Kryztof and Svante Torgny Yngrot.

The members of the delegation called on Pakistan Muslim League-Q President and former Prime Minister Ch Shujat Hussain and former Chief Minister Punjab Ch Pervez Elahi here on Sunday. The PML-Q leaders put forth proposals for holding of fair and transparent election in future and alleged that 2013 general elections were rigged through Returning Officers (ROs).

Ch Shujat Hussain and Ch Pervez Elahi said that 22 other political parties which took part in the 2013 elections also alleged that the officers who conducted the polls were involved in rigging. They expressed the hope that the Election Commission of Pakistan and Foreign Office will fully cooperate and facilitate the European Union Observation Mission in reparation of its report as EU is very important for Pakistan.

During the meeting, party leaders Senator Kamil Ali Agha, Dr Khalid Ranjha, Moonis Elahi, Salik Hussain and Rizwan Mumtaz Ali were also present. It is worth mentioning that the EU accounts for 20% of Pakistani external trade with Pakistani exports to the EU amounting to €3.4 billion, (mainly textiles, medical equipment and leather products) and EU exports to Pakistan amounting to €3.8 billion mainly mechanical and electrical equipment, and chemical and pharmaceutical products. [1]

<u>The European Union (EU) has recently extended Pakistan's Generalized System of</u>

Preferences plus (GSP-Plus) status for another three years after the European Parliament's Committee on International Trade expressed satisfaction on the progress achieved by the country in enacting new laws for implementation of the 27 conventions related to human and labor rights.

The GSP Plus status, granted from January 2014, permitted nearly 20 percent of Pakistani exports to enter the 28-member countries of EU bloc at zero tariff and 70 percent at preferential rates. Pakistan was among the nine countries - including its textile rivals Bangladesh and Sri Lanka - that won the GSP Plus status. The country's exports to EU had registered 45 percent increase while value-added textile products 88 percent over the past five years.

BUSINESS RECORDER
Founded by M. A. Zuberi

MAR 9TH, 2018

‘CPEC industrialization phase opens new avenues of value-addition in textile garment sector’

FAISALABAD: Industrialization phase of China Pakistan Economic Corridor (CPEC) has opened new avenues of value-addition in textile garment sector instead of sticking to the export of raw or semi-finished products and Pakistan should work under a comprehensive and planned strategy to exploit one belt one road to cater to the garment needs of the countries from Gulf up to Europe.

This was said by Faisalabad Chamber of Commerce & Industry (FCCI) former Vice President Engineer Ahmad Hassan. He was participating in a panel discussion jointly organized by the National Textile

University (NTU) and R&D Section of FCCI here in connection with the 3rd All Pakistan DICE Textile Innovation event.

Ahmad Hassan told that historic investment of 51 billion dollar has laid down a strong foundation for the accelerated development and growth of this region.

He said, “CPEC is an opportunity as well as challenge and we must prepare ourselves to harvest the benefits from this project which is going to be a reality.”

He also explained in detail the geostrategic location of CPEC and said that roads are important to gear up the socioeconomic development of any area.

The China Pakistan Economic Corridor will not only benefit Pakistan and China but regional countries could also get its due dividends, he added.

Dr. Tanveer Hussain Rector NTU told that China is making huge investment of 2.7 billion dollar in its textile garment sector. The objective of this initiative is to produce 500 million garments per annum by 2020, he said and added that it will also provide Pakistan an opportunity to avail from Chinese benefits and get its due share from the garment sector.

He also supported an idea to establish a full-fledged Chinese department in NTU to make a pace with well-advanced Chinese industries.

Professor Wang of Beijing University said that 30 years ago China was also facing Pakistan like situation with rampant energy shortage and high cost of doing business. At that time, Japanese and Korean investors established their units in China, he said and added that they fully benefited from their experiences and later upgraded their industry to compete with the rest of the world.

He said that Pakistan should also prepare itself to face emerging challenges so that it could also make progress in the coming years.

The panelists who took part in this discussion include Deputy Director Chinese Study Center Dr. Zameer Ahmed Awan, Retired Major General Akbar Saeed Awan, Zaheer-ud-Din of the National University of Science & Technology Islamabad, Waheed Khaliq Ramay Chairman Power looms Owners Association, Dr. Saeed Zameer-ul-Hassan Associate Professor Balochistan University of Information technology & Management Sciences, Inam Afzal Khan, Former Vice President FCCI and Managing Editor Textile Journal Nadeem Mazhar.

Pakistan's exports to Turkey plummet after hiked duty tax

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Exports to Turkey have plummeted by 69percent reducing it to $282million.

(Web Desk) – Pakistan's exports to Turkey have plunged owing to increased duty tax by the importing party, Dunya News learnt Tuesday.

Reportedly, Turkey hiked the tax by 18 percent taking it to 26.4pc from 6.4pc. Exports to Turkey have plummted by 69 percent reducing it to $282million.

Non-implementation of Turkey FTA

On the other hand, Syed Mazhar Ali Nasir, Acting President FPCCI has criticized preferential treatment to Turkish local industries thus negating the spirit of FTA.

The exports of fabrics have been badly affected due to provocative duties imposed by Turkey. The increase in Duty by 18 to 26.4% against 6.4% has been imposed to give unfair advantage to their local textile industry.

The Acting President further said that recently Turkish measures against Pakistani export items has reduced Pakistan's exports to Turkey by 69% to 282 million dollars in 2017 from 906 million dollars in 2011.

To give boost to Pakistani Textile exports to Turkey it can increase if we have an FTA, he said, adding that signing an FTA without driving any benefit to the biggest export industry of Pakistan will be an exercise in futility.

He further showed his concern over discriminatory measures against Pakistani exports for ceasing the benefits of GSP Plus by Turkish authorities which has been granted to various countries except Pakistani.

Syed Mazhar Ali Nasir, Acting President emphasized that a realistic approach has to be adopted by Turkey so that removal of all kind of barriers to trade in general and Pakistani exports in particular are attended in totality so that Pak-Turkey FTA is concluded to the entire satisfaction of Pakistani exporters and given a level playing field.

