

11. Istanbul Fashion Conference hosted by TGSD (Turkish Clothing Manufacturers Association) is opened with Gala dinner with the contributions of Istanbul Apparel Exporters Association (IHKIB) at 2 October 2018.

Over 300 local and foreign guests attended, shareholders NGO and Board Members, conference sponsors, leading figures of the sector, crucial buying office representatives, speakers apart from TGSD Members and previous presidents, to the night started with opening speeches of TGSD Board Chairman Hadi Karasu and IHKIB Board Chairman Mustafa Gültepe.









Turkish Clothing Manufacturers Association brought up the Responsible Fashion place in Turkey's future agenda with the theme "Responsible Fashion".

11. Istanbul Fashion Conference arranged with over **900 participations** hosted by Turkish Clothing Manufacturers Association (TGSD) is performed with the theme of "**Responsible Fashion**" on Çırağan Palace Kempinski at 3-4 October 2018.

At the conference, the power of Turkey's garment sector, cognizance of sustainability and Turkey's competencies are emphasized as an unrivalled business partner.

At the opening Speech of TGSD, Head Hadi Karasu declared that 2023 export target of Garment sector is 25 billion dollar and he based on the sustainability, branding, value-added production and close contact with "Strategic Action Plan" prepared by TGSD. Hadi Karasu continued as follows specifying %19 of Turkey's Exportation are executed with the sectors like a garment, textile, leather and carpet. "We are champion sector in many areas with %90 local production, %80 contribution to export for reducing current deficit and %27 support to the employment of manufacturing industry. Turkish textile and garment sector are ready to brand and technical production with the using of technology, sectoral added-value, innovation, design, R&D (Research and Development) platform and producing power".

He said during the next 20 years, the most important subject is sustainability for the garment sector and World and he declared that the theme of the conference is "Responsible Fashion" to create awareness.



After making opening speech, protocol speech, IAF Board Chairman Han Bekke, Head of Istanbul Apparel Exporters Association (IHKIB) Mustafa Gültepe and Head of Turkish Exporters Assembly (TIM) Ismail Gulle is continued. TGSD Head Hadi Karasu gave their presents to Han Bekke, Mustafa Gültepe and İsmail Gülle at the end of their speeches.



CONFERENCE SPEAKERS



Marithé+ François founder of Girbaud Brand François Girbaud

Marité+François, founder of Girbaud Brand François Girbaud, who is one the keynote speaker of the conference made a presentation, including topics about new approach and technics to improve the basis of sustainability on a sector by collaborating with the brands like ISKO, EUROJERSEY and CLOSED.

At his speech, he declared that fashion industry is above on linear production model and he has described the developments about denim since 1970 as the pioneer of this sector. While this development is preserved he draw

attention to the significance of less usage of raw materials. Nowadays, less than %50 of clothes gathers for recycling and less than %1 recycling raw materials are used.



Economist David McWilliams: "New Silk-road is coming."

Irish Economist Writer David McWilliams, one of the keynote speakers of the conference, continued as follows by reminding Istanbul was the capital of the World during 1600 years:

"After then the Atlantic period began. But today there is a returning to this side.

China has started the biggest project of the history of humanity. The Silk Road comes to İstanbul again. The area between Turkey and Shanghai has %60 populations of World and %61 GSMH (Gross National Product). It means, Trade of World is heading from Atlantic to the

Silk Road. In this process, Istanbul will be the most important and new center of World trade and so Istanbul' and Turkish garment sector's future looks bright." and David McWilliams continued his speech by specifying the Silk Road's construction and biggest project of China about the history of humanity. Thus, World trade will be moved from West to East and Istanbul will become one of the most important centers in this process.

After their presentations, Head of TGSD Hadi Karasu and Vice President Esra Ercan gave their presents to speakers.

GLOBAL SOURCING PANEL

Moderator: Cuneyt Yavuz - Mavi Jeans, CEO

- . Ralph Lauren Craig Dana, Senior Vice President Global Sourcing
- . Newtimes Alex Angelchik, CEO
- . VF Corporation Napapijri Bhavesh Naik, Senior Director Product, Innovation and Sourcing
- .The United States Fashion Industry Association (USFIA) Samantha Sault, Vice President



The US Fashion Industry Association Vice President Samantha Sault: "There are great opportunities for Turkey in the U.S. market."

