



TGSD

Türkiye Giyim Sanayicileri Derneği
Turkish Clothing Manufacturers' Association



GREEN REVOLUTION

15. İSTANBUL HAZIR GİYİM KONFERANSI

15th ISTANBUL APPAREL CONFERENCE

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OPENING SPEECHES

Speaking at the opening of the Istanbul Apparel Conference, one of the prestigious international events bringing Turkish apparel industry together, Turkish Clothing Manufacturers' Association President Ramazan Kaya:

“Apparel producers focusing on green production and value-added products rather than quantity

Pointing out that Turkey has become an expensive country in the context of apparel industry, Ramazan Kaya said, "In this environment, it will be difficult for us to meet the demands of buyers focusing on price above all. The industry will evolve into being the supplier for buyers focusing on quality and high added value."

The 15th Istanbul Apparel Conference organized by Turkish Clothing Manufacturers' Association (TGSD), brought together the names that shape global fashion and the representatives of the world's leading brands, in Istanbul.



Speaking at the opening of the conference, which is among Turkish apparel industry's prestigious events recognized in the international arena, TGSD President Ramazan Kaya emphasized that Turkey is one of the most important high-quality apparel producers of the world. Reminding that the sector accumulated substantial experience and resources over the decades, with its quality production, extensive collection, and design capacity, not to mention its brands and modern fashion retail market, Kaya said, "However, global conditions continue to change. Today, Turkish apparel industry is also undergoing a new cycle of transformation, the fourth transformation process."



WE MUST MAKE TURKEY THE CENTER OF GREEN PRODUCTION

Noting the need to analyze the conditions which make transformation necessary, if one is to establish the right strategy, Kaya underlined that the process will be financially challenging. Emphasizing that Turkey is becoming an expensive place for the ready-to-wear sector and that it has become difficult to meet the demands of buyers focused on price, Kaya said:

"The sector will no longer be a supplier of price-oriented buyers and products. It will instead, largely become a supplier for buyers and products with a focus on high added value and quality. Therefore, we need to highlight our quality production capabilities, and market them to buyers. We need to adjust production and business scales accordingly. We must make Turkey the center of green production. We need to focus on selling value and products, instead of quantity. Collaborations will become very important in the new era. We need to develop collaborations with suppliers in the textile sector, and long-term strategic partnerships with buyers. In the fourth transformation we will be undergoing, the weight of new investments and the need for financing will be higher. All processes ranging from green transformation to digital transformation, involve significant investment costs. The support of our business partners is especially important in this crucial period."



Ramazan Kaya added that Turkish apparel industry is aware of the need for transformation and believes that it will emerge stronger from this process, thanks to its wealth of experience and capacity.





TIM PRESIDENT GÜLTEPE: WE FOCUSED ON 40 BILLION DOLLARS OF EXPORTS IN READY-TO-WEAR

In his address, the President of Turkish Exporters Assembly (TIM) Mustafa Gültepe reiterated their goal of making Istanbul a fashion center, and Anatolia a production base. Gültepe, who is also the President of the Istanbul Ready-to-Wear and Apparel Exporters' Association (İHKİB), stated that textile and ready-to-wear companies have made very important investments in Anatolia in recent years, albeit at a slightly slower pace this year. Stating that the factories' transition to sustainable energy is continuing rapidly, Gültepe added:

"We have also raised the bar in exports, in accordance with the changing conditions of global trade. We are focused on achieving 40 billion dollars exports figure in ready-to-wear clothing. I believe we can also easily reach 20 billion dollars in textiles. Of course, we have a long way to go for these substantial goals. We need to upgrade our technology, increase our productivity, and increase our value-added production with better design and innovation as well as stronger brands. Every day, we are making progress on these issues. For example, the Global Innovation Index was announced a week ago. This year, Turkey climbed 4 places up to the 37th place in the index. This is the first time Turkey ranks in top 40. We are also working on achieving compliance with the EU's Green Deal."

Gültepe pointed out that transformation is a costly business, and emphasized the importance of the support provided to the companies, by the state and business partners, through this process. Noting the positive step of extending the subsidies program to cover transformation to sustainable energy, Gültepe said, "next generation subsidies should be developed especially for the green transformation of our SMEs. I hope that our exporters' problems in accessing rediscount credits will also be solved in the near future."





