PRGMEA PLUS

Sep - Oct 2014
Issue No. 13

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Pakistan Readymade Garments Manufacturers & Exporters Association (PRGMEA)

Editorial

Paying heed to the woes of the textile industry, Federal Budget 2014-15 has provided much needed relief to the textile sector. PRGMEA appreciates the incentives given to the export sector in the current fiscal year budget, including 4 percent duty drawback for garments sector, reduction in the export markup rate from 9.4 to 7.5 percent and the continuation of existing zero-rated import regime for textile machinery for another two years. However, the industry is still waiting for Sales Tax refunds that have been stuck-up for years. We hope that government would also resolve this major and long standing issue of pending refund claims and fulfill its commitment.

Jawwad A. Chaudhry
Senior Vice Chairman
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Pakistan's textile industry is once again at a crossroads. Despite the recently achieved GSP Plus status from the European Union, the improvement in textile exports is not as significant as was expected. Highest interest rate, political instability, deteriorating law and order situation, frequent power and gas outages and high power and gas tariffs are major hurdles to benefit from free market access to EU countries.

Strong competition with the countries such as China, India, Bangladesh, Vietnam and Cambodia is also a threat.

Value added products are a significant part of textile exports to any country. A lot of foreign exchange is earned through exports of high value added textile products. In spite of almost six decades since Pakistan's independence, the country is still focusing on exporting raw materials. The other cotton producers like China and India are no more exporting yarn, but are using the domestic yarn for producing high value added textile products to export them. Japan and South Korea are not cotton producing countries, but are importing yarn to convert it into high value added products and are fetching much higher prices in the international market. For enhancing exports of value added products Pakistan requires appropriate manpower training and introduction of simple export procedures.

Pakistan is the producer of a number of quality products, which can be described as second to none in the world, yet due to lack of branding of these products we are not getting the actual price of the products. This is one of the major reasons that the country continued to suffer trade deficit. The real benefit of our quality products goes to the international importers as these products are sold in the world market with a tag of foreign brand.

One of the most important pre-conditions for economic revival is the restoration of confidence of the business community and other stakeholders for the future of the country and to achieve this important objective, the present government needs to engage the business community in decision making, ensure steady supply of energy, provide fiscal incentives to improve competitiveness, reduce the cost of doing business and accord high priority to the export sector. The government must create a secure environment for investment and economic revival by minimizing these risks through concerted policies and actions in consultations with the real stakeholders.

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CBI Trends for Apparel

'Insights and foresights on key European market dynamics'

The European apparel market is undergoing transformation in several key areas:

- Rising smartphone and social media use continues to drive consumer expectations for speed, services and transparency upward; all levels of the value chain must seek to improve the delivery, quality of services and visibility to remain competitive.
- Brands and retailers are implementing omni-channel distribution strategies that align and synchronize all the company's channels and present a single face to the customer. More emphasis is being placed on social media for marketing and tracking trends.
- Manufacturers are improving processes and supply chains to meet demand for responsible sourcing, chemical safety and conservation of resources.
- Environmental and humanitarian organizations are becoming more influential, contributing to the demand for transparency in many industries.
- The economy continues to recover slowly; many apparel companies are seeking expansion outside of domestic markets, and exploring new countries for partnerships and outsourcing.
- A shifting population age structure is increasing the importance of targeting the senior consumer group.

These trends represent significant opportunities for exporters to demonstrate a proper understanding of the European market as well as a readiness to adapt, move and grow with the market. Exporters should continue to monitor these issues as the apparel sector continues to evolve.

Social Market Drivers

- ***Seniors a growing segment:*** Over the next 50 years, increasing lifespan combined with low fertility levels will contribute to population ageing in Europe.
  According to the latest projections, the percentage of the population aged 65 years and over will rise from 17% in 2010 to 30% in 2060. Persons aged 80 and over will increase from 5% to 12% over the same period.

  Seniors represent a significant market opportunity for exporters as many people aged 65 or over have both purchasing power and leisure time. Furthermore, seniors may be underserved in the apparel market as there are few prominent brands currently addressing this segment. Exporters seeking to serve this segment must understand the lifestyle of today's senior. Notably, many seniors in Europe continue to work. Seniors may also have a more physically active lifestyle than in previous decades. Recent data indicates seniors are spending more on travel and tourism.

CONSIDERATION FOR ACTION: Exporters should make an effort to understand and cater for the specific needs of this consumer group by monitoring the media and major retailers. Consider creating product lines and collections that cater specifically for seniors, for example:

- Work wear
- Leisure and outdoor wear
- Accessories
- Sportswear and shape wear

Also, consider common ageing factors in designing products for seniors. Incorporate features and elements like:

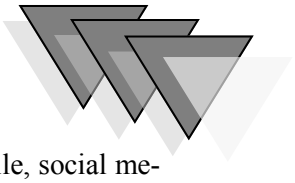
- Simple closures and fasteners o Easy–to-read labeling
- Easy-care, comfortable fabrics
- Integration of monitoring electronics
- Detachable or removable elements
- Shape, colours, and silhouette

- ***Responsible supply chain in demand:*** The April 2013 Rana Plaza collapse in Bangladesh was the largest of several fatal incidents at garment factories in recent years. The tragedy triggered a public relations backlash against big-brand apparel companies and resulted in the launch of several compliance initiatives led by the government, NGOs and industry coalitions. Rising global awareness of the need for increased supply chain visibility is driving demand for transparency and accountability from retailers and brands. Many apparel companies are becoming proactive with regard to responsible sourcing, which addresses a broad range of labor, social and environmental issues, including working conditions, sustainability, product safety and more. Networks that are not just cost-effective, but sustainable and effective in meeting customers' expectations of social responsibility, are in demand. The reputational risks of associating with substandard conditions are becoming too high. For more information, see the CBI Supply Chain trends report.

CONSIDERATION FOR ACTION: Work collaboratively with your buyers on their expectations; encourage long-term sourcing relationships and strive for continuous improvement. Consider developing marketing materials about your supply chain that demonstrate your sustainability proposition and commitment to socially responsible practices. Consider creating a product story that highlights the production process of an item or follows a day in the life of a typical worker.

Technological Market Drivers

- ***Evolving shopping preferences:*** At the end of 2012, smartphone penetration had reached 57% in the EU5 - the top-five markets of Germany, France, Italy, Spain and the UK. By the start of 2014, Europe had nearly 300 million active social media users, accounting for 40% of the region's population. Consumer shopping habits are changing as a result of growing mobile, digital and social media usage.



In addition to shopping for clothes in-store, people also want to shop on the web, through mobile, social media, or even TV. Apparel retailers are increasingly investing in omni-channel retail strategies that align and synchronize all the company's channels and present a single face to the customer.

Industry leaders in omni-channel retailing have well-designed and highly functional mobile sites that integrate seamlessly with social media and other channels; they also have sophisticated cross channel order fulfillment systems and offer a consistent brand experience across channels.

CONSIDERATION FOR ACTION: Visit the websites of some of Europe's best omni-channel retailers. Download their apps and explore their social media presence:

- Topshop (UK) http://www.Topshop.com
- Kiabi (France) http://www.kiabi.com/
- Oasis (UK) http://www.oasis-stores.com/

- ***Rising use of social media:*** Social media have become an integral part of the overall marketing mix**.** They are used to encourage followers to visit a bricks-and-mortar retail locations and online stores and track consumer trends.
  In order to compete for customer engagement, retailers and brands connect with followers through their social media channels and blogs with highly engaging, frequent and exclusive content. For example, new looks might be debuted to followers via Tumblr and Snapchat**.** Fashion shows can be live-streamed via YouTube and Facebook, paired with live Twitter feeds and backstage photos on Instagram. Pinterest might be used to give a product or collection a backstory and lifestyle context.

  Another new way of engaging the customer is through crowdsourcing, a participative online activity in which the company issues a challenge or task and the crowd works together to come up with a solution.

  Through followers, companies can access a real-time apparel testing and design community. For example, French e-tailer Brandalley's Le Lab platform (http://www.brandalley.fr/Lelab) allows users to vote on and decide which designs will move to production to be sold on the site. Danish start-up Fitbay (https://fitbay.com/) helps online shoppers find clothes that fit with personalized clothes suggestions based on other users of similar size and body shape.

CONSIDERATION FOR ACTION: Social media represent an opportunity for exporters to reach consumers easily but to connect with buyers, rules of etiquette apply.

Do:

- Create a business account separate from your personal account. Connect to your existing buyers through their business account.
- Complete your profile with all relevant details about your business. Include a professional photo of yourself, and dress appropriately.
- Use social media for marketing purposes and engaging with customers. Post interesting promotional material, updates on your capabilities and photos of your facilities and samples. You can even ask for feedback and suggestions.
- Use social media to keep up to date on European apparel trends.

Don't:

- Cyber-stalk potential buyers and people you don't know. Repeatedly contacting people through social media tools for the purpose of sales is seen as unprofessional and bothersome. You will risk losing a potential customer.
- Post inappropriate content, like jokes that some people might find offensive.

Economic market drivers

- ***Retail recovery in core markets:*** Economic recovery has been a slow process in the Eurozone. There has been modest growth in the retail sector over the last year, but much of the growth has stemmed from exports rather than consumer spending.

  The economic outlook for retailing in Europe is optimistic due to rising consumer sentiment and moderate growth in core economies such as the UK and Germany; consumers in these economies appear ready to spend. However, consumer spending may remain relatively subdued as a strong recovery in disposable incomes is not anticipated.

CONSIDERATION FOR ACTION: Target end-customer segments with the most opportunity in the current economic climate in Europe. The premium segment has been less affected by the economic downturn, so this group represents an opportunity for exporters.

