

The Apparel Story

Sept-Oct 2014

Special Interview
Bangladesh
could redefine
whole apparel
industry globally
-Mozena

Research and Innovation
Paving way to growth
and sustainability

Focus of the Month
Hamid Fabrics:
A trendsetter in
textile

Cover Story

BATEXPO
transcends
border



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Fax: +8802 9125866
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Clean **Water**,
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Prevention of EBOLA:

What you need to KNOW



How do you get the Ebola virus?

Direct contact with

- 1** **Body fluids of a person who is sick with or has died from Ebola.**
(blood, vomit, pee, poop, sweat, semen, spit, other fluids)
- 2** **Objects contaminated with the virus** (needles, medical equipment)
- 3** **Infected** fruit bats or primates (apes and monkeys)

Early Symptoms

Ebola can only be spread to others after symptoms begin. Symptoms can appear from 2 to 21 days after exposure.

- **Fever**
- **Headache**
- **Diarrhea**
- **Vomiting**
- **Stomach pain**
- **Unexplained bleeding or bruising**
- **Muscle pain**

When is someone able to spread the disease to others?

Ebola only spreads when people are sick.

A patient must have symptoms to spread the disease to others.



MONTH						
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6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

After 21 days, if an exposed person does not develop symptoms, they will not become sick with Ebola.

Travel to and from Ebola-affected Countries

REMEMBER!



WHILE TRAVELLING

Alert airline personnel about a fellow traveller who has Ebola symptoms:

If you develop a fever and Ebola symptoms yourself promptly inform airline personnel.

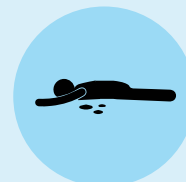
fever, weakness, muscle pain, headache, and sore throat; followed by vomiting, diarrhoea, bleeding.



AT AIRPORTS AND AT YOUR DESTINATION

DO NOT touch the body of a person who has died from Ebola.

Use alcohol rub throughout the day. When hands are visibly dirty use soap and water.



Avoid direct physical contact with anyone who is displaying the symptoms of Ebola.

Seek prompt medical attention if you have Ebola symptoms.

Source: WHO & CDC

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*A*s a nation we have once again proved that we have the ability to rise to any challenge, be it natural or manmade. Given the huge size of our apparel industry, ensuring worker safety in garment factories was really mountainous challenge for the sector. However, Bangladesh took up the challenge and it is really heartening to see that significant progress has been made in the areas of safety standard, including fire, electrical and structural safety, in garment factories.

This has been echoed in a forum held recently to review progress of the Alliance for Bangladesh Worker Safety (Alliance). Bipartisan Policy Center (BPC) Co-founder George Mitchell and Senior Fellow Olympia Snowe announced findings indicating that the Alliance has made “significant and laudable progress” in the effort to improve safety in Bangladesh garment factories. The Alliance has completed 100% inspection of its 587 RMG units from where its signatories brand source products while it has found that 50% RMG units completed remediation. We believe the initiatives taken by Accord, Alliance and NAP will led our apparel industry to international standards in terms of workplace safety.

While our apparel industry is making strides in ensuring workplace safety, it is looking forward to expanding its overseas market for sustainable growth. Considering the importance of trade fair in promoting the industry in foreign market, BGMEA has recently organized Bangladesh Apparel and Textile Exposition (BATEXPO) in Paris. The cover story of this issue presents nitty-gritty of the mega event. A market brief on Russia explores the potentials of Russian market for our RMG exports. This issue also contains an exclusive interview of US Ambassador to Bangladesh Dan Mozena, a special feature on zero discharge of hazardous chemicals in the supply chain, and importance of research and innovation in industry.

We hope our readers will find all the contents of this issue interesting and worthwhile.

Md. Shahidullah Azim
Vice President, BGMEA

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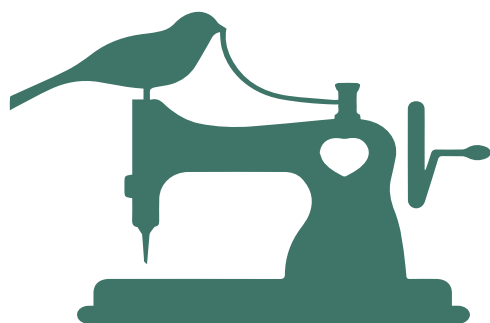
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The Apparel Story

Editorial Board:

Md Shahidullah Azim
Mamun Rashid

Editorial Staff:

Nur Mohammad Amin Rasel
Omar Gias
Nasim Uddin

Magazine Team:

Emdadul Haque
Mohammad Monower Hossain
Nabila Jamal Rusha
A. K. M. Marzanul Islam Joy
UF Nahid Sultana
Tamanna Mahin
Musharrat Tarannum

Photographer:

Md. Obaidul Arif (Rana)

Designer:

Sk. Yeahhia

BGMEA Head Office:

BGMEA Complex,
23/1, Panthapath Link Road
Karwan Bazar, Dhaka-1215
Tel: +88-02-8140310-20
Fax: +88-02-8140322-23
Email: info@bgmea.com
Websites: www.bgmea.com.bd
www.garmentworker.com.bd



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Coats
Bangladesh

Threading the Readymade Garments and Exports Industry of Bangladesh





BATEXPO transcends border

By Omar Gias

'Made in Bangladesh' is now a popular name in the fashion world. The 'Made in Bangladesh' garments are worn and adorned by the people of almost all the continents. The EU is the largest market where Bangladesh exports garments. Till last year the Europeans used to come to Bangladesh to attend BATEXPO. But in the September 2014 Bangladesh Garment Manufacturers and Exporters Association (BGMEA) brought 51 garment manufacturing units from Bangladesh at the doorstep of Paris, the fashion city of Europe.