The biggest problem is the limitation of the U.S. trade protectionism due to rising trade, indicating that the U.S. Fashion Industry Association Vice President Samantha Sault, tried to find a new source area, she said. Therefore, she declared that U.S. market serves trade opportunities to Turkey at a new period. Sault draw attention to U.S. market has great opportunities for men, children and women.

Senior Vice President Global Sourcing Craig Dana of Ralph Lauren, their %40 incomes supplied from out of U.S, "Our goal is to increase this rate in 3 years". In this point, Turkey is a great market for us. Turkey may be a strong European center for us. "he said. Ralph Lauren said that they located to Turkey as strong Europe center. VF Corporation Napapijri Product, Innovation and Supplying Senior Director Bhavesh Naik declared that sustainability is not new for themselves and they have sustainable supplying programme for many years.

They take care to be balanced of supplied countries and areas, for instance he declared that they preferred South America instead of China for U.S market

He said that there are absolutely CSR departments at the factory and it needs to be more transparent to customers by specifying there are many distances to be covered.

Alex Angelchik, CEO of Newtimes, says he is quite optimistic about the future of the industry, specified that there is a changing on customers and design, product and developing a product is the logal point. He said that making less sample is favourable in sustainability by declaring ever - mounting significance 3D technology. He declared that Turkish firms need to be bound up with a design for the continuity of working with the U.S.

Nigel GosseMERINO WOOL - NATURAL, BIODEGRADABLE, RENEWABLE The Woolmark Company Country Manager UK and Turkey





Mike Fralix

ROBOTICS AND AUTOMATION,

[TC]2 - President and CEO



[TC]2 Board Chairman Mike Fralix:

Mike Fralix beginning to speak about Robotic and Automatisation said: "Today we're talking Industry 4.0. What was the first three? First one using the power of vapour energy, then duplicate production comes with electrical power and the third one is machine with communicating people with contributions of computer and automatisation and nowadays the internet. Arms of Baxter robot can be programmed freely that you see in the television and it can perform different things synchronously. When I went to the factory in China, I saw 3 semi operators on 3 sewing machine; respectively one of them were finishing jobs and transmitting the bulk product to other and to other

This process is lagging behind, also everywhere in the World. Supply chain working with local and automatisation can reduce the manufacture and distribution period between 1 or 3 days.



TECHNOLOGIES THAT ARE CHANGING THE INDUSTRY

Moderator: [TC]2 - Mike Fralix, President and CEO

- . Glengo Cenk Levin Gurcan, Marketing Coordinator : Modern Technologies For Apparel Production
- **. Polytropon Automation Systems** Leslie Riley Owner and CEO: True-to-Life 3D: Getting on board the Digital Transformation in the Fashion Industry
- **. Avery Dennison** Francisco Melo, Vice President and General Manager for Global RFID: RFID Technology as a key enabler for the Digital Supply Chain



Cenk Levin Gürcan:

He declared that digitalization changed all process not only fashion industry producing process but also o rientation period of persons. Gürcan is mentioning about all persons can benefit digital solutions from all over the world and underlying the digitalising which effects all stages from design to product development and from manufacturer to ultimate consumer.

Leslie Riley:

Riley starting her speech with the question of "What is digital?" declared that two subjects are crucial for being digital data and they are Accessibility and Transparency.

Leslie Riley explained what it means for the fashion sector in the rest of her speech. "It means a customer can see the clothes that he/she bought produced which factory and conditions. Why are we digitalizing? For entering the market faster. But it is not possible by applying the existing methods and I am sure all working as fast as possible. In this way, 3D modelling steps in."

Francisco Melo:

Melo, specifies many things about digitalization, mentioned that the most basic differentiation bringing by digitalization is increasing the expectations of customers. When Melo compared the buying processes of a consumer, he declared that they saw the complex state of processes. Melo who emphasized the function of smart tag: "At this point, speeding up processes and the improvement of the" smart tag "applications on behalf of our help." he said.