- ***Retailers pursuing emerging markets:*** Industry consolidation and the rise of large-scale global apparel retailers have intensified and concentrated competition in the European apparel market. Many European retailers are shifting their priorities away from mature, stagnating, and highly competitive domestic markets. Emerging markets (Brazil, China, Turkey, the UAE) undergoing significant growth and industrialization offer growth opportunities, having become more accessible and more attractive due to rising incomes, improved infrastructure and fewer tariffs. Pricing and positioning strategies are often adapted to local markets.

CONSIDERATION FOR ACTION: Instead of trying to serve or compete against mega retailers with large volumes, exporters can focus on customization, small niches, pre-production services and diversify production.

- ***New supply partners sought:*** Over the past few decades, apparel manufacturers have relocated parts of their production to low-cost countries such as China. However, rising wages, increasing production costs and substandard labour conditions are prompting many countries to rethink their sourcing models. While several European apparel companies have opted to restore parts of their operations, many are considering new supplying nations.
  When choosing new partner countries, European manufacturers are seeking competitive labour costs, the availability of raw materials, quality, consistency and responsible labour practices. For more information, see the CBI Supply Chain trends report.

Environmental market drivers

- ***Chemical safety a rising concern***: Consumers are becoming increasingly aware of harmful chemicals used in the apparel production process. Conventional cotton is chemically dependent on pesticides and fertilizers to grow; it accounts for 10% of all agricultural chemicals and 25% of all pesticides used worldwide every year. Textile dying and leather processing involve highly toxic chemicals that put workers at risk, and damage local water supply and related eco-systems. Many manufacturers are reassessing their supply chain and production processes. The use of organic fibers is increasing; the production of organic cotton in particular continues to grow. Pioneering suppliers are also using natural and low-impact dyes, eliminating chemical additives and finishes, and improving wastewater treatment.

CONSIDERATION FOR ACTION: Be aware of European Union chemical policy and all substances of very high concern identified in the relevant legislation (EU REACH). Exceed European standards and try to excel in environmentally friendly processes. Become a member of IAF International apparel federation in order to receive the latest updates on chemical and legal issues in the sector and connect to testing bodies in your country like SGS, TUV or Intertek. Consider using employee and facility certification in marketing materials and highlight a chemically safe work environment and the preservation of the local ecosystem as core company values.

- ***Growing interest in conservation:*** Cotton accounts for nearly half the fibre used in all apparel and other textiles worldwide and continues to be the preferred choice of producers and consumers. **Continued on Page No. 27**

An Overview of Different Processes of Jeans Bleaching

The dyeing and finishing of ready-made jeans garments has gained increasing prominence in recent years. It has gained a position of ever-increasing importance in the clothing market, due to wearing comfort and fashion. Designers learned to make jeans attractive to an ever increasing number of customers through innovative modifications and styling.

Bleaching is a treatment of textiles in order to lighten the fabric for the final shades.

Most bleaching processes are made on open-pocket washing machines or barrel machines (sometimes in Asia), in which many denim products can be treated together. The difference between these machine types is the diameter of the drum and the speed of rotation. The recipes and running times in this report are based on recipes for open-pocket machines. But there are also some mechanical and technical treatments, which are carried out for each single garment.

Bleaching with sodium hypochlorite is by far the most common bleaching process. It is used when the indigo's color needs to be lightened as required by fashion, as well as clean up the pocket lining and the inner face of the jeans (weft). This particular bleaching process is preferably used whenever a strong contrast between blue and white fibers is desired, since it gives the bluest cast of all bleaching processes. Moreover, this process is very cost-effective, however, a major disadvantage is that the AOX content, a measure of organic halogen compounds, often exceeds' the permitted effluent pollution.

Sodium hypochlorite is a powerful oxidizing agent with a corresponding high redox potential. Hypochlorite consequently reacts relatively unselective; it reacts even with the fibers. The danger of fiber damage with this bleaching agent is much greater compared to other bleaching processes. Due to its high oxidation agent potential, hypochlorite bleaching is carried out at low temperatures (approx. 40°C).

The actual bleaching agent in bleaching liquors is not sodium hypochlorite (NaOCI) itself, but the hypochlorous acid (HOCI) which is formed from it in a pH sensitive equilibrium. In order to ensure mild bleaching conditions, a pH range between 9.0 - 11.5 has been found as an optimum range of effective bleaching. Since, under practical conditions, pH levels below 10 are difficult to keep constant, an initial pH range from 11.0-12.5 is selected, as a rule to take into account the consumption of soda ash or caustic soda.

The control of the pH value is very important. The strongest bleaching activity is at pH 9.5 - 12.5; at pH 5 - 7 the activity is the lowest. After reaching the required bleaching effect, the bleaching process has to be stopped in the same bath by using hydrogen peroxide or sodium bisulfite. Another disadvantage of hypochlorite is that the solution loses strength over time, especially at higher temperatures in hot regions. This makes the reproducibility much more complicated, because the amount of hypochlorite should be adjusted by the strength of the solution. But mostly it is only adjusted by continuously checking the bleaching progress.

Bleaching with potassium permanganate: Potassium permanganate is a very strong oxidative agent. It's a deep red-violet metallic shiny crystalline solid. It can be dissolved in water to form a dark violet solution, which is well suitable to bleach denim. Potassium permanganate can be used for local bleaching by spraying application or for complete treatments in drum washing machines. The potassium permanganate solution must be mixed very well with the washing liquor, because of dissolved permanganate can cause different shades in only one bath.

After reaching the desired bleaching effect the rest of unconsumed potassium permanganate and the formed brown manganese oxide hydrate have to be removed thoroughly. After 1-2 rinse bathes the removal of the remaining manganese oxide, is usually carried out with sodium bisulfhate, respectively S02.

The bleaching process can be used even for every pale shade, because potassium permanganate can reduce indigo as well as sulphur dyes. When a longer bleaching process is applied, the jeans processed accordingly can even be completely decolorized.

The reproducibility of the bleaching effect is very good, as long as the same conditions are kept in terms of the load weight, liquor ratio, temperature, run time, pH and the amount of potassium permanganate. The fabric is not as stressed as with hypochlorite. However, the blue cast is very gray and the garments become very flat.

Hydrogen peroxide bleaching: Hydrogen peroxide bleaching has gained an importance in view of the effluent problems caused by hypochlorite bleaching. Hydrogen peroxide is a chemical compound, which reacts as and oxidizing agent. Bleaching with hydrogen peroxide is typically chosen for denim articles whenever a high whiteness is requested. But also black denims are usually bleached with hydrogen peroxide, because it avoids a yellowish tone, as it is obtained in case of hypochlorite bleaching.

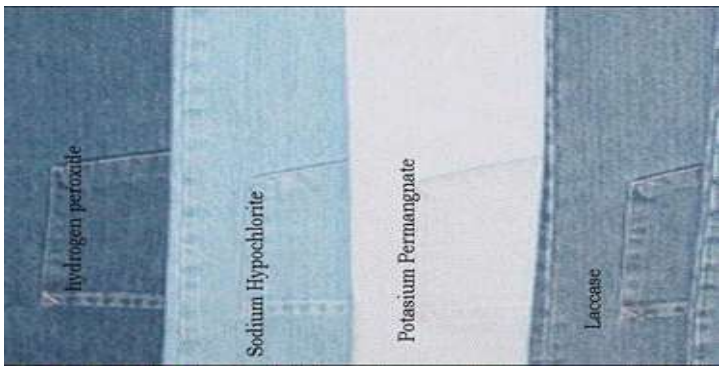
Bleaching with Organic Peroxide: The bleaching with organic peroxide is comparable to bleaching with hydrogen peroxide. Both are compounds of the peroxide family. The bonding between both the oxygen atoms is very unstable and can be easily split at mild conditions. One of the most important organic peroxides in terms of applications is benzoyl peroxide. In the textile industry this product is used in lower concentrations (approx. 20-30% in mixtures). Benzoyl peroxide is a very aggressive and corrosive product. The most common mixtures are based on inert material like calcium chloride. In the jeans bleaching has the product very versatile and dynamic properties. On different material it can have different effects. It is therefore not possible to give standard recommendations. The bleaching effect increases proportionally to the amount of organic peroxide. But this product can also be used for Jeans containing elastic fibers. The bleaching effect can be stopped by adding caustic soda to the bleaching bath. Blue denims get after the bleaching a gray cast.

Bleaching with Laccase: Laccase are useful enzymes for industrial applications. They would be used in the beginning for the waste water treatment. The advantage of enzyme products is the specific treatment. This product preferentially breaks down the indigo molecule, without affecting sulphur, reactive or direct dyes. This process is not useful, if the fabric contains special bottoming or top- Comparison of denim treated with cellulose and pings which are typically made with said other dyestuff classes.

Laccase does not affect harmfully on the strength of the fabric and is also suitable for denim containing elastic yarns.

There is a tendency to have a grayish or antique shade, as opposed to the light blue cast normally associated with sodium hypochlorite bleaching. It also does not damage leather labels or metal trims. Laccases have relative low redox potential, which can be increased, though a mediator-involved reaction mechanism.

Bleaching with Ozone: Ozone is a very reactive gas which can easily release one of his three oxygen atoms for further reactions. This free and high reactive oxygen atom bleaches the indigo molecule. Usually a generator is needed to produce ozone gas from compressed air. This gas needs to be injected into a washing machine loaded with jeans. The garment can be wet or dry. If the fabric is wet the bleaching effect is stronger and faster. The obtained color cast is also a bit grayish than bleached with hypochlorite.