For the first time BGMEA arranged BATEXPO outside the country. The three-day Bangladesh Apparel and Textile Exposition (BATEXPO) 2014 was inaugurated at 11:00am local time on September 16. Bangladesh Ambassador to France M. Shahidul Islam inaugurated the expo. President of France-Bangladesh Economic Chamber Kazi Enayet Ullah, Directors of BGMEA Khandoker Rafiqul Islam and Syed Sadek Ahmed, and former Director of French-Bangladesh Chamber of Commerce & Industry, Syed Moazzam Hossain spoke at the inaugural ceremony. On the second day of the expo BGMEA in collaboration with GIZ, Bangladesh, organized a seminar titled 'Rebuilding Garment Industry Factory by Factory'. BGMEA President Md. Atiqul Islam presented the keynote paper in the seminar where Alan Roberts, Executive Director, International Operation's of Accord, Shahidul Islam, Bangladesh Ambassador to France, Md. Shahidul Islam, Commissioner of Customs Bond Commissionerate, Bangladesh, and Mojibur Rahman, Joint Secretary of the Ministry of Labor and Employment, Bangladesh were present as seminar speakers. In his keynote speech, the BGMEA President highlighted the growth of Bangladesh garment industry and its impact on the country from socio-economic aspects. He updated the buyers about the



BGMEA President Md. Atiqul Islam is seen delivering his keynote speech at the seminar titled 'Rebuilding Garment Industry: Faactory by Factory' arranged on the second day of BATEXPO in Paris.

status of the factory inspection being made by Accord, Alliance and National Action Plan and assured them of workplace safety as only less than two percent of the inspected factories were found vulnerable. Alan Roberts briefed the audience about the initiative of Bangladesh Accord on Fire and Building Safety and its purpose. He informed all of six key components of the Accord. They are:

- Legally binding agreement between brands and trade unions,
- Independent inspections program involving workers,
- Disclosure of factories, inspection reports and corrective actions,
- Commitment to financial support



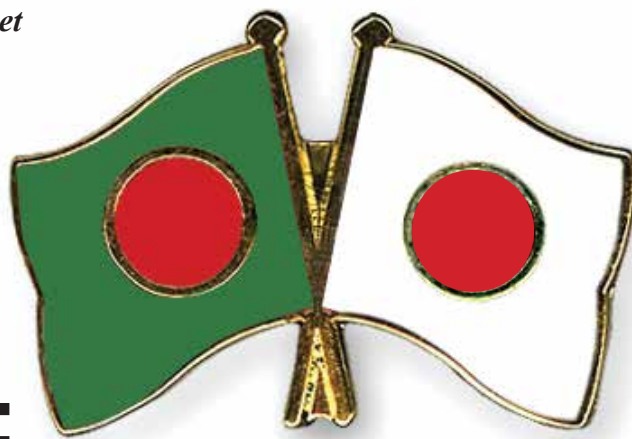
where needed and to maintain sourcing relations,

- Freely elected health and safety committees in all factories, and
- Worker empowerment and training program.

Bangladesh Ambassador to France Shahidul Islam welcomed the initiative of BGMEA and said that if such expo is arranged in France on a regular basis, the export volume of Bangladesh will surely increase in the third largest European market of its apparel.

A good number of buyers and retailers' representatives have visited the exposition which was lead sponsored by IFIC Bank and co-sponsored by Index Group and South East Bank.





Japan: A promising market for Bangladesh's RMG

By *Nasim Uddin*

Japan has always been a trusted development partner of Bangladesh. Japan was the first developed country to recognize Bangladesh on 10 February 1972. Both countries have been sharing a friendly relationship for a long time that grows stronger over times. The relations between Bangladesh and Japan have come to discussion again with the recent visit of Japanese Prime Minister Shinzo Abe with a 50-member high-powered business delegation. This visit was in return to a visit made by Prime Minister Sheikh Hasina to Japan in May this year.

Clearly these back to back visits bear special significance in terms of further strengthening the bilateral trade ties between the two Asian nations. Experts think both Bangladesh and Japan have ample scope of working together for further socio-economic development.

Japan is the 3rd largest economy in the world with a GDP of USD 4.8 trillion. Its economic structure largely depends on its overseas investment and business. The Asian giant's main investment has so far been in China. But due to rise in cost of labour and business, Japan has adopted "China Plus One" policy which promotes shifting the production point from China to other countries. This policy has created a golden opportunity for Bangladesh to attract more Japanese investment and increase its volume of exports to Japan.

Given the dynamic demographic profile, geographical location and rising prosperity, Bangladesh can be a preferred destination for Japan to invest in. Bangladesh has a population of 156 million. The

large populace is a blessing in disguise for Bangladesh as, if turned into human resource, it can be the main driving force of the overall development of the country. According to the Labor Survey 2010, Bangladesh has 56.7 million economically active people; of them 39.5 million are male and 17.2 million female. Moreover, around 2 million people are entering the labor market every year. Still the labour here is cheaper compared to other Asian countries. So experts think that with a huge workforce Bangladesh can be a lucrative destination for Japan to invest in. Japan can invest in infrastructure development, power, industrial parks, automobile and electronics plants, food processing plants and fast-moving consumer goods sectors in Bangladesh.

Visiting Japanese business leaders, who accompanied Prime Minister Shinzo Abe during his two-day visit, expressed their interest in investing in Bangladesh. They also demanded easing of investment rules as they look to divert funds to Bangladesh from China due to rising production costs and worker shortage there.

M. Serajul Islam, former Bangladesh Ambassador to Japan, said that under China Plus One policy Japanese investors in China want to slowly withdraw their investments in China and relocate it to a third country. "In that context, they have long been interested in Bangladesh for its geopolitical location; huge population (that meant cheap labour) and other favorable production costs."

Nevertheless, Japanese investors have always shied away from Bangladesh because of lack of political stability in Bangladesh, he said. So to attract more Japanese investment is to assure Japan about political stability, Serajul Islam added.

Japan also proves to be a lucrative garment export destination for Bangladesh as RMG exports to the Asian giant has increased notably in recent times. Bangladesh's RMG exports have so far mainly concentrated on European Union and USA. But dependence on two markets is not enough for sustainable growth. Keeping the fact in mind, Bangladesh's RMG industry is looking for non-traditional market. Japan has emerged as a promising non-traditional market for Bangladeshi readymade garment as the size of the market and demand for apparel is huge in Japan. Japan is the biggest importer of Bangla-

deshi readymade garments in Asia, as per country-wise export performance data. Japan has reduced its dependence on imports from China, which gave a boost to RMG exports out of Bangladesh. Export of apparel garments from Bangladesh to Japan has witnessed a significant boost in the first nine months of the current fiscal year, indicating that brighter days are ahead. Only \$74.37 million was earned by exporting garments to Japan in 2008-09 fiscal year, which stood at USD 572.27 million in 2013-14 FY; this means, the earnings increased more than seven times in just five years, mainly thanks to the "China Plus One" policy that the Japan government adopted in 2008.

Japan is the fourth largest knitwear importer in the world. Exporters said Japan bought garments worth \$20 billion, or 84 percent of its total global purchase, from China in 2008. While Bangladesh's market share in the Japanese apparel market is only 1.78%. In 2013-14 fiscal year Japan's total imports of RMG was around USD 31.78 billion. So there lies an ample scope of increasing Bangladesh's share in the Japan market.