Marsha Powell

WORLD COTTON MARKET OUTLOOK

Cotton Council International Turkey Program Director



	World Ba	World Balance Sheet			2017/18	18 2018/19 (September)
IBLE	Beg. Stocks Production Susply Mill-Use Demand End Stocks Stocks/Use	22.4 26.0 68.4 26.4 26.4 26.4 26.4 26.0 88.2%	24.0 26.9 44.9 24.7 24.7 20.3 82.5%	20.3 23.2 43.6 25.3 25.3 18.2 72.2%	18.2 26.9 45.1 26.8 26.8 18.2 68.0%	18.2 26.6 44.8 27.9 27.9 16.9 50.5%
COTTON USA		Tage in			ale	SUTTO- C

RE-DESIGNING FASHION'S FUTURE, SHIFTING TO A CIRCULAR SYSTEM: Part-1

Moderator: Dilek Bil - Purpose - Sustainable Ideas, Founder

- . GAMA Recycle Elyaf ve İplik Zafer Kaplan, Founder
- . Orta Anadolu Sedef Uncu Akı, Director
- . Pameks Giyim Cevdet Karahasanoglu, Founder
- . Yeşim Tekstil Dilek Cesur, Corporate Communications Manager





Moderator for the Session on Transition to Circular Economy as Future of Fashion is Being Redesigned Section One - Owner of Purpose - Sustainable Ideas - Dilek Bil:

Noting that they will examine a brand-new textile economy in this session, Dilek Bil said that while 53 million tons of garments were produced every year, 87% of the production was either buried as wastage or burned. They underlined the importance of re-discussing and re-shaping the idea

"Purchase-produce-waste", an idea which has been prominent in the textile industry as well as others since the first industrial revolution.

Owner of Pameks Giyim - Cevdet Karahasanoğlu:

Noting that sustainability is no longer an option but rather a necessity for the humanity, Cevdet Karahasanoğlu talked about their (Cut-Up Scraps) Project. They iterated that they had first issued a roadmap and set out with the idea of converting cut-up scraps into threads to re-circulate them into the economy instead of sending them off to the nature. Elaborating on the other stages of the project, Karahasanoğlu noted that the most important stage of the project was fabric R&D. Furthermore, Karahasanoğlu underlined the fact that 42.5 million litres of water was saved thanks to the project and 5 tons of fibre was consumed.

Owner of GAMA Recycle Elyaf ve İplik - Zafer Kaplan:

Starting their speech by noting that Game Recycle had been working on recycling for nearly 20 years, Zafer Kaplan said that they produced 3500 tons of regenerated threads out of garment wastage and 1500 tons of polyester threads out of pet bottles, and that they exported these products to numerous countries around the world. Noting that there is still a lot to accomplish in terms of R&D, Kaplan said the global population of 7 billion today would reach 10 billion by 2050 and 20 billion by 2100, increasing the need for sustainable resources of raw material.

Director of Orta Anadolu - Sedef Uncu Akı:

Stating that Orta Anadolu had been a pioneer in the use of organic cotton since it started to use it as of early 2000, Sedef Uncu Akı noted that their adventure continued in the following years with better cotton and other types of sustainable fibre. Stressing that they wanted to bring the spotlight to the theme of sustainability, which is one of the most important matters for them as a company, in the company's 65th year, they added: "We define the damage we inflict onto the environment as result of our consumption as "footprint"; let's define all the changes and disruptive innovations we introduce for improvement as "handprint"."

With the motto "show me your handprint", the "Handprint" project focuses on five topics, each representing a finger. Water, energy, raw materials, production and people.

Corporate Communications Director of Yeşim Tekstil andBoard Member of Global Compact Dilek Cesur:

Underlining the fact that the sustainability journey of Yeşim Tekstil dates back to 1949, Dilek Cesur said that they, as a company, perceived the matter of sustainability as not just a matter of environment, but in a broader sense. Cesur said that they had set out with the theme "People First" and carried out all development efforts in a people oriented manner, that they cared deeply about their employees utilising all their rights, and that they believed that ensuring this would make projects aimed at the society more meaningful. They added that they assumed the concept of "Green Factory" in all their production processes in terms of "Respect for Environment", that they were pioneers in this field with the then-largest treatment facility they established in early 2000s, and that they launched the brands Yeşim Organic and Yeşim Recycle in early 2010s and continued with their efforts in this regard.