Bleaching with Glucose: The glucose bleaching process is a reductive bleaching. This bleaching process is an inverse dyeing process with glucose as reducing agent. Glucose is converted at strong alkaline pH values and temperatures of at least 80°C (mostly carried out at 9Q-95°C) the indigo pigment into the water soluble leuco indigo, which can strip easily from the fiber. In the bleaching bath a strong dispersing agent is needed, so that the leuco indigo does not dye the white weft yarn. Due to the oxygen in the drum washing machine the soluble leuco form converts back to the insoluble indigo pigment. This pigment form is drained with the bleaching bath, followed by 1-2 rinse bathes The bleaching process with glucose was promoted for a long time as the preferred ecological form of bleaching, however, this process requires much energy due to high temperature, and the waste water has a high pH value and a very high COD load.

Sandblasting: Sandblasting is a mechanical method to lighten Jeans. In this process the sand is blown with high pressure to the surface until the blue shade gets lighter and the vintage look arises. The abrasion on the surface gives a look "like using yet'. Starting end of the 90ies the vintage look has been a high fashion look with a great demand.

The biggest problems of the sandblasting process with high pressure are the working conditions. Most workers do not wear neither protective masks nor work wear. Due to the high pressure quartz dust particles are formed. If this mineral gets in the lung, composite nettings results in cicatrization of the lung. At the end the worker suffers from silicosis, which is known in the metal and mining industry. Since 2008 several media published reports about the sandblasting process and the problem of workers affected by silicosis. The campaign "Clean Clothing" and the Swede Fair Trade Center tried to convince the brands to abstain from the sandblasting for jeans treatment. In the meantime, most jeans brands have put sandblasting on their restricted lists. Turkey has restricted the use of sandblasting in 2009, but mostly this treatment is used in countries like Pakistan, China, Bangladesh and Egypt. In particular, sandblasting is used for plagiarism of the big brands.

Electrochemical Bleaching: Electrochemical procedures, in which electrons are transferred between chemicals via electrodes through electrical currents. In the production of reduction and oxidation agents electrochemical processes are well known, and frequently used in the production of various raw materials. But as of today they are not yet used in jeans bleaching process.

The electrochemical bleaching system (ECB) of indigo dyed jeans garments was developed at the institute for Textile Chemistry and Textile Physics, Dornbirn, based on former studies in the institute about the waste water discoloration with an electrochemical treatment. Based on the comparison with other bleaching systems, it was shown that the total Eco balance of the production of blue jeans based on pre-reduced indigo, and using the electrochemical bleaching process, is the optimum.

The ECB has economic and ecological advantages against the other bleaching processes. The process is easy to carry out, well repeatable, cost-saving and possibly with low waste water. ECB can be used for oxidative or reductive processes. In both processes a mediator is needed -like in the laccase process. In the oxidative ECB process the mediator is oxidized at the anode. The activated mediator oxidizes the water-insoluble indigo on the fabric surface of a water soluble decomposition product. The movement in the washing machine removes the decomposition product from the surface and a dispersing agent hold it the bleaching bath.

Courtesy: www.fibre2fashion.com

GE4DE: a showcase of talented Pakistan

In order to promote vocational institutes in Pakistan, it is essential to provide trainees from these institutes with a platform to showcase their talent. This is exactly what the International Labor Organization's (ILO) Gender Equality for Decent Employment (GE4DE) fashion show provided.

International Labour Organization (ILO) hosted a talent show under the title, Gender Equality for Decent Employment (GE4DE) at the Avari Towers, Karachi on June 20, 2014 to showcase the work of artisans from eight different areas of Pakistan.

As implied by the name, this talent exhibition showcased the skills and competencies of trainees who have graduated under the Curriculum Based Training Approach CBTA curricula facilitated by respective training institutions and local NGO partners of GE4DE. The GE4DE fashion show primarily focused on the rural communities and the training given to low income groups whilst showcasing the tremendous talent existing in our Villages and Peri Rural Communities. The GE4DE talent show celebrated cohesion and practicality of all GE4DE projects and their participants.

The main highlight of ILO's GE4DE fashion show was the full participation of the trainees and respective implementing partners in 360 degree coverage of this event that included aesthetic set designing, creating theme based outfits, crafting marketing material (logo, invitation cards), refreshments and personalized catering to individual guests. As the trainees belong to the less privileged population, due and fair chances were given to them to eliminate limitations; this gesture was appreciated by all the attendees.

"Synchronizing ILO – GE4DE's efforts with the emerging fashion industry of Pakistan is a huge breakthrough, and a dream comes true for me. Almost everything you have seen here today has been put together with the trainees of GE4DE skills development projects. The most unique aspect of this talent exhibition was that for the first time in Pakistan the marginalized class of worker was directly linked with the international and national buyers without the traditional middle person. This has only been made possible purely due to the high standard of training and post training efforts of GE4DE", says Hiba Siddiqui, Programme Officer promoting GE4DE.

The talent show had two main sessions: Red Carpet and the fashion Show; the beautifully designed U-shaped ramp by the graduates of SOHB Educational Welfare Society was the main attraction of the event. To make it more appealing, three exquisite marble mosaic pieces were also installed on the ramp.

The show consisted of four segments, each of which aimed to highlight the creative work coming out from the rural landscape of Pakistan. The title of each segment was taken from the acronym GE4DE, and was backed by a two-three minute documentary that took the viewers through the entire process of creating their collections, the chosen theme and why they chose that certain alphabet from **GE4DE** that depicts their work.

The first segment was presented by the graduates of Fashion Apparel Design & Training Institute chose the alphabet *'E' from GE4DE to develop the theme of 'empowerment'*. The entire collection was made by ILO graduates of fashion design, fancy stitching and lingerie making. The entire collection explained the importance of strategic management and fighting against all offs and not letting any hindrance obstructs your path to success. Handicraft pieces were modified into head gears in the shape of turbans from Punjab, Baluchistan and KPK. Very strong essence of Kailaash in the head gears was seen along with cross stitches from Gilgit Baltistan.

Pakistan Knitwear Training Institute's (PKTI) graduates chose the *'E' from GE4DE to develop their collection around the theme of 'Elements'* of Pakistan. Graduates of the fancy stitching course worked to present their collection depicting regional cultures, including Punjabi, Sindhi, Balochi, Pukhtun and Kashmiri. The collection complimented handmade accessories from another GE4DE project 'Sughar' implemented by Pakistan Development Initiative (PDI).

Pakistan Readymade Garments Technical Training Institute's (PRGTTI) "Knitting" was the next segment to follow. The PRGTTI's graduates took the alphabet *'G' from 'GE4DE' to develop their collections around the theme; 'GLAMOUR'*. PRGTTI graduates have effortlessly transformed denim into dresses and embellished them with gota, brocade and floral embroidery that looked quite striking. The Inspiration for the collection was taken from Hazara and Mongol tribes, depicting a combination of eastern and western style. A total of 15 outfits was presented on the ramp, truly showcasing the talent existing in our rural communities. Baltistan Cultural Development Foundation students wove woolen shawls by hand, and Sohb provided mosaic marble accessories for the collection.

The last segment of the night "Fashion Designing" was presented by fashion designer Shaiyanne Malik. Her trainees, the skilled trainees of DeraJutta chose the alphabet *'D' from GE4DE to develop the theme dreams'*. Shaiyanne Malik's Samanzar gave these girls the courage to dream of a better future through their hard work. Shaiyanne was also the management lead for both the Red Carpet and the Fashion Show. Her iconic style and grace has resulted in the most influential collection of people in the event, and is expected to directly benefit the marginalized women and men.

Makeup and styling for the entire fashion show was done by the graduates of *Depilex Smile Again Foundation's 'Pro-Beautician Plus'* course. The students identified and short listed most realistic and artistic styling options for hair and make-up. The letter 'D' from the 'GE4DE' was strategically picked to symbolize with the theme of the event; 'Development' symbolizing the skills development of the trainees for decent employment in the society.

The talent show was attended by the topmost personalities of the fashion industry, government officials, donors, partners, editors and celebrities who appreciated ILO and its partners for providing aspiring trainees a chance to showcase their talents. The fact that despite belonging to less privilege households all the participants displayed amazing pieces was appreciated by all and highlighted the fact that if provided with opportunities and proper training, the skills of these less privileged individuals can be polished and they can not only support their families but can also play their part in the economic growth of the country.

International Labour Organization (ILO) is a specialized agency of the United Nations and works with a unique, tripartite structure of workers, employers and governments. Pakistan has remained an important member of the ILO since its establishment in 1947 and has also ratified 36 conventions including all fundamental conventions. Initiated in 2010, ***Gender Equality for Decent Employment*** (GE*4*DE) is ILO's five year project funded by DFATD (previously known as CIDA). Its three core areas are strengthening governance structures, enhancing skills & employability and capacitating media for equal opportunities for women. Under the objective 2; 'Enhancing skills and employability of poor women in rural and urban areas of selected districts' the GE4DE project is mandated to get 6,300 women and men trained in demand driven trades and support them in securing formal and informal employment. Many short and long termed skills development sub -projects (following competency based approach) have been completed by GE4DE. To date now under these programmes, well above 4,000 women and men (80% women) have acquired viable skills and employment.

Glimpses of GE4DE: a showcase of talented Pakistan

DENIM

Versatile denim fabrics enjoy unabated global popularity

by *Dr. Noor Ahmed Memon*

For finishing of denim fabrics, a range of treatment methods are used. They all are aimed at new possible effects of fabric appearance, namely mill wash or rinse wash, stone wash, moon wash, sand wash, bleach, over dyed-look, damaged-look, scrubbed-look, sand blast, PP spray, whisker effects, 3-D effects, etc. Particularly dry finishing creates different effects on denim fabric stimulates the customers to buy, and thereby increasing its market potential in the denim market.