Former Bangladesh Ambassador to Japan M. Serajul Islam said that Bangladesh's trade to Japan is increasing but still not to the extent of the potentials.

"The reason is Bangladesh's garment sector has never looked at Japan seriously. Further, the Japanese market is, unlike the European and American markets, on the high end of the scale. In other words, Japanese buyers do not look for cheap products where Bangladesh's advantages lie. Moreover, Japanese garment market is already geared to other markets, Chinese for example."



Prime Minister Sheikh Hasina and Prime Minister Shinzo Abe during the former's visit to Japan in May 2014.

He said that to make inroads there, Bangladeshi garment producers must invest time and money to motivate Japanese buyers that would mean participating in trade fairs that our garment producers have not.

Increasing trade in Japan is therefore not a short term issue but one that would require long term planning which is not something our RMG producers are willing to do.

Md. Shahidullah Azim, Vice President of BGMEA, said, "Besides traditional market we are looking for new markets for our apparel sector to make our RMG export basket bigger and sustainable. With the existing market we get sufficient orders in eight months. But if we can explore new markets, the flow of orders will remain same throughout the year as when there is winter in the US, the summer season prevails in Latin America and South Africa."

He said, "As Japan has adopted China Plus One Policy and is shifting

their business from China to other countries, the country would be a great destination for Bangladeshi apparel; and we will be able to tap the potential since we have 30-year experience in the RMG sector as well as huge capacity along with competitive price."

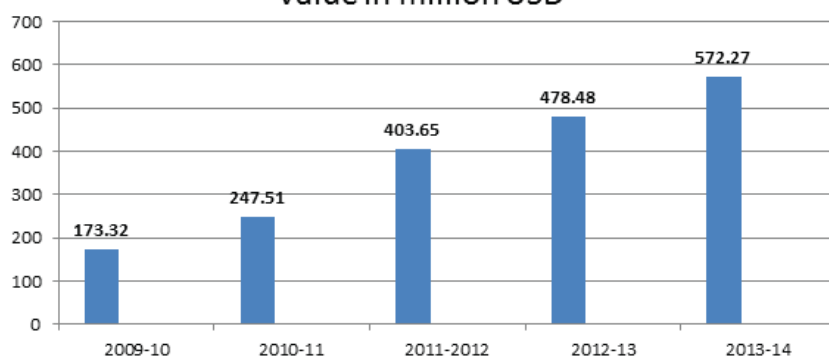
"Japanese are very quality conscious but offer comparatively low price for RMG. However, we want to grab more share in the Japanese market," the BGMEA Vice President added.

Kei Kawano, Country Representative, Japan External Trade Organization (JETRO), Bangladesh, said that if Bangladeshi entrepreneurs are serious about Japanese market, at first it is better to visit China to know how Chinese companies do business with Japanese companies.

"Bangladeshi entrepreneurs should also understand the difference between European and Japanese markets. Quality and standards are totally different in these two markets. In Western market there is a demand for fewer items but in huge volume while in Japanese market the demand is for a large number of items but in small volume. So, Bangladeshi RMG entrepreneurs need to invest in new equipment to increase the number of items which are in demand in the Japanese market," he said. Kei Kawano is hopeful that Bangladesh's RMG exports to Japan will increase.

Given existing proximity to the Japanese market and the newly adopted trade rules by Japan, the situation has become very conducive to increasing Bangladesh's RMG exports to Japan.

Bangladesh RMG Exports to Japan Value in million USD



A portrait of Dan Mozena, a middle-aged man with brown hair and a mustache, wearing a dark suit, white shirt, and a blue and red patterned tie. He is smiling slightly and looking towards the camera. Behind him is a large American flag, with the stars and stripes clearly visible. The background is a solid grey color.

Special Interview

Bangladesh could redefine whole apparel industry globally

-Mozena

Dan Mozena, Honorable US Ambassador to Bangladesh, is closely involved with the development and transformation of Bangladesh garment industry to a safe and sustainable one. Omar Gias of the *Apparel Story* talked with the ambassador to know his thoughts on the latest development of the RMG industry.

AS: You have toured entire Bangladesh. What would you say about Bangladesh and her people?

Mozena: Well, two weeks ago I finished my last trip to the districts. I visited Comilla. With the conclusion of my Comilla trip, I completed my visits to all the districts of Bangladesh. From my trips to the districts, I learned so many things. But I think the most important thing I learned is how rich this country is. You hear people say: O poor Bangladesh! I never say poor Bangladesh. I don't know poor Bangladesh. I know Bangladesh that is rich. Bangladesh has a lot of poor people, that's a different thing; but this country is not poor. The country has such rich soil, ample water, a climate that allows up to four growing seasons a year, the coal, the gas -- and incredible people everywhere I went. And I really mean this about Bangladeshi people who work harder and more creatively, with greater entrepreneurial skills, than anybody. Who is tougher than Bangladeshis? I answer my question -- nobody. Nobody is tougher, nobody is more entrepreneurial, nobody works harder, nobody works more creatively. I visited in Jessore a village called Golkali where I saw the whole horizon filled with roses and other flowers. These flowers have tremendous potential for exports, especially to the Middle East. Down in Satkhira I discovered something I never even heard. There, Bangladeshis have been making ten-colored clay tile that they are exporting to Italy. In Panchagarh I found an organic tea garden making the best tea I have ever drunk in my life. In other places I have seen fish and other activities going on. All the historical sites, all the tourist sites, and the beauty of the country...so many things! I could go on for six hours answering just this question. I will leave it at that. I discovered the magic of Bangladesh. I must say most Bangladeshis really haven't discovered their own country and they should do that and see how amazing the country is.

AS: In one of your articles recently published in a Bangladeshi newspaper, you mentioned that the darkest tragedies of life have silver linings while referring to two recent tragic accidents in Bangladesh's garment industry. What is the silver lining for Bangladesh?

