



**16TH ISTANBUL APPAREL CONFERENCE**  
**TRANSFORMATIVE**  
**JOURNEY**

October 12-13 Çırağan Palace Kempinski

**FINAL REPORT**



**TGSD**

Türkiye Giyim Sanayicileri Derneği  
Turkish Clothing Manufacturers' Association

**16 SESSIONS**  
**31 SPEAKERS**



**1300 +**  
**RECORD NUMBER OF**  
**IN-PERSON PARTICIPATION**

**MORE THAN 200+**  
**COMPANIES PARTICIPATING IN B2B**

**OVER 50**  
**BUYER OFFICES**  
**REPRESENTING HUNDREDS OF**  
**GLOBAL BRANDS**

**1500 B2B**  
**BUSINESS**  
**MEETINGS**





# 16TH ISTANBUL APPAREL CONFERENCE TRANSFORMATIVE JOURNEY

## OPENING SESSION





### Ramazan Kaya, TGSD Co-Chair

*"We will make future investments in our businesses to increase value, not to increase quantity. We will further increase our speed, logistics capabilities, market and product diversity."*

- As one of Türkiye's leading exporting sectors, we are proud of our total exports of 406 billion dollars generated in the first 100 years of our Republic.
- The fourth transformation period has knocked on the door for the ready-made clothing industry. Nothing will be the same in the new era due to the effects of the pandemic, wars, climate change and the habits of new generations.
- We are aware that it is inevitable for the Turkish ready-made clothing industry to 'continue to transform'. Therefore, we are extremely ready and determined to embark on this journey.
- In this new era, the market will be dominated by more buyers with different features and different demands. Slow fashion will gradually replace fast fashion, and fast fashion will transform itself with a focus on sustainability.
- We will break down the walls we put in our minds to be successful in the transformation process. We need to have a flexible structure from our management processes to our organizational structures, from our human resources to our supply network, from R&D and design to marketing.

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### Cem Altan, IAF President

*"Sustainability is not a goal, it is an endless journey."*

- 2030, 2040 and 2050... These are the years when we, as the textile and ready-made clothing sectors, will go through many tests. The EU and its member states have pledged to reduce greenhouse gas emissions by 55 percent by 2030 compared to 1990. This rate will be 90 percent in 2040, and it is aimed to be carbon neutral in 2050.
- In order to achieve these goals, everyone, from farmers to spinners, from fabric makers to ready-made clothing manufacturers, from brands to consumers, must work together in harmony. Because the greenhouse gas emissions we have been producing for a long time have now reached unacceptable levels.
- It is time to include in our consciousness the factors that form the basis of sustainability, such as water conservation, energy saving, the use of renewable energy sources by limiting the energy produced from fossil fuels, recyclable materials, and ending the use of plastic. When we act with this awareness, transformation will be easier to achieve.
- As we set out for a healthy planet, a world full of dignity and opportunity for all, we must look beyond the current crisis. In this context, we should make sustainable fashion in our industry not just a trend but a habit for a better future.

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### Mustafa Gültepe, Chairman, TİM & İHKİB

*"We must develop mechanisms to ensure sustainability with our European business partners."*

- We are working to make Istanbul the fashion center and Anatolia the production base. We build all our strategies according to the export target of 40 billion dollars in ready-made clothing and 20 billion dollars in textiles. As we move step by step towards our total export target of 60 billion dollars, the alignment process with the European Green Deal is of critical importance for us, as our largest export market is the European Union.
- We develop projects on sustainable production and digitalization. We use the European funds to develop our industry, increase our digital and sustainable production capacity, accelerate the transition to branded production, and bring our industry to a stronger position in global competition.
- We want to work more closely with our European business partners in this process. We must develop mechanisms that will ensure sustainability not only in production but also in collaborations. We have a great potential with our integrated production infrastructure, our brand identity in production, our power of adaptation and our geographical proximity. In particular, our geographical proximity also provides an advantage in reducing the carbon footprint in logistics processes.