Table 1: EU Imports of Trousers & Denim Jeans - 2010-12
Quantity: Million Kg
Value: Rs. Million Euro

Country	2010		2011		2012	
	Quantity	Value	Quantity	Value	Quantity	Value
World	1,957	3,386	1,980	31,665	1,767	33,075
China	1,127	15,323	1,118	16,381	926	14,738
Turkey	122	2,938	116	3,144	113	3118
India	105	2,307	98	2,580	83	2,212
Bangladesh	169	1,783	195	2,525	226	3,178
Vietnam	57	980	68	1,235	64	1,274
Sri Lanka	31	537	33	593	32	626
Cambodia	7	89	12	166	21	341
Pakistan	61	581	64	747	60	739

Major markets for Pakistan's woven garments exports to EU are UK, Germany, Italy, France, Spain and Belgium.

Source: Research & Development Cell, PRGMEA (North Zone) , Lahore

Denim is the most preferred clothing of today's youth. Various items of denim like pants, shirts, skirts, jackets, and belts, etc., are available in the global market. To give distressed denim look, many types of washing effects are given to denim fabric. Almost all of these countries witnessed an increase in trousers and denim jeans exports during the period 2010 to 2012. Statistics regarding the EU export trousers and denim jeans are given in ***Table-1.***

Denim is now well established as a high fashion fabric, contrary to its traditional image of a fabric suitable for rough and functional usage.

Denim jeans have consistently been fashionable in global culture and also have changed in style significantly throughout the years. Denim was traditionally coloured blue with "Indigo dye" to make blue "Jeans", though jeans denoted a different, lighter cotton textile. Denim accounts about 3% of world fabric production. The global jeans market is projected to reach $56 billion by 2018, according to research firm Global Industry Analysts, Inc. In the U.S., the NPD Group reported U.S. shoppers spent nearly $16 billion on denim in 2011. According to survey of children's denim products showed that comfort, softness and easy care, lightweight and fabric quality of the attributes are considered to be important by both parents and children. Another survey conducted among the denim consumers shows preference towards the branded wear due to the superior quality. The top global denim fabric exporting countries are China, followed by Hong Kong, Turkey, Italy, Pakistan, the USA, India, Japan, Spain and Brazil. Together, these countries accounted for as much as 83% of world denim fabric exports.

Denim manufacturing process: Traditional blue denim is a "warp faced" cotton fabric in a 3x1 twill construction, and as a result denim fabric is bluer on the face and almost white on the back. The range of fabric construction is 60-72 ends per inch and 32 -44 picks per inch. About 56% denim fabrics are produced using projectile looms and 29% in air-jet and 15% in rapier weaving. The classic 14 Oz denim covers 70% of the total market. The other market is for lighter weight fabrics, such as shirts and sheeting. Combination of rotor yarn and shuttle less weaving has eliminated weft bands in the denim. The yarn count range Ne 6 to Ne 10 is the most commonly used in the traditional denim manufacturing. Today, major denim producers around the globe are operating the air-jets.
Other machines join several slivers together, and these slivers are then pulled and twisted, which serves to make the threads stronger. Next, these ropes are put on spinning machines that further twist and stretch the fibres to form yarn.

Testing: Denim is also tested for durability and its tendency to shrink. The fabric shrinkage is determined by measuring the dimensions of the fabric before and after three washes / dry cycles. The wash/ dry cycle consists of washing the fabric according to the desired look (process recipe) and drying in a conventional tumble dryer to a maximum dryness at a final max temperature of 710C. Usually drying time of 30 minutes is required.

Quality control: Cotton is a desirable natural fibre for several reasons. Cloth made from cotton is wear resistant, strong, flexible, and impermeable. Blue jeans are only as good as the cotton that goes into them, however, and several tests exist for cotton fibre. All bales of cotton are inspected by the denim manufacturer for the desired colour, fibre length, and strength. Strength is the most important factor in blue jeans.
Blue jeans are also inspected after they are completed. If a problem can be corrected, the jeans are sent back for re-sewing. The pair is then inspected again and passed. The buttons are inspected to ensure that they and the buttonholes are of the proper size; the snaps, metal buttons, and rivets are checked for their durability and ability to withstand rust. The zippers must be strong enough to with-stand the greater pressures of heavy cloth and their teeth durability must be checked as well. This is done by subjecting a sample zipper to a lifetime of openings and closings.

Pakistan Denim Industry: The denim fabric is an intermediate product in the supply chain of denim garments. It is not purchased by the final customers; instead, the buyers of denim fabric are buying houses and garment manufacturers. These manufacturers procure denim fabric from the denim manufacturers based upon their requirements and specifications. This is then further processed and cut, sewn and transformed into finished garments. These garments are then marketed to the final consumers.

Thus the denim fabric is not a final retail product. It is an intermediate product which requires another party to perform further manufacturing tasks before it reaches the final consumer in the form of denim garments. There are about 40 major players in the denim industry of Pakistan. They are producing about 50 million square meters of finished denim fabrics monthly. Denim was traditionally coloured blue with indigo dye to make blue "jeans," though "jean", then denoted a different, lighter cotton textile. Common uses included overalls made of blue denim, worn by mechanics and painters. Common uses included topcoats, vests or short jackets, and fine trousers in chestnut, olive, black, white and blue jean.

Export of cotton denim fabrics from Pakistan increased from 229 million square meters worth Rs20 billion in 2009-10 to 326 million square meters worth Rs47 billion in 2012-13, thus showing an average increase of 34% per annum in terms of value.

Table 2: Export of cotton denim fabrics		
Year	**Quantity (000 Sq. m)**	**Value (Rs. Million)**
2007-08	84,066	8,040
2008-09	117,961	11,707
2009-10	228,879	20,490
2010-11	263,263	26,771
2011-12	320,116	35,341
2012-13	326,135	46,707
Source: State Bank of Pakistan Annual Reports.		

Export statistics of cotton denim fabrics from Pakistan are given in ***Table-2.***

Denim is now one of the key apparel sectors and the driving force behind the apparel exports of the country. The global recession, in fact, did not impact the denim industry in Pakistan. The present market situation does not allow the global players in the denim to increase consumer prices and therefore they have to absorb the price increases from denim fabric producers worldwide.

In this scenario Pakistan has emerged as a key supplier of this highly demanded fabric due to the competitive prices and in house innovations by the denim manufacturers in Pakistan. Bangladesh, Turkey, Egypt, Sri Lanka and Colombia are the major markets for denim fabric exports from Pakistan. With about 140 million sq. meters of denim fabric being exported to Bangladesh in 2012-13, it is a major market for Pakistan. However, export is going to be severely affected with Turkey increasing duties on imports from 24th July 2011. India is becoming an important market for Pakistani denim fabrics. Though the quantities of about 3.6 million meters in 2021-13 are still small, it is indicative of the potential of the Indian denim market and it seems that it will become more important in the coming years.

Both the garment exporters, from India as well as the local brands are becoming important in India as they are getting more aggressive and to differentiate themselves, they buy fabrics from around the world – Italy, Turkey, Spain and with Pakistan becoming an important supplier to service their export market. Country-wise export of cotton denim fabrics from Pakistan is given in ***Table-3.***

Table 3: Country-wise export of cotton denim fabrics
Qty: (000 Sq. mtrs)
Value: (Rs million)

Country	2011-2012		2012-2013	
	Quantity	Value	Quantity	Value
Bangladesh	126,072	13,348	139,843	19,612
Cambodia	11,068	1,229	11,658	1,596
Egypt	23,938	2,827	24,652	3,510
Germany	2,438	281	1,563	227
Hong Kong	5,274	652	5,771	852
India	3,097	350	3,608	522
Italy	8,414	956	5,576	880
Lesotho	3,762	467	5,083	789
Mexico	6,095	701	4,743	73
Peru	9,439	990	9,469	1,230
Poland	837	91	1,067	164
Sri Lanka	12,638	1,341	14,109	2,024
Turkey	50,628	5,534	45,984	7,180
Vietnam	6,754	921	10,433	1,392
All Other	49,662	5,653	42,576	9,290
Total	**320,116**	**35,341**	**326,135**	**46,341**
Source: Federal Bureau of Statistics, Government of Pakistan.				

Future Prospects: Asia has become a major player in the global denim market in recent years for a number of reasons. The continent is home to fashion industry trendsetters Japan and South Korea, two emerging economic superpowers with a billion-plus populations in China and India, as well as a number of highly competitive and swiftly industrializing. Next other nations like Vietnam, Taiwan, Indonesia, the Philippines, Pakistan and Bangladesh. These countries have booming populations and are experiencing increasing consumer sophistication and affluence as a result of several decades' worth of market leadership in manufacturing and a prominent role in the evolution of the information technology industry. Denim in the future will remain an important fabric to meet the ever increasing fashion demands of Asian customers as well as retaining its leading position in global apparel exports.

Courtesy: www.ptj.com

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EU Buyer Requirements for Apparel

Buyer requirements can be divided into (1) *musts*, the requirements you must meet in order to enter the market, such as legal requirements, (2) *common* requirements, which are those most of your competitors have already implemented, in other words, the ones you need to comply with in order to keep up with the market, and (3) *niche* market requirements for specific segments.

Legal requirements are a must – product safety, health and informing consumers correctly crucial

Here you can find requirements you must meet when marketing your products in the EU. Pay attention to the indications of which materials are concerned per requirement described.

The following 'musts' apply to the products and uses listed here:

- **Product safety** – applicable to all products
- **Chemicals** – specific for textiles, leather and accessories
- **Labelling** – specific rules for textiles
- **CITES** – applicable to products made from wild plants and animals

Product safety

The General Product Safety Directive basically states that all products marketed in the EU must be safe to use and forms a framework for all specific legislation established for specific products and issues. If no specific legal requirements have been established for your product and its uses, the General Product Safety Directive still applies. If there are specific requirements applicable to you, the General Product Safety Directive applies in addition, covering all other safety aspects which may not have been described specifically.