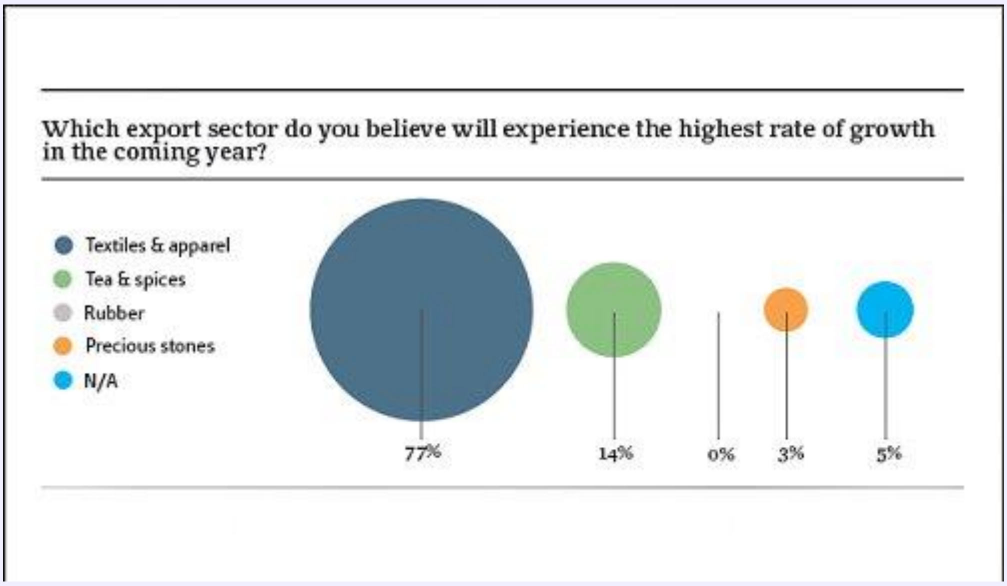
* Textiles to lead Sri Lanka's export revival in 2018 - OBG report

Wed, Feb 28, 2018, 10:02 am SL Time, ColomboPage News Desk, Sri Lanka.

Feb 28, Colombo: Sri Lanka's apparel and textile export segment is likely to experience the highest rate of growth in 2018 as Sri Lanka focus on achieving $20 billion in export earnings by 2020, according to a recent survey by the Oxford Business Group (OBG) said.

Executives interviewed for OBG's most recent Business Barometer: Sri Lanka CEO Survey have resoundingly voted for textiles and apparel as the export segment likely to experience the highest rate of growth in overseas shipments in 2018.

Some 77% of CEOs who took part in the OBG's face-to-face survey predicted that the garments industry would be the growth engine for exports in the year ahead, followed by tea and spices at a distant second with 14%.



Textiles and tea are the backbone of Sri Lanka's tradeable sector, respectively comprising 47% and 12% of total exports in 2016.

Under President Maithripala Sirisena's National Export Strategy, ICT, wellness tourism, spice concentrates, boat building, processed food and beverages, and electronics/machinery were identified as the six priority areas for diversifying the country's export base.

"While diversification will certainly contribute to meeting the government's bold targets, it is clear that local business leaders expect traditional industries to underpin growth for the foreseeable future," the OBG report said.

Export industries received a welcome boost in May 2017, when the EU reinstated Sri Lanka's Generalized Scheme of Preferences Plus (GSP+) status, which had previously been rescinded over human rights concerns in 2010. GSP+ status removes the majority of import duties on Sri Lankan goods entering the European single market, and likely drove the 13.8% year-on-year increase in garment exports to the EU in November 2017.

Even though the immediate future looks bright for the garments segment, Sri Lanka would be wise to devise adaptation strategies for technological advancements in manufacturing processes. Developments in innovative areas such as 3D printing and robotics are likely to erode some of the country's current competitive advantages in the years to come, as without the need for lower labor costs, clothing giants may start to move production facilities closer to their main consumer markets.

Meanwhile, the rise in oil prices worries the executives as Sri Lanka was forced to ramp up oil imports last year, following a severe drought that hampered hydro-generation capacity. According to the survey 49% of respondents place rising global oil prices as the top risk factor.

One of the chief reasons for Sri Lanka submitting to the $1.5bn IMF bailout package was the profligacy of the previous Mahinda Rajapaksa administration, which had agreed to a number of high interest Chinese loans to fund infrastructure projects. Many of these developments have operated below capacity since completion, making it difficult for Sri Lanka to honor its payment commitments. As a result, the Sirisena administration has been forced to make hard choices, such as handing over control of 70% of Hambantota Port to Chinese interests on a 99-year lease.

Chinese investment plays a major role across Sri Lanka's economic sectors: China is now the country's main source of foreign direct investment, its largest trading partner and its second-largest tourism source market. Despite this, just 16% of executives surveyed in our barometer cited a slowdown in Chinese demand as the top external risk that could impact the national economy in 2018.

Tunisie : "Si l'inflation ne s'arrête pas, les conséquences seront désastreuses" (El Abassi)

Publié le Jeudi 08 Mars 2018 à 15:25

En février, le taux d'inflation a atteint 7,1%. Réaction de la BCT : L'augmentation du taux directeur qui passe de 5 à 5,75%. Le gouverneur Marouane El Abassi confirme que c'est une mesure douloureuse, mais il rappelle : "Si rien ne se fait pour freiner l'inflation, les répercussions seraient bien plus graves".

Directement dans le vif du sujet, Abbassi a présenté la situation ayant poussé la BCT à prendre cette mesure : «Nous comprenons la conjoncture difficile. Nous sommes un pays qui passe par une transition globale. Nous avons des difficultés dans tous les domaines. Mais malgré tout, avoir 10% de déficit de la balance des paiements est intolérable. Le taux d'inflation a aussi atteint des proportions insoutenables. En février, il était de 7,1%. Un chiffre qui n'a pas été atteint depuis deux décennies. Là il fallait réagir, sinon, les choses deviendraient incontrôlables ».