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### Ahmet Öksüz, Chairman, İTHİB

*"We are aware of the critical role our industry plays in protecting our world."*

- Textile and apparel sectors are integral parts of each other. As a result of this strong unity, our sectors, which have made Turkey one of the most important suppliers in the world, have an annual production value of 80 billion dollars and create more than 2 million jobs.
- The foundations of the concept of sustainability were laid approximately 50 years ago. Over the past half century, we have become an industry that has not taken any steps regarding sustainability, but has run forward and put future generations at the center of its focus.
- As industrialists, we make serious investments in this field. However, responsibility should not be one-sided. We must also fight together against audit fatigue and greenwashing. We must work in integration with global brands to set applicable goals regarding sustainability.





## 16TH ISTANBUL APPAREL CONFERENCE TRANSFORMATIVE JOURNEY

# NEW GOALS IN THE APPAREL INDUSTRY IN THE SECOND CENTURY OF THE REPUBLIC



**Sanem Dikmen, TGSD Co-Chair**

*"We have no intention of giving up on this sector."*

- In the first years of the Republic, factories were one of the most important elements for the development of Türkiye, and the increase in the welfare of the society. Factories, which not only produced but also changed the face of the region where they were established, and which were all castles, as Atatürk said, are still leading the transformation today.
- Our producers and our industry are going through difficult times due to the conditions in the world and are struggling to continue manufacturing. However, we can say this with certainty: We have no intention of giving up on this sector. The ready-made clothing industry has always been important with the employment, production and added value it creates, and will continue to be so.
- In addition to our exports, which provide net foreign exchange income, we are also able to meet the local consumption of our country which has a large population of 85 million.
- The Turkish ready-made clothing industry will continue to exist as a player that determines and changes the rules of the game at all stages from cotton to the final product. For this, we must include issues such as traceability, transparency, new EU regulations, recycling, circular economy and wearable technology on our agenda.
- Ready-made clothing and textile are considered a strategic sector in developed countries, especially in the EU countries and the USA. This approach should serve as an example for our country as well. We will continue to create a strong Turkish brand on a global scale by transforming our sector and our companies in cooperation with the private sector, public and NGOs.







# 16TH ISTANBUL APPAREL CONFERENCE TRANSFORMATIVE JOURNEY

## SUSTAINABILITY JOURNEY OF VF



**Moderator: Matthijs Crietee, Secretary General, International Apparel Federation (IAF)**

- “If you compare a conversation on sustainability today with five years ago, we can say a lot has changed and a lot has not changed. So what is new is that the urgency is much greater.”
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**David Quass, Senior Sustainability Director, EMEA, VF**

*“The big transformation that we see relates to our supply chain in terms of transparency.”*

- We see an incredible uptake in renewables across the various renewable energy types, from solar to wind to hydropower. We see at the same time how countries are picking up and banking on renewable energy creation.
  - The big transformation that we see relates to our supply chain in terms of transparency. It relates to joint data protocols. How do we create data? How do we share data across the supply chain, across various actors, into accounting bodies? It's terribly technical, but it's terribly important. It's about primary data and helping us to understand our impact and how we optimize against that.
  - Who is going to invest. Is it the brand? Is it the supplier? What are those long-term partnerships that we need to forge? How are we going to do this?
  - There is one motivator that stood out above all others and that one motivator is love. It's love for our families, for each other, for the planet. So, what I want to call upon you is to be bold, to engage, not to be fearful. The world and the planet, they need you.
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**Dilek Güçlüer, Director of Marketing and Sales, Gelişim Tekstil**

- We have started to work with VF in 2012 and used organic cotton. Between 2016 and 2018, we used only BCI cotton and have decided not to use any conventional cotton although there was no request from our customers.
- In 2019, we started to develop %100 recycled cotton products with The North Face and shipped the first 100% recycled cotton garment in 2020. In 2022, we have made first shipment of garments with regenerative cotton.
- We made a lot trials together with VF that most people thought that were hard, but we have achieved together.







