PRGMEA PLUS

January 2014
Issue No. 12

'Trained work force essential for garments industry growth'

- Skills Need Assessment for Garments Industry
- CBI Tradewatch for Apparel
- 8th Expo Pakistan
- Country Profile: Bulgaria
- Project ESPIRE

Pakistan Readymade Garments Manufacturers & Exporters Association (PRGMEA)

Pakistan Readymade Garments Manufacturers & Exporters Association (PRGMEA)

Publication of PRGMEA Plus is being done regularly for a number of years. This publication is in line with PRGMEA's mission to monitor exports, provide knowledge and support to our members in the areas of potential markets, events, latest trends, forecasts and to highlight the importance of our garment sector in Pakistan's economy.

PRGMEA is looking forward to the kind support of its members for advertisements of supply line of raw materials, accessories, machinery equipment and exportable products to be of benefit for the readers.

PRGMEA Plus magazine containing update articles on Exports opportunities.

It achieved a high standard and is well received within all PRGMEA members, sister organizations, all relevant Ministries, international organizations (IAF, AAFA, etc.) and to all Pakistani Trade missions abroad and trade partner countries' embassies in Pakistan.

PRGMEA
Recognised by Govt. of Pakistan

Advertisement Rates for PRGMEA Plus

i.	Back Page: Colour	Rs. 10, 000/-
ii.	Inside Page (Front or Back): Colour	Rs. 7,500/-
iii.	Inside Full Page: Colour	Rs. 4, 000/-
iv.	Inside Half Page: Colour	Rs. 2, 500/-
v.	Quarter Page: Colour	Rs. 1, 500/-

(Subject to availability of space)

Editorial

On Your Marks-----Get Set-----Go

These are the words that get a sprinter dash towards a target --- the finish line. If there is no target the sprinter has no clue what direction to run and where to stop. My euphoria on the prospects of GSP plus for the EU comes to naught when I think about the target – our finish line. Where are we heading? Have we done our home work? Do we even have the capacities to grow? Do our cash flows and the policies of our Banks and our Government enough to invest in creating capacities required for growth? Is there enough energy to make our machines run? Is there enough raw material to help fuel this growth?

I really do not have any clear-cut answers to the above so you all will have to figure it out yourself. I will, however, throw some numbers to see if it helps you make up your mind. Further, since I am not a statistician, the numbers I give, will be in the ball park range and not exact. But our objective is to grasp the situation and maybe wake up our policy makers to the reality staring at us.

The total export increase allowed under this scheme is close to about 5 billion USD. This should take us to 2% of the total imports into the EU – and hence the limit allowed under GSP plus. About 14% growth is allowed in each category and given our total exports into the EU around 4 billion USD it should take us about 10 years to achieve this under the GSP plus.

Let us now focus on two major garments groups. Woven and Knitwear. The total imports of these into the EU are roughly 88 and 85 billion dollars, respectively. Our share is about 1.2 percent in woven and about 0.95 percent in the knitwear sector. Based on the fact that both of these categories are allowed up to 6% there is enough room to achieve the total 5 billion USD growth in just these two sectors. If the 14% growth rate is achieved a total of about 250 million USD can be added to export every year. The problem, however, is that at least 20% of this amount would be needed to invest; which is about roughly 60 million USD every year. Where will this money come from?

Sajid Saleem Minhas
Convener,
PRGMEA PLUS
Member ZMC / CMC,
PRGMEA

This was the motivation that lead us to talk to the Chief Minister Punjab to give us land on terms that allow us to invest in buildings and machinery and hence saving us from a very large immediate outflow of cash in land and roads. The result is what is now known as the Garment Industrial Park on the Lahore – Islamabad motorway just 38 km from Lahore. This Zone is to address all issues from custom clearances to Energy needs to the long sought after one window operation. Please pray this succeeds. But this is not enough. We will have to think more. Think beyond turning black money into white.

Message Central Chairman PRGMEA

First of all, I would like to thank all the esteemed members of PRGMEA for electing me as the Central Chairman for the year 2013-14. This very important position brings a heavy responsibility on my shoulders which I shall try my best to bear. The tasks of representing the garment industry and to sort out individual members' problems would be my first priority but these duties require a collective and a concerted effort, otherwise a single person's endeavors will not bring the desired results. I would, therefore, request all members to step forward and play their respective parts also. The fiscal year 2013-14 has started on a positive note and the garment exports are showing a positive trend as the first 3-months' figures are showing $1.05 billion garments exports as compared to $0.99 billion in the same period of last fiscal year. Although this 6% increase may seem minuscule, but if the same trend continues, we can expect a figure close to $4.5 billion when the fiscal year ends in June 2014.

Pakistan finally succeeded to get the GSP plus status from European Parliament which allowing duty free access to Pakistani products to EU market. This development give boom to the exporters from various industries in Pakistan including textile were anxiously hoping for access to European markets, which promises huge potential for multiplying the country's current exports.

Despite this positive news, the textile and garment industry faces severe problems due to the huge amount of stuck-up refund claims of the textile sector with the government. The textile sector is also in jeopardy for the last three years due to severe energy crisis in the country. Because of these two factors, the industry is facing acute liquidity shortage and the association has been rightly pointing out that we will not be able to fully capitalize from GSP Plus status as the businesses are unable to invest in expansion programs for the lack of funds.

Sajid Shahnawaz
Central Chairman
PRGMEA

Lastly and most importantly, the associations which are the representative bodies of the industry, are in a very difficult situation due to this liquidity crunch. If immediate remedial measures are not taken on a collective basis, we should expect that we may lose these very important platforms which are essential for sectors' development and voicing our concerns. I would, therefore, sincerely request all our members to come forward, provide their valuable input and share the associations' work for making the associations sustain this difficult period.

Issue No. 12
JANUARY 2014

INSIDE THIS ISSUE:

Project ESPIRE: Energy Efficiency and Green Productivity 5

CBI Tradewatch for Apparel 6

Skills Need Assessment for Garments Industry 10

Country Profile: Bulgaria 18

8th Expo Pakistan (26-29 September, 2013) 21

IAF News 23

National News 25

Chairman's Annual Report 26

PRGMEA Contacts 28

PRGMEA Plus

MESSAGE
SENIOR VICE CHAIRMAN (NORTH ZONE)

We lauded the Hon'ble Chief Minister Punjab Shahbaz Sharif services for promotion of industry, who has approving such a big industrial project, which will be spread over an area of 1,000 acres where the Pak-China industrial zone will be established. The project has immense potential to create jobs with comparatively low investment and less energy needs. The proposed garment city in Lahore would enable manufacturers to compete in various garment categories.

Pakistan is in a position at the moment to double its present share of US$13 billion in the international textile and clothing trade in the short to medium-term as Chinese textile industry is steadily losing its share and interested in relocating production facilities to other Asian countries. China's declining share in global textile and clothing business is mainly attributed to an increase in the cost of production. The main hurdle in the way of Chinese investment however, is the security and law and order situation in the country. The decline of China's share in the global textile and clothing trade when coupled with the ***GSP Plus*** status for Pakistan by the EU in January 2014 can most certainly prove to be a boon for our textile industry.

The Association expresses deep appreciation to the government for achieving favourable support and European Parliament decision to grant duty free market access to Pakistan, terming it a big success for Pakistan and good sign for the country's exporting industry. The duty free access to the European Union could well be the start of a new golden era for our textile industry. However, it is imperative that the energy situation as well as the law and order in the country should improve significantly to be able to take maximum advantage of this opportunity. If the power and energy shortage is overcome to a large extent, we can expect to reap great benefits from the opportunities that are well within our reach.
It is important to note that the technology that can help our industry to achieve savings of energy and consequently the cost of production is the need of the hour.

PRGMEA PLUS is one such appreciable initiative taken by PRGMEA for dissemination of information. It is my heartfelt wish that circulation of PRGMEA PLUS will continue to an even bigger readership and this publication will keep on giving vital information to all the concerned for betterment of our garment sector and for the betterment of Pakistan. Further, we encourage our members to write to us their ideas that we can include in our magazine as well as for discussion with the Government.
discussion with the Government.

Jawwad A. Chaudhry
Senior Vice Chairman
(North Zone)
PRGMEA

MESSAGE
VICE CHAIRMAN (SOUTH ZONE)

I am pleased to express my views on PRGMEA Plus; the magazine which is a true symbol and voice of garment industry and its association.

Garment / Textile sector is the backbone of our economy. It contributes billions of rupees to the exchequer and provides employment to thousands and especially to the women folks, who are employed in garment industry and contributes to the exchequer.

We, at PRGMEA try our level best to help and nurture this industry to grow. The publication of PRGMEA PLUS, our association aims to provide the industry all the useful information to support our members in different areas, such as research, marketing and economy of scales for purchasing and negotiating price for bulk purchase.

Our research team gathers information on trade exhibitions; events & latest trends. we highlight the issues of garment sector for sustainable results and discuss it to the highest level to benefit the members.

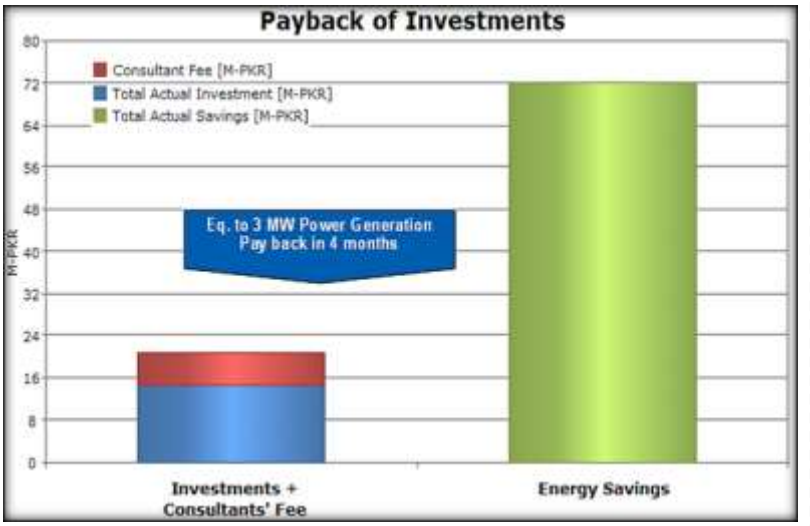
I congratulate the PRMGEA PLUS team on continuing this helpful initiative and expect that PRGMEA members would also support our mission by contributing their feedback, articles, notes or information of interest.

My very best compliments on this latest issue of PRGMEA PLUS.

Arshad Aziz
Vice Chairman (South Zone)
PRGMEA

Project ESPIRE: Energy Efficiency and Green Productivity for Industrial Sector in Pakistan

ESPIRE is a partnership project between the Training and Development Centers of the Bavarian Employers' Association (bfz) gGmbH and business associations of Lahore and Karachi in Pakistan. The objective of ESPIRE project is to support industries in Pakistan to work economically more efficiently and ecologically more sustainable and start making energy conservation and cleaner production part of their work routine.



41 companies have reported combined energy savings of 70 Million PKR per annum equivalent to power generation capacity of 03 Mega Watts with an investment of only 20.48 Million PKR at a PAY-BACK PERIOD LESS THAN 4 MONTHS.

The project has two major components:

- ***ESPIRE Energy***
- ***ESPIRE green***

The product portfolio and description for both components can be seen in the charts.

In Pakistan bfz gGmbH is cooperating with ***Pakistan Readymade Garments Manufacturers and Exporters Association (PRGMEA)***, Small and Medium Enterprises Development Authority (SMEDA), Pakistan Hosiery Manufacturers Association (PHMA), Towel Manufacturers Association of Pakistan (TMA), Federal B Area Association of Trade and Industry (FBATI), North Karachi Association of Trade and Industry (NKATI), and Korangi Association of Trade and Industry (KATI). The Project is funded by the German Federal Ministry for Economic Cooperation and Development (BMZ) via Sequa gGmbH.

CBI Tradewatch for Apparel

'Broadcasting your trade statistics'

Notwithstanding the negative impact of the economic downturn on European domestic consumption of apparel, the European market is still very interesting for exporters from developing countries (DC). Indeed the reputation of European brands abroad, as well as their global reach makes European buyers still very interesting in order to reach a wider market with apparel products. Moreover, consumption is still projected to grow in Europe between 2012 and 2017.

As global recession hits, demand for high-priced apparel weakens in Europe. Though demand for apparel in some emerging markets, such as China, is still growing, the effects of the global recession have been felt not only at European, but also at a global level.