ITHIB PRESIDENT ÖKSÜZ: WE SEE SUSTAINABILITY AS A

RESPONSIBILITY



In his speech, Ahmet Öksüz, President of Istanbul Textile and Raw Materials Exporters Association (ITHİB), said that the textile and ready-to-wear sectors play an important role in Turkey's promotion in the globe, in addition to their contributions to the national economy. Reminding that the EU aims to cut greenhouse gas emissions down to zero by year 2050 with the Green Deal, Öksüz continued his words as follows:

"We see sustainability as a responsibility and continue our efforts with this awareness. We were the first sector to announce an action plan dedicated to sustainability. Within the framework of the extensive project we developed in 2021, we created the sustainability roadmap of our industry and shared it with the entire sector.

We also organized a 4-month long training program which reached an audience of 28 thousand. In addition to publishing our Sustainability Guide, we launched the 'Sustainable Textiles P&D Project'. With our sister association İHKİB, we are executing the IPA and İSTKA projects to reduce carbon footprint. Moreover, on November 2nd, we will organize the 'Sustainability Talks Istanbul' event, drawing the attention of the whole world.



IIAF PRESIDENT ALTAN: TEXTILE AND APPAREL SECTORS ENTERED A TRYING PERIOD

Cem Altan, the President of the International Apparel Federation (IAF), TGSD Board Member and Conference Committee Chairman, reminded in his speech that the apparel industry has entered a difficult period due to energy and raw material prices, recession expectations and the conditions prevailing in a shrinking market. Stating that the sector is also making efforts to comply with the regulations introduced with the aim of reducing carbon emissions, Altan said, "all countries continue to work hard to solve these problems that stand in front of the apparel and textile industries and to draw the road map for the future for the industry. Many supplier countries, seeking to gain a share of the shrinking market, are rapidly making necessary changes to increase their competitiveness. Turkey's textile and apparel sectors also need to cooperate with a view to keeping up with these changes, and reform themselves pretty soon."



Karafiber Textile was the main sponsor of the 15th Istanbul Apparel Conference organized by TGSD in cooperation with İHKİB and İTHİB. Gama Recycle was the theme sponsor of the conference. Cotton Council International, Aksa, Lenzing AG - Tencel™, Business Finland, Coats Digital, Durak Textile, Polytropon, Solarçatı, Galata Transport, Avery Dennison, Nebim, Mavi, Permess, GOTS, Uğur Machinery, YKK, Leras Textile, and Reflect Studio also provided support for the event.

HUMAN FACTOR ON GREEN REVOLUTION

İbrahim Kara, Vice Chairman of the Board of Directors, Karafiber Textile

We need to adapt to the circular economy



I want to talk about the circular economy in the Green Deal. The circular economy should be the cornerstone of our action plans. Why is it so important, you may wonder? Because the circular economy represents a new economic revolution. We either have missed or caught up late with the industrial revolutions so far. From now on, we must not miss any change, any transformation. Because the world is moving very fast. We have to look at the circular economy in this context. This is a brand new economic revolution. We are moving from the linear economic model of 'buy, use, throw away' paradigm to the 'repair, recycle, reuse' one. This change will disrupt all our business routines. We need to keep up with it. For, this transformation will take place all over the world, especially in Europe. But we are one of the first countries to be affected due to our proximity to Europe.





SUSTAINABILITY JOURNEY OF PUMA

Stefan Seidel, Senior Head of Corporate Sustainability, Puma

Our 2025 goal is to have 9 of our 10 products made from recycled materials

By 2025, we want to be one of the leading brands in the context of sustainability. In the message “Forever Better” we strive to make ourselves better on a daily basis. We went from defensive to progressive. Our sustainability goals are linked to the UN. We want completely sustainable products in our product range. Our 2025 goal is to have 9 out of 10 products made from recycled materials.



Nesrin Baser, Head of Corporate Sustainability, SLN Tekstil ve Moda

We believe that cooperation is the key to sustainability

Technological adaptation is a priority for us in terms of capacity and programs. Digitization is currently at the level of 80%. We have moved the 3D product development and HR management system to the digital field. As a manufacturer, our facility inspections are carried out at universal standards. We measure our carbon footprint and publish it for 3 years. 100% of the electricity we use in 2021 comes from renewable sources. We have significantly reduced our carbon emissions. Gender equality and women's empowerment are extremely important at SLN. We have been a signatory to the UN initiative since 2017. We have 100% female employees at the Board of Directors level, 68% at the management level and 54% in general average. Sustainable development is possible only with the contribution of all stakeholders.