# 16TH ISTANBUL APPAREL CONFERENCE TRANSFORMATIVE JOURNEY

## CLOSING THE LOOP : READY-TO-WEAR RECYCLING AND UPCYCLING



**Moderator: Dilek Bil, Founder, Purpose - Sustainable Ideas**

*"We must switch to a circular economy to solve the problems."*

- Preventing water pollution caused during the production process, energy efficiency, circularity of materials used and recycling of waste are of critical importance for the sector. In this context, we need to focus on new business models, manage every stage of the value chain with sustainability principles and take steps in line with the European Green Deal.
  - If we switch from the linear economy we have been accustomed to so far to a circular economy, we can increase the economic benefit as well as preventing the climate crisis and other global problems.
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**Özgür Atsan, Circularity & Sustainable Operations Director, RE&UP Sürdürülebilir Teknolojiler (SANKO)**

*"The condition of quality in the recycling of waste clothing is the right technology."*

- 10 million tons of waste clothing is generated annually in Europe, and only 1 percent of it is recycled. The biggest question mark in recyclable materials is the quality of the raw material. However, if the right technology is used, products can be produced without compromising quality.
- Serious difficulties await the textile industry in terms of producing from waste PET bottles, because these waste PET bottles have buyers from different sectors such as the packaging industry. For this reason, textile-to-textile conversion is becoming increasingly important.







# 16TH ISTANBUL APPAREL CONFERENCE TRANSFORMATIVE JOURNEY

## POWERED BY DATA, TRACEABLE BY DESIGN: TRUST IN A SMARTER COTTON FUTURE



**Stephanie Thiers-Ratcliffe, Director, European Brands and Retailers, Cotton Council International**  
*"It starts with our growers in the field."*

- It's all about data and what we collect at farm level.
- We don't only believe in looking after the planet. We also believe in looking after the people. We've got 12 criteria in our program to make sure that workers' well-being and safe labor is upheld.
- With the trust protocol now, over the last 30 years, U.S. cotton has reduced its water consumption by 79%, we have this goal of reducing water use in cotton another 18% going forward by 2025.
- Cotton has this reputation of being a high-water-use crop, and in reality, it isn't. About two-thirds of the cotton grown in the United States is grown solely on rain moisture.
- On our farm, we track every drop of water that we apply, and we know exactly how much water.







# 16TH ISTANBUL APPAREL CONFERENCE TRANSFORMATIVE JOURNEY

## CELLULOSIC FIBER JOURNEY



**Moderator: Sedef Uncu Akı, Director, Orta Anadolu**  
*"We should use waste instead of natural resources."*

- We do a much more useful job if we use existing waste as raw material rather than consuming natural resources from scratch.
  - Although manufacturers focus on supporting their ideas, their inability to purchase products from startups, at the scale they want, creates an obstacle.
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**İlkşen Dedeoğlu Demiray, Lenzing Türkiye Business Development Department Manager**  
*"We care about everyone's opinion in the supply chain."*

- New and creative ideas are very important, but what is as important as this is to commercialize these ideas, spread them to the base and make them more usable. As Lenzing, we can bring these innovations to real life thanks to our pilot production facilities.
- As a raw material producer, we constitute one of the first links of the textile industry, which has a very long supply chain. However, we are doing a difficult job and we care about everyone's opinions including the last link in this chain, which is consumers, in order to find the best way.







# 16TH ISTANBUL APPAREL CONFERENCE TRANSFORMATIVE JOURNEY

## IMPACT OF AI ON DESIGN AND MANUFACTURING



**Leslie Riley, Co-founder & CEO, Polytropon**

*"AI is very powerful in trend forecasting, sales forecasting."*

- AI is used in the manufacturing and supply chain, forecasting, inspection, connecting upstream to downstream, supplier to buyer, in optimization, and of course, in the warehouse. You've all seen the bots moving around the warehouse, figuring out how to move things on their own.

Generative means that the AI generates the images. AI generates human-like faces, bodies, skin colors, hair, gives you all the characteristics you want. If I have a digital product, I can combine those two and showcase a finished product. The garment doesn't exist, the people don't exist, and it looks very real.