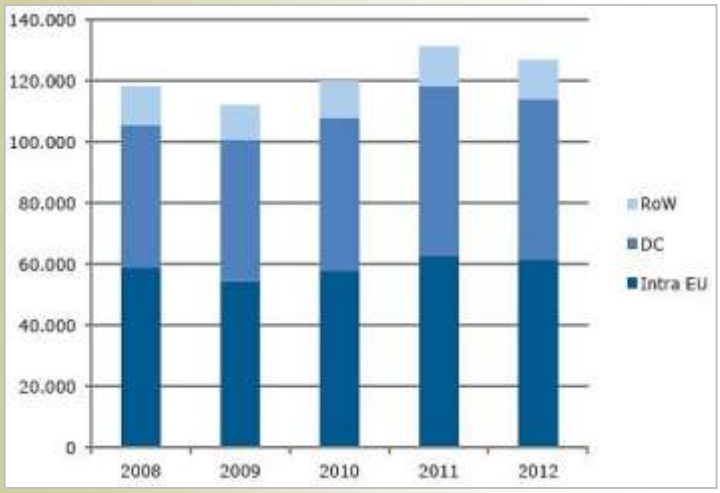
Uncertainty represents a big challenge facing the European apparel industry in 2013. Although domestic demand is slowing down in Europe, the region still represents an important trade, production and creative hub with access to other growing regions, such as the US and the BRIC countries.

Companies are continuously shifting manufacturing operations to low-wage countries or sourcing their products from independent contractors in these regions in an effort to minimize costs. China is the world's primary source of apparel; the country accounts for 38% of total industry exports. However, wages in China are rising, and despite its well-established manufacturing infrastructure, industry operators are slowly moving production activities out of the country. Other emerging countries, including Bangladesh, Indonesia and Cambodia, are expanding their presence as key manufacturing regions. The recent events in Bangladesh however could well drive the European Union to change its trade policy with the country if the Bangladeshi authorities do not take drastic action to improve safety and working conditions. This might have consequences for the European sourcing outlook in apparel in the years to come.

Import

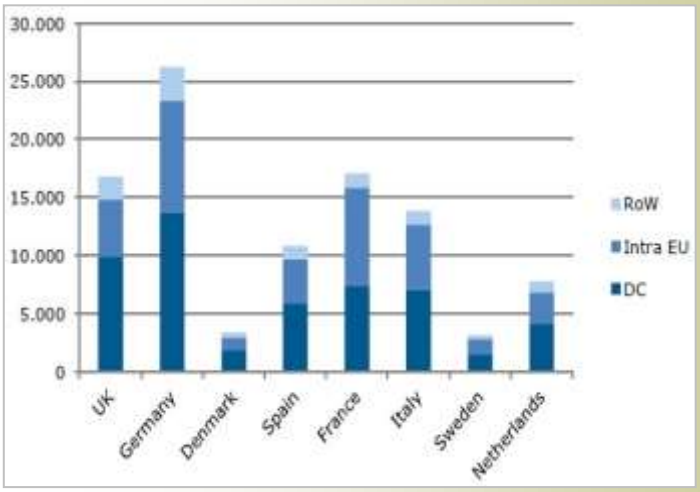
Traditional EU apparel manufacturers, such as Italy, France, Spain and Germany are still appealing destinations for DC exporters.

Figure 1: European import trend of apparel by partner group, in € million



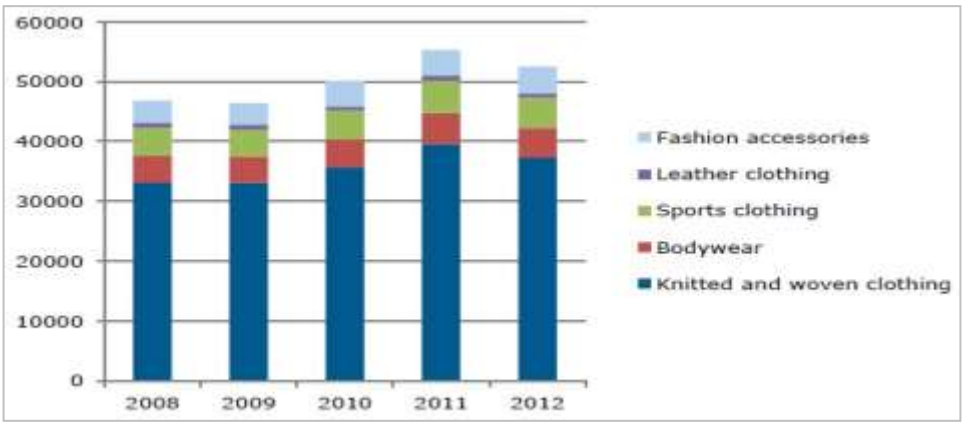
Data source: Eurostat 2013

Figure 2: Import of main European buyers by partner group, in € million

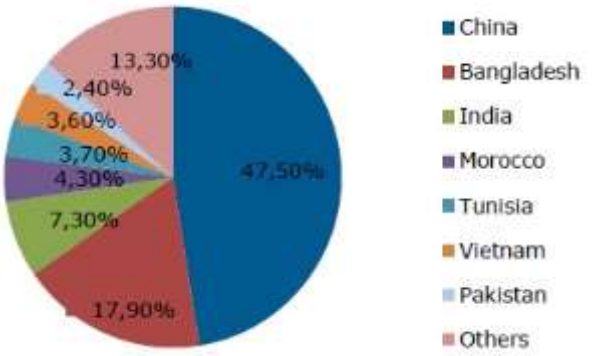


Data source: Eurostat 2013

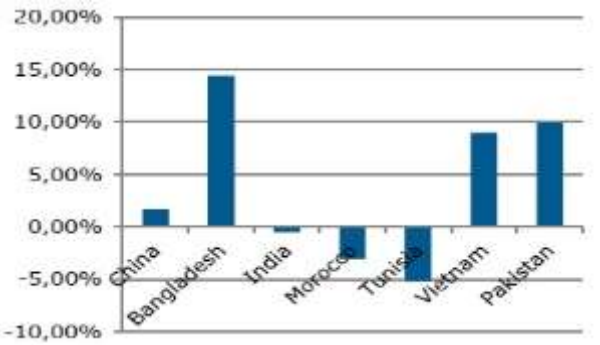
Figure 3: European import trend by product group, in € million



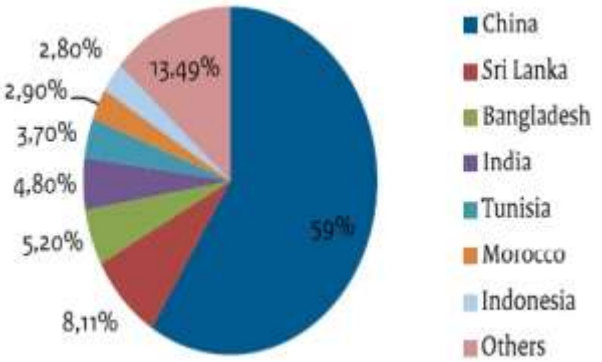
Knitted and Woven Clothing



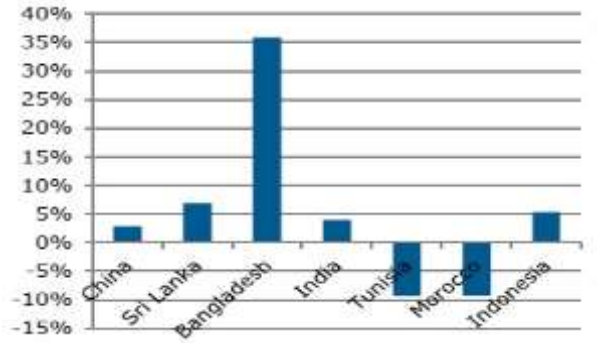
CARG 2008-2012:



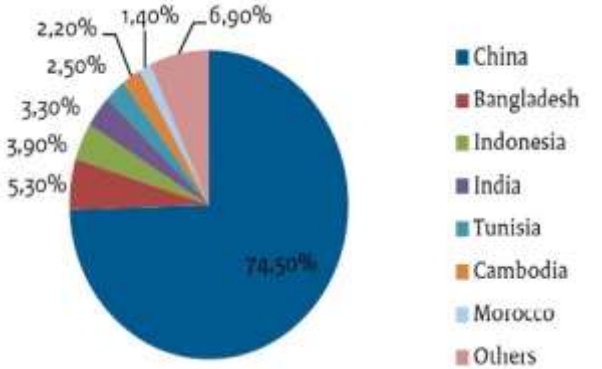
Bodywear



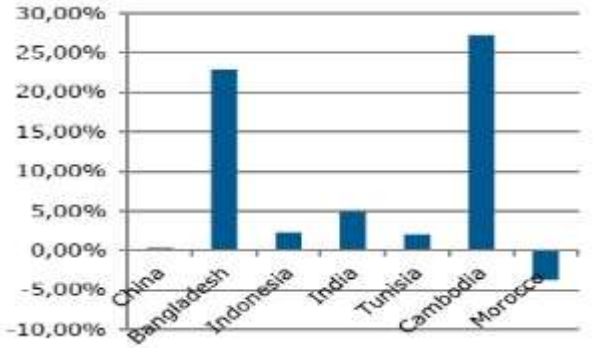
CARG 2008-2012:



Sports Clothing

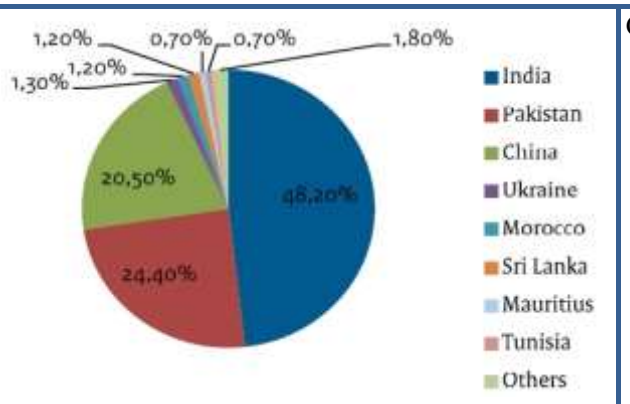


CARG 2008-2012:

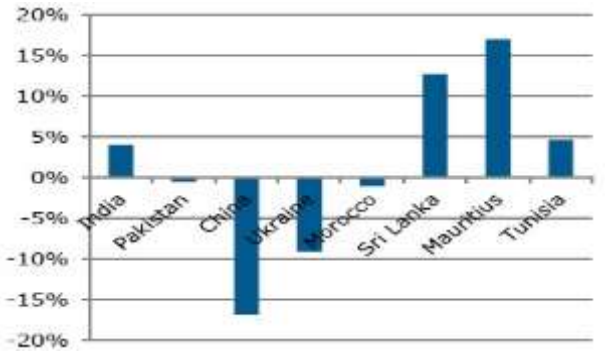


CBI
Ministry of Foreign Affairs of the Netherlands

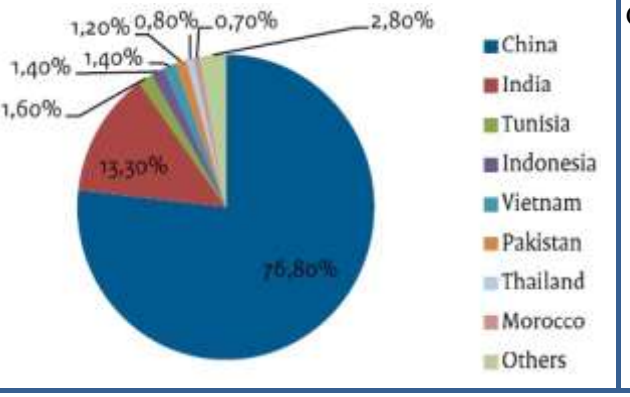
Leather Clothing



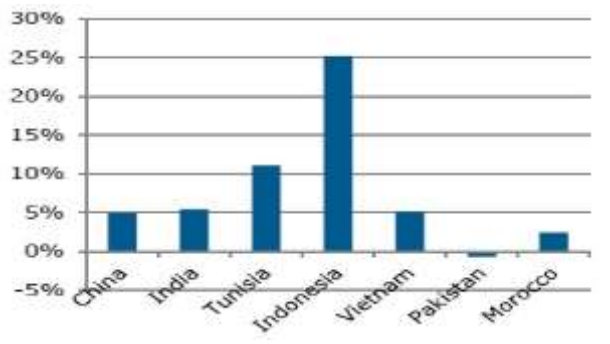
CARG 2008-2012:



Fashion Accessories



CARG 2008-2012:



Interpretations and opportunities

- China is still the major supplier to Europe, with more than half of the total import from DCs. There are certain variations according to the product group. China's success can also be attributed to extensive production networks in countries closely related to the EU like Tunisia and Morocco. The network shortens the route to the EU, which allows Chinese products to arrive at target markets faster than products from other Asian suppliers.

- Notwithstanding the undisputable Chinese leadership as supplier to Europe, growth of imports from China is rapidly slowing down (when not negative), e.g. for leather clothing. The general slow-down in import and consumption of leather clothing can be related to at least two factors, (1) relative high price of leather items, compared to substitutes and (2) the trend towards consumption of more animal-friendly materials in Europe.