THE SUSTAINABLE FIBER GAP

Florian Heubrandner, VP Global Textile Business, Lenzing AG – Tencel TM

The additional 30 million tons of fiber that we need have to be circular, it will have to be a fiber that is made out of waste.

Our global fiber consumption is 113 million tons every year. This is the weight of 2.2 billion people. Every year we are adding 3% of fiber. In the beginning, we needed fibers for clothing, for wipes, hygiene. Today two-thirds is synthetic fibers, 23% cotton, 6% is cellulosic fibers and other 5% is other natural fibers like wool and silk. We basically need another 30 million tons of fiber in only 8 years from now. Where do 30 million tons of fiber come from and what kind of fiber do we need? We have to meet certain performance criteria. It has to be more sustainable, biodegradable ideally, it needs to support the circular economy, should be affordable with stable prices and most importantly it needs to be available. Cotton will not solve our 30 million tons problem. Availability is certainly going to be one big issue for our 30 million tons problem. 30 million tons have to be more sustainable than the 113 tons we are using today. Right now, 1% of clothing is actually being recycled. 73% of clothing in the wardrobe will end up on a landfill. As Lenzing, we basically reuse 30% of waste so instead of using 100% wood pulp, we are using only 70% wood pulp. If you recycle fiber today, it is not immediately cheaper because of a learning curve. We need to jointly invest to calm down that learning curve similar to what we did in renewable energy or solar energy.





The textile waste collection ecosystem needs to be developed

Marika Ollaranta, Head of Decarbonizing Industries, RRF, Business Finland

We definitely need a knowledge sharing across the value chain in order to speed up and have a meaningful impact in the market

We definitely need a knowledge sharing across the value chain in order to speed up and have a meaningful impact in the short term in the market, because that is something that the consumers want to have soon. I would like to see young generation as role models for all of us because according to studies they are willing to pay more for sustainable options and also, the sustainable elements in the products are the critical ones when they do the purchasing decisions. Still, for the young people, giving the transparency through the data is important. They can see the source of the raw material where it has come from and where it has been proceeded. The social aspects are also important for them and also, what is happening in the end of the life cycle.



Rui Fontoura, Fiber & Materials Strategy Lead: Cotton & Fiber Crops, Textile Exchange

We're trying to create a platform where that data is collected in a more standardized and harmonized way

We have the mission to equip the industry with the tools required to make the right decisions and our vision is to have a global textile industry that creates positive impact as they are producing. We realize there's a big gap in the industry in terms of the data that we need to validate. We are launching a geospatial system data so we can have track directly to the farm and on a specific location in the world. We have got our tracking system, which is definitely going to improve the traceability in the cotton supply chain in particular, and obviously we are not doing this alone. We collaborate with the certification bodies to be able to access that data and make that data available to brands and retailers. We are hopefully going to launch a shared measured system by the end of this year. We are trying to create a platform where data is collected in a more standardized and harmonized way so it's for easier access and for use for brands and retailers.

Yunus Kara, Board Member, Karafiber

We believe that when the awareness increases, fiber variety will be much more in near future.

Five years ago, our sustainable production was only 7%. Today 60% of our production is sustainable. And I believe that at 2025 we will reach at least 90% because big players declare that the following years they won't use any commercial raw materials anymore. They try to sell at their stores all sustainable products. We are separating all of our textile wastes and we deal with ready-to-wear factories to collect their wastes and we make them post-consumer and pre-consumer products. Once upon a time, producers like us, only have known conventional cotton and organic cotton, but today I can count at our warehouse maybe 8 types of cotton, four types of viscose, 5 types of polyester products, biodegradable products, vegan products, etc. We believe that when the awareness increases, fiber variety will be much more in near future. We make lots of research about all kinds of fibers. So, we analyzed that lyocell production was limited. Therefore, Ecocell brand was born. We are the 6th country which produces lyocell fiber in the world. Ecocell is fully sustainable. This fiber is coming from ancient and endangered forests. The difference from other man-made fibers is we are using organic solvents.





HERNO'S JOURNEY TO SUSTAINABLE CLOTHING

Claudio Marenzi, President, Herno

Sustainability is a healthy selfish meaning that if everybody keeps his garden clean, then all the street will be clean.