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**Hailey Tan, Sales Director, EMEA, Browzwear**

*"Digital transformation is like going to the gym to exercise. Because it is a muscle that you have to keep strengthening and keep training."*

- Digital transformation is a journey. It's not something that you can commit today and get it done by next week.

- With artificial intelligence, we can ensure that the model we want to create is available in different sizes. We can see how it will look both in the studio and outdoors, across different age groups and ethnicities. We can evaluate what will sell better from the perspective of the entire customer demographic.

- If I see a print or an image of a bird that inspires me on the internet, I can add it to my product with artificial intelligence. All of these are done without physical samples, so we are providing a solution to a large inventory problem.

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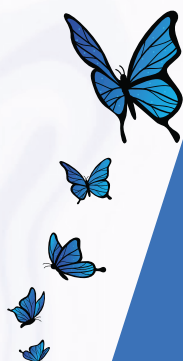
**Özgecan Üstgöl, Founder & CEO, Myth.Ai**

*"We are reducing design processes from 3-4 months to seconds and weeks using generative AI technology."*

- According to a conducted survey, 64% of employees mention that they don't have enough energy and time for the work they do. Additionally, 70% of these employees express their willingness to delegate 70% of their work to artificial intelligence technologies. On the other hand, company leaders state that they plan to use artificial intelligence technologies to increase their companies' efficiency and emphasize that they will not reduce the number of employees in their companies during this process.

- The biggest problem with design is that the human brain mistakenly believes it has created something when, in reality, it is trying to create something similar by drawing inspiration from what it has seen. This is called collective consciousness. So, should we resist this collective consciousness or should we assimilate it within ourselves using creative artificial intelligence technologies to create something new?

- We secure the design we create with blockchain along with the time of creation.







## 16TH ISTANBUL APPAREL CONFERENCE TRANSFORMATIVE JOURNEY

# INNOVATION IN ACRYLIC FOR A SUSTAINABLE FUTURE



**Ercan Şahin, Aksa Akrilik Marketing Manager**

*"We must produce products that are independent of time in terms of design and usage period."*

- 25 percent of people in the world do not have access to clean water. While the need for food is increasing, agricultural land is decreasing day by day. We need trees for every breath we take. Therefore, every action we take for sustainability has the potential to impact millions of people.
- We must produce products that eliminate barriers in production processes, strive to reveal consumer benefits, and are more sensitive to nature.
- Thanks to the circular models we have implemented as Aksa Akrilik, we save enough to meet the energy needs of 214 thousand people and the water needs of more than 5 million people annually. At the same time, we turn our waste into a chemical product.







# 16TH ISTANBUL APPAREL CONFERENCE TRANSFORMATIVE JOURNEY

## INNOVATION DESIGN & TRANSFORMATIVE WEARABLE TEXTILE



### Moderator: Arzu Kaprol, Human Innovation Designer

● I define my job as human innovation design with consciousness and responsibility of surrounding our only physical existence, our bodies. We do design and create an object, a piece of textile to protect, reflect and accompany our body. I believe we can create this task better with better consciousness and with the help of technology.

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### Kaspar Jansen, Professor, Delft University of Technology

*"Textiles with integrated sensors can measure and provide information about your body, your heart rate, your mental rate, health conditions."*

● To integrate existing electronics into our bodies comfortably, we must make them suitable for flexible fabrics. At the end of life, you can remove the electronics from smart textiles and recycle the sensor and textile separately.

● Imagine, a shirt that sets you up, that alerts you when you need to do some extra exercises, because you have been sitting at your table for too long. Textiles no longer just provide protection; they have the potential to gather information about our bodies with integrated sensors.

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### Hans Peter Hiemer, Managing Director, Style3D Assyst

*"Reducing waste and inventory is possible with a digital ecosystem."*

● Our target is really to find a way to be sustainable and profitable in a digital ecosystem. We have been able to change drastically the way of working. The natural way of working is we create a lot, we think a lot, we try to sell, then we have sold, and then we think again. We have to reproduce our product and make it work. This will not be the future.