Consideration for action

- Instead of just targeting interesting destination markets think about the production network and address a cluster of related countries

- As a result of increasing prices for production from China, new supplying DCs (e.g. Bangladesh, Indonesia and Cambodia) are increasing their market share and there could also be opportunities for other countries. Specializing in products which utilize materials that are present in your country will shorten the supply chain and reduce costs .

- Imports from Bangladesh display the fastest growth in knitted and woven clothing (followed at distance by Vietnam and Pakistan) and body wear. For sport clothing the fastest growth is displayed by Cambodia, while Mauritius and Sri Lanka are growing quickly in leather clothing, where India is still undisputed leader, followed by Pakistan and China. The recent events that involved Bangladeshi apparel producing factories might change the outlook for trade with Europe in the next few years. Further guarantees on labour conditions will be required and adherence to ILO standards by the origin country will be increasingly important. Changing trade agreements within the European Commission will however require all member countries to sign up and this will take some time.

To Be Continued...

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/135943/tradewatch

Consideration for action

- Guarantees on labour conditions and security standards are increasingly gaining attention from European buyers as well as authorities and engagements in new agreements and partnerships will be subject to more scrupulous surveillance. European buyers will increasingly become involved in ensuring standards are respected; a proactive approach by DC suppliers could make the difference in the choice of a partner

Skills Need Assessment for Garments Industry

Workshop on skills need, targets, industry contributions and other key issues relevant for vocational training for the garments industry in Punjab

Punjab Skills Development Fund (PSDF) is non-profit company that finances training delivery in vocational skills. The Fund is sponsored by Government of the Punjab and UK's Department for International Development (DFID). Its coverage currently extends to ten districts: Bahawalpur, Bahawalnagar, Lodhran, Muzaffargarh, Lahore, Faisalabad, Gujranwala, Sargodha, Chiniot and Sheikhupura. PSDF follows a competitive model of engagement to purchase training services from a mix of private institutes, public providers and NGOs.

The Plenary Session starts

Government of the Punjab has identified the Garments Industry as a potential growth sector that needs a coordinated and well-considered strategy to enable it to benefit from emerging export opportunities.

Under the overall supervision and guidance of Dr. Ijaz Nabi, Advisor to the Government of Punjab and Mr. Irfan Elahi, Chairman Planning and Development Board, a Core Committee and its subservient Working Groups are considering key areas affecting the sector's competitiveness such as energy, transport, market access through GSP-Plus, import and export policies, industrial zone development and human capital, for development of a cohesive and consistent plan of action. All Working Groups report to the overarching Core Committee on Garments which in turn reports to the Chief Minister of Punjab.

Punjab Skills Development Fund takes the lead on the skills sector and is assisted by Pakistan Readymade Garments Manufacturers & Exporters Association (**PRGMEA**), Punjab's Technical Education and Vocational Training Authority (TEVTA), Punjab Vocational Training Council (PVTC) and selected sector experts. Setting the direction for future work, the group decided that any action plan for skills will be based on evidence collected from the industry through consultations and a formal survey which will be part and parcel of PSDF's research agenda, to be pursued in preparation of its expansion to new districts.

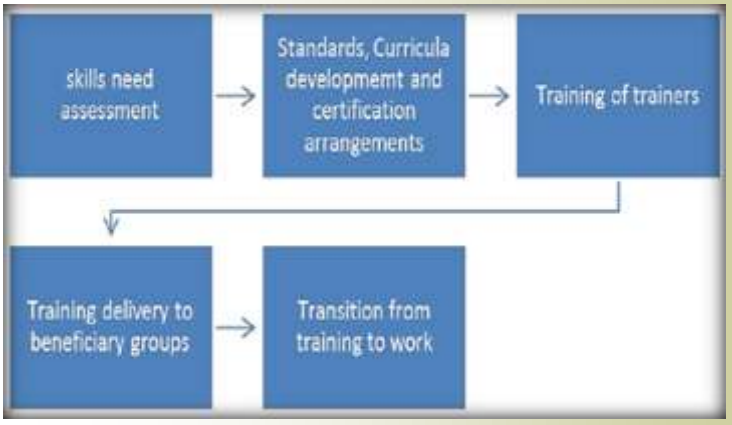
The garments and textile sector is Pakistan's major foreign exchange earner and a significant employer. The garments sector, in particular, contributes relatively more to value-addition and labour absorption compared to the textile sector. The woven sector fared better and has posted a positive growth rate in unit prices as well as volumes.

Workshop on Skills Need Assessment for the Garments Sector

A one-day *Workshop on Skills Need Assessment for the Garments Sector* was held in Lahore, kick started the initiative to address human capital deficiencies in the apparel industry especially at the worker and middle management level. The event brought small, medium-sized and large employers under one roof providing them a forum to articulate and share their skills needs. This information gathered in this event will feed into the development of an action plan for skills development encompassing different elements of the training cycle:

PSDF and the Committee on Skills for the Garments Industry give key importance to the need to engage employers and for them to be at the center stage of the planned skills initiative to play the following roles:

- Identify what skills are currently needed and what new skills requirements may be anticipated in future;
- Provide an estimate of the target number of trainees for the initiative in the short and long term;
- Provide feedback for development of suitable curricula;
- Develop linkages with training institutes for training, assessment and job matching;
- Act as trainers for on-the-job training; and
- Offer jobs to the trainees and share feedback on their quality.



*The Workshop was organized with the active support of **PRGMEA.***
The programme consisted of a plenary session followed by four breakout sessions in the following five segments:
1. Woven Garments
2. Knitted Garments
3. Sportswear
4. Technical Wear
5. Logistics, Warehousing & International Freight Forwarding

Each of the five sessions was led by an industry expert. A structured short questionnaire containing multiple choice questions was filled in by all participants. Following this, the industry representatives carried out detailed discussions on selected open-ended questions that were shared with them prior to the session.

Opening Session: The opening session was presided over by Mr. Almas Hyder, Member, Board of Directors, Punjab Skills Development Fund (PSDF) and Chairman SPEL Group of Industries.

Mr. Almas Hyder,
Director PSDF /
Chairman SPEL Group

Mr. Almas Hyder welcomed the participants and thanked them for their interest in engaging with PSDF. He explained the principle behind the establishment of PSDF which was to fund trainees rather than training institutions. The primary aim of the Fund was to encourage private sector in the field of vocational training delivery following an output-based payment model.

Mr. Sajid Saleem Minhas, Central Chairman Pakistan Ready-made Garments Manufacturers and Exporters Association (PRGMEA) was the Guest of Honour. Mr. Minhas said that the workshop was a unique opportunity to share views on the subject as leading players of the industry including some pioneers were present. Mr. Minhas touched upon the recent history of the garment industry development in Pakistan.

On the current state of the industry, Mr. Minhas emphatically stated that "what got us here will not get us there" i.e. Pakistan cannot compete without a radical change in its production philosophy.

A window of opportunity was emerging due to the exit of China from the low-end garments sector. China's garments exports amount to $ 120 billion. This trade can be attracted by countries such as Vietnam, Cambodia, Bangladesh and to some extent by India. In case Pakistan wins GSP-Plus status in the European Union market, competitiveness will be the critical factor for capturing larger market shares. He called for garments producers and exporters to improve skills of their workers and middle managers which was being supported by the government though PSDF and other schemes. Alongside, companies should also pay attention to the training of their CEOs.

Mr. Minhas pointed out important gaps in workers' skills. He shared that our workers lacked proper care and handling techniques.

For example, a garment fallen on the floor will not be picked by a worker unless it is from his/her own lot. Sri Lankan labour force, on the other hand, has better work attitudes on the factory floor which has enabled them to improve their quality and productivity.

The Chief Minister Punjab was taking keen interest in the garments sector which was evident in his personal supervision of the work being pursued by the Core Committee on Garments. The possibility to open up new road links to Europe was being pursued aggressively and talks with Iran and Turkey were underway. If brought to fruition, better land route options could reduce the lead time of our exporters by 10-15 days – which could give us an edge over our competitors. Pakistan could also venture into high fashion products which require shorter lead times and have brief shelf life spans.

Mr. Minhas shared that the Chief Minister had given the industry the ambitious target of overtaking Bangladesh in garments exports and had assured them of his full support. He had high expectations that PRGMEA and its members would do their best and come up to the nation's expectations by adopting better production and marketing techniques and bringing Pakistani products in the same league as that of major, successful exporting countries.

Mr. Sajid Saleem Minhas,
President PRGMEA outlines the challenges that the industry faces today.

If our efforts to market Pakistan as an alternative to China were successful, existing firms would need to expand and new investments would have to be made. But upsizing from 100 to 200 machines is not an easy task, he emphasized. Growing from a small to medium sized garments producer, needed effective planning and tying up of many loose ends neglected in small set ups. Our target should be setting up a good number of garments exporters employing more than 10,000 workers.

In case of grant of GSP-Plus status, this expansion will need to be rapid. We will have very little time to respond and soon the emerging opportunities could as well be water under the bridge, much like the recent EU concessions which could not be utilized in many HS lines.

Mr. Ijaz A. Khokhar, former president PRGMEA appreciated the planned sector survey by PSDF and suggested that the analysis should be done region-wise as workers' skills needs are different based upon where the garments cluster is located. For example, skills shortages and gaps of Lahore, Faisalabad, Multan and Sialkot were influenced by the kind of industry specialties emerging there.

He underscored the need for comprehensive planning by the industry to meet the challenge. A roadmap must be developed by the industry; some government support was required for this as well. What was most needed was better coordination between federal and provincial agencies. He pointed out that the Trade Development Authority of Pakistan (TDAP) must be activated to aggressively market Pakistan in our export destinations.

Mr. Ali Sarfraz, CEO Punjab Skills Development Fund explained the format of the workshop and future plans to conduct a representative study mapping the sector and its skills needs.

While the questionnaire contained multiple choice questions, the break-out sessions were designed to receive industry input in more detail. Discussion was structured around open-ended questions in Box 1.

Discussion that took place on the open-ended questions (Box 1) is summarized below. The group moderators presented their recommendations to the plenary and also responded to comments and queries by those present.

Box 1: OPEN-ENDED QUESTIONS FOR DISCUSSION

I. *What sub-sectors are growing or have a definite growth potential? Evidence/cases can be cited.*
II. *What should be the overall skills training target for the garments industry in Punjab and in your sub-sector?*
III. *What new trends/ technologies/drivers of change require efforts for skills development of workers?*
IV. *What are the most needed skills for your sub-sector?*
V. *What have been successful past examples of vocational training in the industry in Pakistan (this could be from training experience of individual companies, institutes or donors).*
VI. *Based on your knowledge in the sector, which country's skills qualifications, certification and trainers can be most useful to Pakistan's garments industry?*
VII. *(country, skills to be identified, reason for preference)*
VIII. *What can be employers' contribution (in cash or in kind) for training of workers?*
IX. *It is said that vocational training is incomplete without practical experience in the industry. What would be the most appropriate system of providing on-job training to workers under training?*
X. *Can employers provide pledges to employ trained workers? If yes, for which skills?*
XI. *What role can PRGMEA play in this initiative?*
XII. *Can you share any other suggestions to improve the vocational training for skilled workers?*

Break out Session on Skills Needs in the Woven Garments Segment:

The group on woven garments had representation from leading companies.

Growth Potential: Garments of denim and twill Fabrics were identified as two strong sectors in the apparel industry. Tops and bottoms were the two main products made out of denim and twill. Within the woven segment, the following areas had high potential for growth:

- Cotton Accessories & Embroideries: Respondents identified the "Embellishment Industry" as an integral and growing part of the garment industry. Some argued that embellishment represent a separate industry but all unanimously agreed that the garment industry is substantially affected by the trends with in this sector.

- Laundry (dry and wet): Most respondents highlighted "dry laundry" as a potential area for growth. They specified that the industry faced skills scarcity particularly within this sector.
- Trims: The area must be developed to reduce dependence on imports.
- Logistics: Firms serving the garments sector must develop new competencies that were being demanded by buyers such as Duty Paid Delivery.

Skills Training Target: Assuming the high and low industrial trends, the group members said that the yearly demand for new workers would be in the range of 15,000 – 50,000 in the post GSP+ regime. The middle ground was estimated approximately 30,000. The group emphasized the need to initiate and roll out training programmes to meet the burgeoning demand as a result of new expected orders.

New Trends or Technologies: The group discussed that increasing international and national focus on compliance audits had increased the demand for facilities such as Effluent Treatment Plants. Middle management and supervisors could be trained in dealing with compliance aspects of the industry. A new required qualification, MSc Environment, may be designed to meet the needs of the *local* industry.
The garment sector needed to adapt quickly to changing technological trends, however, industry faced resistance from employees who were reluctant to learn new technologies. Nonetheless, the industry needed to move towards automation. Vocational / skill training in the areas of machinery operation, technical and mechanical skills would be extremely beneficial.