Functionality and fashion are in our DNA. In 2010, we invested 8 % of the turnover in making our company completely carbon-free. The energy we are producing is the energy we are using. In 2013, we worked on the prototype of PEF (Pro-environmental footprint) to make the map of the product from the yarn to the end. By doing that, you think about the pollution that you are producing. Sustainability is a healthy selfish meaning that if everybody keeps his garden clean, then all the street will be clean. We have to work together but everybody must do his duty. Our task is to make customer understand that sustainability is a cost. It is a question of marketing and communication globally. We are using all the sustainable materials available on the market. We have to be neutral at the end, the energy that we use and the energy that we produce should be neutral. The energy should be renewable.



Vittorio Zagaia, CEO and VP, Galata International Freight Forwarding

The way of carrying, storing and distributing goods is changing.

International logistics and forwarding industry is trying to adapt itself with greener solutions, more environmental solutions and sustainable approaches. All the investments are changing. The way of carrying, storing and distributing goods is changing. You can see more electrical vehicles in the in-city distribution in Europe to minimize the carbon footprint.



PROVIDING VERIFIED ASSURANCES THROUGH DATA AND SUPPLY CHAIN TRANSPARENCY

Stephanie Thiers-Ratcliffe

Director, European Brands and Retailers, Cotton Council International

The Trust Protocol is grounded in sustainability



We are the third producer in the world but the largest exporter. It is a program that brings quantifiable and verifiable goals and measurements to a more sustainable cotton production while also ensuring supply chain transparency. We are a new program launched two years ago. We count more than 40 global brands as members. We have over 900 mills that joined us. We have got 72 members in 10 locations in Turkey. We have been accepted by different audits and sustainable initiatives around the world. Sustainability is a long path that we will achieve together. And for that we need some integration at different stages of the sector. All starts in the fields with our growers. The program is voluntary for growers in the States. We want to reach 50% of the U.S. cotton production 2025.

The idea is to set up a protocol cotton consumption management system and the idea is to record and verify the movement of U.S. cotton from the origin to the end product. We record all the transactions along the supply chain, the value to members, data for brands and retailers and of course the traceability of the supply chain. For mills and manufacturers, the biggest membership benefit is the opportunity to be identified as part of a fully transparent supply chain to be selected by brands and retailers when they look for suppliers. In conclusion, the Trust Protocol is grounded in sustainability.





HOW TO CAPITALIZE ON THE RECESSION THROUGH DIGITAL PRODUCT CREATION?

Leslie Riley, Founder & CEO, Polytropon Automation Systems

Everybody that takes part in the product development see the same: the one true digital picture.

Today 92 million tons of textile are wasted in the production process, and if we don't change that, it is projected to go to 158 million tons by 2030. A new rising challenge is how can we develop faster smaller capsule collections and deliver them quickly. We need to put technology at the heart of these operations so that we have standardized processes. One important factor is to become a go-to market partner. A supplier is absolutely a partner with his customer. You should take the lead on the technology, not to wait your customers to push you. So, the core of all those things is the digital product creation and the digital twin. We want the end-to-end digital apparel process. Everybody takes part in this product development from the people who buy it to the people who produce it, to the people that sell it, all see the same picture, the one true digital picture.





INTEGRAL PART OF SUSTAINABILITY

Atakan Koru, Aksa Marketing Manager

We will involve the consumer in decision-making

As producers, we are working to consume less natural resources, less energy and less water. For example, we are planning to produce without using any fresh water sources soon. We have developed waterless dyeing technologies. There is also the recycling part of the picture. We are also working on this issue. It is necessary to involve the consumer in the process. Because the manufacturer is responsible for but one third of a T-shirt's negative impact on the environment. Two thirds, in turn, occur during the consumption process of the product, i.e. during washing, drying, ironing and dry cleaning. Looking at this picture, we have identified three areas with room for development. First, we will involve the consumer in the decision-making mechanism. The second is an action plan for the consumer. That is, we will determine what they need to do. Thirdly, consumers will be our stakeholders, providing input and support as we design tomorrow.





INTEGRAL PART OF SUSTAINABILITY

Zafer Kaplan, Chairman of Gama Recycle

We can utilize the clothes waiting in the wardrobes, in industry

There are about 500 million tons of clothes waiting in wardrobes around the world. If we can recycle this 500 million tons of resource, and bring it to the industry, we can cover our needs at least until year 2100. By 2030, it will be possible to increase the recycling rate of used clothes to 10 percent or even 20 percent. The EU can do it a bit easier. Sure, some brands would not be willing to do this.