Consideration for action

- Study the specific legal requirements listed here, but also use your common sense to ensure the product does not tear, catch fire or cause any other danger in its normal use as this may not be outlined in specific legislation, but is covered in the General Product Safety Directive. You can read more about the General Product Safety Directive in the EU Export Helpdesk.
- Ireland, the Netherlands and the UK have additional national legislation regarding the flammability of nightwear. To get an idea, you can check the RAPEX database where all EU products that are rejected at the border or withdrawn from the market are reported. Fill in "Textiles" in the product category. For more information on the legislation, see the relevant EU website.

Safety of clothes for children

In addition, there is a specific standard regarding the safety clothes intended for children up to the age of 14. Many clothes are rejected by customs authorities due to risk of suffocation, strangulation and causing injuries. This applies especially to the clothes for children up to 7 years old.

Chemicals – restricted substances

The EU has restricted a great number of chemicals in products that are marketed in the EU. These are listed in the REACH regulation (Regulation (EC) 1907/2006). Which chemicals are of relevance for, you will depend on your specific product and material used.

Textiles

- Azo dyes: if you dye your textile make sure you do not use any of the azo dyes that release any of the 22 aromatic amines which are prohibited. The EU legislation lists the aromatic amines, not the azo dyes which release them. The vast majority of azo dyes are therefore legally acceptable. Moreover, most reputable dye manufacturers only produce legally accepted dyes. However, border rejections and market withdrawals do show that azo dyes still is an issue that causes problems on the EU market.
- Flame retardants: in textile products that come into contact with the skin flame retardants are restricted. Often used flame retardants are Tris (2,3 dibromopropyl) phosphate (TRIS), Tris (aziridinyl) phosphine oxide (TEPA) and Polybromobiphenyles (PBB).
- Organotin compounds: if you use PVC in your products, know that organotin compounds are also restricted. Organotin compounds Dioctyltin (DOT) compounds and Dibutyltin (DBT) compounds can be used in textile products (e.g. Print on T-shirts and other garments). Their use is restricted as they can pose a risk to human health (i.e. suppress the immune system, be toxic to reproduction).

Consideration for action

- For children clothing, do not use cords in the neck areas or with long free ends that can be become trapped and parts (e.g. buttons) that can be easily be detached and swallowed by children. There are small parts cylinders to determine whether accessory of garment is too small that it may cause choking hazard to children.
- Familiarize yourself with the full list of restricted substances in products marketed in the EU by checking out restricted chemicals in textile products in the EU Export Helpdesk.
- In case of dyeing: Make sure your products do not contain any of the azo dyes which release the forbidden aromatic amines. This includes checking your suppliers. To test your products, use the official tests. You can find the tests on the CEN website:
- CEN Leather – Chemical tests – determination of certain azo-colourants in dyed leathers. Reference: CEN ISO/TS 17234:2003.
- CEN Textiles – Methods for the determination of certain aromatic amines derived from azo-colourants – Part 1: Detection of the use of certain azo-colourants accessible without extraction. Reference: EN 14362:2003 / EN 14362-1:2012.
- Follow new developments in the field of flame retardants, as new alternatives are being developed. You can do so for instance through the European Flame Retardants Association (EFRA).
- Some EU countries have additional or stricter national restrictions on chemicals substances used in apparel. For example, formaldehyde in textiles (Austria, Germany, Finland and the Netherlands) and PCP (Austria, Denmark, Germany, the Netherlands) and disperse dyes in textiles (Germany). To find out more contact the helpdesk of the Europeans Chemicals Agency (ECHA) or of European national agencies.

Leather: Azo-dyes legislation also applied to the colouring of the leather. In addition, be aware that that the EU has recently adopted a draft Regulation to amend REACH to put restrictions on the use of chromium (VI) in leather as it can produce allergic contact dermatitis. The new legislation will enter into force in 2014 but the effective date is expected to be in the first quarter of 2015. Germany already has national legislation to limit (max 3 ppm) the use of chromium in leather products.

Metal: Metal parts and accessories (e.g. zippers, jewellery, buttons) coming into direct and prolonged contact with the skin should not release more 0.5 µg/cm2 nickel per week.

PVC: The organotin compounds mentioned under textile products also apply to articles made from PVC (e.g. gloves, child care articles). In addition, specific legislation exists for phthalates in childcare articles and toys. They are used as a softener of PVC and can have an adverse effect on human health. The restriction for each phthalates is 0.1% by weight.

Labelling: Textile products must be labelled with the fibre composition and using the fibre names in accordance with EU rules. The aim of this common set of labelling rules is to ensure that the consumer knows what he is buying.

CITES- products from wild plants and animals: If you produce products (partially) made from wild plants or animals, you need to make sure that these do not fall under the restrictions of the Convention on International Trade in Endangered Species (CITES). The EU has implemented the requirements in Regulation 338/97 and lists restricted species (including products thereof) and special procedures where applicable.

Full overview of requirements for apparel

For an overview of all legal requirements set for your product, see the EU Export Helpdesk where you can identify your product code to get a list of requirements applicable.

Consideration for action

- Buyers in Italy, France and Spain have already started to reject leather articles containing Chromium VI. Therefore, aim to supply chromium-free products.
- Find out more about the restrictions of PVC in the EU Export Helpdesk.
- Find out more about legislation on phthalates on the website of the EU.
- Know your own product and study the EU labelling rules to find out how it should be labelled. Find out more about textile labeling rules in the EU Export Helpdesk.
- If you are not certain whether your products fall within CITES or not, you need to find out. You can read more about the legislation in CITES in the EU Export Helpdesk and check out the links to find out whether or not CITES is relevant to you. The EU Export Helpdesk also provides information on the different procedures applicable to the different categories within CITES.

Common requirements: Good sustainability performance commonly asked

Sustainability performance: Sustainability is one of the ways for companies to differentiate themselves, and the means of offering sustainable products are numerous, ranging from labour issues to choice of sustainable materials for certification and use of labels (see 'Niche'). In particular, social aspects like basic labour rights are major issues in the garment industry. Several initiatives have gained quite some ground in (particularly) western European countries. The Ethical Trading Initiative, ETI is used by large buyers in the UK. Retailers/importers and producers also participate in the Business Social Compliance Initiative (BSCI) and the Fair Wear Foundation, which have a strong presence in the other European markets. Implementing a management system such as ISO14000 (environmental aspects), OHSAS 18001 (occupational health and safety) or SA 8000 (social conditions) is a way to address sustainability and possibly gain a competitive advantage. Research with your buyer, whether this is appreciated.

Niche requirements: certified sustainable products

While sustainability is gaining ground, the actual use of certification is still a niche in this sector.

Fair trade products (textiles): Among the niche initiatives, Fair Trade is the best known with a relatively large market presence (including several sectors) and available for textile products.

Eco-labelled apparels: There are several different eco-labels used for apparel and as this is a means of showing sustainability, there is an interest from buyers. The Global Organic Textile Standard (GOTS) and Naturland (Germany) are examples of textile processing standard for organic fibres; OEKO- TEX and Bluesign stand for no use of hazardous chemicals in textiles; the EU Eco-label and also look for chemicals environmentally-friendly options. When doing business in Germany the Blauer Engel is an important eco-label. When targeting north European countries look into the Nordic Swan. Organic labels also apply to leather. In addition, Leather Weather Group and Naturleder are other eco-labels that are used.

Courtesy: CBI, Market Information Database,
URL: http://www.cbi.eu/marketintel_platform/apparel/

Consideration for action

- Look into the possibilities of improving your sustainability performance. This may not always include immediate certification or application of a label (read the information in 'Niche'), but it is important to familiarize yourself with issues.
- In case you are targeting the UK market familiarize yourself with the ETI base code to check what ETI members require from their suppliers.
- When targeting other EU markets it might be interesting to assess your company's current performance by doing a self-assessment, which you can find on the BSCI website.
- Be aware that many of the environmental and social sustainability issues take place at upstream in your supply chain (factory, collector, farm). Think about a way to assure responsible business at the premises of your suppliers.
- Also see CBI's tailored intelligence on the market for sustainable apparel in the UK.
- For more information about SA8000 and other standards please turn to the ITC's Standards Map where you can search

Consideration for action

- Check the Fair Trade Standards for small organizations.
- Consult ITC's Standards Map for more information on the Fair Trade label.
- If you are looking to focus on the ethical niche market, you need to find business partners. This could range from large companies with sustainable product lines as well as specialized apparel buyers. Familiarizing yourself with the initiatives and how they work is an initial step in finding out whether or not your company would be a good match.
- For more alternatives, see ITC's Standards map.

Country Profile: United Kingdom

Research & Development Cell, PRGMEA (NZ), Lahore

The United Kingdom has historically played a leading role in developing parliamentary democracy and in advancing literature and science. At its zenith in the 19thcentury, the British Empire stretched over one-fourth of the earth's surface. The first half of the 20th century saw the UK's strength seriously depleted in two world wars and the Irish Republic's withdrawal from the union. The second half witnessed the dismantling of the Empire and the UK rebuilding itself into a modern and prosperous European nation. As one of five permanent members of the UN Security Council and a founding member of NATO and the Commonwealth, the UK pursues a global approach to foreign policy. The UK is also an active member of the EU, although it chose to remain outside the Economic and Monetary Union. The Scottish Parliament, the National Assembly for Wales, and the Northern Ireland Assembly were established in 1999. The latter was suspended until May 2007 due to wrangling over the peace process, but devolution was fully completed in March 2010.