Mozena: That's a quote of my mother who is now 93. She often says that the darkest tragedies of life often have silver linings. The silver lining of the horrible tragedy of Rana Plaza and the silver lining of the horrible tragedy of Tazreen Fashions fire is out of that has come a series of developments unprecedented in the history of the world. These developments offered an opportunity for Bangladesh to transform its apparel industry and make it a preferred brand, a premium brand, number one brand in the world. After the tragedies, for the first time brands have come together and made groups called Accord and Alliance, and they are putting millions of dollars on the table to undertake inspections of factories that supply to them, and millions of dollars on the table for soft loans to undertake remedial actions. That has never happened before. You have the International Labor Organization (ILO) with funding from Britain, Denmark and Canada working with BUET to inspect all other factories which remain outside the purview of Accord and Alliance. That has never happened before. Now you have a publicly accessible database onto which the inspection reports are being posted; there is no precedent for that anywhere in the world. The ILO is preparing to launch the biggest Better Work Program in the history of the world. None of these things have happened before. America is also deeply involved with plethora of programs to support the development, the transformation of the apparel industry. You have labor getting organized, which has never happened before; over 230 new unions registered in the last 22 months. There is no precedent for that. You have many of the owners, not all of them, very much engaged

in supporting the transformation. You have the government of Bangladesh constructively trying to support the transformation. So all of these variables have come together, creating the silver linings of the potentials for transforming the whole apparel industry, bringing it to an agreed standard for fire safety, factories' structural soundness and respect for workers' right to freely associate. That's what is going on; that's very exciting. Bangladesh could redefine the whole apparel industry globally. When will that happen? I don't know. It will take commitment by more owners and the government will need to take the lead in that transformation.

AS: According to a study jointly conducted by the United States Fashion Industry Association (USFIA) and the University of Rhode Island (URI), the US-based fashion companies are expected to bump up their sourcing from Bangladesh in the next two years. So what do you think has led US brands to prefer Bangladesh as a popular garment sourcing destination?

Mozena: Bangladesh is a great supplier of apparel. The country offers quality products at a good price. So buyers want to come here. This is a good place to do business. But will it stay a good place to do business? To ensure that 'Made in Bangladesh' is a premium brand, the brand that people want to buy, Bangladesh has to address the fire safety, the factories' structural soundness and the labor rights issues. I think and hope Bangladesh will transform the industry and become the new global standard for the apparel industry. It will take a big commitment from the members of BGMEA to make that happen, to make sure that 100 percent of the factories come to the standard in those three areas -- fire safety, factories' structural soundness and labor rights.

AS: A recent survey by the US Fashion Industry Association says that leading retailers and brands in the US want their government to reduce import tariffs on apparel and fashion accessories. What does your government think about it?

Mozena: This is a political decision. Decisions on tariffs are made by the Congress of the United States. Therefore, those who want to reduce or remove tariffs need to make a case to the Congress of the United States. I think, judging from our last Ticfa meeting, that the government of Bangladesh wants to make the case. In making the case, it is important to convey that Bangladesh understands how tariffs work. Because when you start talking about tariffs to the Congress of the United States, if it becomes clear that you don't know what you are talking about, you lose credibility. For example, many Bangladeshis will tell me that the government of Bangladesh pays US tariffs; that Bangladesh sends USD 800 million to the US as tariffs. No, Bangladesh spends zero. The importers pay the tariffs; Bangladesh does not pay the tariffs. Other people say Bangladesh pays 16 percent tariffs, China pays 3 percent and Vietnam pays 5 percent or something like that. In fact, every country that is subjected to tariffs pays the same tariffs. So when you are talking to lawmakers in the United States, you have to talk straight. So don't say that Bangladesh sends a USD 800 million check; no, it's not true. Then you don't have credibility. So be credible and make a strong case for why Bangladesh should not pay tariffs. The first step in this is restoration of GSP (Generalized System of Preference). Bangladeshis often say they want duty-free, quota-free; America doesn't have duty-free, quota-free. We have what is called GSP and that is the mechanism by which America provides tariff benefits to countries. Right now Bangladesh is not a beneficiary of GSP. So, as a first step, I encourage Bangladesh to work on fulfilling the various steps identified in the GSP restoration action plan. When President Obama suspended Bangladesh's GSP

privileges last June, he provided the government of Bangladesh an action plan that lays out the kinds of things Bangladesh could address so that he would be in a position to restore those benefits. On 20th October there will be a review session in Brussels for the Sustainability Compact. The Sustainability Compact was agreed upon last year, on July 8 in Geneva by Bangladesh, EU, US and ILO. That Compact takes most of the elements of the GSP restoration Action Plan and puts them in the Sustainability Compact to which Bangladesh has now formally committed itself. So we are going to review on 20th October in Brussels the progress Bangladesh has made in satisfying the various commitments made last July in the Sustainability Compact.

AS: Accord, Alliance and National Plan of Action have been formed and have been working for the past one year. They have inspected almost all the listed factories and given corrective action plans to the factories that needed correction. How do you see the transformation of the RMG sector?

Mozena: It is happening right now because Alliance has finished all of its inspections and Accord is right on the verge of finishing and BUET has finished several hundred and they have more to go. Those inspections have identified shortcomings in fire safety and factories' structural soundness. A few factories have been closed permanently. A small number of factories are closed temporarily. A lot of remedial actions are taking place -- generators on the top floors have been brought down to lower floors, weights are reduced as needed, etc. I have recently visited a factory which has installed fire doors. They had no fire doors before. Each floor of this factory now has five exit stairwells; in addition, it has emergency windows for exit. It has a speaker system and an alarm system that they did not have before. The alarm could be sounded and the public address system could tell workers which exits to use and

which ones not to use. It has a brand new water system with a dedicated water reservoir, with a dedicated fire pump and with fire hoses located on each floor with workers' trained to use the fire hoses, and they have demonstrated this for me. I could see the pressure in the hoses that could be effective in putting out the fire. This is very impressive.

Your question relates to fire safety and factory structural safety. But you don't ask about the labor rights situation. That's a whole other issue. Bangladesh has signed international agreements that support workers' rights to organize; those rights have not yet been fully recognized. That needs to be done. I urge Bangladesh to establish a remediation facility that will in real time address the problems that arise between factory management and workers. There are about four thousand factories. So we will have issues. Nothing wrong with having issues. Those issues need to be resolved non-violently through some kind of remediation mechanism working in real time, not a six year or sixteen year long court battle.

As: The US is of great value to Bangladesh as it is the single largest market for its readymade garments. How can we further increase our share in US apparel market?

Mozena: The way to do that is to transform the industry, ensure buyers, ensure consumers that there will be no more Rana Plazas, no more Tazreen fires; those disasters are finished. You have to do that bringing the whole industry, as I said before, 100 percent up to an agreed standard for fire safety, to an agreed standard for factories' structural soundness, and to an agreed standard for workers' right to freely associate and organize. And that's how brand Bangladesh will become a premium brand, a preferred brand, number one brand in America and number one brand in the world.

AS: Thank you very much for your valuable time.

Mozena: You are welcome.

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Textile Technology Business Center starts journey

By Md. Monower Hossain



Martine van Hoogstraten, Deputy Head of Mission, the Embassy of the Kingdom of Netherlands in Dhaka, inaugurating the Textile Technology Business Centre (TTBC) at BGMEA while BGMEA Vice President Md. Shahidullah Azim and former Vice President Faruque Hassan were present.