Those brands may be subjected to an extra 5 percent tax. Or we need to certify clothes as recyclable, that is, we need to apply recyclable product certification alongside recycled product certification on clothes. Because if we design the garment in recyclable form, we would be making a great leap for making all subsequent processes easier. Especially in the EU, it would be better to require recyclable product certificates. The labels on clothes providing instructions for use constitute another important issue. There are hordes of labels on the clothes, with washing instructions. The global use of labels reaches 2.5 million tons. These labels have a scissor mark on the edge. In other words, we are telling the consumer 'to cut it up and throw it in the garbage after reading it'. When we throw these labels in the garbage, they are very difficult to sort back. We can solve the label problem with QR codes.



Arzu Kaprol, Human Innovation Designer

We must create a new concept that is not about consumption, but about sharing, transforming, reusing and establishing long-lasting relationships.

We use more clothes than we need. According to a study conducted in the 50s, the number of clothes a woman will use in a year in her wardrobe is eight. I think that one of the important problems is that the clothes are no longer as durable as in previous years. Our rate of consumption of clothes is based on the fact that the human race, which we call the consumer, duly fulfills this duty and this title. We must create a new concept that is not about consumption, about sharing, transforming, reusing, and building long-lasting relationships. With the new perspective we have created on this concept, our customers need to switch to a new relationship model. At the same time, I think that the design processes should be different.





NET ZERO ENERGY ECOSYSTEM WIND/SOLAR/SOLARCHARGE

Utku Korkmaz, CEO of Solar Roof

Net zero energy economy is possible for businesses

I will try to explain whether a “net zero” energy economy is possible for individuals and then for businesses... Today, there are about 5 thousand electric vehicles in Turkey. Yet, our local brand TOGG alone plans to produce 200 thousand electric vehicles in the next 4 years. This is a very substantial figure. Upon TOGG's arrival on the scene –and I'm not taking into account the products of other brands in the market–, in 4 years the number of electric vehicles will reach 40 times the current levels. In a nutshell, a net zero energy economy as we have described is possible and feasible today, in the context of electricity, natural gas and fuel for individual consumers. This is possible for businesses as well as for homes. What is possible for the home is also possible for businesses. Existing regulations, especially on solar power generation, also encourage these efforts.



Osman Hulusi Toprak, Deputy Chairman of Taypa Textile

Waste is our most important raw material in regenerated yarn production

Our story begins in 2009. Back then, everyone laughed at us because we were thinking about recycling clippings and potential products we could come up with, with certainly more added value. Today, waste is our most important raw material in regenerated yarn production. We made a decision in 2018 to reduce not only our carbon footprint but also our water footprint. With reverse osmosis technology, we managed to reduce our water footprint as well. We currently recover 55 percent of our wastewater. We have also produced a prototype for hydrogen-based systems. Tests are on track, and we are getting good results. By mixing the green hydrogen we produce with natural gas, we managed to reduce our carbon footprint –and thus our natural gas bills– by around 20 percent.





SUSTAINABLE RAW MATERIALS

Armando Guastella, Partner of the Turkish Office, Bain & Company

The fashion industry is entering into the delivery-phase where results will be more important than commitments.

Between 2015 and 2002, brands and value chain players set goals and commitments for the future. Actions and achievements mainly focused on brand operations, while core of the problems are in the supply chain. From now on, brands will need to act on their pledges, largely out of economic and regulatory necessity. The successful players of the future will re-define fashion with ever more substantial, holistic and cross-value chain sustainability strategies for 2030 and beyond. However, delivering long-term commitments will not be easy. 90% of retailers and brands say that they are below or far below expected progress in sustainability efforts. From a demand perspective, there is still a general 'say-do-gap' for fashion consumers, whose purchasing behavior is not always aligned with declarations. However, approximately 15% of fashion consumers already make purchasing decisions based on sustainability and this cohort is likely to become 50% in the next 5 years. "Impact per wear" is a key metric to assess the sustainability profiles of products, often overlooked by brands and with enormous storytelling potential. This is a huge opportunity for manufacturers having a room to apply a higher price because of sustainable products. Start-ups can transform the industry much faster than we believe.