RE-DESIGNING FASHION'S FUTURE, SHIFTING TO A CIRCULAR SYSTEM: Part-2

Moderator: Dilek Bil - Purpose - Sustainable Ideas, Founder

- . Primark Libby Annat, Ethical Trade and Sustainability Controller
- . The Boston Consulting Group (BCG) Catharina Hase, Manager
- . CO2 Logic Eric Dierckx, Project Director
- . The European Apparel and Textile Confederation (EURATEX) Mauro Scalia, Director Sustainable Businesses



Moderator for the Session on Transition to Circular Economy as Future of Fashion is Being Redesigned Section Two:

Trade and Sustainability Auditor of Primark Etik Ticaret Libby Annat:

Libby Annat stated that, when it came to sustainability, brands all over had issued requests the most important of which was the new laws introduced recently. They also pointed out that vital regulations were introduced in the last 10 years with regards to the society and the environment in the United Kingdom. Annat said that producers and suppliers needed to understand the causes of the regulations and the pressure they pose on the brands and to cooperate with regards to the requests in this matter.

Partner and Managing Director of Boston Consulting Group Catharina Hase:

Stating that the share held by small and medium sized enterprises in the global market had increased, Catharina Hase stressed that these establishments had to improve themselves in terms of sustainability. They said that, in their meetings with the executives of large fashion companies, half of these companies held key importance in the decision-making process regarding sustainability. They justified this by discussing the need for both the end users and the law makers to attribute more importance to the subject matter. Moreover, touching on the economic reasons, they added that the fact, that the price of energy and water would rise in the future, forced the companies' hand in this regard. Hase explained how suppliers and producers could improve themselves in the regard and pointed out the existence of organisations that could help them take the first step.

Project Director of CO2 Logic Eric Diercx:

Eric Diercx noted in their speech that the middle class would grow rapidly in the coming years, offering various opportunities for the industry but stressing the environment, and that the stress on resources would lead to not only environmental issues but also economic and social issues. Noting that customer habits and the location of procurement, an aspect in which Turkey has an advantage, would be definite for the product, they pointed out the importance of the companies starting off by measuring their carbon footprint and setting a goal in line with a carbon reduction plan.

Sustainable Businesses Director of the European Apparel and Textile Confederation (EURATEX) Mauro Scalia:

Maura Scalia shared with the participants that the matters pressuring the industry changed over time, a portion of the effects of the environmental and social changes had been seen, and that another portion would continue to be seen. They noted that the European Union had issued new regulations on wastage that concerned the entire continent, and the importance this held for Turkey, a major partner and market for Europe. They added that the garment industry, which struggled to find young and qualified employees, should give the due attention to environmental economy for a positive influence on its image and for attracting the younger population.

Ayşe Arman Columnist

Columnist Journalist







Turkish Clothing Manufacturers Association prepared with the concept of "Responsible Fashion" at the 11. İstanbul Fashion Conference backed up to young girls, attending Favour Movement started by Ayşe Arman, who get university education on the textile and garment departments with the bursary via the Association for Supporting Contemporary Life (ÇYDD) with the aim of creating awareness.

MANAGING THE PROCESS EFFICIENTLY IN COMPANY-DESIGNER COLLABORATIONS

Moderator: Mehtap Elaidi, Fashion Designer

. Gamze Saraçoğlu, Fashion Designer

. Özlem Kaya, Fashion Designer

. Özgür Masur, Fashion Designer





Mehtap Elaidi being a moderator on the session of "Productive Process Management on Firm Designer Collaborations" declared that the goal is the same, so it means the goal is to set the position of Turkey from producing fashion to creating fashion when designers are gathered. She emphasized that there is critical potential on existent and developing fashion designers to reach this target. She added to her words that the target must be clear for two sides in collaborations of designer either brand or manufacturer, at the same time it is so crucial to giving a clear brief to the designer by a firm.

Gamze Saraçoğlu, at her speech, it is the only way to right collaborate between designer and brand if communicates in right platform and mentioned about those expectations of the firm designer must be transferred properly.

Özlem Kaya also underlined that the DNA is the most important factor in collaboration of firm designer to good figure out and transfer. He expressed that it is very important for keeping clearness with designers without ruined their DNA for the manufacturers who have own their brand.

Özgür Masur mentioned in his speech that it is very important to determine which designer is more suitable for the togetherness of brands. For example, he shared about collaborated İpekyol said that "Özgür we have already specific customer profile, but we want to obtain your woman profile" While serving a vision to brand as designer and teaching manufacturing process on big structures, he specified how the design process is evolved. Özgür Masur said, "Firm designer collaborations must be on the upper level anymore" and he draws attention to the necessity of firms invest in a designer who believed his/her own power, soul and feeling not to lose their belief for Turkish designers and brands which can be creatable by them.