A remarkable stepping stone has been marked by Bangladesh Garments Manufacturers and Exporters Association (BGMEA) in the area of environmental sustainability on 1 October 2014. An exciting new centre named Textile Technology Business Centre (TTBC), the first of its kind in Bangladesh, was launched that day.

TTBC will be supportive to the member factories of BGMEA in adopting resource efficient management system, cleaner production process, and environment friendly technology. As a knowledge hub, one of the key roles of the TTBC will be to assist the RMG and textile industry in adopting sustainability measures, including waste water and ground water management systems.

The centre was set up by the BGMEA with support from the Embassy of the Kingdom of Netherlands (EKN) and the International Finance Corporation (IFC), and is part of the Partnership for Cleaner Textiles (PaCT) program.

Housed in the BGMEA complex, the

TTBC will be supportive to RMG/textile factories in adopting best practices and technologies that improve business and environmental sustainability.

With its strong local and international network TTBC will act as a platform between the factories, service providers, financial institutions, technology vendors, chemical suppliers and the knowledge centers/universities.

TTBC will also facilitate access to objective information on modern textile technologies, chemicals and service providers. The center will support factories in innovation and investment in resource efficient technologies. Apart from these, TTBC will organize trainings and workshops on CP management system, technical sessions, moderate user group meetings to exchange ideas and experiences amongst the factories. For dissemination of available best practices, CP manuals, fact sheets and case studies on technology and business cases TTBC will bring out publications for broader

communications.

In the centre of TTBC there is a world-class library and knowledge center equipped with all the necessary books, publications, journals, scientific papers etc to provide updated information to visitors.

From the service providers perspectives TTBC will act as an perfect place to share their knowledge and create business connections with the partners and stakeholders.

-TTBC will also deposit the knowledge developed by the PaCT program for broader public dissemination. TNO, a reputable Dutch research organization, provided technical support in the establishment of TTBC.

"Why we make TTBC? It was the realization that the knowledge that developed from the interventions is confined within few peoples; TTBC will help in public dissemination of huge knowledge acquired from PaCT", said Bastiaan Mohrmann, Strategic Advisor and Chair Steering Committee, Bangladesh Water PaCT. "I think it is very important to have a center like TTBC in BGMEA; it is important to share and preserve knowledge," said Martine Van Hoogstraten, Deputy Head of Mission, the Embassy of the Kingdom of Netherlands in Dhaka.

Among others, Frans Verspeek, Senior Adviser, Bangladesh Water PaCT, Carel de Groot, First Secretary Water Resource Management, the Embassy of the Kingdom of Netherlands in Dhaka, Mrinal Sircar, Program Manager, PaCT, IFC, and Marieke Weerdesteijn, Senior Program Manager at Solidaridad Network were present at the inaugural ceremony. Faruque Hassan, former Vice President of BGMEA, was also present at the event.

Details about the TTBC can be found at the link below: www.textilepact.org/ttbc

Paving way to growth and sustainability

By Nabila Jamal Rusha

Research plays a key role in shaping the world. Through research, we gain a better understanding of today's most pressing and complex social and scientific issues such as cultural diversity, human rights, disease prevention, and climate change. The importance of high-quality research cannot be overstated. The benefits of the research enterprise cannot be realized unless the knowledge generated is both accurate and trustworthy and hence the integrity of research is vital.

Research plays an important role in business and is commonly known in the arena as Research and Development (R&D). Some incorporate it in their organization as much as to make a separate department for it, some chalk out strategies based on R&D and some make it a core part of their business structure. Research and Development is a key element of many organizations and, when well-planned and used, enables a business to generate increased wealth over a period of time. R&D involves researching your market and your customer needs and developing new and improved products and services to fit these needs. Some companies rely on R&D for growth via new product introduction; others use R&D to stimulate incremental improvements. Some companies view R&D as an unnecessary expense. Understanding all the roles of R&D and recognizing the

value in each role are keys to properly supporting the concept.

The first major role of R&D is the development of fundamental knowledge or "enabling technologies". The business and the R&D community agree that research is important and companies are increasingly using

university collaborations to augment their long-range research efforts. Though knowledge-building activities are often the first activities cut during lean times.

The second important function of R&D is to provide support to manufacturing, customers, and business management.





R&D organizations are often the repositories of technical know-how. As such, R&D can be an invaluable resource to factories and plants. The value of R&D can be demonstrated when factory production problems are solved quickly or avoided. R&D functions to evaluate competitive technology threats and opportunities, which allows business management to make decisions with greater confidence. By pointing out technology strengths and weaknesses or forecasting technology trends, new business opportunities can be created.

While the first role is considered strategic and the second is considered necessary, the third role is simple and often considered discretionary. The third major function of R&D is the plain development and implementation of new technology, which is usually the hardest and most expensive of all investments.

Dr. Selim Raihan, Executive Director of South Asian Network on Economic Modeling (SANEM), says, "We most often think of development as merely growth spurring progress. But in doing so, we tend to miss the fact that progress can take two forms namely; 1) Horizontal or extensive progress which means copying existing technology and 2) Vertical or intensive progress that entails doing new things (P. Theil, Zero to One). Obviously the second form of progress is curve shifters in terms of economics which could only be done

through new innovations. On the other hand, new innovations are hard to come by without intensive investment in research and development. Hence the importance of innovation and research could not be more pressing than now."

If we don't support, encourage and fund basic research, we cannot innovate. Research and innovation are a loop wherein one cannot exist without the other. Yet at times innovation is rewarded and basic research is not. This means there is little incentive to support basic research. Hence it is important for people to understand that without research, innovation is impossible and basic research is nothing but first steps towards positive change and development.

Innovation can help companies discover what opportunities exist now, or are likely to emerge in the future. Successful businesses not only respond to their current customer or organizational needs, but often anticipate future trends and develop an idea, product or service that allows them to meet this future demand rapidly and effectively. Innovation helps stay ahead of our competition as markets, technologies or trends shift. Companies should include innovation as a key part of your overall business plan.

It should also be added that there are numerous definitions of innovation, counting at least in the hundreds. Current literature emphasizes that

innovations are not only new products and technological production processes, but refer to many more and wider phenomena, including new organizational forms and the creation of new markets. Furthermore, most of the innovation literature defines an innovation as something that is new to the firm adopting or developing it, rather than new to the whole market or indeed the whole world.