Most Needed Skills: At higher skills level, the group identified the need for production managers, mechanical engineers and project developers. Production managers play a key role in changing status-quo oriented attitudes. Mechanical Engineers can familiarize themselves with new technologies and train machine operators. They could also help reduce the cost of business by introducing local versions of imported machinery through reverse engineering and help in overall maintenance of machinery parts. Mechanical engineers will also be able to perform important jobs such as PLC repairing and printed circuit boards. The garment industry faced a dearth of experts who could prepare feasibility reports and cost estimates for a particular project. Project Developers could be guided by industrial experts to design new investment and prepare estimates.

Laboratory testing for product compliance is being done by international firms which increase the businesses costs substantially. If testing skills are developed locally, this will help SME's overcome financial obstacles. Participants mentioned that PCSIR had modern testing equipment. Businesses must be given access to this equipment, or alternatively, incentives being offered for import of laboratory equipment in order to reduce testing costs. PCSIR can use their laboratory staff as master trainers.

Employers from the Woven Wear Segment discuss the questions posed to them.

Other most needed skills were:
- Machine Operators
- Textile Machine Mechanics
- Mechanical Engineers
- Electrical Engineers
- Chemical Engineers (for Laundry industry)
- Laboratory Testing Technicians

It was also highlighted that the garments industry needed Concept Developers. (The term 'concept developer' refers to designers that are in high demand in the garment industry).

Successful Past Examples of Skills Training in the Industry: GENPROM5 (Gender Promotion in Garment/Clothing industry through skills development, was a Project sponsored by United Nations Development Programme (UNDP). The project started in 2007. Its implementing partners were Pakistan Readymade Garments and Exporters Association for Sindh and Government College University, Faisalabad for Punjab. GEN-PROM training project was successfully implemented in 48 factories across Pakistan at Karachi, Lahore and Faisalabad and trained more than 487 Master Trainers/middle management professionals and 8081 workers. The Project delivered an integrated training/capacity development system including supervised trainings, gap analysis services, course curricula, manuals and consulting guidelines to these factories.

International Assistance in Training: The group suggested inviting expertise from Sri Lanka, Italy and Turkey to upgrade local skills, in order of preference. They preferred Sri Lanka over others due to the fact that the country has had similar industrial culture in the past.

However, over the years it had transformed tremendously and had implemented technological advancements. They argued that Sri Lankan trainers and certifications could be most beneficial in introducing and infusing new technology in Pakistan. Participants mentioned, however, that the garments industry preferred previous employment history and experience over international / national certifications. The garments industry had indigenous training centers and was able to train workers according to their own requirements. Foreign expertise may therefore only be invited for high-end trades.

Employers Contribution: Garment producers have traditionally offered OJT to their own inductees. The group was divided on the question of training outsiders or unemployed persons nominated by PSDF. Some showed willingness while others were reluctant due to the possibility of their industrial secrets being leaked out. The respondents also showed willingness for up skilling of their own employees with their contribution in the shape of:

a) Financial cost sharing or
b) Sharing of facilities

A few participants opposed the cost sharing proposition for vocational /skills development training of new worker. They feared high employee turn-over after completion of training.

Pledges to employ trained workers: 50% of the companies stated that they would employ PSDF trained workers if given the option to select trainees on their own, prior to training.

Role of the Association

The members of focus group specified the following roles through which PRGMEA could provide assistance:

- PRGMEA must liaison with individual companies in order to identify skills requirement in the industry
- PRGMEA must design curriculums and courses according to the international standards
- PRGMEA can be involved in training delivery.

Suggestions: The following suggestions were given by the group:

a) Machine-Specific Skills Courses must be designed.
b) Courses for "Dry Laundry" and "Chemical Wash" must be introduced.
c) A forum must be designed where PRGMEA and the industry leaders can stay in touch and share information on skills initiatives.
d) Trainers providing training must possess machine-specific know-how and sufficient practical experience.
e) Industries must collaborate with training providers and allow their supervisors/skilled employees to provide training to individuals at institutes.

Breakout Session on Sportswear

The group assigned to discuss the above topic had representation from leading companies.

The Sportswear Group discusses issues.

A gist of their discussion is as below:

Growth Potential: In the 1970s, athletic sportswear began to evolve from a product line aimed at niche markets into a mainstream fashion product. The clear divisions between performance and fashion, function and style, formal and informal that once existed became increasingly blurred. In the 1980s, the acceptability of casual dress on more occasions paved the way for sportswear to move into the mainstream clothing market. The trend was accompanied by a real increase in sports participation**.** *The sportswear industry, which includes both athletic footwear and apparel (garments), is very labor intensive.*

The areas with faster growth and those with growth potential were identified as:

- Training wear; e.g. Football training wears, tracksuits etc.
- Breathable fabric wear i.e. made from stretchable waterproof breathable fabric
- Martial Art wear/ accessories: e.g. Uniform of Judo Karate, Boxing shorts, Boxing gloves etc.
- Children and Ladies Sportswear &
- Special items such as boxing gloves

Pakistan has a long-established presence in sportswear especially martial arts wear; however, we are struggling to keep pace with new trends.

The group was of the view that Pakistan should continue to strengthen the areas for which it has potential for growth especially the segment of **Martial Art wear and accessories**.

Due to diversification of Chinese manpower to other sectors, buyers of European countries were facing inordinate delay in shipments and increase in prices.. Owing to this critical situation, the European importers were shifting their orders to Pakistan. This phenomenon was giving a boost to sportswear exports from Pakistan. Several global multinational companies had shown keen interest in importing sportswear from Sialkot. The group believed that with China moving out of the sportswear segment, a quantum jump in Pakistan's exports may be possible, enhancing tax revenues and creating 20 per cent more jobs in the industry.

Within the segment, focus should also be on enhancing the product line for children's sportswear. With reduction in the family size, customers especially in the OECD markets are ready to spend higher amounts than before on children's sportswear products.

Skills Training Targets: The garments industry sector can absorb up to 50,000 workers in total who may be trained according to needs.

New Trends or Technologies: Currently, Pakistan is producing first and second generation sports garments. The need is to produce third and fourth generation garments now. The sportswear sector has traditionally served as a test-bed for everyday clothing as in the past, its new features supporting comfort and functionality were widely adopted by the general clothing sector. (An important trend in the industry is the use of special materials such as breathable fabrics which is expected to move to casual wear soon.) Supporting innovation in this sector, would, therefore, result in spin-offs for the overall garments industry as whole.

Most needed skills for the sector were:

- Garment technologists (in larger numbers and of better quality)
- Stitchers (in larger numbers)
- Middle managers
- Higher managers
- ERP reporting systems
- Operations of High-Tech Machines
- Working in a Chain Production System
- Product Development and Upgrading Capacities

The group was of the view that women workers needed to trained and recruited by the industry. They felt that there was a mismatch between the output of our technical and vocational trainings institutions and what was needed by the industry.

Workforce development in the sportswear sector should focus on three areas: (a) training (pre-employment standardized training for new workers and customized industrial training solutions), (b) attraction and retention of workers and (c) continuous up skilling and lifelong learning. Catalyzing the customized training system may be essential to meet the immediate specialized needs of the industry.

At all levels, workers should be trained in such a way that they become quality-conscious and therefore, separate quality inspectors become redundant. Training on safety, firefighting and compliance is becoming more and more important with the recent upsurge in reported large scale industrial accidents.

Successful Past Examples of Skills Training in the Industry: The participants cited the example of GEN-PROM model / project, sponsored by United Nations Development Programme (UNDP) and implemented by Pakistan Readymade Garments and Exporters Association for Sindh and Government College University, Faisalabad for Punjab. GEN-PROM hired the services of KSA-Technopak, India (the world renowned experts in the apparel sector) for training and *facilitated the local industry in establishing Satellite Training Units (STUs) in 46 factories across Pakistan. During these training rounds, 517 Master Trainers and more than 8000 workers, predominately stitching operators, were trained and employed.*

Assistance in Training: Experiences of a number of countries were relevant for Pakistan. Examples that could be emulated from these countries were cited as below:

- Efficiency models from Japan: Japanese companies follow the model of training workers on "efficiency". The group felt that we needed to understand how the same model could be replicated in Pakistan.
- Sri Lanka Sportswear Sector: Sri Lanka had promoted female employment and taken steps to improve worker productivity. As Pakistan is also trying to adopt a similar approach, it is important to draw lessons from the Sri Lankan experience especially in terms of changing the gender composition of workers.
- Korean Sportswear Sector: Most Bangladeshi factories were operated by Korean floor managers who have helped the local industry improve worker efficiency7.
- Turkey Garment industry: Workers in the Turkey garment industries were directly trained by German technicians, were highly skilled and operated in the higher value added segment.

Employers Contribution: Employers can contribute by offering on-the-job and other professional trainings. The group believed that larger firms can effectively train their own workers and share their training capacities with others. This view was not unanimously shared. The need to protect their trade secrets was one reason cited by the larger firms not willing to share their training capacity.

On-Job Training: The group was of the favor that the GENPROM model can be adopted for giving on-the-job training. The project basically followed a cascade model of training: master trainers were developed first who in turn provided on-the- job training to unskilled female workers in the area of cutting, stitching, finishing, packing, quality assurance and quality control. Premises of garment companies were used as training sites. The programme was however limited in its reach and only a selected few were able to benefit from it. The absence of external certification of GENPROM trainees was also pointed out.

Pledges to employ newly trained workers: Employers were keen to share information on employment opportunities. The group emphasized that the industry faced a supply and not a demand-side issue. As working conditions in the industry were tough, trainees graduating from training institutions sometimes ended up in unrelated jobs and sectors which was a waste of resources. Some participants supported the idea of obtaining an undertaking to work in the sector from male and female trainees whenever they were enrolled for any particular training.

The group did not assign much importance to certification. One of the industry representatives said that the *training institutions should be selling skills and not certificates*. In their view, certificates had lost their credibility which needs to be restored. Moreover, the industry representatives suggested that the curriculum designed for the trainees should be industry-related.

Role of the Association

Since PRGMEA represented the industry, it should be able to offer its support in the following areas:

- Job placement;
- Self-employment and encouraging workers to start their own business;
- Career counseling in the garments sector; and
- Training of the trainers (TOT)

Any other suggestions: The group proposed the following additional recommendations:

- Import-cum-re-export rules should be made more flexible and easy. This recommendation was particularly relevant for the sportswear sector as most of the accessories were shipped over by the buyers.
- The outdated Apprenticeship Ordinance needs to be revised and must incorporate incentives to encourage and engage employers in training provision.
- Stipends for on-job trainees should be at least at the minimum wage level.

A questionnaire was designed with assistance from Pakistan Ready-made Garments Manufacturers and Exporters Association (PRGMEA). The intention was to elicit responses to a number of short and multiple-choice questions and also present the view of individual companies which could have been different from the majority in the group discussions held during the workshop.

Participants filling the questionnaire

Analysis and the Way Forward:

The garments industry today stands at crossroads: there can be many scenarios some of which are more probable than others. Industry leaders share the expectation that China will move out of low-end high volume clothing trade opening up new markets for second and third tier supplying countries including Pakistan. Other opportunities could emerge following grant of GSP -Plus status to Pakistan and opening up of a land route reducing lead times for supply to Europe.

Skills development of our existing and new workers will be a critical step in improving our competitiveness in the international trading environment.

New technologies and trends are necessitating acquisition of better skills by our workers. Some skills are needed in greater numbers than others while in others; quality of the skills imparted is of utmost importance. In certain skills areas, shortages are already emerging and are being pointed out by the industry.

The supply response is insufficient and is meeting the needs of a few firms.

Almost all industries consulted in the workshop identified the need for **trained industrial stitchers**. This was definitely a skill shortage area. But the need was expressed not just in quantitative but also in qualitative terms. Many participants stressed on the need to build the capacity of operators to upgrade from manual to computerized stitching machines.
The need for automation also propped up time and again during the discussion on the need for Machinery mechanics, who are also required in significant numbers. Quality of training is very important in this area.

International buyers becoming increasingly quality conscious, firms have to move towards better production methods to reduce wastages and improve quality of the end product.

Quality inspectors were, therefore, demanded in moderate numbers. Cutters, patternmakers and embroiderers were also in demand but to a lesser extent.

The industry lamented the absence of **linkages between training institutes** and themselves. Designers being produced by the universities and institutes were considered more suited for the local/national boutique scene rather than for the export market. Instead of developing products for international buyers, the local industry was basically a CMT (cut, make and trim) industry based on designs communicated by buyers. The industry needed to pay specific attention to product development and attune local designers and producers to the higher value added proposition of combining design and product services.

Apart from basic worker level skills, more specialized skills are absent from the current menu offered by training providers. These skills are not demanded in numbers as high as operators but still are critical for the industry's development. **Dyeing laboratory technicians**, **denim washing and finishing technicians, hand embroiderers for the formal garments exporters, finishing machine operators and dry laundry experts** were cited as areas for which new, specialized courses are required.