RESPONSIBLE FASHION EXHIBITION

"Responsible Fashion" exhibition which is made with collaborations of Turkish Clothing Manufacturers Association (TGSD) and Fashion Designers Association (MTD) is prepared with added values of Turkish fashion designers on the purpose of emphasizing of Turkey's raw material power, export volume and importance of innovation vision on the economy. Contributor for preparing of the exhibition;

DESIGNERS

Curator: Barış Çakmakçı

Really Carbs (Fabric: Mayteks, Ekoten / Production: TGSD)

Begüm Berdan (Fabric: Nilba, Mayteks, Orta Anadolu / Production: TGSD)

Belma Olsen (Fabric: Ekoten / Production: TGSD) **Eda Güngör** (Fabric: Ekoten / Üretim: TGSD)

Gamze Saraçoglu (Fabric: Elyaf Tekstil / Production: TGSD)

Giray Sepin (Fabric: Nilba, Mayteks, Orta Anadolu / Production: TGSD)

Gökay Gündoğdu (Fabric: Ekoten / Production: TGSD) **Kadir Kılıç** (Fabric: Elyaf Tekstil / Production: TGSD)

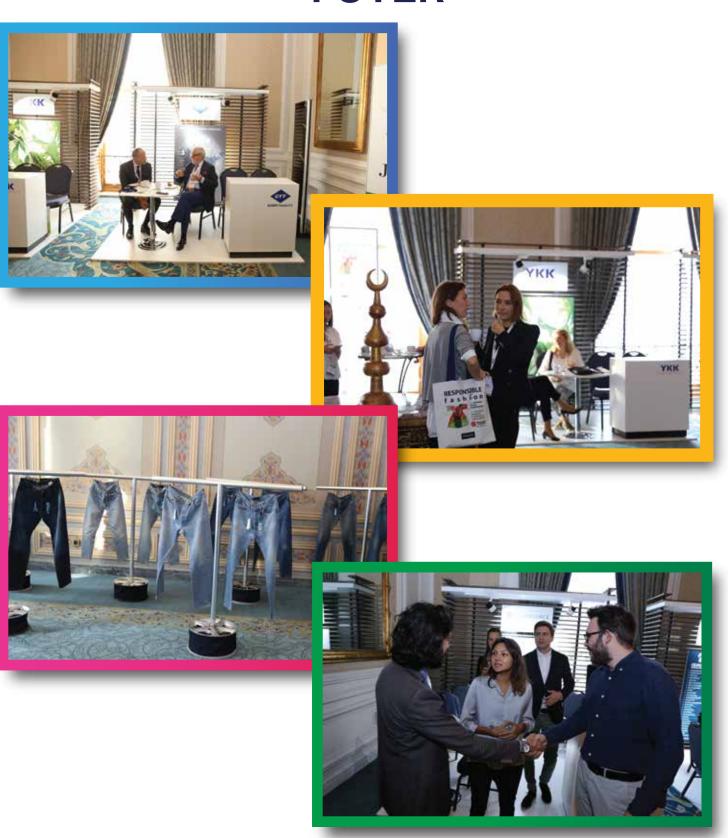
Mehtap Elaidi (Fabric: Orta Anadolu, Modega / Yarn: Filpucci /Production: TGSD)

Nihan Peker (Fabric: Nilba / Production: TGSD)

Özlem Kaya (Fabric: Mayteks, Orta Anadolu / Production: TGSD)



FOYER



BUYING OFFICES

On the second day 4 October 2018 at B2B business to business meetings platform; approximately 1000 B2B meetings negotiated between manufacturers and 50 buying offices. Platform is prepared by he support of Republic of Turkey, Ministry of Trade which is a supporter for employment and domestic market as well as export. It is expected that negotiations will gain 150 million dollars to domestic market, 250 million dollars to export. The B2B platform consists of buying offices which represent to the Germany, United Kingdom, Italy, Spain, Netherlands and Scandinavian and other European countries and firms have approximate 5 billion € annual return and firms making a purchase from Turkey 75 million monthly. This brand targeting the %15 growth in Turkey in 2018 is targeting to get into the different markets and starting to buy new product group.