Though there are various types of innovation taking the number to a higher two-digit, the ones like incremental innovations, process and service innovations are pretty common and we get to see them on a regular basis. In spite of being common, they are the types that bring in more revenue and success for the business and are more dependent on by companies. Still there are few "innovative innovations" that are extraordinary and literally reflects the concept of being out of the box.

For example there is Blue Ocean innovation, which represents the unknown market space, i.e. part of the industries not in existence today. Blue oceans are defined by untapped market space, demand creation, and the opportunity for highly profitable growth. Blue oceans can be created by expanding existing industry boundaries or by reconstructing industry boundaries.

But some out-of box thinking that are 'in' right now is the sustainable innovation where eco-centric concepts are applied to design products and processes that contribute to sustainable development. Another type of breakthrough is the supply chain innovation which is about applying best practices and technological innovations to the supply chain in order to reduce such cycle and wait times and other waste in the in-house processes.

Another interesting innovation is the reverse innovation which is new in the family of breakthroughs. Reverse Innovation is the strategy of innovating in emerging (or developing) markets and then distributing these innovations in developed markets. Many companies are developing products in emerging countries like China and India and then distributing them globally. For example Nestle's Maggi brand – Low-cost, low-fat dried noodles developed for "rural places" like India and Bangladesh found a market in

Australia and New Zealand as a healthy and budget-friendly alternative.

What all these innovations tell us is that it required a lot of thinking along with expertise to come up with such ideas. It must have taken years of brainstorming, researching and testing to achieve such breakthroughs. It is not a switch that can be turned on and off, it's not a bulb that will glow light up suddenly; it is a systematic investigation and study of materials and sources in order to establish facts and reach new conclusions. Hence without research we cannot think of innovation, it is an elongated process that requires time and effort.

The apparel industry of Bangladesh has significantly evolved, particularly over the last 30 years, when the boundaries of the industry started to expand. The changing dynamics of the industry since then, such as increase in the number of fashion seasons, both emergence and fading of mass production, and modified structural characteristics in the supply chain have forced retailers to desire low cost and flexibility in design, quality, delivery and speed to market. It is suggested that 'sense and respond' is the key strategy to maintain a strong position in the increasingly dynamic and demanding market. In order to sense and respond we need to know our market and customers well, for that we need research.

In conversation on research and development with Prof. Dr. Syed Masud Husain, Vice Chancellor, BUFT, he mentioned how we are already very late in establishing a research center dedicated for the RMG industry. He said, "The industry has evolved over the last 30 years and it's been 15 years that an educational institute came into being exclusively to educate people in this sector. But we must act fast to hold our position and explore opportunities to go further and as a way to express and establish the importance of research, a few years back we started Center for Export and Product Development (CEPD). It was established to promote quick response in the process of manufacturing and new product development through provision of technical support services to the industry and its mission was to become a more proactive research-led institution. It is no longer possible for Bangladeshi industry to continue to



supply the bottom end of the international market but that manufacturers must start making value added products. In the context of the present scenario it is a must to maintain sustainability and growth of the industry."

R&D can lead to innovations in business. These may be in terms of new products and services, improved processes and new ways to interact with customers. These innovations can result in greater profits and lower costs and a useful way to grow business. Who better than a successful businessman can vouch for this, hence quoting Abdus Salam Murshedy, Managing Director of Envoy Group and former President of BGMEA as saying, "We are way past the period when we should just be discussing significance of research, by now we should be proactive enough and act on it as fast as possible. We are a market worth of USD \$25 billion and I firmly believe that it is not enough. With proper actions and infrastructural support, in a span of 10-15 years we can reach export of 3 digit value. But for this, we must do continuous research both in home ground and international arena. We must focus on innovations to tackle the competitive issues that will take us forward. For this we must continuously look into competitors' strategies, workers' skills worldwide etc. to apply the best practices in our industry. We must also emphasize on the importance of self-sufficiency, as we see that in terms of woven fabric, we process only around 25% whereas we need to import maximum from outside. I believe this is where our

opportunities lie, these are the places where we lack and hence we should start tapping and working on it so that we can reduce our dependency for raw materials on international markets. In the end all I can say is that innovation should reflect everywhere, in technology and know-hows, training, skill development, management's responsibility, mid-level application and coordination, production and efficiency, multi-variant operations by both machines and workers, it should be visible in literally everywhere. That is when we will be able to better realize the significance of research and development. Another area where we should concentrate is fashion and designing, though we have evolved into a bigger industry, we still go for mass production rather than specializing in major designs and fashion. But days of mass production is over, so we should focus on our own designs that can be sold at a much higher price than these mass produced cheap products."

Importance of research and innovation is still not very well-established in Bangladesh. They will buy the most expensive technologies but will not invest a single penny in making of these big technologies. So to make a culture out of anything we must first start with the changing of our mindset and what better way to do that than a great inspiring quote by William Pollard, "Learning and innovation go hand in hand. The arrogance of success is to think that what you did yesterday will be sufficient for tomorrow."

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'Suppliers Speak Up'

By Nabila Jamal Rusha



Reaz Bin Mahmood, Vice President (Finance) of BGMEA, is seen delivering his speech on challenges of Bangladeshi suppliers in trying to improve working conditions at a seminar titled 'Suppliers Speak Up' organized by IEH in Oslo, Norway.

Over the past six years IEH-Ethical Trading Initiative Norway (IEH) has spoken to 1500 suppliers who have participated at IEHs supplier trainings in India, Vietnam and China. The data collected shows that buyers have a critical role in ensuring that the efforts suppliers put towards improving working conditions are not compromised by short lead times, last minute changes to orders and price pressure. As a response to these findings, IEH has launched a new, comprehensive guide. The guide provided buyers with the necessary understanding and tools to develop responsible purchasing practices.

To launch the guide IEH organized a seminar on 5 September 2014 in which they gave an overview of the challenges buyers and suppliers face today, presented the guide and provided platform for suppliers to tell how they cope with the purchasing practices of their customers. They provided case study of how an IEH member company has improved their purchasing practices in order to improve working conditions and productivity gains.

This seminar which took place in Oslo, Norway, was attended by Reaz Bin Mahmood, Vice President (Finance) of BGMEA. Before the one-day seminar, IEH arranged some meetings for the BGMEA Vice President (Finance) to

meet various international stakeholders and development partners. Mr. Reaz Bin Mahmood met with representatives from Norwegian Ministry of Foreign Affairs (MFA) and representatives from The Norwegian Agency for Development Cooperation (NORAD). The representatives wanted to know from him about the recent updates on working conditions of Bangladesh. The BGMEA Vice President (Finance) gave the full details on the current working conditions, starting from the 219% increase in minimum wage to the amendment to the Labor Law which is more favorable towards workers' rights to freedom of association. After the meeting with MFA and NORAD, Mr. Reaz Bin Mahmood was introduced to the IEH secretariat where they discussed about the problems and prospects of the Bangladesh RMG sector. Various issues that need to be tackled were discussed elaborately and in the process they came up with various ideas and initiatives to take the industry further.