In middle to high level skills, designers (concept developers), merchandisers, mechanical engineers, production planners were required.

Garments producers are demanding new services from logistical companies operating in Pakistan, such as Duty Paid Delivery (DDP). This trend will require skills specific to export documentation, duty/VAT payment in the destination country and fulfilling other legal compliance issues which were in normal cases handled by the buyers. Our garments industry, therefore, needs to develop the expertise for **full-service suppliers** and skills will need to be developed accordingly.

Apart from the need to skill new workers, the industry also feels the need for customized training solutions. Each industry faced its own set of problems based on its production systems and products. These needs were not being met by standardized training packages. The industry, therefore, recommended that the **customized training** should be catalyzed to meet the skills gaps of their current employees including executive and middle management level officers.

The garments industry has a good appetite for quality training and the need for quality was emphasized in all groups. At the same time, the demand for certification was not strong. An interesting comment by the Sportswear Group was that ***"training institutions should be selling skills and not certificates".***

Industry's critique on the lack of communication between technical and vocational schools and firms was voiced repeatedly and a suggestion was made to develop a forum for active exchange between the two sides. It may be feasible to develop a training information exchange facility under PRGMEA to bridge the information gap between training institutes and the industry.

The outcome of consultations held with the garments sector of Punjab, both through a structured questionnaire and discussions in the workshop, provided a reliable basis for Punjab Skills Development Fund to develop its short term roadmap for skilling workers for the industry.

Country Profile: Bulgaria

Research & Development Cell, PRGMEA (NZ), Lahore

The Bulgars, a Central Asian Turkic tribe, merged with the local Slavic inhabitants in the late 7th century to form the first Bulgarian state. In succeeding centuries, Bulgaria struggled with the Byzantine Empire to assert its place in the Balkans, but by the end of the 14th century the country was overrun by the Ottoman Turks. Northern Bulgaria attained autonomy in 1878 and all of Bulgaria became independent from the Ottoman Empire in 1908. Having fought on the losing side in both World Wars, Bulgaria fell within the Soviet sphere of influence and became a People's Republic in 1946. Communist domination ended in 1990, when Bulgaria held its first multiparty election since World War II and began the contentious process of moving toward political democracy and a market economy while combating inflation, unemployment, corruption, and crime. The country joined NATO in 2004 and the EU in 2007.

COUNTRY FACTS:

Country Name: Conventional long form: Republic of Bulgaria, Conventional short form: Bulgaria, Local short form: Balgariya
Capital: Sofia**,** Time difference: UTC+2 (7 hours ahead of Washington, DC during Standard Time)
Government type: Parliamentary democracy
Administrative divisions: 28 provinces (oblasti, singular - oblast); Blagoevgrad, Burgas, Dobrich, Gabrovo, Khaskovo, Kurdzhali, Kyustendil, Lovech, Montana, Pazardzhik, Pernik, Pleven, Plovdiv, Razgrad, Ruse, Shumen, Silistra, Sliven, Smolyan, Sofiya (Sofia), Sofiya-Grad (Sofia City), Stara Zagora, Turgovishte, Varna, Veliko Turnovo, Vidin, Vratsa, Yambol
Independence: 3 March 1878 (as an autonomous principality within the Ottoman Empire); 22 September 1908 (complete independence from the Ottoman Empire)
Legal system: Civil law
Executive branch: Chief of state: President Rosen PLEVNELIEV (since 22 January 2012); Vice President Margarita POPOVA (since 22 January 2012)
Head of government: Prime Minister Plamen ORESHARSKI (since 29 May 2013) Deputy Prime Minister Zinaida ZLATANOVA (since 29 May 2013)
Cabinet: Council of Ministers nominated by the prime minister and elected by the National Assembly
Languages: Bulgarian (official) 76.8%, Turkish 8.2%, Roma 3.8%, other 0.7%, other (unknown) 10.5% (2011 census)
Religions: Eastern Orthodox 59.4%, Muslim (Sunni) 7.4%, Muslim (Shia) 0.4%, other (including Catholic, Protestant, Armenian Apostolic Orthodox, and Judaism) 1.7%, other (unknown) 27.4%, none 3.7% (2011 census)
Currency: The lev (Bulgarian: plural: leva)
Exchange rates: Leva (BGN) per US dollar - 1.5221 (2012 est.), 1.4065 (2011 est.), 1.4774 (2010 est.)

Location: Southeastern Europe, bordering the Black Sea, between Romania and Turkey
Geography - note: Strategic location near Turkish Straits; controls key land routes from Europe to Middle East and Asia
Area: Total: 110,879 sq. km, Land: 108,489 sq. km, Water: 2,390 sq. km, Country comparison to the world: 105
Land boundaries: Total: 1,808 km
Border countries: Greece 494 km, Macedonia 148 km, Romania 608 km, Serbia 318 km, Turkey 240 km
Coastline: 354 km
Internet country code: .bg, **Calling code:** +359
Internet users: 3.395 million (2009), Country comparison to the world: 63

Population: 6,981,642 (July 2013 est.)**,** Country comparison to the world: 101
Age structure: 0-14 years: 14.2% (male 506,968/female 481,962)**,** 15-24 years: 10.5% (male 377,834/female 357,546), 25-54 years: 42.3% (male 1,467,339/female 1,486,062), 55-64 years: 14.1% (male 454,728/female 528,650), 65 years and over: 18.9% (male 532,084/female 788,469) (2013 est.)
Urban population: 73.1% of total population (2011)
Population below poverty line: 21.8% (2008)
Major urban areas - population: SOFIA (capital) 1.174 million (2011),
Literacy: definition: age 15 and over can read and write

Climate: Temperate; cold, damp winters; hot, dry summers
In winter the average temperature is about -1, - 2 C. In summer the average temperature is about 20 - 22 C.
Natural resources: bauxite, copper, lead, zinc, coal, timber, arable land, **Natural hazards:** earthquakes; landslides
Environment - current issues: Air pollution from industrial emissions; rivers polluted from raw sewage, heavy metals, detergents; deforestation; forest damage from air pollution and resulting acid rain; soil contamination from heavy metals from metallurgical plants and industrial wastes.

ECONOMY - overview:

Bulgaria, a former Communist country that entered the EU on 1 January 2007, averaged more than 6% annual growth from 2004 to 2008, driven by significant amounts of bank lending, consumption, and foreign direct investment. Successive governments have demonstrated a commitment to economic reforms and responsible fiscal planning, but the global downturn sharply reduced domestic demand, exports, capital inflows, and industrial production. GDP contracted by 5.5% in 2009, stagnated in 2010, despite a significant recovery in exports, grew 1.7% in 2011 and 1% in 2012. Despite having a favorable investment regime, including low, flat corporate income taxes, significant challenges remain. Corruption in public administration, a weak judiciary, and the presence of organized crime continue to hamper the country's investment climate and economic prospects.

Alexander Nevsky Cathedral, Sofia, Bulgaria

Basic Economic Facts:

GDP (purchasing power parity): $105.5 billion (2012 est.), $104.7 billion (2011 est.), $102.8 billion (2010 est.), N*ote:* data are in 2012 US dollars

GDP (official exchange rate): $51.02 billion (2012 est.)

GDP - real growth rate: 0.8% (2012 est.), 1.8% (2011 est.), 0.4% (2010 est.)

GDP - per capita (PPP): $14,500 (2012 est.), $14,300 (2011 est.), $13,700 (2010 est.), Country comparison to the world: 93, *Note:* data are in 2012 US dollars

GDP - composition, by sector of origin: Agriculture: 6.4%, Industry: 30.4%, Services: 63.2% (2012 est.)

Agriculture - products: Vegetables, fruits, tobacco, wine, wheat, barley, sunflowers, sugar beets; livestock

Industries: Electricity, gas, water; food, beverages, tobacco; machinery and equipment, base metals, chemical products, coke, refined petroleum, nuclear fuel

Industrial production growth rate: 1.2% (2012 est.)

Labor force: 2.585 million (2012 est.)

Labor force - by occupation: Agriculture: 7.1%, Industry: 35.2%, Services: 57.7% (2009)

Unemployment rate: 11.1% (2012 est.), 9.6% (2011 est.), Country comparison to the world: 119

Budget: Revenues: $17.71 billion, Expenditures: $17.97 billion (2012 est.)

Fiscal year: Calendar year

Inflation rate (consumer prices): 3% (2012 est.), 4.2% (2011 est.), Country comparison to the world: 93

EXPORTS:

$26.82 billion (2012 est.), $28.12 billion (2011 est.), Country comparison to the world: 69

Exports - commodities: Clothing, footwear, iron and steel, machinery and equipment, fuels

Exports - partners: Germany 10.4%, Turkey 9.1%, Italy 8.7%, Romania 8.2%, Greece 7.3%, France 4% (2012)

IMPORTS:

$31.5 billion (2012 est.), $30.86 billion (2011 est.), Country comparison to the world: 65

Imports - commodities: Machinery and equipment; metals and ores; chemicals and plastics; fuels, minerals, and raw materials

Imports - partners: Russia 20.9%, Germany 11.3%, Italy 6.7%, Romania 6.6%, Greece 6.1%, Turkey 4.6%, Spain 4.5% (2012)

Transportation:

Airports: 68 (2013), Country comparison to the world: 74

Railways: Total: 4,152 km, Country comparison to the world: 40, **Roadways:** Total: 19,512 km, Country comparison to the world: 109, **Ports and terminals:** Major seaport(s): Burgas, Varna (Black Sea)

Cost of Living in Bulgaria: Compared to most other countries in the European Union, Bulgaria is relatively cheap and much more affordable place to live.

CULTURE:

Traditional Bulgarian culture contains mainly Thracian, Slavic and Bulgar heritage, along with Greek, Roman, Ottoman, Persian and Celtic influences.

Bulgarian cuisine is similar to those of other Balkan countries and demonstrates a strong Turkish and Greek influence. Yogurt, lukanka, banitsa, shopska salad, lyutenitsa and kozunak are among the best-known local foods. Meat consumption is lower than the European average, given a notable preference for a large variety of salads.

Bulgarian Business Culture: Bulgarians like to do business with people, face-to-face, therefore visiting the country to meet and work with local partners and customers is vital. You will need to be prepared to visit Bulgaria regularly to maintain the relationship with your partner and customers. Simply sending emails or faxes, or relying on distance selling techniques will not work .

Finding the suitable local business partner(s) is the most important factor for export success. Managing already established business relationships will require more time than in other countries, and regular visits to the market are vital.

Business etiquette: The usual office hours of business in Bulgaria are 9.00am-5.00pm, Monday to Friday.
Words of advice about the ways Bulgarian people do business:

- Appointments can take some time to arrange, depending on the seniority of the person you wish to meet. It is recommended to seek appointments in advance of a visit.
- Allow sufficient time for business meetings, which can be quite protracted – always allow more time than you expect.
- It is expected that visitors arrive on time for an appointment. If unexpected circumstances arise to cause a delay of more than 10-15 minutes, call to notify the person of the delay.
- In the public sector, Bulgarians have at least two to four weeks holiday per year. The annual vacation period is usually in July and August and it is advisable not to arrange appointments during this period or Christmas/New Year.
- At formal meetings surnames are used. As relationships gradually build up it would be natural to address your counterpart in given (first) names. Business cards are normally exchanged at the beginning of a meeting.
- Decision-making is usually made on a consensus basis and it is recommendable to include all possible decision-makers.
- A business lunch or dinner usually follows negotiations. Bulgarians are very hospitable, and enjoy Bulgarian food and drink. Occasionally some of these lunches and dinners may take longer than usual. Lunch normally starts between 12.30pm-1.00pm, while dinner starts around 7.00pm-8.00pm. English is spoken in most of the big restaurants, especially in the capital, Sofia.
- There is a Bulgarian habit of toasting by clinking glasses with a 'rakia', a strong grape or plum brandy that comes together with a salad. The toast in Bulgarian is 'nazdrave' which means 'to your health'.
- Smoking is not an issue in Bulgaria, and Bulgarians can light up a cigarette in the middle of their salad. Nevertheless, it would be polite to ask whether it is accepted to smoke when visiting someone's office or home.