Ce glissement, qualifié de « dangereux » par le gouverneur de la BCT a imposé des mesures urgentes, parmi lesquelles, l'augmentation du taux directeur de 75 points, passant ainsi de 5% à 5,75%.

Rim Kolsi, directrice des stratégies monétaires, souligne que cette augmentation du taux directeur, jugée « excessive » par plusieurs experts est « la meilleure solution pour freiner l'inflation ». Elle souligne : « C'est une mesure d'anticipation inévitable, surtout avec le taux de change du dinar par rapport à l'euro et au dollar », a-t-elle déclaré. Pour la responsable de la BCT, l'inflation va se poursuivre. La BCT envisage 7,2% pour l'année 2018. La sortie du tunnel ?

Pour la responsable de la BCT, ce sera vers la fin de l'année 2018. Quand à l'impact de l'augmentation du taux directeur, elle aura des effets en 2019. Elle souligne ensuite que si l'inflation continue, au-delà des prévisions, le taux directeur de la BCT pourrait encore augmenter : « De 20, 50 ou 100 points. S'il le faut, nous irons le plus loin possible, parce que nous n'avons pas vraiment le choix ».

Le gouverneur reprend la parole et affirme que la situation économique est « effrayante ». Il souligne : « Nous sommes un petit pays. Dans une économie de marché, nous sommes exposés à tous les dangers : politiques, sociaux et même climatiques. Maintenant, pour revenir en arrière, baisser le taux d'inflation et conserver la stabilité des prix, il y a beaucoup de travail et de sacrifices à faire ».

Défendre le dinar ? Pour Marouane El Abassi, c'est actuellement très compliqué : «Même si nous le voulons, nous ne pourrons pas. Le déficit du commerce extérieur est alarmant. En termes d'avoirs en devises, nous sommes à 80 jours d'importation. Nous devons inciter les entreprises à investir. Encourager l'export et rationnaliser l'import».

Mais comment encourager l'investissement quand les taux d'intérêt augmentent, ce qui impacte directement les coûts des projets et la compétitivité des entreprises exportatrices ? El Abbassi répond : «Pour l'investisseur c'est l'accès au crédit qui est le plus important et pas le taux d'intérêt. La bonification du taux ? C'est une décision budgétaire qui revient au ministère des Finances. Il faut comprendre que la BCT n'a pas le pouvoir exécutif sur tous les aspects de l'économie, mais c'est un parmi plusieurs autres intervenants qui doivent collaborer tous ensemble ».

Le gouverneur regrette ensuite le manque de réactivité de secteurs sensibles de l'industrie tunisienne : « Le textile, le tourisme ou encore l'extraction du pétrole ou du phosphate. Le port de Radès ? Il est inadmissible que des marchandises attendent des dizaines de jours avant d'être livrées. Les délais étaient de trois jours en 2010. Notre travail consiste aussi à relever et remonter certaines défaillances aux autorités compétentes, en espérant que des solutions concrètes soient rapidement appliquées ».

Le gouverneur de la BCT met ensuite les citoyens devant leurs responsabilités : « Quand les gens se plaignent, ils doivent être conscients qu'ils sont des acteurs de l'économie et qu'ils sont aussi responsables de la situation. Rien ne changera tant que le pays entre en hibernation durant le mois de Ramadan et aussi pendant l'été. Si nous voulons que les choses changent, que le dinar reprenne de la valeur, il faut tout simplement travailler. Il n'y a pas de solution miracle. Cette augmentation du taux directeur aura certes un impact négatif, mais si nous ne faisons rien pour freiner l'inflation, les conséquences seront désastreuses».

Le gouverneur de la BCT revient ensuite sur les rapports de l'UE, du GAFI et des agences de notation. En effet, la Tunisie s'apprête à contracter un nouveau prêt. Il s'agit de la troisième tranche du crédit du FMI. « Nous devons rester positifs malgré tout ce qui a été dit et fait. Nous avons une sortie sur le marché monétaire international qui est prévue pour cette fin de mois, suite à la demande de l'Etat. Nous y allons avec beaucoup de confiance et de force, malgré toutes les difficultés ».

Selim Slimi

THE NEW INDIAN EXPRESS
Wednesday, March, 07, 2018

Turkey could retaliate US tariffs with duties on cotton

By Reuters | Published: 06th March 2018 04:33 PM |

A textile mill image used for representational purpose. (File photo | Reuters)

ISTANBUL: Turkey could retaliate against potential US steel tariffs by hiking duties on imports of American cotton, one of President Tayyip Erdogan's economic advisers said on Tuesday.

US President Donald Trump said last week he would impose broad tariffs on imports of steel and aluminum to protect American national security, sparking concern from US trade partners and causing turmoil in global stock markets.

"Starting with Turkey, countries affected by the US tax imposition are preparing to answer the US in alternative goods - such as Turkey in cotton," Cemil Ertem, a prominent Erdogan adviser, wrote in the Milliyet newspaper. He did not say how much of a tariff was being considered.

The Economy Ministry said it had spoken to European Union Trade Commissioner Cecilia Malstrom regarding the issue and that they had agreed to cooperate on it in the World Trade Organization (WTO).

Turkey, home to a major textile industry and companies that supply global fashion brands such as Zara, Adidas and Nike, imported USD 519 million worth of US cotton in 2016, according to data from the Turkish Statistical Institute.

US cotton accounted for 42 percent of its total imports that year, the biggest share of any country, the data showed. Turkey is the world's eighth-largest steel producer and the sixth-largest exporter to the United States.

The reaction so far from Turkish steelmakers to Trump's proposal has been relatively sanguine, with one saying it could ramp up its U.S. business in response. An industry association has said Turkish steel producers could still remain competitive thanks to lower costs.

Trump's proposal has also spurred talk of retaliatory duties from Europe, where officials have threatened counter-measures on Harley-Davidson Inc motorbikes, bourbon and jeans.