The seminar was a day-long program with Decent Work Accounting workshop. The BGMEA Vice President (Finance) was a panelist and a discussant in one of the sessions of the seminar. Also in attendance were companies who are both IEH members and non-members, government representatives,

researchers and academicians, representatives from NGO and public sector. In the seminar, the BGMEA Vice President (Finance) explained how purchasing practices of buyers are undermining suppliers' ability to improve working conditions and he emphasized on how brands should pay a fair price for their products. He said that brands should contribute to positive changes by improving their purchasing practices by reflecting responsibility towards ensuring better working conditions.

Reaz Bin Mahmood spoke about price and cost and how both are moving in the opposite direction. While cost of doing business is going up, the price trend has shown that it is constantly declining over years. He also mentioned the recent compliant issues and remediation initiatives that are taking up a lot of investment for the factory owners. All these add to the burden of a manufacturers and hence buyers should come forward and help the manufacturers have a more beneficial stance. The Vice President (Finance) really appreciated the Decent Work Accounting (DWA) Model that takes prevailing purchasing practices into account with the explicit purpose of itemizing and covering decent work costs in each individual order.

Dhaka Apparel Summit 2014

BANGLADESH RMG 2021: \$50 Billion on 50th Anniversary of Bangladesh

By Apparel Story Desk

The emergence of the readymade garments (RMG) industry has been a significant positive achievement toward manufacturing based economic growth of Bangladesh. Some recent challenges faced by the industry relating to workplace safety issues have raised global concerns. Discussions are going on to shape a more sustainable and responsible global supply chain. Bangladesh Garment Manufacturers and Exporters Association (BGMEA) The Dhaka Apparel Summit is organized with the objective of opening and furthering such dialogue to frame a

sustainable road map on building responsible supply chains in the textiles and garment sector that contribute to its sustainable development and inclusive growth of the economy.

The summit will feature a number of panel sessions over two days participated by representatives of governments of home and partner countries, international organizations, employers, private sectors, workers' representatives, civil society organizations, brand representatives and buyers, academics and media.

Day-1: December 7, 2014

Session & Time	Topic
Session-1 2.00pm-3.30pm 90 mins	Bangladesh RMG 2021- Reaching 50 Billion on 50- A collaborative & Coordinated approach This session will cover present business and investment trend, global sourcing dynamics and potentials for Bangladesh, prior issues to support the growth potentials, like infrastructure/port/SEZs, power/gas, human resources development, compliance issues, prudent commercial diplomacy & political stability; supportive policies and coordination between different government agencies, product & market diversification, etc. The discussions will focus toward devising a strategic action plan to overcome the existing challenges and realize the potentials.
Session-2 4.00pm-5.15pm 75 mins	Infrastructure - The Road to Chittagong & Beyond This session will focus on the infrastructure and supply chain issues for the industry to achieve the Vision 2021 being set for Bangladesh and the way to resolve them. It will include the importance of the development of physical infrastructure, power, gas, energy etc. and how important they are to secure the vision. Do we have the capability to cater the 50 billion dollar market? Discussion on the govt. policy, importance of public investment in fostering private investment will also be discussed. Importance of establishment of deep Sea Port, Dhaka Chittagong 4 lane highway, new industrial RMG park etc will also be highlighted here.
Session-3 5.30pm-7.00pm 90 mins	Environmental Sustainability- A must This session will look at the questions of environmentally sustainable economic growth in a densely populated country, and examine how the RMG sector can meet the standards required. This will cover environmental health and safety, resource efficiency, environmental footprint, global agenda on environment, impact on buying pattern, preparedness, and green concept.

Session & Time	Topic
Session-4 10.00am-11.30am 90 mins	Future of Workers: Workplace Safety and Sustainable Production <p>Where is the RMG Sector situated now, and how did it get there? Can the sector ensure safe working conditions? This session will focus on the perspective of purpose built manufacturing in a modern era. The session will also brief on progresses made since the inspection initiatives, i.e. NTAP, Accord & Alliance, started working. A consolidated report of the factory inspections will be shared. The session will also focus on workers' rights issues, policy and capacity of the government and private stakeholders, donors support, engagement of the diplomatic community and brands.</p>
Session-5 11.40pm-12.50pm 70 mins	Remediation Financing for Transforming Bangladesh Garment Industry <p>Garment industry has grown over many years and the factories within it are of varying sizes and at various points in their business growth. Many factories in Bangladesh are located in unplanned, while many others are located in purpose-built buildings which are fully compliant. Factory relocations and remediation require collaboration for capital expenditure loans, while it will also require support from the government in terms of making land available, and provide financing options, infrastructure, and utilities, particularly gas lines, to those locations. This session focuses on issues related to access lower-cost financing required for the transformation of the industry.</p>
Session-6 1.30pm-2.30pm 60 mins	Reinventing the Apparel Model - The Race to Responsible Sourcing & Productivity Enhancement <p>This session will cover sustainability issues from the perspective of global value chain, accountability of the stakeholders across the value chain, and responsible entrepreneurship.</p>
Session-7 2.40pm-3.55pm 75 mins	Assuring Workplace Tranquility <p>The discussion will focus on how current labor relations in Bangladesh is causing workers dissatisfaction and untoward incidents that ultimately lead to reputation crises of the industry both at home and abroad, and also causes inconvenience to the buying community. The discussion will also shed lights on how could we turn around to tackle such difficulties living in the reality, and working out a pragmatic approach on 'how factories can limit or eliminate workplace unrest by negotiation, mediation and even arbitration of workplace disputes'. Most importantly the speakers intend to show how other countries have achieved success by limiting or eliminating workplace unrest and how companies and brands can do this in Bangladesh on their own, by developing in-house private programs without government intervention or control.</p>
Session-8 4.05pm-5.15pm 70 mins	Bangladesh RMG 2021 - The Role of Media <p>This session will also focus on the importance of industry and nation branding for the progress of the garment industry in Bangladesh. The discussions will be aimed to find a holistic/national approach toward branding Bangladesh and its apparel industry and bring all the critical stakeholders on the same boat.</p>
Session-9 5.30pm-6.45pm 75 mins	Social Impact - Can RMG Sector help Bangladesh to become a middle income country <p>This session will focus on the role the apparel industry has been playing for the economic independence, social uplift and better livelihoods of Bangladeshi people. The progress toward women empowerment, poverty alleviation and human development indicators will be discussed. The aim of this session will be to establish a common understanding on how important the labor intensive apparel industry is for building the future of a country like Bangladesh, where population is abundant and the core asset of the country.</p>

Speakers:



Dr. William K. Fung
Group Chairman
of Li & Fung Ltd



Professor Arnold M. Zack
Professor
Harvard Law School



Kihak Sung
Chairman & CEO of
Youngone Corp.