Transnational Issues:

Disputes - international: None

International organization participation: Australia Group, BIS, BSEC, CD, CE, CEI, CERN, EAPC, EBRD, EIB, EU, FAO, G- 9, IAEA, IBRD, ICAO, ICC (national committees), ICRM, IDA, IFC, IFRCS, IHO (pending member), ILO, IMF, IMO, IMSO, Interpol, IOC, IOM, IPU, ISO, ITSO, ITU, ITUC (NGOs), MIGA, NATO, NSG, OAS (observer), OIF, OPCW, OSCE, PCA, SELEC, UN, UNCTAD, UNESCO, UNHCR, UNIDO, UNMIL, UNWTO, UPU, WCO, WFTU (NGOs), WHO, WIPO, WMO, WTO, ZC

References:

- *https://www.cia.gov/library*
- *http://www.investbulgaria.com*
- http://www.trademap.org

Trade Comparison

Unit : US Dollar Million

Product code	Product label	Bulgaria's imports from Pakistan in 2012	Bulgaria's imports from Bangladesh in 2012	Bulgaria's imports from India in 2012	Bulgaria's imports from China in 2012	Bulgaria's imports from Sri Lanka in 2012	Bulgaria's imports from Vietnam in 2012	Bulgaria's imports from Cambodia in 2012	Bulgaria's Import from Rest of the World in 2012	Bulgaria's Total Import from World in 2012
TOTAL	All products	18.32	26.63	175.05	2,128.83	2.87	94.28	3.55	30,293.61	32,743.13
61	Articles of apparel, accessories, knit or crochet	0.65	15.81	2.19	31.68	0.46	2.21	1.01	205.99	259.99
'62	Articles of apparel, accessories, not knit or crochet	1.42	7.63	4.06	34.61	0.32	2.62	0.74	159.18	210.58

The ***8th edition of Expo Pakistan*** held at the Expo Center Karachi on September 26-29, 2013, saw a strong representation from PRGMEA with a stand of 60 square meters in Hall 5. Five leading garment exporting companies, M/s. Soorty Enterprises (Pvt.) Ltd., M/s. Rajby Industries, M/s. Digital Apparel (Pvt.) Ltd. M/s. Premier Cotton (Pvt.) Ltd. and M/s. Gagan Textiles displayed their products under the PRGMEA banner. For this Expo, TDAP had pre-arranged B2B meetings with delegations from 23 countries including USA, UK, Sweden, Russia, Poland, Netherlands, India, Hong Kong, etc. Textile and garment buyers from both traditional and non-traditional markets were present. The 8th Expo Pakistan edition also saw largest ever trade delegations from Japan and China, which shows growing interest of these countries in the Pakistani products. However, absence of leading T&G

retailers and importers from USA and the EU, suggested that foreign buyers are still hesitant to visit Pakistan. Marks & Spencer of UK was the only leading name which was represented by its business unit manager in this expo. The ***Minister of Commerce, Mr. Khurram Dastagir*** *also visited PRGMEA stand* and appreciated the quality of products on display.

Despite all the shortcomings, the 8th Expo Pakistan proved satisfactory for the five participating member companies of PRGMEA who got a number of inquiries from some new buyers.

According to TDAP, Dubai Textile city Group delegate members received buying interest of approximately USD 100 million. One of the delegates of the Dubai Textile City, M/s. Art India Textiles made deals worth US $ 1 million with Pakistani textile exporters. Another delegate of the Dubai Textile M/s. Renoka Textile finalized the deal worth of 2 million dollar with home furnishing sector (curtain, fabric etc.) of Pakistani exporters. M/s. Uttam General Trading from UAE are also finalizing an order of US$ 1 million. M/s. Qasab Textiles from UAE are also finalizing a sample order of approximately US$ 10 million. Pak Denim has finalized executed deal with Turkish buyer 1 million dollar.

AHAN has fetched order for the supply of 50,000 pieces from foreign buyer. A leather company has fetched order from 3 foreign buyers worth Rs. 10 million.
One of the textile exhibitor M/s. Hussain Textile finalized deal of 100,000 from Italy. However, most of the business was concluded in the food sector.

Speaking about the Expo Pakistan 2013 ***TDAP*** officials said that we are delighted with the way the expo is progressing.

Around 550 exhibitors from different industries showcased their products and around 800 foreign buyers from over 70 countries attended this event to witness the product exhibition and assess the vast opportunities of investment in Pakistan. The turnout of local & foreign delegates was exceptional and so far the deals signed during Expo Pakistan are beyond expectation. A 20 member delegation from Bangladesh arrived this year to attend expo 2013 with leading importers of food, sports, surgical goods, food processing and textile raw material, machinery and plants some of whom are already importing goods from Pakistan. Whereas this year three buyers from other potential areas are also attending expo like marble, chain super stores/retail outlets and pharmaceutical.

TDAP also organized a series of seminars on the side lines of Expo Pakistan 2013. Centre for Promotion of Imports from Developing Countries. (CBI) Netherlands Ministry of Foreign Affairs, U.S. Department of Commerce, U.S. Department of Agriculture, U.S. Agency for International Development, Federation of Pakistan Chambers of Commerce & Industry (FPCCI), Associated Chinese Chamber of Commerce and Industry (ACCCIM), Sindh Investment Board, Malaysian-Pakistan Business Council (Malpak) were some of the prominent organizations with conducted these seminars.

8th Expo Pakistan
Expo Center, Karachi
September 26-29, 2013

PAKISTAN Joins IAF

International Apparel Federation

Pakistan Readymade Garments Manufacturer and Exporters Association (PRGMEA) has joined International Apparel Federation (IAF). Becoming the member of a prestigious body like IAF would help Pakistani apparel industry and exporters to establish worldwide business contacts which foster dialogue and knowledge sharing, exchange between individuals active in the world apparel value chain for the betterment of business practices, promotion of the international image of Pakistani apparel sector, advancement of technology and the promotion of its use, encouragement of innovation and new ways of thinking and improvement of social, health and safety and environmental conditions relating to the apparel chain worldwide, and advancement of apparel education and training.

Former Chairman of PRGMEA, Ijaz A. Khokhar has been elected as Board Member of International Apparel Federation (IAF).

THE IAF - AN INTRODUCTION

IAF aims and objectives include the consolidation and collaboration between the apparel industries across the world to promote the fashion industries and to present innovative ideas and solutions to multiple challenges being faced by apparel industries.

The IAF is a worldwide knowledge network that collects and disseminates information about statistics, bench-marking, on developments in apparel design, manufacturing, distribution, sourcing, trade and technology.

> "THE IAF HELPS ITS MEMBERS TO BE CONNECTED TO A GLOBAL NETWORK AND THESE GLOBAL CONNECTIONS ARE IMPORTANT TO EFFICIENTLY GATHER STATE-OF-THE-ART INFORMATION AND CONTACTS."

IAF wants to maximize the positive effects its members can obtain from global cooperation. IAF's activities concentrate on market information, global responsibility, innovation and research, health and safety, Database and Market Information Centre, Market data from Euro monitor and Textiles Intelligence, Newswire, Market Express in bi-monthly newsletter, IAF Legal Newsletter related to trade policy, regional seminars, IAF Designer Award, trade missions and match making.

IAF News

IAF launches Individual Membership

As the International Apparel Federation (IAF) has a strong focus on building bridges in the fashion chain, the decision has been made to include Individual Members in the membership portfolio.

Expanding IAF's membership to include consultants, (young) designers, young professionals and fashion (technology) students, means offering a much larger group of professionals the opportunity to expand their network in the global fashion industry.

Detailed information about IAF Individual Membership can be found via: http://www.iafnet.com/about/individual-membership/. Via this page, potential Individual Members are able to register online, providing them with direct access to the Members' Area of the IAF website. IAF is confident that this new form of membership will ensure added value to a large variety of professionals in the fashion industry.

(25-02-2013)

Fair Wear Foundation launches Business-to-Business Brandfinder

IAF associate member, Fair Wear Foundation (FWF), launched its 'Business to Business (B2B) Brandfinder' on 23 January 2013 - an online tool to help business customers find dozens of FWF member brands. FWF members have committed to improving working conditions in their supply chains. FWF's B2B Brandfinder is designed for public and corporate procurement officers, as well as for retailers and wholesalers. It allows users to search for a wide range of clothing types, including work wear, protective gear, uniforms and promotional clothing.

More than 80 companies representing 120 brands are members of FWF, an independent, non-profit organization dedicated to improving conditions for garment workers around the world. FWF's unique approach acknowledges that '100% Fair' clothing does not yet exist,

and places an emphasis on practical steps brands can take to reduce the risk of problems in factories. Members must sign the 8-point FWF Code of Labour Practices, which is based on UN and ILO principles. Each year FWF reports publically on members' progress towards implementation of the code in their supply chains.

'An increasing number of governments and corporations are interested in sustainable procurement. An important element of sustainability is respect for human rights in supply chains.' said Erica van Doorn, Director of Fair Wear Foundation. 'FWF receives many requests for help from procurement officers, as well as from retailers and wholesalers looking to stock responsible brands. The B2B Brandfinder is designed to help answer those requests.'

One example of a commitment to sustainable procurement comes from the Dutch ministry which oversees procurement policy. The Netherlands Ministry of Infrastructure and the Environment has named FWF as a 'qualified initiative' for sustainable procurement. This means that FWF member companies fulfill the social sustainability criteria which have been set for selling textiles or clothing to the Dutch government.
Development of the B2B Brandfinder was supported in part by the SBOS subsidy of the Netherlands Foreign Ministry.

Fair Wear Foundation (FWF)'s mission is to improve labour conditions for the hundreds of thousands of workers involved in making clothes for FWF member companies. FWF has invested more than 10 years in developing effective solutions to the key problems facing workers in the garment industry.
FWF's four main areas of activity are:

- checking that member brands respect human rights in their supply chains
- checking working conditions in garment factories
- providing worker complaint hotlines in 15 production countries
- ensuring cooperation between factories, brands and all other stakeholders

FWF is an independent non-profit organization that is jointly governed by representatives of business, labour and non-profit sectors. FWF also works closely with a network of stakeholder organization in production countries.
FWF's 80 member companies are based in seven European countries, and represent around 120 brands. FWF member products are sold in 20,000 retail outlets in more than 80 countries around the world. FWF is active in 15 production countries in Asia, Europe and Africa.URL: www.fairwear.org

(25-01-2013)

Innovation in Denim Take Centre Stage at the World Fashion Convention

During the 2nd day of the World Fashion Convention, jeans took center stage. More precisely, the global corporation to make jeans a more sustainable product was explained.
Mariette Hoitink of Amsterdam based House of Denim; Andrew Olah, founder of the renowned Kingpins tradeshow and Vincent Qin of the Chinese denim fabric supplier Prosperity showed among them a large array of innovations that are aimed at reducing the environmental impact of denim products.

'Recycled' water for jeans wet processing; laser and ozone in laundry; numerous alternative raw materials and alternative sources of energy- which are more sustainable- are all already available to reduce the impact on the environment of a pair of jeans.
And this is highly necessary because, especially in jeans, measures to improve sustainability are crucial. Andrew Olah showed that denim is very taxing on the environment. If indigo was invented today it would probably have been discarded because it consumes relatively so much water. Added to this, cotton is a very water intensive fibre and 35% of the world's cotton is used in the manufacture of jeans.

The jeans case showed how buyer – supplier alliances have emerged to create the necessary change. Innovations are often bought from upstream but they commonly require collaborative development. Prosperity has collaborations with Tencel, Clariant, Olah Inc and with Jeanologia and it has set up an innovation forum.

House of Denim is an Amsterdam initiative bringing together brands such as G-Star, Tommy Hilfiger, Levi's, Denham and Scotch and Soda. Its 'brighter blue' initiative will center on a research lab in Amsterdam aimed at sustainability. Its Jeans School is the first dedicated jeans school which also has sustainability featuring big in its curriculum.

But Andrew Olah made quite clear that the effect of all of this innovation and cooperation is still too little. The sustainable innovations are simply put used in too small a percentage of jeans. Connecting the efforts taking place in the centers of the jeans industry in the US, Europe and China would certainly help. But for the jeans industry as a whole to make big steps towards more sustainability the best way is setting common goals and an ambitious time path to get there.

(11-10-2013)

Courtesy: www.iafnet.eu

National News

Public-private partnership on to reap benefits of EU market access

With a view to reap the maximum benefits of the European Union market access to Pakistan by enhancing value-added textile export, the Punjab Board of Investment & Trade, in collaboration with Pakistan Readymade Garments Manufacturers & Exporters Association, Tuesday announced to organize an International Textile & Clothing Conference (ITC) Pakistan 2013 on December 9 in Lahore. The conference will be addressed by prominent speakers from across the world and Pakistan.

While addressing a press conference, PRGMEA's former central chairman Sajid Saleem Minhas, who was accompanied by PBIT DG Dr. Ali Naveed Pirzada and CEO Matrix Sourcing Azfar Hassan, informed that the ITC would be a unique initiative for promoting and empowering textile and clothing sector of Pakistan. It aims at establishing universally recognized performance benchmarks in the Pakistani textile sector as well as providing a networking forum for various stakeholders in the industry. He said that ITC 2013 will provide a unique opportunity to investors, suppliers and students to benefit from the expertise of the best minds in the industry. Director General (Project, Policy & Research), PBIT Dr. Ali Naveed Pirzada, CEO, Matrix Sourcing and Azfar Hassan said that the theme for ITC 2013 is "Pakistan's Industry – Integrated & Collaborating for Today & Tomorrow." The keynote speakers for the conference consist of national and international leaders from the textile sector, including Per Gasseholm, President, Global Apparel Brands, Inc., Amit Gugnani, Senior Vice President, Technopak Advisors Pvt. Ltd., India and Mian Mansha, Chairman Nishat Group. They said that the conference will be divided into three chapters, General Business Environment, Innovation and Manufacturing Excellence. Each chapter will consist of several independent sessions with the keynote speakers, designed to gain maximum output for the avid attendees.