COUNTRY FACTS:

Country name: Conventional long form: United Kingdom of Great Britain and Northern Ireland;
Note - Great Britain includes England, Scotland, and Wales
Conventional short form: United Kingdom (UK)
Capital: London, Time difference: UTC 0 (5 hours ahead of Washington, DC, during Standard Time)
Government type: Constitutional monarchy and Commonwealth realm
Administrative divisions: England: 27 two-tier counties, 32 London boroughs and 1 City of London or Greater London, 36 metropolitan districts, 56 unitary authorities (including 4 single-tier counties) two-tier counties: Buckinghamshire, Cambridgeshire, Cumbria, Derbyshire, Devon, Dorset, East Sussex, Essex, Gloucestershire, Hampshire, Hertfordshire, Kent, Lancashire, Leicestershire, Lincolnshire, Norfolk, North Yorkshire, Northamptonshire, Nottinghamshire, Oxfordshire, Somerset, Staffordshire, Suffolk, Surrey, Warwickshire, West Sussex, Worcestershire
Legal system: Common law system; has nonbinding judicial review of Acts of Parliament under the Human Rights Act of 1998**, Executive branch:** Chief of state: Queen ELIZABETH II (since 6 February 1952); Heir Apparent Prince CHARLES (son of the queen)**,**
Head of government: Prime Minister David CAMERON (since 11 May 2010), **Cabinet:** Cabinet of Ministers appointed by the Prime Minister,

Languages: English, *Note:* the following are recognized regional languages: Scots (about 30% of the population of Scotland), Scottish Gaelic (about 60,000 in Scotland), Welsh (about 20% of the population of Wales), Irish (about 10% of the population of Northern Ireland), and Cornish (some 2,000 to 3,000 in Cornwall) (2012)

Religions: Christian (includes Anglican, Roman Catholic, Presbyterian, Methodist) 59.5%, Muslim 4.4%, Hindu 1.3%, other 2%, none 25.7%, unspecified 7.2% (2011 est.),
Currency: Pound sterling (Code: GBP), (Symbol: £**),**
Exchange rates: British pounds (GBP) per US dollar - 0.6391 (2013 est.), 0.6307 (2012 est.), 0.6472 (2010 est.), 0.6175 (2009), 0.5302 (2008)

Location: Western Europe, islands - including the northern one-sixth of the island of Ireland - between the North Atlantic Ocean and the North Sea; northwest of France
Geography - note: Lies near vital North Atlantic sea lanes; only 35 km from France and linked by tunnel under the English Channel; because of heavily indented coastline, no location is more than 125 km from tidal waters, **Area:** Total: 243,610 sq. km (Country comparison to the world: 80)**,** Land: 241,930 sq. km, Water: 1,680 sq. km
Note: includes Rockall and Shetland Islands
Land boundaries: Total: 360 km**, Border countries:** Ireland 360 km, **Coastline:** 12,429 km**, Internet country code:** .uk**, Internet users:** 51.444 million (2009)**,** Country comparison to the world: 7, **Dialing Code:**+44

Population: 63,742,977 (July 2014 est.), Country comparison to the world: 23

Age structure: 0-14 years: 17.3% (male 5,660,891/female 5,380,448), 15-24 years: 12.6% (male 4,116,859/female 3,945,146), 25-54 years: 41% (male 13,299,731/female 12,843,937), 55-64 years: 11.5% (male 3,621,110/female 3,702,717), 65 years and over: 17.3% (male 4,990,024/female 6,182,114) (2014 est.)

Urban population: 79.6% of total population (2011)
Major urban areas - population: LONDON (capital) 9.005 million; Birmingham 2.272 million; Manchester 2.213 million; West Yorkshire 1.625 million; Glasgow 1.137 million; Newcastle upon Tyne 874,000 (2011)
Population below poverty line: 16.2% (2011 est.)
Literacy: Definition: age 15 and over has completed five or more years of schooling,

Climate: Temperate; moderated by prevailing southwest winds over the North Atlantic Current; more than one-half of the days are overcast
Natural resources: Coal, petroleum, natural gas, iron ore, lead, zinc, gold, tin, limestone, salt, clay, chalk, gypsum, potash, silica sand, slate, arable land
Natural hazards: Winter windstorms; floods

ECONOMY - overview:

The UK, a leading trading power and financial center, is the third largest economy in Europe after Germany and France. Over the past two decades, the government has greatly reduced public ownership. Agriculture is intensive, highly mechanized, and efficient by European standards, producing about 60% of food needs with less than 2% of the labor force. The UK has large coal, natural gas, and oil resources, but its oil and natural gas reserves are declining and the UK became a net importer of energy in 2005. Services, particularly banking, insurance, and business services, are key drivers of British GDP growth. Manufacturing, meanwhile, has declined in importance but still accounts for about 10% of economic output. After emerging from recession in 1992, Britain's economy enjoyed the longest period of expansion on record during which time growth outpaced most of Western Europe.

In 2008, however, the global financial crisis hit the economy, particularly hard, due to the importance of its financial sector. Facing burgeoning public deficits and debt levels, in 2010 the CAMERON-led coalition government (between Conservatives and Liberal Democrats) initiated a five-year austerity program, which aimed to lower London's budget deficit from about 11% of GDP in 2010 to nearly 1% by 2015. In November 2011, Chancellor of the Exchequer George OSBORNE announced additional austerity measures through 2017 largely due to the euro-zone debt crisis. The CAMERON government raised the value added tax from 17.5% to 20% in 2011. It has pledged to reduce the corporate tax rate to 21% by 2014. The Bank of England (BoE) implemented an asset purchase program by £375 billion (approximately $605 billion) as of December 2013.

During times of economic crisis, the BoE coordinates interest rate moves with the European Central Bank, but Britain remains outside the European Economic and Monetary Union (EMU). In 2012, weak consumer spending and subdued business investment weighed on the economy, however, in 2013 GDP grew 1.4%, accelerating unexpectedly in the second half of the year because of greater consumer spending and a recovering housing market. The budget deficit is falling, but remains high at nearly 7% and public debt has continued to increase.

Basic Economic Facts:

GDP (purchasing power parity): $2.387 trillion (2013 est.), $2.343 trillion (2012 est.), $2.341 trillion (2011 est.)
Note: data are in 2013 US dollars
GDP (official exchange rate): $2.49 trillion (2013 est.)

GDP - real growth rate:1.8% (2013 est.)**,** 0.1% (2012 est.), 0.9% (2011 est.)
GDP - per capita (PPP):$37,300 (2013 est.), $37,100 (2012 est.), $37,300 (2011 est.)**,** *Note:* data are in 2013 US dollars
GDP - composition, by sector of origin: Agriculture: 0.7%, Industry: 20.5%, Services: 78.9% (2013 est.)
Agriculture - products: Cereals, oilseed, potatoes, vegetables; cattle, sheep, poultry; fish
Industries: Machine tools, electric power equipment, automation equipment, railroad equipment, shipbuilding, aircraft, motor vehicles and parts, electronics and communications equipment, metals, chemicals, coal, petroleum, paper and paper products, food processing, textiles, clothing, other consumer goods
Industrial production growth rate:-0.3% (2013 est.)
Labor force: 30.15 million (2013 est.)
Labor force - by occupation: Agriculture: 1.4%, Industry: 18.2%, Services: 80.4% (2006 est.)
Unemployment rate: 7.2% (2013 est.), 7.8% (2012 est.)
Budget: Revenues: $1.023 trillion**,** Expenditures: $1.112 trillion (2013 est.)
Fiscal year: 6 April - 5 April
Inflation rate (consumer prices):2% (2013 est.)**,** 2.7% (2012 est.), **Central bank discount rate:**0.5% (31 December 2013 est.), 0.5% (2012 est.)
Commercial bank prime lending rate:4.4% (31 December 2013 est.), 4.22% (31 December 2012 est.)

EXPORTS: $813.2 billion (2013 est.), Country comparison to the world: 5, $801.7 billion (2012 est.)
Exports - commodities: Manufactured goods, fuels, chemicals; food, beverages, tobacco
Exports - partners: Germany 11.3%, US 10.5%, Netherlands 8.8%, France 7.4%, Ireland 6.2%, Belgium 5.1% (2012)
IMPORTS: $782.5 billion (2013 est.)**,** Country comparison to the world: 5, $777.6 billion (2012 est.)
Imports - commodities: Manufactured goods, machinery, fuels; foodstuffs
Imports - partners: Germany 12.6%, China 8%, Netherlands 7.5%, US 6.7%, France 5.4%, Belgium 4.4%, Norway 4% (2012)

Transportation:
Airports: 460 (2013), Country comparison to the world: 18
Railways: Total: 16,454 km**,** Country comparison to the world: 17, **Roadways:** Total: 394,428 km**,** Country comparison to the world: 16, **Waterways:** 3,200 km (620 km used for commerce) (2009), Country comparison to the world: 32
Ports and terminals:
Major seaport(s): Dover, Felixstowe, Immingham, Liverpool, London, Southampton, Teesport (England); Forth Ports (Scotland); Milford Haven (Wales)
Oil terminals: Fawley Marine terminal, Liverpool Bay terminal (England); Braefoot Bay terminal, Finnart oil terminal, Hound Point terminal (Scotland),
Container port (TEUs): Felixstowe (3,248,592), London (1,932,000), Southampton (1,324,581)

CULTURE: The culture of the UK is the pattern of human activity and symbolism associated with the United Kingdom and its people. It is influenced by the UK's history as a developed island country, a liberal democracy and a major power, its predominantly Christian religious life, and its composition of four countries—England, Northern Ireland, Scotland and Wales—each of which has distinct customs, cultures and symbolism. The wider culture of Europe has also influenced British culture, and Humanism, Protestantism and representative democracy developed from a broader Western culture. British literature, music, cinema, art, theatre, media, television, philosophy and architecture are influential and respected across the world. The United Kingdom is also prominent in science and technology. Sport is an important part of British culture; numerous sports originated in the country, including football. The UK has been described as a "cultural superpower", and London has been described as a world cultural capital.