● We can optimize fabric and trims design making with technology. My aim is not only to offer aesthetics but also to provide an effective solution. We can create a design and integrate it directly into the production process.

● Consumer is changing their mind so quickly. We have to be much faster. We need to do much less mistakes.

● It's very easy to count. Each piece of product in the bigger average produces 30 kilos of CO2 emission. So in a full year, it's about 50,000 pieces not made anymore. It's 1.5 million kg CO2 which is safe. One kg CO2 has a price, has a cost. Save it, put it in your company and change your process.

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### Merve Aydiner, Founder & CEO, Invamar

*"IoT smart product is that these products can talk with you, actually."*

● So the biggest thing between a non-smart tech product and a smart product is that smart products communicate with you. You can literally make any type of technology product talk with another technology product and transfer data and then response with Wi-Fi, bluetooth etc. A non-smart tech product has some sensors. An IoT product controls the environment.

● If your cell phone can live for three years, then your smart textile will also be able to live for years, because the lifetime of a smart or intelligent textile is literally limited according to the electronics.

● Most of the time, we start from the textile and try to go to the electronics. But actually, the equation has to be opposite. You have to start thinking with the electronics and then come to the textile.







# 16TH ISTANBUL APPAREL CONFERENCE TRANSFORMATIVE JOURNEY

## INNOVATION AND TECHNOLOGY TO SUPPORT SUPPLY CHAIN TRANSFORMATION AND TRANSITION



**Moderator: Ayşegül Kaya, Member of TGSD Youth Platform & Sustainability Manager, TYH Tekstil**

*"Transformation is only possible with innovation. Transforming the supply chain in a sustainable, digital and aligned with EU legislation is another requirement."*

**Shahriare Mahmood, Chief Sustainability Officer, Spinnova**

*"We are very much focused on the carbon, after some time we will start to talk a lot about water."*

- Planetary boundary shows us that there is something else to take care of. There are a lot of innovation happened. For example, the synthetic fibers that came a few decades back were actually very nice innovations. But we are having the problems nowadays with those.
- Spinnova is very natural, biodegradable cellulosic fiber. The whole fiber process is a mechanical process. We don't use any dissolving chemistry, unlike viscose or lyocell process or the other chemically produced fiber. It's a zero-waste production, meaning that we don't produce any waste water, we don't produce any solid waste. In our process, whatever we are putting in, we are getting out as fiber.

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**Pernille Bruun, Materials Manager, Bestseller**

*"Taking something in nature, transforming it from a cocoon to a butterfly. That is true transformation."*

- Sustainability is not a target, it's a journey. It will be the preconditions for our industry and our business continuity in the future. We need to embed sustainability in everything we do across the whole value chain.
- We need to prepare ourselves for a different future where data, and not just data that sits in a excel sheet. We really need quality data, verified data, and we need not to be afraid to share it.
- We really need to be able to take the risk and work strategically together. So, all of the successes are successes that come from collaboration across the value chain, both upstream and downstream, but also across. Collaboration is the key to success. It is how we are going to need to work in the future. We want to work much closer with our garment suppliers, with our fabric mills, with our spinners, also with our raw material suppliers. But we also want to work across the industry with our peer brands, not to consider as my competitors. In terms of driving the industry forward, they need to be my collaborative partners.







# 16TH ISTANBUL APPAREL CONFERENCE TRANSFORMATIVE JOURNEY

## AUDIT FATIGUE



**Avedis Seferian, President, CEO, Worldwide Responsible Accredited Production (WRAP)**

*"The challenge of validating your supply chain has always been there. And the shift now is from voluntary nature to mandatory nature."*

- In the current dynamic and unpredictable economy, we are witnessing significant changes in how brands and retailers will be subjected to regulations by regulators and legislative bodies.
  - Shifting buyers from China creates a unique opportunity for new destinations like Turkey. However, to capitalize on this advantage, manufacturers must stay consistently updated, particularly on corporate social responsibility issues related to changes in brand expectations.
  - Suppliers must ensure that they operate legally and ethically, staying clear of human rights violations.
- 

**Anıl Noyin, Textile Department Manager, Control Union Türkiye**

*"Apply to accredited organizations for globally recognized certifications."*

- Manufacturers need an accredited control organization to verify the accuracy of their efforts to achieve the European Union's 2030-2050 goals.
- Obtaining documents also demonstrates compliance with new markets and their regulations. Manufacturers may not gain global acceptance if they conduct these assessments themselves.
- Services related to any certification program, from wastewater to carbon emissions or social compliance, can be obtained.