Explaining about the core goals of the conference, PRGMEA north zone senior vice chairman Jawwad Ch told The Nation that important and relevant issues of the industry would be discussed and keynote speakers, and experts, will be available for one on one sessions and discussions. Jawwad Ch said that the conference will see a convergence of buyers, sellers, service providers, suppliers of materials and equipment, government organizations, policy makers and the media. The conference will also host representatives of significant importers as well representatives of local and international bodies such as Pakistan Trade Mission Tokyo and National Chambers, Textile Ministry and Trade Associations.

Source: The Nation (27-11-2013)

PRGMEA welcomes GSP Plus status: Garment units to operate at full capacity now

Pakistan Readymade Garments Manufacturers and Exporters Association (PRGMEA) North Zone Senior Vice Chairman Jawwad Chaudhry has welcomed European Parliament decision to grant duty free market access to Pakistan, terming it a big success for Pakistan and good sign for the country's exporting industry.

Mr. Jawwad said that this is a great opportunity for the clothing sector of Pakistan and hoped that exporters would increase the per unit value of their already successful products to share the zero rating facility benefits with the European buyers and all credit in this regard goes to Governor Punjab Ch. Muhammad Sarwar who strong lobbying lead us to the victory, he added.

Mr. Jawwad said that approval of GSP Plus status to Pakistan by European Parliament has proved that all international conventions relating to human and labor rights, environment and good governance have been implemented by the Pakistan to the satisfaction of the European Parliament.

He expressed hope that the textile and garment units which are running under capacity would soon start running at full capacity and thanked Hon'ble Prime Minister Nawaz Sharif, Finance Minister Ishaq Dar, Chief Minister Punjab Shahbaz Sharif, Pakistan's Ambassador to the EU Munawar Bhatti and leaders of different parties in the EU parliament, for their efforts to secure the granting of GSP Plus status. He said that Pakistani manufacturers and exporters were finding it hard to compete with countries like Bangladesh etc who already had duty-free access to European markets and were getting 11.5 per cent and above tariff cuts. "Pakistan can earn an additional 500 million to a billion dollars per year through GSP Plus status," he said, adding that the facility would provide duty free access to 3,500 products.

Continued on Page 27

Chairman's Annual Report (2012-13)

Sajid Saleem Minhas, Chairman (Central), PRGMEA

Dear Members,

I begin with the praise of Allah who helps whoever He wills from avenues that they do not expect. And praise be upon His Prophet Muhammad, His family, His companions and upon all those who follow Him until the Day of Judgment.

When I took over as the Central Chairman one year ago my target was to try to make a difference. Frankly, however, I had no clue where to start and how to go about it. Now that when I am handing over the responsibility it seems that the current Government has linked its employment and economic policy with the well being of the garment industry. Even when I write these lines I have been requested to discuss future of garment industry of Pakistan at the London School of Economics. PRGMEA is the only association to have been invited out of all the ten countries invited to this three-day event. I am confident that if the momentum is maintained PRGMEA will be at the forefront to guide the garment industry of Pakistan to new heights.

Below I would like to discuss some specific points:
GSP plus: It is safe to say that through our efforts on this scheme we have set a new standard in private-public relationship. The continuous interaction between PRGMEA and the Government has resulted in developing a good amount of trust. Truly , we felt like one team working for the benefit of the nation. My mentors Shahzad Saleem sb and Ijaz Khokhar sb made my job very easy by being on top of this issue all the time. May Allah reward them for their effort. I have been continuously whispering the importance of this into the ears of the Punjab Chief Minister and through him into the ears of the Prime Minister. I am confident that we will get GSP plus. Obviously the result will come to light after the EU parliament votes towards the end of October.

PRGTTI: I can assure you that the future revenue and opportunities for PRGMEA lie in projects related to skill development for the garment industry. We are now considered as experts in training personnel for the garment industry. So whatever project comes forth our participation is guaranteed. This is why I am really concerned about the problem faced by PRGTTI, Karachi. The time has come to take bold decisions on the future of this institute. If we do not then there is a chance that this will taint our reputation. The solution is not mainly in just financial help but it is mainly in the viability and its ability to generate interest in the industry. If the industry in the south zone does not consider it important then we are in real trouble with this institute. I must however thank my friend Younus Khamisani sb for his efforts to find solutions against all odds. Further Sohail Afzal sb should be knighted for his contribution towards developing PRGTTI, Lahore into a brand name.

Research and Development: This area needs a lot of improvement. In all of my meetings I would rate myself as the lowest when it came to data and its analysis that I carried in my bag compared to all other associations. I tried to link up our two best officers Mr. Ibrahim Mehmood from the south zone and Ms. Hina Asif from the north zone. Their efforts did bear fruit as I did have information on various issues prior to my meetings. This department should be pro-active in bringing issues to light and making them part of the CMC or ZMC agenda.

EDF fund: Many of the projects and programs now being funded by this fund do not relate directly to export development and many areas with very little contribution to export are being funded out of proportion. Hence it has been suggested to the ministry of commerce that a proportion should be established to fund projects by associations commensurate to the contribution by their members. If this is not done it seems to me that this fund will be used for a lot of non-export development purposes.

Sales Tax and refunds: All the associations came together to oppose and to convince the previous Government and its FBR Chairman that the imposition of the two percent Sales Tax was plain wrong. Primarily due to the problems associated with the refunding process. The erosion of working capital is what would happen if the tax is imposed. The FBR Chairman bulldozed all logic and went ahead with the tax. As expected the exporters are now facing huge problems getting their refunds. Recently however, the comment from the FTO in Islamabad questioning the use of taxing the exporters and not refunding them properly is very encouraging. I would suggest that we should not let down in our pressure for the new Government to return exports to the zero regime.

Import of Raw material for re-export: We have moved forward to a level where the Government now clearly distinguishes between the Readymade Garment Industry and Textiles.

It has been drilled into their minds that our main role is to manufacture in our assembly lines value added products. In this role of assembly we are not bound only to use fabrics and trims manufactured in Pakistan. Instead we respond to the needs of our customers and hence can also produce garments based on fabrics not manufactured in Pakistan. Hence it is our need to be able to import fabrics and trims not made in Pakistan. Most of our SME's however cannot do so due to the cumbersome and complicated paper work associated with importation for re-export. This has prevented the industry from diversifying into higher value added products. We tried to convince the government to allow fabric import under SRO 492 and hence do away with the DTRE regime. Even though we have not succeeded in convincing the FBR to date, however, they have agreed to join hands with us to ensure that all technical delays are reduced for quick clearance of fabrics. Further paper tags and other small items will be made duty free and reduce the burden of paper work for these petty items.

The above are a few areas that have always remained work in progress for the garment industry. Hence it is important that a constant vigilance is kept to ensure that improvement is made regularly.

Further, it is very important that we build and enhance our capacities to meet the future opportunities and challenges. This capacity means much more than just adding machines and buildings. This also includes the vision of the top management. The whole mindset will have to change if we are to move from small and medium enterprises to large enterprises. Compliances should not only be customer driven but the drive must be from within. It should not be media driven but the zeal should be to improve the conditions of our lot and give people the opportunity for an honorable living. Hence contribute our bit in alleviating poverty, which is perhaps the single most cause of extremism in Pakistan.

Lastly, I would like to thank the CMC members, the ZMC members from North and South, the PRGMEA staff from both zones and the Center for the cooperation and help extended to me during my tenure.

Continued from Page No. 25

PRGMEA welcomes GSP Plus status……..

The PRGMEA leader, on this occasion, also appealed to the government to improve the supply of gas and electricity to the textile industry in order to realize the full potential of GSP-Plus.

PRGMEA north zone chief said that exporters from various industries in Pakistan were anxiously hoping for access to European markets, which promises huge potential for multiplying the country's current exports.

"The EU's GSP Plus Scheme would not only further strengthen our trade relations with the member countries of the European Union but would also significantly help strengthening our economy through greater trade, generation of economic opportunities and creation of more jobs for the people."

Garment city has immense potential to create jobs

Appreciating the establishment of garment city near Kala Shah Kaku, Pakistan Readymade Garment Manufacturers and Exporters Association has observed that the project has immense potential to create jobs with comparatively low investment and less energy needs.

The vice chairman of PRGMEA North Zone Jawwad Ch hailed CM Shahbaz Sharif services for promotion of industry, who has approving such a big industrial project, which will be spread over an area of 1,000 acres where the Pak-China industrial zone will also be established.

Jawwad Ch said the garment city project was of vital importance and should be implemented expeditiously, adding that no laxity or negligence should be tolerated in the execution of the project. He was of the view that garment cities generate four times the employment at one-fourth of the energy consumption compared to other textile sectors. Countries like Vietnam, Cambodia and Indonesia are grabbing a major share in global garment market, while Bangladesh and India are also preparing themselves to pick up greater share, he said. The proposed garment city in Lahore would enable manufacturers to compete in various garment categories. The PRGMEA leader also suggested that garment cities be established at five new cities—Multan, Gujranwala, Rawalpindi, Rahimyar Khan and Jhelum—in addition to the three cities where the garment cities are proposed to be set up across Punjab province. He said the Pakistan government should give top priority to obtaining the EU's GSP plus status, as it would increase exports by more than $ 500 million and create over 25,000 new jobs every year. He viewed that energy crisis has already been hit hard the Punjab-based value-added industry and demands attention from the policymakers.

Source: The Nation (27-10-2013)

CENTRAL MANAGING COMMITTEE OF PRGMEA 2013-2014

Mr. Sajid Shahnawaz
Central Chairman
Pakistan Readymade Garments Manufacturers & Exporters Association
18-A, Shaheen View Building, Block-VI, P.E.C.H.S., Shahra-e-Faisal, Karachi - Pakistan
Tel # 021-34382601-3, Fax # 021-34536686-34539669
E-mail: prgmea@cyber.net.pk, info-south@prgmea.org

Office address:
M/s. Dewany Corporation., Suite # 39-40, Business Plaza, Mumtaz Hassan Road,
Off I.I. Chundrigar Road, Karachi - Pakistan
Tel # 021-32411117, Fax: 021-32470206
E-mail: dewanycorporation@gmail.com

Mr. Jawwad Ahmad Chaudhry
Senior Vice Chairman (North Zone)
M/s. Musterhaft (Pvt) Ltd.
Attari Saroba, 17-Km Ferozepur Road, Lahore - Pakistan
Tel # 042-35821672, 35824835, 35812839-40,
Fax # 042-35822840, E-mail: info@musterhaft.com,
jawwad@musterhaft.com, prgmealhr@cyber.net.pk

Mr. Sajis Saleem Minhas
M/s. Delta Garments Ltd.,
Attari Saroba, Atta Bakhsh Road, Besides Rohi Nala,
Bank Stop, 17-KM Off Ferozepur Road, Lahore – Pakistan
Tel# 042-35820362-35821060, Fax # 042-35824268
E-mail: sajid@deltagarments.com, deltag@cyber.net.pk,

Mr. Ijaz A. Khokhar
M/s. Ashraf Indsutries (Pvt) Ltd.,
Small Industrial Estate, Sialkot – Pakistan
Tel # 052-4265000, 325576, 8, Fax: 052-3554541, 3552629
E-mail: info@ashraf.net.pk, ijaz.khokhar@hotmail.com

Mr. Pervez Hanif
M/s. Hanif Pakistan (Pvt) Ltd.
258/259- Riwaz Garden, Lahore- Pakistan.
Tel # 042-37351313-3724537462122-3, Fax # 042-37233067,
E-mail: hanifsonslhr@gmail.com

Mr. Sh. Luqman Amin
M/s. Thapur Pakistan (Pvt) Ltd.,
Thapur Building, Maharaja Road, Sialkot - Pakistan
Tel# 052- 4589056-57, Fax # 052 - 4589055
Email: info@thapurgroup.com

Mr. Arshad Aziz
Vice Chairman (South Zone)
M/s. Weave & Knit (Pvt) Ltd.
Plot No. 7, Sector 7/A, Korangi Industrial Area, Karachi-Pakistan
Tel # 021-351216045-6, Fax # 021-38115253
E-mail: arshad@weaveandknit.com, info-south@prgmea.org

Mr. Muhammad Jawed Chinoy
M/s. Chinoy & Co.
F/211, A/1, S.I.T.E., Karachi - Pakistan
Tel # 021-32561238-32563079, Fax # 021-32572555,
E-mail: javedchinoy@yahoo.com

Mr. Bilal Mulla
M/s. Mulla International
97 - Malir Industrial Area, Karachi - Pakistan
Tel # 021-4504287, 4502845, 4516683, Fax # 021-4515968
E-mail: mulla@mullainter.com