The Industrial Revolution, with its origins in the UK, had a profound effect on the socioeconomic and cultural conditions of the world.

As a result of the British Empire, significant British influence can be observed in the language, culture and institutions of a geographically wide assortment of countries, including Australia, Canada, India, Republic of Ireland, New Zealand, Nigeria, Pakistan, South Africa and the United States. These states are sometimes collectively known as the Anglosphere*, and are among Britain's closest allies. In turn the empire also influenced British culture, particularly British cuisine. The cultures of England, Scotland, Wales and Northern Ireland are diverse and have varying degrees of overlap and distinctiveness.

UK Business Culture: The British are rather formal. Many from the older generation still prefer to work with people and companies they know or who are known to their associates. Younger businesspeople do not need long-standing personal relationships before they do business with people and do not require an intermediary to make business introductions. Nonetheless, networking and relationship building are key to long-term business success. Rank is respected and businesspeople prefer to deal with people at their level.
Punctuality is a very British trait. It is especially important in business situations. In most cases, the people you are meeting will be on time. Always call if you will be even 5 minutes later than agreed. If you are kept waiting a few minutes, do not make an issue of it. In general, meetings will be rather formal and always have a clearly defined purpose, which may include an agenda.

Business etiquettes:

- Business attire is conservative. Men should wear a dark coloured, conservative business suit. Women should wear either a business suit or a conservative dress.
- Shake hands with everyone at a meeting upon arrival. Maintain eye contact during the greeting.
- Business cards are exchanged at the initial introduction without formal ritual. The business card may be put away with only a cursory glance.
- Business gift giving is not part of the business culture.

International organization participation: ADB (non-regional member), AfDB (non-regional member), Arctic Council (observer), Australia Group, BIS, C, CBSS (observer), CD, CDB, CE, CERN, EAPC, EBRD, EIB, EITI (implementing country), ESA, EU, FAO, FATF, G-20, G-5, G-7, G-8, G-10, IADB, IAEA, IBRD, ICAO, ICC (national committees), ICRM, IDA, IEA, IFAD, IFC, IFRCS, IGAD (partners), IHO, ILO, IMF, IMO, IMSO, Interpol, IOC, IOM, IPU, ISO, ITSO, ITU, ITUC (NGOs), MIGA, MINUSMA, MONUSCO, NATO, NEA, NSG, OAS (observer), OECD, OPCW, OSCE, Pacific Alliance (observer), Paris Club, PCA, PIF (partner), SELEC (observer), UN, UNCTAD, UNESCO, UNFICYP, UNHCR, UNIDO, UNISFA, UNMISS, UNRWA, UNSC (permanent), UPU, WCO, WHO, WIPO, WMO, WTO, ZC

References:

- https://www.cia.gov, https://www.trademap.org

Trade Comparison

Unit : US Dollar Million

Product Code	Product Label	United Kingdom's imports from Pakistan in 2013	United Kingdom's Imports from Bangladesh in 2013	United Kingdom's Imports from India in 2013	United Kingdom's Imports from China in 2013	United Kingdom's Imports from Sri Lanka in 2013	United Kingdom's Imports from Vietnam in 2013	United Kingdom's Imports from Cambodia in 2013	United Kingdom's Import from Rest of the World in 2013	United Kingdom's Total Import from World in 2013
TOTAL	All products	1,451	2,913	9,669	57,588	1,109	4,483	1,048	577,437	655,698
61	Articles of apparel, accessories, knit or crochet	285	1,399	813	3,750	467	136	516	5,302	12,668
'62	Articles of apparel, accessories, not knit or crochet	269	1,220	860	3,760	449	397	250	4,967	12,172

CBI
EXPORT COACHING SEMINAR FOR BSOs

The Centre for the Promotion of Imports from Developing Countries (CBI), of the Ministry of Foreign Affairs of the Netherlands contributes to the economic development of selected countries by providing services aimed at strengthening competitiveness of companies and business support organizations in the field of export marketing and export management pertaining to EU and EFTA markets.

Pakistan appears prominently in CBI activities and current-

ly a number of Export Coaching Programs are underway. In addition, a Business Support Organization Development (BSOD) Program was offered to strengthen the governmental and nongovernmental export support mechanism in Pakistan.

As part of the BSOD Program BSO EXPRO, a Training Workshop was being organized for the benefit and capacity building of leading business support organizations who are stakeholders in the drive to enhance Pakistani Exports. With the new government planning an exponential growth in Pakistan's exports, the initiative from the Netherlands Ministry of Foreign Affairs is well programmed for achieving its goals.

The BSOD EXPRO is designed to steering BSOs from Afghanistan and Pakistan into new directions of Exports and Skills Training of their member companies for improving skills levels of exporting staff and the owner managers for achieving export-led growth of the Pakistan economy.

The common objective is to develop Pakistan through an export boost of goods from Pakistan can only be met through mutual cooperation, support for each other and co-ordinated efforts to achieve efficiency, effectiveness and synergy. In Pakistan, the CBI's project duration is 4 years (from November 2012 till the end of 2016). This whole Export Coaching Program is divided into 12 activities.

"CBI's BSOD – EXPRO Training Workshop was conducted in 16-19 December, 2013 at Pearl Continental Hotel, Lahore". The purpose of this training was to offer added value to the client SMEs by extracting export Marketing Plan (EMP) on company level from the Sector marketing Plan (SEMP) on sector level.

Topics included in the training:

- Capacity building versus stake holder's added value and involvement
- Basic information about the European union
- Market research techniques and web-based market research on CBI's MI-platform
- Work on your own market research targets, questions and plan for the EU
- Market access requirement for products in the European market, in particular in the field of consumer health and safety, environment and social issues
- Building your service portfolio and value chain mapping and analysis
- Image building, project proposals and implementation
- Export Marketing Plan template

Support Organizations like Engineering Development Board, TDAP, ***PRGMEA***, SMEDA, NPO, Mango Grower Association, SIMAP, etc. DART, headed by Mr. Zaheeruddin Dar is the local organizer of the EXPRO Seminar.

People from successful CBI ECP companies were guest speakers at the workshop. Almas Hyder (SPEL), Usman Malik (Kortech Radiators), Amirah Hashmi and Nabeel Hashmi (Thermosole) spoke about the Best Practices adopted in their companies which provided export led growth in their companies and reduced depending on the local market.

The EXPRO in Lahore is taking place shortly after participants of the CBI's Export Coaching Program, from the Engineering Sector, have just returned from the CBI sponsored EXPRO Seminar held at The Hague, the Netherlands. The group in the Netherlands consisted of Pakistan engineering sector companies as well as five representatives from Business Support Organizations EDB, TDAP, NPO, SMEDA, PAAPAM and Pakistan Foundry Association. This resulted in creating a core team of trained BSO Staff who is expected to make a nucleus for further development of capacity of each BSO. CBI works on behalf of the Dutch Ministry of Foreign Affairs, to promote exports from developing countries to Europe.

Continued from Page No. 7

CBI Trends for Apparel…….. However, cotton is one of the most water-intensive crops to grow. European manufacturers and importers are increasingly looking for materials and fibres that are sustainable and functional, such as those that are raw, natural, synthetic, renewable or recycled. Through R&D, companies are developing technologically advanced fabrics from new materials. Many apparel companies are also seeking improvements in textile processing and taking action to minimize their carbon footprint, water use and waste. With growing consumer awareness and the participation of major brands, conservation trends will become of greater interest to importers.

CONSIDERATION FOR ACTION: Become a member of ETI (Ethical trading Initiative). Consider how your facilities and processes can be improved to have less impact on the environment. Think about trying new, more efficient dyeing techniques, for example.

Political marketing drivers

- ***Growing influence of NGOs:*** Environmental and humanitarian organizations have tackled an ever-broadening range of issues in the apparel industry, including sustainability, working conditions, energy and resource conservation. As a result of intensified efforts and increased funding, these organizations are becoming more experienced, effective, and visible across global markets. For the most part, these organizations rely on the power of negative publicity to influence consumer choice. This has been an effective method and companies that violate environmental and human rights standards face a significant public relations risk if exposed. European apparel companies are becoming more proactive on corporate social responsibility issues as they learn from their mistakes, or the mistakes of their peers.

CONSIDERATION FOR ACTION: Be aware of the positions adopted by environmental and humanitarian organizations, especially if you plan to manufacture for major retailers. Use high social and environmental standards to create a story for your products.

This report was compiled for CBI by GIA in collaboration with CBI sector expert., Source: CBI, Market Information Database, URL: http://www.cbi.eu/marketintel_platform/Apparel/

IAF News

International Apparel Federation

CBI and the International Apparel Federation sign co-operation agreement

CBI (Centre for the Promotion of Imports from developing countries) and the International Apparel Federation (IAF) signed a Memorandum of Understanding (MoU). The goal of this MoU is to intensify collaboration between the two organizations in improving the apparel value chain in developing countries.

The MoU commits CBI and the IAF to share contacts, to involve each other in trade missions and to work together in projects which involve sourcing, value chain development, capacity building and CSR.

A mutual goal: The MoU was prepared by CBI expert Dhyana van der Pols and signed by CBI Programme Managers Tamar Hoek and Melanie van der Baaren-Haga and IAF Deputy Secretary General Matthijs Crietee. "We share a mutual goal, which is to improve the apparel value chain. In this agreement we have listed practical ways in which we can support each other in achieving this goal", said Crietee.