- ADİL IŞIK
- ANNA LAUDEL
- ANT DIS TİCARET
- BEAUMANOIR
- BESTSELLER
- BIS TEXTILE
- BOYNER
- C&A
- CARREFOUR
- CELTIC SOURCING
- COMAB
- CONNOR
- DECATHLON
- DEFACTO
- EL CORTE INGLES
- FRENCH CONNECTION
- GAIA SOURCING

- H&M
- HERMES OTTO
- KOTON
- LCW
- LITTLE BIG
- I FFTIFS
- LI FUNG
- MAVİ
- MIGROS
- MINO TEKSTİL
- MODA TİMKAR
- NEW LOOK
- NIKE
- OMNIBRAND
- PERSEUS
- RN OFFICE
- RSR

- SHOP DIRECT
- SONGUR
- SPRING NEAR EAST MANUFACTURING
- SUPERDRY
- TEKSPERT
- TURFKS
- ULTIMO
- VARNER
- VF
- ZARA MAN
- ZXY INTERNATIONAL
- SPLEXS
- GIANNETOS
- NICOLAS
- NATIONAL FASHION CHAMBER OF BULGARIA
- PHARA MODA

B2B AREA





WHAT THEY SAID?

Thank you very much for your e-mail and Hadi Karasu's friendly letter.

It was my pleasure to attend the conference and for the opportunity to say a few words about IAF and our relationship. The conference was excellent and very well attended.

It was also nice to see so many good old Turkish friends. The photo's are a good remembrance. Much appreciated.

With kind regards

Han Bekke

MODINT / Chairman of the board

IAF / President

Dear Hadi.

just a short mail to thank you and your team for the perfect organization of last week conference.

Due to the price level of our collection the B2B meetings were not really successful, but, at least, we had the possibility to open some contact we hope will be active in the future.

Once again, many thanks for the invitation; it was worth being there.

Sincerely Yours,

Franco Ghiringhelli

Dear President,

On behalf of myself and my company, I would like to thank you for the 11th Fashion Conference Gala Dinner held on 02/10/2018 Tuesday night, Conference held on 03/10/2018 Wednesday and B2B organization held on 04/10/2018 Thursday.

You have performed a succesfull and qualified organization. Congratulations.

I am sure that we will see, in a short time period, the benefits of these meetings, which will make easier to overcome the troubled period for the sector. I would like to thank you for your support and endeavors.

SADETTİN ÜÇEYLER

Gürmen Group (Ramsey-Kip)

Dear Hadi,

I want to thank you again for your kind invitation to the fantastic Istanbul Fashion Conference! It was simply great and overwhelming! I was deeply impressed by the perfect organization of this fantastic event that offers unequaled opportunities - this is really world class!

Also Mr. Kamphöner was very impressed as he has been doing association work in Brussels for the last 16 years and has participated in many conferences and congresses but he says he has never ever seen an event like yours of such quality and perfection. My sincerest respect and great compliments for your performance as a host and speaker as I can only imagine how much work and dedication goes with it. I will report to my German association colleagues what they have missed but I will also do everything in my power to bring the German and the Turkish Textile Associations closer together.

Again many many thanks, please accept my honest respect and admiration; I am very grateful to call such a brilliant mind like you my friend.

Kindest regards,

Dr. Wilfried Holtgrave

President of the North-West German Textile and Clothing Industry Association

WHAT THEY SAID?

I am continuing my journey by adding at least 1 manufacturer to my manufacturer portfolio on your all invitation.

ANT FOREIGN TRADE- As purchasing Office, each year increasing my personal effort, I feel a sense of responsibility of how can I order to more manufacturer.

I thank you again on my behalf and my company.

We had very efficient "Dual job interview".

A. Merih Ergin

ANT Foreign Trade

It was pleasant and efficient negotiations.

Esin Kınran

Little Big

The majority of these efficient B2B meetings and conferences all we send our thanks to those who contributed to it.

Özlem Levent

French Connection

It was a great conference... Congratulations...

Caner Soytaş

Nike

I hope we will see you next year and our work continues to increase.

Mustafa Gençtürk

Decathlon

Thank you for the great and useful organization.

Banu Sertel

Gaia Sourcing

BILLBOARD

RESPONSIBLE

2018 9 24





PROMOTION IN THE CITY











CONFERENCES SPONSORS



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See you next year at the 12th Istanbul Fashion Conference which will be held on 2-3 October 2019

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