The US president has also faced growing domestic pressure from political and diplomatic allies as well as American companies urging him to pull back from the proposed tariffs, although he has said he will not back down.

La Turquie et l'UE sur la même longueur d'onde face au projet de nouveaux tarifs douaniers américains

Par : french.china.org.cn | Mots clés : Turquie-UE-USA-tarifs douaniers
French.china.org.cn | Mis à jour le 07-03-2018

La Turquie et l'Union européenne (UE) ont décidé de monter au créneau ensemble devant l'Organisation mondiale du commerce contre un projet des Etats-Unis visant à instaurer de nouveaux tarifs sur leurs importations d'acier et d'aluminium, a annoncé mardi le ministère turc de l'Economie.

Nous avons suivi de près cette question et nous allons prendre toutes les mesures nécessaires devant différentes instances, selon un communiqué rendu public par le ministère.

Lors de leur conversation téléphonique, le ministre turc de l'Economie, Nihat Zeybekci, et la Commissaire européenne au Commerce, Mme Cecilia Malmstrom, se sont mis d'accord pour une meilleure coordination sur cette question.

Parallèlement, le conseiller économique du président turc Recep Tayyip Erdogan, Cemil Ertem, a suggéré mardi que la Turquie pourrait riposter contre la décision de Washington, en augmentant les droits de douane sur les importations de coton en provenance des Etats-Unis.

Le 1er mars, le président américain Donald Trump a annoncé que son administration allait imposer un tarif de 25% aux importations d'acier et un tarif de 10% aux importations d'aluminium, ce qui a provoqué un tollé général dans de nombreux pays ainsi que des turbulences sur les marchés boursiers internationaux.

Si les producteurs et exportateurs turcs "se plaignent des mesures américaines, nous évaluerons la situation et il est probable que nous prendrons des mesures de rétorsion", avait mis en garde le ministre Zeybekci précédemment.

La Turquie est le huitième producteur mondial d'acier et le sixième exportateur d'acier à destination des Etats-Unis, derrière le Canada, le Brésil, la Corée du Sud, le Mexique et la Russie.

En 2017, la Turquie a exporté vers les Etats-Unis pour 1,2 milliard de dollars d'acier et pour 78,5 millions d'aluminium. La Turquie a également importé des produits du coton d'un montant d'environ 738 millions de dollars, selon des données officielles turques. F

*Suivez China.org.cn sur **Twitter** et **Facebook** pour rejoindre la conversation.*

Source: Agence de presse Xinhua

08 MARS 2018 - 15:00 |
PAR COMMODAFRICA

©(DR)

Les mesures de Donald Trump sur l'acier et l'aluminium impacteraient le marché du coton

L'annonce le 1er mars par le président américain Donald Trump de taxer les importations d'aluminium et d'acier à leur entrée aux Etats-Unis pourrait avoir des répercussions sur le marché … du coton.

En effet, en début de semaine, la Turquie et l'Union européenne (UE) auraient décidé d'approcher conjointement l'Organisation mondiale du commerce (OMC) pour lancer à Genève des consultations sur le règlement des différends avec les Etats-Unis, a rapporté lundi le journal turc *Hurriyet Daily News*.

La Turquie est le 6ème fournisseur d'acier des Etats-Unis, ses exportations lui ayant rapporté $ 1,2 milliard l'année dernière ; ses ventes d'aluminium ont généré $ 78,5 millions.

En représailles, la Turquie imposerait des tarifs à l'importation de coton américain, a souligné Cemil Ertem, conseiller économique du président Recep Tayvip Erdogan.

En 2017, Ankara a importé pour $ 738 millions de fibre blanche, toutes origines confondues, afin d'alimenter son industrie textile de rang mondial qui fournit les grands de la confection comme Zara, Adidas, Nike, etc. Or, en 2016, 42% du coton importé par la Turquie venait des Etats-Unis, selon l'Institut turc des statistiques.

Une mesure qui pourrait conduire à une redistribution des cartes sur la scène internationale du coton