Market research: Cooperation in the field of market intelligence is also part of the MoU. CBI's market intelligence department will offer its research studies to IAF members and the two parties will look for ways to cooperate in new research on trends in the apparel sector, industry developments, sourcing and supply chain management.
Tamar Hoek: "The IAF offers us a new platform to share our knowledge with business support organizations. By cooperating in the production and dissemination of market intelligence studies we will truly integrate with the worldwide apparel industry."

More than 60 countries: The International Apparel Federation represents the interests of the global fashion chain. The federation has members in more than 60 countries in all continents. These include brands and manufacturers, their associations and their specialized suppliers.

CBI is an agency of the Ministry of Foreign Affairs of the Netherlands. CBI's mission is to contribute to sustainable economic development in developing countries through the expansion of exports from these countries. The MoU is valid for two years and can be extended with another three years.

IAF supports the Accord on Fire and Building safety and the Alliance on Worker Safety

Rana Plaza building collapse is one of the world's biggest and most tragic Industrial accidents in modern history. The accident caused worldwide discussion on how to improve the worker safety and fire and building safety.

The IAF has taken steps to support the main action based programs, the Accord on Fire and Building safety and the Alliance on Worker Safety. IAF's support is based on its main characteristics: its global spread and its representation of SME's.

IAF represents apparel industry associations from over 60 countries, who in turn represent the total spread of the apparel industry, from large to small enterprises and from buyers to the manufacturers. Therefore, the IAF serves as an important hub for the exchange of information between the Accord and IAF's members. Based on its own global responsibility action plan, the IAF encourages its members to support collective, action based programs currently running in Bangladesh, aimed at improving worker safety.

Information about the implementation of the Accord is important for the IAF and its members because of the growing impact of the Accord on companies involved in sourcing from Bangladesh. Both organizations are committed to open and frequent exchange of information. This provides the Accord with a valuable connection to global apparel associations and their members, and ensures IAF has up to date and easy access to information about the Accord relevant to its members

The IAF is in the process of setting up a similar exchange of information with the Alliance, in accordance with its global mission.

Courtesy: www. iafnet.eu

TEXTILE PACKAGE

2014-15

EXPORTS REFINANCE FACILITY (ERF): Mark-up rate on export finance will be reduced from 9.4% to 7.5%, which will reduce the financial cost of exporters by 2%.

LONG TERM FINANCE FACILITY: Mark-up rate on long term financing will be reduced from around 11.4% to 9% w.e.f 1st July, 2014 for 3-10 years duration which will reduce financial cost of exporters by 2.4%.

DRAW-BACK FOR LOCAL TAXES AND LEVIES: Drawback of local taxes and levies will be given to exporters of textile products on FOB values of their enhanced exports if increased beyond 10% (over last year's exports) at the rate of $% for Garments, 2% for Made Ups and 1% for Processed fabrics.

PAYMENT OF LONG OUTSTANDING SALES TAX REFUNDS: All pending Sales Tax refund claims will be disposed of before ***30th September 2014.*** In future, all admissible refund claims of exporters shall be disposed off with 3 months.

LONG TERM FINANCING FACILITY: Textile Industry units in the value added sector would be provided Long Term Financing Facility (LTFF) for up gradation of technology at the rate of 9% for 3-10 years duration.

DUTY FREE IMPORT OF MACHINERY: In view of the need to take full advantage of GSP plus facility, this concession duty free import of machinery would be allowed for another two years.

VOCATIONAL TRAINING PROGRAM FOR TEXTILE WORKERS: A new vocation training program will be launched to train 120, 000 men and women, over the five year period, for skills required in the textile sector, especially in the value added sector such as garments and made ups.

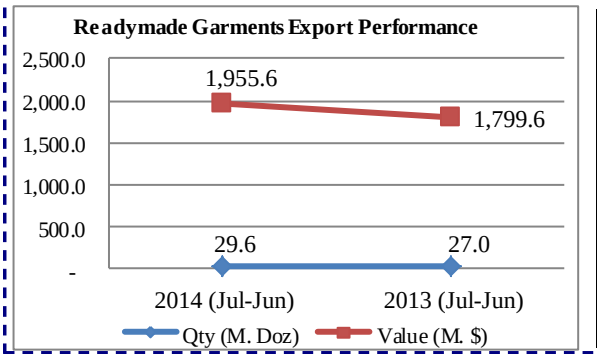
SETTING UP OF EXIM BANK OF PAKISTAN (SPECIALIZED DFI): An Export-Import (EXIM) Bank will be established to enhance export credit and reduce cost of borrowing for exporting sectors on long term basis. Its authorized capital will be Rs. 100 billion while the initial Paid up Capital will be Rs. 10 billion.

Textile Commissioner's Organization , Ministry of Textile Industry

Textile Industry - Export Performance

S. No.	Products	2014 (Jul-Jun)	2013 (Jul-Jun)	% age Change
1	**Raw Cotton**			
	Qty (M Kg)	114.8	92.5	24.1
	Value (M.$)	205.1	153.9	33.3
2	**Cotton Yarn**			
	Qty (M Kg)	663.4	737.6	-10.1
	Value (M.$)	1,990.5	2,252.0	-11.6
3	**Yarn Other than Cotton Yarn**			
	Qty (M Kg)	12.9	11.7	10.2
	Value (M.$)	43.4	38.5	12.8
4	**Cotton Cloth**			
	Qty (M. Sq. Mtrs)	2,351.9	2,160.8	8.8
	Value (M.$)	2,773.6	2,689.8	3.1
5	**Bed Wear**			
	Qty (M. Kgs)	316.4	263.6	20.0
	Value (M.$)	2,138.6	1,785.4	19.8
6	**Other Made-Ups**			
	Value (M.$)	666.9	598.6	11.4
7	**Towels**			
	Qty (M.Kgs)	171.3	170.1	0.7
	Value (M.$)	767.3	769.6	-0.3
8	**Tents/Canvas**			
	Qty (M. Kgs)	28.6	32.0	-13.4
	Value (M.$)	82.1	117.5	-30.1
9	**Hosiery & Knitwear**			
	Qty (M. Doz)	116.4	97.9	18.9
	Value (M.$)	2,258.1	2,042.0	10.5
10	**Ready Made Garments**			
	Qty (M. Doz)	**29.6**	**27.0**	**9.5**
	Value (M.$)	**1,955.6**	**1,799.6**	**8.7**
11	**Synthetic Fabrics**			
	Qty (Th.Sq.Mtrs)	296.4	335.6	-11.7
	Value (M.$)	383.5	405.7	-5.5
12	**Other Textile Products**			
	Value (M.$)	467.6	379.4	23.2
13	**Carpet & Carpeting**			
	Qty (Th.Sq.Mtrs)	3.3	3.1	7.6
	Value (M.$)	125.2	122.4	2.3

Source : F.B.S.



Composition in Exports			(M. $)
	2014 (Jul-Jun)	**2013 (Jul-Jun)**	**% Change**
Cotton Textiles	13,143.7	12,474.3	5.4
Raw Cotton	205.1	153.9	33.3
Synthetic Textiles	383.5	405.7	-5.5
Sub Total	13,732.3	13,033.9	5.4
Wool & Woolen Textiles	125.2	122.4	2.3
Total:-	13,857.5	13,156.3	5.3
Total Export (All)	25,131.9	24,460.5	2.7
Textiles as % age of Total Exports	**55.1**	**53.8**	

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WITH THE FINANCIAL SUPPORT OF PUNJAB SKILLS DEVELOPMENT FUND (PSDF)

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TECHNICAL TRAINING INSTITUTE, LAHORE

A project of

Ministry of Textile Industry, Government of Pakistan and Pakistan Readymade Garments Manufacturers and Exporters Association (PRGMEA)




3 to 6 MONTHS CERTIFICATE COURSES

Trade Name	Qualification	Duration in Month	Career
Industrial Engineering	Graduation	6	Assistant Industrial Engineer
Production Planning and Control	Graduation	6	Assistant Production Manager
Merchandising Management Techniques	Graduation	6	Assistant Manager Merchandise
CAD/CAM Computerized Pattern Designing	Intermediate	6	Assistant CAD Master
Quality Control in Garments	Intermediate	6	Quality Inspector
Apparel Supervisor	Matric	6	Assistant Supervisor
Industrial Stitching Machine Operator	Primary	3	Sewing Operator

ENTRY REQUIREMENT

- Male & Female both can apply
- Assurance for On Job Training (OJT) & Jobs
- Timing:Morning & Evening Classes Courses
- Age: 15 years & above
- Requirement: 3 Passport Size Photographs, Copy of ID Card / B-Form, Domicile & Educational Certificate

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Ministry of Textile Industry Government of Pakistan

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Pakistan Readymade Garments Manufacturers & Exporters Association (PRGMEA)

Pakistan Readymade Garments Manufacturers & Exporters Association (PRGMEA) is an apex organization, which represents nearly 600 manufacturers and exporters.

PRGMEA has helped many overseas buyers to form an enduring and profitable business relationship with Pakistani exporters of Readymade Garments year after year. PRGMEA offers a wide range of services to overseas buyers, absolutely free. Some of these include:

- Introduce you the right Pakistani manufacturers and exporters
- Provide up-to-date and accurate information
- Circulate your trade enquiries
- Keep you abreast of the latest development in Pakistan's apparel and garments industry
- Organize exhibition, buyers-sellers meetings for you
- Assist you in arranging travel and stay in Pakistan for business visits
- Attend to your complaints and in case of trade dispute help you to bring about an amicable settlement

PRGMEA has been doing all this and much more for the last 32 years.

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