# 16TH ISTANBUL APPAREL CONFERENCE TRANSFORMATIVE JOURNEY

## IMPROVING THE TERMS OF TRADE FOR APPAREL MANUFACTURERS



**Matthijs Crietee, Secretary General, IAF**

*"Improved business results for the entire supply chain are closely linked to improved sustainability outcomes."*

- Purchasing practices encompass all actions of the buyer related to orders and deliveries that affect the supplier, such as planning, forecasting, delivery conditions, payment terms, and penalties. Purchasing practices can either be a factor enabling a more sustainable industry or contributing to poor conditions in the supply chain.

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**Andrew Martin, Executive Vice President, Sustainable Apparel Coalition (SAC)**

*"Under creating a nature-positive future, it's circular product design."*

- The impact of the apparel and footwear industry on biodiversity and natural resources is huge. We need to be looking at that. We have to ensure that there is fair and safe well-being for workers and for people within the supply chain.
  - None of brands and retailers will achieve their science-based targets unless they focus on building the relationships with their value chain. Responsible purchasing practices are core to that.
- 

**İrem Yanpar Coşdan, Stakeholder Engagement Manager, Open Supply Hub**

*"The high-quality open supply chain data is so important, because it leads us to connect each other and collaborate, work together for a more liveable world."*

- It's impossible to fight against big problems, such as climate crisis, such as modern slavery or deforestation without data. To solve all these problems, we need transparency because we can't solve those problems without knowing the real reason behind them.  
Companies also use Open Supply Hub as a marketing and comparison tool. They can see and organize the information uploaded by brands and organizations. Additionally, when missing an order, they can quickly view and compare facilities working with that brand in a specific country.
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**John Thorbeck, Chairman, Chainge Capital**

*"The battlefield of competition today is supply chain performance."*

- Geography is not destiny, process innovation and data science is a significant opportunity for both buyers and suppliers.
- Upstream Supply Chain encompasses all activities related to the organization's suppliers. Downstream Supply Chain includes post-production activities, i.e., distributing the product to the final customer.
- Today, fashion is sold at discount and we have unnecessary inventory and excess production that often ends up in landfills and incineration facilities around the world.
- What is fashion's alternative approach to create value versus over-reliance on lowest cost global production? The global supplier community has the answer in Upstream Value so that we can create a fashion industry that is more productive, more profitable, and more sustainable.