Mr. Amir Amin Kothawala
M/s. Best Apparel Industrial (Pvt) Ltd.
Plot # 54/B, Sector 28, Korangi Industrial Area,
Karachi - Pakistan
Tel # 021-35045665-6, 35045111, 35060314
Fax # 021-35045110, E-mail: akothawala@hamsons.com.pk

ZONAL MANAGING COMMITTEE OF PRGMEA (SOUTH ZONE) 2013-2014

Mr. Arshad Aziz
Vice Chairman (South Zone)
Pakistan Readymade Garments Manufacturers & Exporters Association
18-A, Shaheen View Building, Block-VI, PECHS, Shahra-e-Faisal, Karachi
Tel # 021-34382601-3, Fax # 021-34536686-4539669, E-mail: prgmea@cyber.net.pk, info-south@prgmea.org

Office address:
M/s. Weave & Knit (Pvt) Ltd., Plot No. 7, Sector 7/A, Korangi Industrial Area, Karachi-Pakistan
Tel # 021-351216045-6, Fax # 021-38115253, E-mail: arshad@weaveandknit.com

Mr. Sajid Shahnawaz
M/s. Dewany Corporation
Suite # 39-40, Business Plaza, Mumtaz Hassan Road, Off. I.I. Chundrigar Road, Karachi -Pakistan
Tel # 021-32411117, Fax # 021-32470206,
Email # dewanycorporation@gmail.com

Mr. Muhammad Jawed Chinoy
M/s. Chinoy & Co.
F/211, A/1, S.I.T.E., Karachi,
Tel # 021-32561238, 32563079
Fax # 021-3257255,
E-mail: javedchinoy@yahoo.com,

Mr. Aftab Mustafa Karimjee
M/s. Mustafa & Co. (Pvt) Ltd.
Room No. 204, Windsong Place, Plot No. A, 16-17, Block 7-8, KCHS Society, Karachi.
Tel # 021-34538656-34530651
Fax # 021-34552192,
E-mail: mco2@cyber.net.pk

Mr. Amir Amin Kothawala
M/s. Best Apparel Industrial (Pvt) Ltd.
Plot # 54/B, Sector 28, Korangi Industrial Area, Karachi - Pakistan
Tel # 021-35045665-6, 35045111, 35060314
Fax # 021-35045110,
E-mail: akothawala@hamsons.com.pk

Mr. Hussain Kassam
M/s. Shahbaz Garments (Pvt) Ltd.
42-M, Block-6, PECHS, Karachi-75400
Tel # 021-34520061-63,
Fax # 021-34520072-73,
Email:hussain@glovessafety.com,
sgoi@glovessafety.com

Mr. Irfan Merchant
M/s. S. M. Traders
D-11, South Avenue, SITE, Karachi-75700
Tel # 021-32562310-32566970,
Fax # 021-32562312-32570130,
E-mail: smdenim@smg.com.pk,
eximpo@smgroup.com.pk

Mr. Sh. Shafiq Rafiq
M/s. J. Tex Exports.
40- Business Plaza, Mumtaz Hussain Road, Off. I.I. Chundrigar Road, Karachi-Pakistan
Tel # 021-32411118, Fax # 021-32411119
E-mail: smshafiq_jtex@yahoo.com

Mr. Bilal Mulla
M/s. Mulla International
97 - Malir Industrial Area, Karachi-Pakistan
Tel # 021-4504287, 4502845, 4516683,
Fax # 021-4515968
E-mail: mulla@mullainter.com

Mr. Abdul Wahid Bandukda
M/s. Textile International
805, Business Centre, Mumtaz Hassan Road, Karachi - Pakistan
Tel#021-32464718-9, Fac. # 021-6907292,
Fax # 021- 2410662,
E-mail: wbandukda@hotmail.com

Mr. Muhammad Aman
M/s. Jamal Apparel
1st Floor, B-22, SITE, Karachi - Pakistan
Tel # 021-32584215, Fac. # 021-32570502
Fax # 021-325705010, E-mail:
jamaltex@cyber.net.pk

Mr. Masood Ahmed Khan
M/s. Bella- De-Fashion
Office No. 601, 6th Floor, Anum Estate, Shahra-e-Faisal,Karachi.
Tel # 021-34387850,
Fax # 021-34387851,
E-mail: bellade@cyber.net.pk

Mr. Atiq Ahmed
M/s. T H S international
46 Korangi Industrial Area, Sector 27, Karachi-Pakistan Tel # 021-3 6633977,
Fac. # 021-35076661-35076662, Fax # 021 -35058976, Email: ths_int@hotmail.com

Mr. Muhammad Saleem Qamar
M/s. Qamarsons Apparel
Plot # 11/9, & 11/10, Sector 17, Korangi Industrial Areal, Karachi– Pakistan
Tel # 021- 34390391-4
E-mail: saleem@qamarsons.com.pk

Mr. Irfan Shaikh
M/s. The Tajers
301-A, Khayam Chamber, Shahra-e-Faisal, Nursery, Karachi-Pakistan
Tel # 021-35801943, Fac. # 021-34536015-34536016, Fax # 021-34547651,
Email: tajers@cyber.net.pk

Mr. Ghulam Murtaza
M/s. G M Fashion
Plot # 133-C, Sector 15, Korangi Induatrial Area, Karachi
Tel: 021-35114526-7, Fax # 021-35121520,
E-mail: gmfashion@cyber.net.pk,
gmtex@cyber.net.pk

ZONAL MANAGING COMMITTEE OF PRGMEA (NORTH ZONE) 2013-2014

Mr. Jawwad Ahmad Chaudhry
Senior Vice Chairman (North Zone)
Pakistan Readymade Garments Manufacturers & Exporters Association
Lahore Off: PRGMEA House, 343-A, Bhabrra Market, Main Ferozepur Road, Lahore - Pakistan
Tel # 042-35858221, 35851277, Fax # 042-35858231, E-mail: prgmealhr@cyber.net.pk

Sialkot Off: Oberoi Building Near Pakistan Muslim League House, Paris Road, Sialkot – Pakistan
Tel: 052-4592683, 4597128, Fax: 052-4592683, E-mail: prgmea_sialkot@yahoo.com, prgmea_skt@hotmail.com

Office address:
M/s. Musterhaft (Pvt) Ltd., Attari Saroba, 17-Km Ferozepur Road, Lahore - Pakistan
Tel # 042-35821672, 35824835, 35812839-40, Fax # 042-35822840,
E-mail: info@musterhaft.com, jawwad@musterhaft.com

Mr. Sajid Saleem Minhas
M/s. Delta Garments Ltd.
Attari Saroba, Atta Bakhsh Road, Besides Rohi Nala, Bank Stop, 17-KM Off Ferozepur Road, Lahore - Pakistan
Tel # 042-35820362-35821060,
Fax # 042-35824268, 35923134,
E-mail: sajid@deltagarments.com, deltag@cyber.net.pk

Mr. Ijaz A. Khokhar
M/s. Ashraf Indsutries (Pvt) Ltd.,
Small Industrial Estate, Sialkot – Pakistan
Tel # 052-4265000, 325576, 8,
Fax: 052-3554541, 3552629
E-mail: info@ashraf.net.pk, ijaz.khokhar@hotmail.com

Mr. Pervez Hanif
M/s. Hanif Pakistan (Pvt) Ltd.
258/259- Riwan Garden, Lahore- Pakistan.
Tel # 042-37351313-37462122-3,
Fax # 042-37233067, 37417302,
E-mail: hanifsons@gmail.com

Mr. Javaid Iqbal Bhatti
M/s. Stylers International (pvt) Ltd. 20-Km Ferozepur Road Glaxo Town,
Lahore -Pakistan, Tel # 042-35274471-73,
Fax # 042-35274474,
E-mail: iqbal@stylersintl.com,

Mr. Muhammad Bashir
M/s. Sunny Textiles (Pvt) Ltd.
Suite#5, 2nd Floor Lahore Tower,
New Garden Town, Lahore - Pakistan
Tel # 042-35857631-32,
Fax # 042- 35857633
E-mail: sunny@brain.net.pk

Mr. Mubashar Naseer Butt
M/s. Body Media (Pvt) Ltd.
34-Km, Ferozepur Road, Nabi Buksh,
Lahore - Pakistan
Tel # 0492-450738-39, Fax # 0492- 450478,
E-mail: info@bmijeans.com, ceo@bmijeans.com

Mr. Tariq Javaid Fiazi
M/s. J. F. Enterprises (Pvt) Ltd.
155-A, Ahmed Block, New Garden Town,
Lahore – Pakistan.
Tel # 042-35274401-3,
Fax # 042-35274400,
E-mail: fiazi@brain.net.pk

Mr. Adeeb Iqbal Sheikh
M/s. Denim Plus (Pvt) Ltd.,
72-C, Model Town, Lahore - Pakistan.
Tel # 042-35811515,35820924
Fax # 042-35820924, E-mail: den-implus@hotmail.com, adeeb@bimsha.biz

Mr. Faisal Rashid Sheikh
M/s. Ruby International
9–Km Daska Road, Chabil Pur, Aaddah,
Sialkot – Pakistan.
Tel # 052-4626110, 4626210
Fax # 052-4626312,
E-mail: info@ruby.com.pk

Mr. Ahmed Hussain
M/s. Special Sports (Pvt) Ltd.
Toheed Street, Rangpura, Sialkot –Pakistan.
Tel# 052 –4591892-93,
Fax # 052-4588775,
E-mail: special@skt.comsats.net.pk

Mr. Sh. Luqman Amin
M/s. Thapur Pakistan (Pvt) Ltd.,
Thapur Building, Maharaja Road, Sialkot - Pakistan
Tel# 052- 4589056-57,
Fax # 052 - 4589055
Email: info@thapurgroup.com

Mr. Nasir Iqbal Baryar
M/s. Talon Sports (Pvt) Ltd.
Addah, Daska Road , Sialkot - Pakistan
Tel # 052-6526633, 6526644,
Fax # 052-6526833, 3525403, E-mail: info@talonsports.com

Mr. Sohail Ashraf
M/s. Deelux Sports
Toorabad Daska Road, Sialkot – Pakistan.
Tel # 052- 3562310 , 3255386
Fax # 052 – 4591567,
E-mail: info@deelux.com.pk

Mr. Mushtaq Ahmed Butt
M/s. Kashmiry International,
Wazirpura, Sialkot – Pakistan.
Tel # 052 - 3559606, 3252616
Fax # 052 – 3252606,
E-mail: info@kashmiry.com

Mrs. Sumaira Mushtaq
M/s. Zarco Martial Arts
Shatab Garah, Sialkot
Tel # 052-3555751,
Fax # 052-4593559,
E-mail: info@zarcomartialarts.com

Pakistan Readymade Garments Technical Training Institute - Lahore

The Pakistan Readymade Garments Technical Training Institute (PRGTTI-Lahore) was founded in September 2001 by a group of eminent apparel industrialist and members of Pakistan Readymade Garments Manufacturers and Exporters Association (PRGMEA). The Institute is duly recognized by the Trade Development Authority of Pakistan, Ministry of Commerce, Government of Pakistan and Pakistan Readymade Garment Industry.

In order to meet the acute shortage of qualified textile personnel, the need for the systematic re-enforcement of technical education, training of personnel and product development on most modern lines was felt and as a result PRGTTI was established. The PRGTTI is transferring latest technology to industry by updating technical know-how of personnel from industry and new entrants by conducting training courses, workshops, seminars, and conferences.

PRGTTI is offering its courses to the Apparel sector, since its inception in 1995 at Karachi and then in 2003 at Lahore, which gives us an opportunity to access the textile market situations with respect to human resources. The curriculum at PRGTTI was designed keeping in view the courses offered at world's renowned institutions abroad and the local requirements. Also it was peer reviewed locally and internationally.

Our Motto is "Excellence In Style" and the Mission Statement is to improve the practices of management.

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.

Experience and expertise you can always count on!

Head Office:

18-A, Shaheen View Building, Block VI, P.E.C.H.S Shahra-e-Faisal, Karachi – Pakistan
Tel: 021-34382601-3, 34539361, 34547912, Fax: 021-34539669
E-mail: info-south@prgmea.org, prgmea@cyber.net.pk
Website: www.prgmea.org

Lahore Office:

PRGMEA House, 343-A, Bhabrra Market, Main Ferozepur Road, Lahore – Pakistan
Tel: 042-35441343, 35851277, 35858221,
Fax: 042-35858231,
E-mail: prgmealhr@cyber.net.pk , prgmea.nz.research@gmail.com
Website: www.prgmea.org

Sialkot Office:

Oberoi Building Near Pakistan Muslim League House, Paris Road, Sialkot – Pakistan
Tel: 052-4592683, 4597128,
Fax: 052-4592683, E-mail: prgmea_sialkot@yahoo.com, prgmea_skt@hotmail.com
Website: www.prgmea.org