Muzaffer Kayhan, CEO of Söktaş

We are trying to convince more farmers to adopting regenerative agriculture

In 2019, we initiated the regenerative agriculture experience with Stella McCartney, one of the pioneers of sustainable fashion, on 5 decare of land. The following year, WWF Turkey joined the program with a very large US clothing company. Our story began with 5 decare and grew to 550 decare. Next year we plan to increase this to 1000 decare... We want this to be embraced by even wider segments of the sector. But we have some challenges. The first problem is financing. We are working with various NGOs to convince farmers. We are doing our best to convince more farmers to adopting regenerative agriculture. At the beginning of this year, the United Nations Economic Commission for Europe became a partner in our first project. And they brought the European Space Research Institute with them. Together we are trying to develop a system that will ensure traceability at every stage.

Eray Erdoğan, Co-Founder of Reflect Studio

We built the company we, as the young generation, wanted to see

One year after our establishment, we set out with the question of how to develop sustainable design and production methodologies to maximize our impact. This question led us to collaboration with other companies in search of sustainable textiles. Currently we are working with brands, schools and culture and art institutions. We manage the process for all kinds of textile-related needs, ranging from design to delivery. We built the company we, as the young generation, wanted to see. There is a certification agency called B Corp, which is the only agency worldwide that certifies companies. We are the only company in Turkey with B Corp certification.

Edipcan Yıldız, Co-Founder of Reflect Studio

We address sustainability with its environmental and social dimensions

In our view, sustainability rises on pillars. One is environmental, and the other is social. On the environmental side, we make sure that every input used in production is organic, recycled or circular cellulosic fiber. We strictly check that everything we use, from embroidery and sewing threads to packaging, is produced with minimal environmental impact. We struggled with the social compliance side of the whole endeavor, especially in the beginning. We realized that the right way forward was to develop and transform our suppliers, and we provided both financial and intangible support for their social compliance certification efforts.



Ece Altunmaral, Co-Founder of Reflect Studio

Our target audience demands transparency

Currently, 15 percent of our audience is ready to pay a premium for a sustainable product. It looks like this rate will increase to 50 percent in the future. This is not only an advantage, but also a great responsibility. Our target audience is one that constantly asks questions, demands transparency from the company, and wonders what is being done, how and by whom. Therefore, it is not enough just to offer a quality, well-designed product, and to announce it on social media. We have to explain the whole process, even the grounds of price hikes, to our audiences.



PATHWAY TO GREEN FACTORY

Emre Ilıcalı (Ph.D.), Altensis Co-Founder

A new model is developing under the name of 'green economy'

In addition to gains on the energy efficiency and combating climate change fronts, green buildings provide comfortable and healthy environments for their inhabitants. When we set out to build a green building, we also need to pay attention to the materials we choose. Our efforts result in the green economy. In other words, from the choice of raw materials, to construction materials, to the equipment we use, we are moving to a dimension that concerns the entire economy, and a new economy model is developing under the name 'green economy'. At some point, the facilities on offer at green buildings for their inhabitants, ensure and facilitate social sustainability, social and environmental equality. When we talk specifically about the textile sector, the road to a green economy starts even before the factory building is built. In other words, depending on the land you choose and the way you use that land, you are either on the path to sustainability, or you start to move away from that path.





PURCHASING PRACTICES

Matthijs Crietee - Secretary General, IAF

The Sustainable Terms of Trades Initiative (STTI) is a global effort to enable supplier and buyers understand each other.

We hear today the list of demands from brands and retailers buying from manufacturers on sustainability and on flexibility. At the same time margins for manufacturers are being squeezed by rising costs, and it becomes clearer every day that without better ways of purchasing practices, manufacturers cannot realistically be expected to create a greener industry by themselves. It's a collaboration, but understanding does not lead automatically to actions. IAF is very much involved in this topic through a project called the Sustainable Terms of Trades Initiative. This is a 13-association, 10-country initiative led by manufacturing associations from across the world and together they represent about 75% of global production, so this is really a global effort going on.



Marsha Dickson - President and Co-founder, Better Buying Institute

Better purchasing practices is not just about environmental sustainability or social sustainability, it's about just good business.



I started studying the impact of purchasing practices on suppliers and workers 20 years ago, and we created better buying out of the research I was doing as a professor at the University of Delaware. We created a digital safe space for suppliers to share what happens in their business relationships with specific buyer customers and share their ideas about improvements that could be made and have their concerns taken more seriously and acted on. We are providing a mechanism for supplier voice because it has been neglected too long in this industry. Data is suppliers' voice, their voice is heard with data. When a large number of suppliers point out and report the same issue the buyer's perception of that issue changes it from a complaint. With the data that we gather, we advance your concerns, advance your issues to the particular customers, but also to the industry at large. Better purchasing practices is not just about environmental sustainability or social sustainability, it's about just good business. Our index report last year that compared pre-COVID with COVID data year over year comparison shows improvements in planning, forecasting cost, cost negotiation and win-win sustainable partnership.