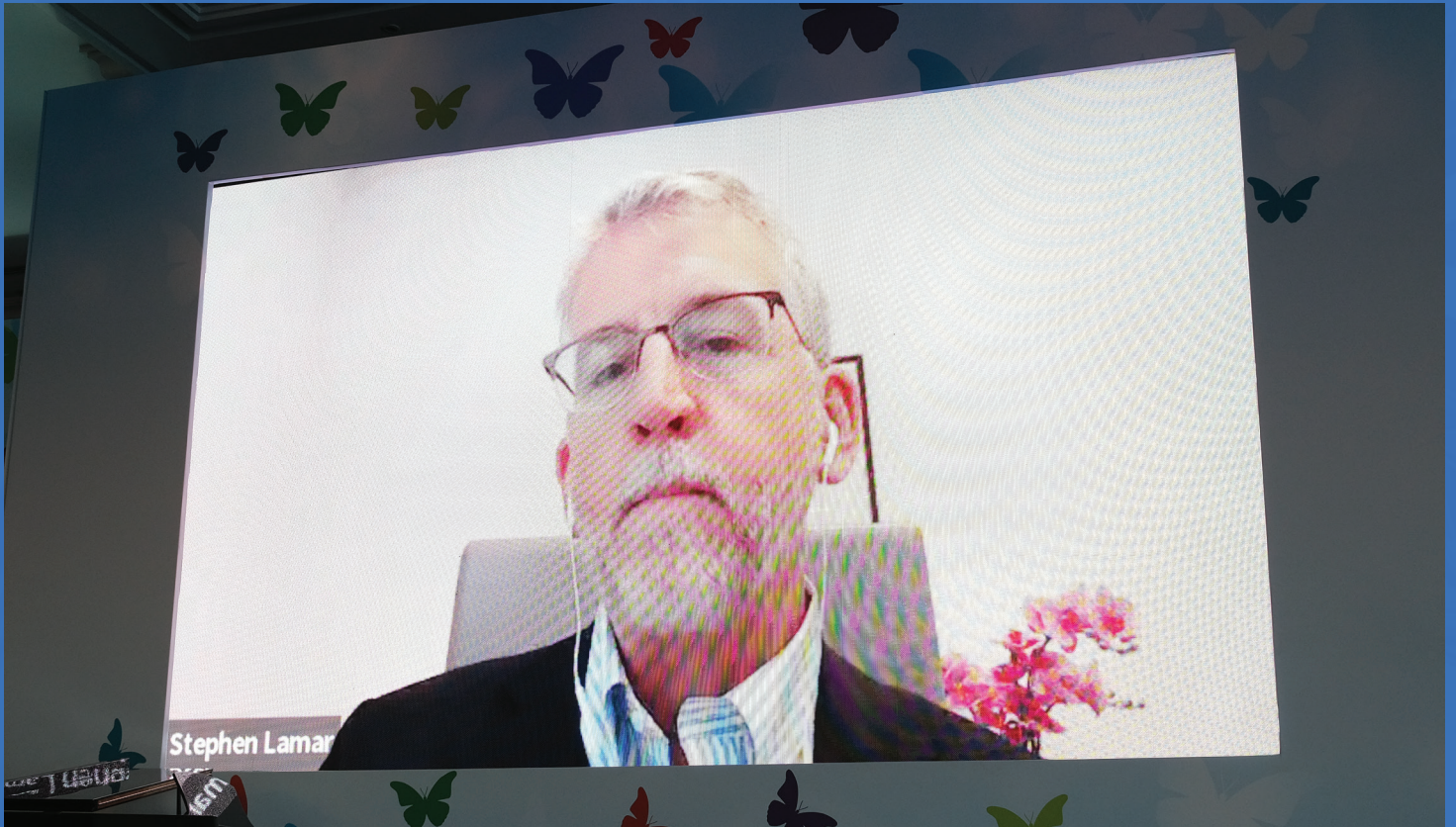






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# ROAD TO US APPAREL MARKET





**Steve Lamar, President, CEO, American Apparel & Footwear Association (AAFA)**

*"Stocks from the previous year are still present in four out of every five retailers and brands."*

- You'll need to know and understand your entire supply chain all the way back to the raw material like never before. This dynamic fuels and informs a lot of needs, including a laser focus on making sure you have the right materials, top-notch labor practices, methods to track and reduce your carbon footprint, better buying practices, smarter auditing practices to reduce audit fatigue, and that you absolutely do not have forced labor or restricted substances anywhere in your supply chains.
  - We're in the midst of a huge sourcing shift, maybe the biggest in a generation. As we've seen for some time now, we are witnessing fundamental changes in where products are made and where the inputs from those products come from. This is affecting many industries, not just fashion, but is clearly a driver in our industry. This shows up most markedly as diversification away from China.
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# 16TH ISTANBUL APPAREL CONFERENCE TRANSFORMATIVE JOURNEY

## COCKTAIL





CONFERENCE







# 16TH ISTANBUL APPAREL CONFERENCE TRANSFORMATIVE JOURNEY

## B2B MEETINGS



# SUPPORTERS

## TRANSFORMATIVE JOURNEY



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# TGSD

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Turkish Clothing Manufacturers' Association