LinkedIn

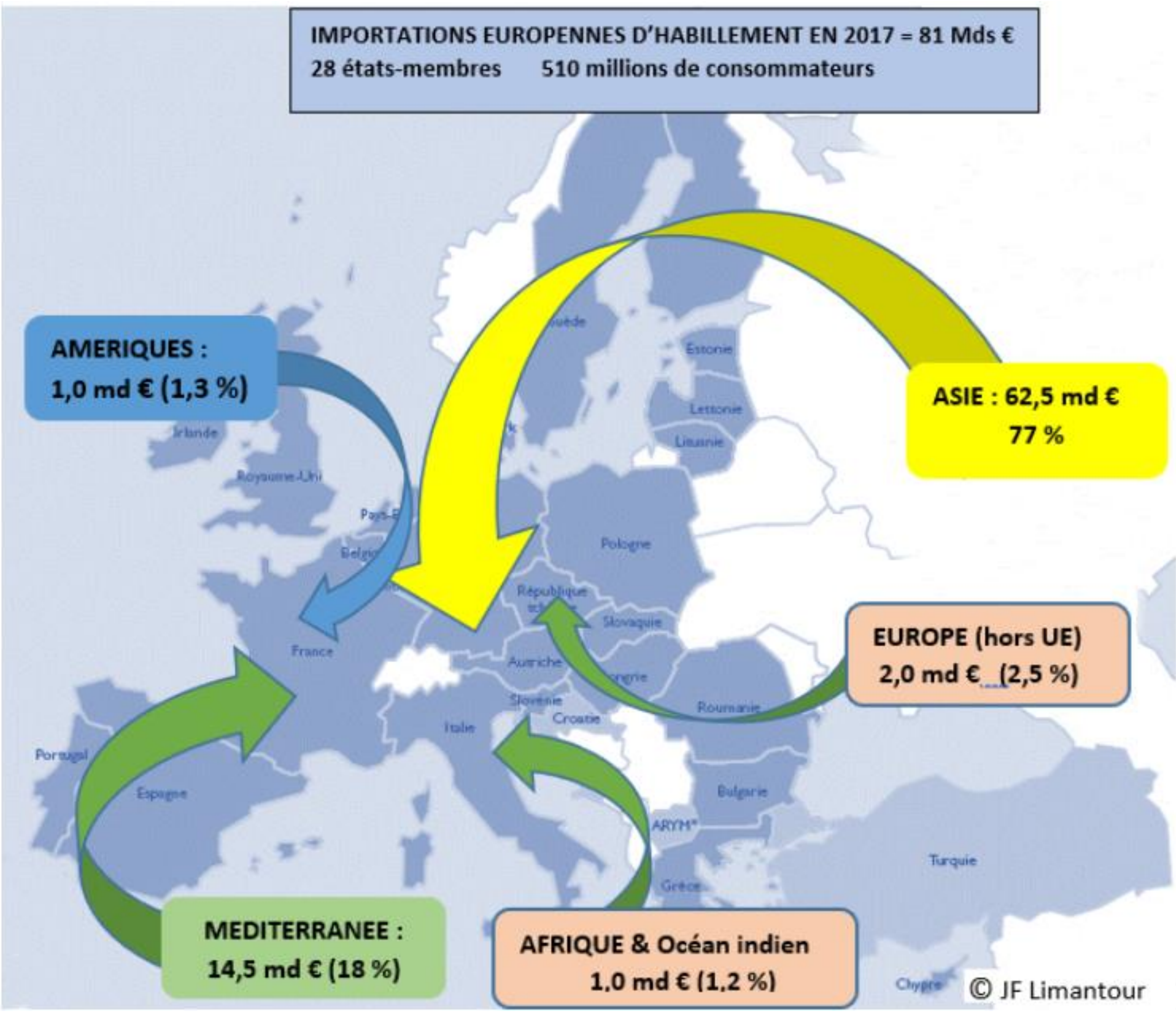
2 mars 2018

L'Europe a importé pour 112 milliards d'euros de produits textiles en 2017 !

Publié le 22 février 2018 Modifier l'article | Voir les stats

Jean-François Limantour
President of Evalliance
45 articles

Les importations européennes de textile-habillement se sont élevées à 112 milliards d'euros en 2017, dont 30 milliards d'euros de produits textiles (+ 3,4 % par rapport à 2016) et 82 milliards d'euros de vêtements (+ 1,0 %)



La Chine fournit un tiers des importations d'habillement, en baisse de 2 % en 2017. La Chine n'est cependant pas en déclin, bien au contraire, et renforce son contrôle du marché mondial tant dans le domaine industriel (implantation renforcée dans les pays à bas salaires et/ou liés à l'UE par des accords préférentiels (Cambodge, Myanmar, Vietnam, Bangladesh, Ethiopie, Egypte, etc.) que dans celui de la distribution (acquisition de distributeurs internationaux, développement/création de pôles de distribution par exemple en France (Aubervilliers, Marseille).

Situation diversifiée pour les autres grands fournisseurs asiatiques avec, d'un côté, les pays qui, liés à l'UE par des accords préférentiels (SPG, SPG+, Tout Sauf Les Armes), poursuivent leur progression rapide (Bangladesh, Vietnam, Pakistan, Sri Lanka, Myanmar) et d'un autre côté, ceux qui, en l'absence d'accords avec l'UE, stagnent ou sont en déclin: Inde, Indonésie, Thaïlande, Hong-Kong, Malaisie, Philippines,...

Performances contrastées également pour les fournisseurs méditerranéens : alors que la Turquie, la Tunisie et l'Egypte stagnent, le Maroc voit ses exportations d'habillement vers l'UE croître à un rythme soutenu (+4,9 %), fruit d'une politique professionnelle active de compétitivité et de promotion.

On notera enfin que les prix moyens des vêtements importés par l'Union européenne sont presque tous stables ou en baisse en 2017 par rapport à 2016, situation qui reflète l'atonie du marché européen et la sagesse du prix des matières, ainsi que les effets de l'évolution de la parité euro/dollar.

L'UE réplique à la taxe sur l'acier et l'aluminium: la liste des produits américains ciblés

L'UE réplique à la taxe sur l'acier et l'aluminium: la liste des produits américains ciblés - © Tous droits réservés

Publié le jeudi 08 mars 2018 - Mis à jour à 07h39

L'UE a promis de taxer lourdement des dizaines de produits américains, dont le tabac, le bourbon, les jeans ou les motos, si elle était touchée par les droits de douane américains sur l'acier (25%) et l'aluminium (10%). D'ici une quinzaine de jours, ce sera peut-être le cas si l'UE ne parvient pas à négocier son exemption.

La Commission européenne a établi une liste d'articles parfois emblématiques, consultée par l'AFP. Il s'agit de produits fabriqués sur le territoire américain et non pas vendus par les marques américaines - qui sont eux susceptibles d'être fabriqués partout dans le monde.

Ces produits sont listés selon une nomenclature douanière très précise, qui ne cite aucun nom de marque ou d'entreprise, même si le président de la Commission Jean-Claude Juncker a lui-même évoqué la semaine dernière Harley-Davidson et Levi's.

L'Union européenne a exporté 5,3 milliards d'euros d'acier et 1,1 milliard d'euros d'aluminium vers les États-Unis en 2017.

Les contre-mesures européennes sur les produits de la liste visent à compenser à hauteur de 2,8 milliards d'euros les dommages que causeraient à son industrie les taxes américaines, un chiffre "*mesuré*", selon la Commission, qui tient à ce que la procédure respecte pleinement les règles l'Organisation mondiale du commerce (OMC).

Textile

Des T-shirts et maillots de corps en coton, laine ou matière synthétique, des pantalons "*denims*" (c'est-à-dire les jeans) ou en coton, des shorts, le linge de lit en coton et certaines chaussures en cuir.

Acier

Plusieurs dizaines de produits comme certains aciers laminés, les barres en acier inoxydables, les tubes sans soudure, les fils en acier, des portes, des fenêtres, des outils et des couverts, etc.