Gerwin Leppink
Europe Representative, Worldwide Responsible Accredited Production

The German Act on Corporate Due Diligence in Supply Chains, effective in January 1, 2023 has an effect on purchasing practices.



WRAP is Worldwide Responsible Accredited Production, the world's largest independent factory-based program focused on apparel, footwear, and sewn products. We do not have members, we are a non-profit organization about social compliance. The German Supply Chain Due Diligence Act, effective in January 1, 2023 is about the actions of enterprises in his own business areas in Germany, but also the actions of direct suppliers and the action of indirect suppliers. It is a legislation about the supply chain and I absolutely think that has an effect on purchasing practices. It will be the new North Star in compliance. The interesting thing is of course that an authority in Germany is really checking what these companies are doing. So, it is quite different from different legislation we have seen so far. Manufacturers can play an active role by themselves to see what they can do to align actually with their factory to become a supplier of choice for German retailers and brands. The role of social compliance certification in this is to inspect and certify factories if their social compliance standards do meet principles. The EU actually is very active to say "We want to cover this in Europe with the European legislation and there is already a draft on Corporate Sustainability Act.



WHY IS DIGITAL TRANSFORMATION KEY TO GROWING YOUR BOTTOM LINE?

Wesley Ekman, Senior Global Commercial Director, Coats Digital

It is no longer about the cheap needle, it is about the smart needle.

We know that supply chain disruptions continue from the pandemic. We know that raw materials, labor costs are rising. We know that the kind of order fragmentation is getting more and more, lead times are getting lower, labor is getting harder to find. People are leaving the industry. Then, we look at the details, we look at the small things in the business, this simple concept of measuring work content.

So, we talk about that matrix between quality, cost and time. How do we increase quality without increasing time or cost? How do we reduce cost without reducing the quality and so we try to balance this. There is a concept called standard minute value (SMV). We talk about the labor time it takes to produce a garment. It is that small SMV that determines so much of the big things that happen within our businesses, within our manufacturing environments. Businesses are made up of people who want to add value to organizations. We see industry transformation starting at the most minute data points. Once you have that data point, it is easy to maintain, manage and then collaborate. We work on the simple principle: get the right amount of information to the right person at the right time and let them make the right decision. Technology is there to augment human potential. It is no longer about the cheap needle, it is about the smart needle.





WHERE IS GLOBAL TRADE HEADING?

Prof. Asaf Savaş Akat, Economist

The global trade may register a decline in the short term

We are talking about changes in supply chains around the world. What do we mean by that? Buyers want to procure products from sources close by, in contrast to their previous sources in China. They are also considering alternatives for diversifying their supply channels, in the light of political risks... Recession and inflation in Europe... A serious slowdown in the world economy... As a result of this slowdown, there may even be a short-term negative trend in global trade. This is a short-term situation. In the long run, this will grow again. Think of it this way: Will the trade among EU countries, inside the Eurozone, decrease or increase? It will surely continue to increase. In other words, the trade between France, Germany and Italy will definitely continue to increase. Maybe the direction of trade with the rest of the world could change. So regional contractions may occur. Maybe China's exports to the EU will decrease while those of India will increase. As a matter of fact, Vietnam filled the gap well and did very well on that front.



Ege Cansen, Economist

Conditions will set Turkey back in the clothing industry

One of the critical questions in my mind is whether Turkey's progress in apparel and textile industry will be confined to the pages of history. Did we pass that stage? We've come a long way with this. But many other countries like Vietnam and Bangladesh are entering this sector and they are better positioned compared to us, in terms of cheap labor. The designs are already provided by foreign companies. So, in general, the conditions will set Turkey back in some time frame, particularly in the clothing industry. That's my two cents. So what can be done under these circumstances? How can the decline be slowed down? Or is it possible to sustain the current modus operandi in spite of everything? For instance, pants and jackets are still produced in Switzerland, but at ridiculous prices, and at very small volumes. Therefore, the production figures will not fall to zero, but it seems that Turkey is on its way out of this league.



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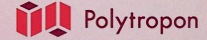
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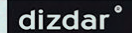
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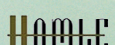
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