Agriculture et alimentation

Les haricots, le maïs et le riz (transformés ou non), les airelles, le jus d'orange, le beurre de cacahuètes, le bourbon, les cigares, les cigarettes, le tabac pour pipes, à rouler, à chiquer ou à priser.

Produits de beauté

Le rouge à lèvres, le maquillage pour les yeux, le vernis à ongles et le fond de teint.

Véhicules

Les motos d'une cylindrée supérieure à 500 cm3, les bateaux à voile, de plaisance ou de sport, avec ou sans moteur, les bateaux à rames et les canoës.

March 9, 2018

EU launches €2bn claim against UK over China customs fraud

Rochelle Toplensky in Brussels
yesterday

Brussels has launched a process to recover nearly €2bn from the UK for failing to crackdown on customs fraud by Chinese clothing importers.The European Commission sent London a formal notice on Thursday that the UK must pay customs duties lost on undervalued Chinese textiles and clothing brought into the bloc through Britain between November 2011- December 2017."Despite having been informed of the risks of fraud relating to the importation of textiles and footwear originating in the People's Republic of China since 2007, and despite having been asked to take appropriate risk control measures, the United Kingdom failed to take action to prevent the fraud," said the commission in a statement on Thursday.

EU officials calculated that the UK's failure to act resulted in EU budget losses of €2.7bn, or nearly €2bn after collection costs.A three-year long investigation by OLAF, the EU's anti-fraud office, accused the UK of failing to act on repeated warnings since 2007 that some Chinese importers were escaping customs duties on the textile imports by using fictitious and false invoices and declaring the items to be worth a fraction of their true value.OLAF passed their findings to the Commission one year ago and formally recommended that the EU recover the lost duties that it estimated at almost €2bn.Britain has two months to respond with its arguments, after which EU officials will take a decision. If London fails to comply with that decision, the commission can refer the matter to the European Court of Justice.

SJ SOURCING JOURNAL

Apparel and Textile Imports Rise in January Amid Trade War Threats

by Arthur Friedman

Posted on March 7, 2018 in Import/Export, Market Data

Photo credit: Maersk Line

Though President Trump has threatened to impose tariffs on steel and aluminum and trading partners have alluded to retaliation on items like Levi's jeans, textile and apparel imports to the U.S. are on the upswing for, increasing 2.6% to 5.61 billion square meter equivalents (SME) in January over a year earlier.

Textile imports rose 4.5% to 3.19 billion SME, while apparel shipments increased 0.2% to 2.42 billion SME, according to a monthly report released Wednesday by the Commerce Department's Office of Textiles and Apparel.

Among the top 10 U.S. suppliers, China—still No. 1 by a very long shot—saw its imports increase 0.9% in January to 2.76 billion SME year-over-year. Meanwhile India, the No. 2 supplier of textiles and apparel to the U.S., notched an 11.4% gain to 455 million SME, and Vietnam, the third largest supplier, posted a 0.6% rise to 425.6 million SME.

Among the top suppliers with declines in shipments, South Korea saw the biggest drop, with its goods to the U.S. falling 9.4% to 115.8 million SME. Imports from Pakistan to the U.S. dipped 0.3% to 222.6 million SME, and Indonesia's fell 5.4% to 148.1 million SME.

The remaining countries making gains, Cambodia saw the steepest increase, with its U.S.-bound textiles and apparel jumping 27 percent to 112.2 million SME. Canada followed closely in terms of growth, with the U.S. taking in 25 percent more of its goods to reach

100.2 million SME, and Mexico saw its shipments rise 2.4% to 191 million SME. As tensions grow increasingly strained in the North American Free Trade Agreements, however, that growth could be threatened.

In value terms, textile and apparel imports to the U.S. rose 4.24% in January to $9.29 billion compared to $8.91 billion a year earlier. Imports from China increased 0.68% to $3.41 billion, garnering a 36.44% market share, while Vietnam saw a 4.16% gain to $1.16 billion and a 11.5% share.

Amid the NAFTA talks, Mexico posted a 14.16% increase in shipments valued at $374.53 million and a 4.53% share, and Canada notched a 14.48% rise to $107.37 million and a 1.23% share.

Among the major Asian suppliers, the value of imports from India increased 2.69% to $649.76 million, taking it to a 6.96% share. Bangladesh’s shipments rose 1.95% to $509.69 million and a 4.97% share, Pakistan’s moved up 5.52% to $251.13 million and a 2.61% share, and Cambodia’s jumped 22.87% to $226.88 million and a 2.14% share. Imports from Indonesia, on the other hand, fell 1.73% to $428.49 million and a 4.47% share.

Among Central American countries, Honduras saw the value of its imports to the U.S. increase 13.92% to $157.1 million and a 2.36% share, El Savador’s shipments rose 0.93% to $123.15 million and a 1.84% share and Nicaragua’s shipments increased 10.96% to $117.35 million and a 1.41% share.

Footwear imports were up 6.6% to $1.78 billion in January compared to December.

Meanwhile, the overall U.S. trade deficit in goods and services increased 5 percent to $56.6 billion in January from $53.9 billion in December, according to the Bureau of Economic Analysis (BEA). BEA reported that January exports decreased 1.3% to $200.9 billion compared to December and were essentially flat at $257.5 billion from a year earlier.

Exports of apparel and clothing accessories increased 11.2% to $277 million in January from December and grew 21.5% compared to a year earlier.

Exports of fabric and yarn increased 6.7% month-to-month and 4.8% year-to-year to reach $960 million in the month. Footwear exports fell 8.7% to $69 million month-to-month, but rose 19 percent year-over-year.

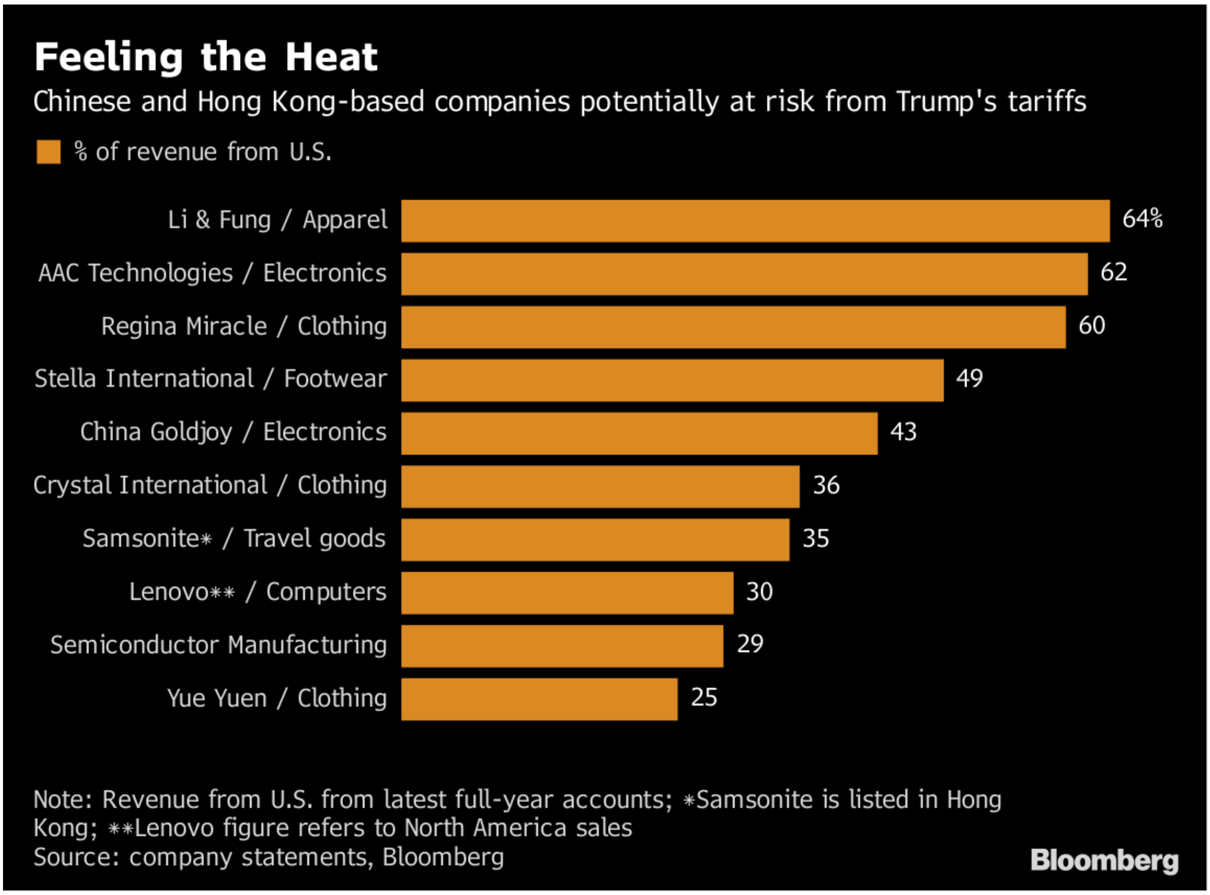
Walmart, Nike Suppliers Put on Notice by China Tariff Threat

7 March 2018, 4:15 PM7 March 2018, 5:55 AM

(Bloomberg) -- Some of China's biggest manufacturers that supply U.S. multinationals from Walmart Inc. to Nike Inc. find themselves in President Donald Trump's cross hairs as his administration discusses new import tariffs.

The U.S. is considering taxing imports from shoes and clothing to consumer electronics, putting on the hook companies including Yue Yuen Industrial Holdings Ltd. and Li & Fung Ltd. that help fuel the about $450 billion in Chinese goods imported to America annually. Chinese manufacturers won't be the only ones hurt in a trade war, as their close relationships as suppliers to American brands will likely create a ripple effect.

"Our greatest fear is a trade war," said Eric Li, the owner of Huizhou Baizhan Glass Ltd., which has a factory in Guangdong province and makes glass lampshades for Home Depot Inc. and Lowe's Cos. "I hope Trump realizes that everything has a price. Americans also have things they need to sell to China and the world, so he should think of the consequences."



Many Chinese manufacturers are part of the global supply chain. Li & Fung, which sources clothes and toys for retailers, counts Walmart and Macy's Inc. as customers, while Yue Yuen supplies Nike and Under Armour Inc.

Yue Yuen generates about 25 percent of its sales in the U.S., while Li & Fung relies on the U.S. for almost two thirds of revenue, according to Bloomberg data. The American Apparel and Footwear Association said that some 98 percent of shoes and 97 percent of clothing sold in the U.S. are imported. Most of that manufacturing comes from China.

Read more: The U.S. Businesses at Risk From Trade War With China: QuickTake

Companies that have products assembled in China, such as Apple Inc., may be hurt, and Deutsche Bank analysts said General Electric Co. is also among those most at risk. It's also not clear how tariffs might affect a borderless company like Samsonite International SA. The Hong Kong-listed company has headquarters in Mansfield, Massachusetts, and uses Chinese factories to make some of its travel luggage.

A Samsonite representative couldn't immediately be reached for comment.

The reaction to the Trump administration's trade moves continued as European Union Trade Commissioner Cecilia Malmstrom warned Wednesday that the U.S. would face a "firm" response should it go ahead with threatened new tariffs on foreign steel and aluminum.

Malmstrom's comments come as the EU has drawn up a list of about $3.5 billion in U.S. goods it intends to target with retaliatory levies if the Trump tariff plan proceeds.

Shifting Production

Chinese manufacturers may be able to mitigate the impact of U.S. trade policy, as many have been shifting production to Southeast Asia over the last three years, said Bloomberg Intelligence retail analyst Catherine Lim.
Spencer Fung, chief executive officer of Li & Fung, noted that the company operates in 60 countries with more than 15,000 factories. "If there is any change in trade policy, we have the ability to channel production to any market quickly," he said in an email response to questions.

Pacific trade deal to boost Vietnam's economy, drive reforms: World Bank

By **Ngan Anh** March 9, 2018 | 05:25 pm GMT+7

Textile and garments are among sectors expected to enjoy the biggest boost from CPTPP. Photo by Reuters/Kham

Textiles, footwear and beverages are expected to enjoy a boost thanks to lower tariffs.

The Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) signed by Vietnam and 10 other countries on Thursday will yield robust economic gains for Vietnam, a new World Bank report says.

According to analysts, multilateral trade agreements such as the CPTPP are expected to boost Vietnam's investment and export driven growth model.

The CPTPP will reduce tariffs in countries that together amount to more than 13 percent of the global economy - a total of $10 trillion in gross domestic product. With the United States, it would have represented 40 percent.

Even without the United States, the deal will span a market of nearly 500 million people, making it one of the world's largest trade agreements, according to Chilean and Canadian trade statistics.

The CPTPP will increase Vietnam's GDP by 1.1 percent by 2030, according to the report. "Assuming a modest boost to productivity, the estimated increase of GDP would amount to 3.5 percent from the CPTPP," said Ousmane Dione, World Bank country director for Vietnam.

Lower tariffs under the trade deal are expected to help boost Vietnam's exports by 4 percent, said Tran Toan Thang from the National Center for Socio-economic Information and Forecasting.
Under the CPTPP, exports to signatory countries will increase from the current $54 billion to $80 billion by 2030, reaching 25 percent of total exports, according to the World Bank.

Textiles, footwear and beverages are expected to enjoy the biggest boost thanks to the lower tariffs.

For Vietnam's seafood industry, the biggest impact of the CPTPP may well be improving quality, according to *Nikkei Asian Review*. The country's fish - particularly its panga - have been the subject of attacks in Europe and the U.S. over food safety and farming conditions.
In February, Vietnam struck back, filing a case against the U.S. for what it called punitive tariffs on its fish, including new rules requiring panga to be inspected by both the U.S. Department of Agriculture and the U.S. Food and Drug Administration.

But the CPTPP could improve the reputation of Vietnam's fish. Japan has high tariffs on seafood, meaning it made little sense for companies to invest the money in techniques that would ensure their catch was up to its high standards. "If those tariffs drop to zero, suddenly there are incentives to figure out how to clear the challenging standards to sell in Japan," *Nikkei* quoted Deborah Elms, executive director of the Asian Trade Center in Singapore, as saying. "The upsides of being in Japan are huge for Vietnam." Duong Ngoc Minh, owner of the country's leading panga exporter Hung Vuong, says his company will still benefit from the CPTPP. He sold $20 million worth of seafood to Japan, Canada and Australia last year, but hopes to eventually increase that by 30 percent after the final agreement is signed among the so-called TPP 11 countries at a ceremony in Santiago, Chile, on March 8, according to *Nikkei*.

Boost reform

In addition to boosting exports, the trade deal will create opportunities for domestic private firms to integrate into global value chains and promote the development of the small and medium-sized enterprise (SOE) sector.

“The new agreement will bring direct benefits to Vietnam, from trade liberalization and improved market access. Most importantly, it will help stimulate and accelerate domestic reforms in many areas.” said Sebastian Eckardt, the World Bank Lead Economist for Vietnam. “Delivering commitments under the CPTPP will contribute in promoting transparency and supporting the creation of modern institutions in Vietnam.”

The CPTPP is expected to stimulate reforms in areas such as competition, services (including financial services, telecommunications, and temporary entry of service providers), customs, e-commerce, environment, government procurement, intellectual property, investment, labor standards, legal issues, market access for goods, rules of origin, non-tariff measures and trade remedies, the World Bank said.

According to new data from HSBC, 63 percent of businesses in Vietnam believe the CPTPP will have a positive impact.

The 11 CPTPP state members represent a market of 500 million people, greater than that of the European Union's single market.

The pact will come into force 60 days after it is fully ratified by six of the 11 members.

The 11 CPTPP countries are Australia, Brunei, Canada, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore and Vietnam.

Global Yarn and Fabric Production Declines Seen Deepening on Weak Asia Outlook

by Arthur Friedman

Posted on March 6, 2018 in Market Data, Raw Materials

The International Textile Manufacturers Federation said the relatively stable third quarter 2017 global market for yarn and fabric production is expected to show a deeper contraction in the fourth quarter.

ITMF reported that global yarn production decreased 0.4% in the third quarter from the previous three months and was 2.4% lower than a year-ago-period. An output reduction of 3 percent in Europe and 0.5% in Asia, were somewhat balanced by increases of 0.5% in Africa, 4.8% in the U.S. and 6.5% in Brazil.
"This downward trend is expected to be observed in the fourth quarter due to negative forecasts in the Asian market," according to ITMF.

Global yarn stock declines ranged from 0.3% to 6% in all regions in the third quarter except in Europe, where stocks increased 10 percent. Altogether, yarn stocks reached 105 percent of the previous year's level.

Global yarn orders fell 2.7% around the world from the second quarter to the three months through September, as a result of a 14 percent increase in South Korea, a stable European market and decreases of 2.5% decreases in Egypt and 11.7% in Brazil.

Compared to the previous three months, global fabric production declined 0.6% in the third quarter, reflecting a 10.7% improvement in Brazil, stable conditions in the U.S. and a reductions of 0.9% in Asia, 3.1% in Europe and 7.6% in Africa.

Negative forecasts in all regions should lower this level in the fourth quarter, ITMF said. Global fabric stocks showed a positive trend in all regions in the third quarter, except for a 9 percent drop in Egypt. Overall, global fabric stocks increased 0.5% in the period.

"A significant positive change of 18.4% in stocks has been observed in Brazil," according to ITMF. "This trend has been setting in for the third consecutive quarter. While conditions are relatively stable in Asia and the USA, Europe shows slow but constant positive changes."

Global fabric orders improved in the quarter, with a 18.3% improvement in Brazil counterbalancing reductions of 1.2% in Europe and 2.6% in Africa. This brought the global index up 12.7 compared to the second quarter, ITMF noted.