Nate Herman
Vice President, AAFA

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Fashion Icons over the years



For generations we have been following trends, be it the trend of wearing massive shades, the little black dress or the famous red leather zip up jacket. We follow trends set by icons. Today we stop to take a look at the trendsetters that have been ruling our fashion senses and showing us what to do and what not to do. It was not a challenge for them, it was what they were comfortable in and yet years later today we owe our styles to them.



Audrey Hepburn

Audrey Hepburn, the epitome of elegance, femininity and the creator of the much desired, timeless 'Audrey Hepburn Look'. She was born in 1929 in Belgium to a British father and Dutch Aristocrat mother. When talking about Audrey Hepburn, it is impossible not to mention her fifty-year friendship with up and coming fashion designer of the time, Hubert de Givenchy. It was during her second film "Sabrina" that Audrey and Hubert met, as she had shown interest in having him design the costumes. They soon formed a loyal partnership, with Audrey often being his muse and inspiration for designs. They collaborated together and created the exclusive 'Audrey Hepburn Look', which women all over the world fell in love with. It was the costumes in "Breakfast at Tiffany's" that helped to create the unique 'Audrey Hepburn Look'. The little black dress, oversized sunglasses and statement pearl necklace all held a womanly and chic charm, one that Audrey was keen to share with women. Audrey played an integral part as a fashion icon in her lifetime, and still does today. She introduced modesty and grace into fashion, a style that has become timeless and will always be associated with her.

Elizabeth Taylor is considered to be the greatest movie star of all time, appearing in almost fifty films and in many TV series. She was one of the most prominent and enduring icons of Hollywood's Golden Age. Taylor was born Elizabeth Rosemond in 1932 to American parents just outside of London. Even though Taylor's fashion sense was typical of actresses at the time, her



Elizabeth Taylor

unique face set her aside from the rest. Dramatically lined eyes on a perfectly structured face complete with heavy brows made Taylor a cut above the rest. Her violet eyes and double lashes caused a sensation in the film industry and made her all the more seductive. Off screen Taylor had created her own passion for dressing herself. Dresses that were cinched in tightly at her tiny waist, highlighting her feminine figure, were her favourite. Taylor also enjoyed the higher end of fashion, and was often seen clad lavishly in fur coats and designer gowns. One of the things that Elizabeth is most famously remembered for is her love of jewellery and she is thought to have had one of the most significant jewellery collections in America.

Elvis Aaron Presley was born in 1935 to two parents in Mississippi. In addition to contributing to the massive breakthrough in the rock n' roll revolution; Presley also made his mark by the outfits he wore when he performed, with a never-seen-before originality that captured the nation. Throughout his success in the fifties, sixties and seventies, music had its influence on his style, and his style held a strong influence on music. Always appearing fashionably dressed, Elvis had a specific rock n' roll image to retain. One of his most recognizable features was his hair. Coolly slicked back at the sides and in a slight wave at the top of his head (and



Elvis Aaron Presley

later on with a distinctive curl), his hair was what identified him as a rock n' roll, a casual yet still charming look. When Elvis performed, he liked to make a fashion statement. In 1968, clad in a black leather tight outfit, Elvis made his comeback, perfectly adhering to the rock n' roll persona which he had created for himself. This however was only the start of his outrageous dressing. In 1970, Elvis performed in what is probably recognised as his most famous outfit to date. The Elvis Aloha Jumpsuit caused a sensation in the fashion and music industries. The tight white jumpsuit features a high angular collar, which fell in a straight V down his chest. The outfit was adorned in patriotic red blue and gold gems, sporting numerous American Eagles. Elvis Presley played a significant part in changing the face of twentieth century pop culture and is recognised internationally for it.

Jacqueline Kennedy is known first and foremost as the First Lady, wife of American President John F. Kennedy. Known for her classically good taste and love of fine fashion houses, Jackie has left a great style legacy that women around the world remember and look up to and one that's hard to follow.

Born Jacqueline Lee Bouvier in New York 1929 she is remembered for her good taste. She embraced high class brands such as Chanel, Dior and Givenchy. Jacqueline Kennedy soon became known for her classic style. Her signature look was made up of designer skirt suits, smooth A-line dresses, knee length dresses with thick straps, and of course the pillbox hat, which she matched with



Jacqueline Kennedy

every outfit. Jackie enjoyed a wide range of colors, mainly focusing on soft pastels shades, such as pale orange, yellow and pink, which complimented her dark hair. In the years after the White House, Kennedy's look changed to one that was still stylish but less restrained and smart. She dropped the suits and favored gypsy skirts, large jackets and over the top dark sunglasses. However, she still looked towards designers, especially Hermès for their silk scarves. During her time at the White House, her signature piece of jewellery which went with almost every outfit became to be a three strand pearl necklace, which remains to be a timeless and elegant piece in every woman's wardrobe.

Michael Jackson, for over 20 years, reigned as the electric, highly fuelled music icon that inspired and brought entertainment to music lovers all over the world. The 'King of Pop', his influence over the music and fashion industry created a storm which would be the basis for future acts.

Born on 29 August 1958, Michael was the eighth out of ten children. In regards to his fashion, the point can be made that they were an extension of his art. They were designed to bedazzle, shine and draw attention to him when dancing onstage. They were costumes, but they became for the young population at the time a style,



Michael Jackson

that signified rebellion and artistic expression. Pegged pants, heavy leather, white socks and an attitude; Michael's style reflected a man as a leader in music and fashion. Staple items from many of Michael's evolutions that have become pop culture history include his 'Beat It' red leather zipped biker jacket to his vamped up, The Warrior's styled setting for 'Bad', directed by Martin Scorsese.

His costume designer, Michael Bush, created some of the most iconic outfits that Michael Jackson wore over the most renowned years of his career. This included his Swarovski jewelled glove that he wore as an extension of his performances, often shooting out his hand and dipping his head whilst under a spotlight. On his Dangerous Tour, Michael wore a gold bodysuit, with the left side flapped open, a personification of jester royalty.

In his Bad Tour, the most acclaimed and successful tour which played 123 sold out shows to over 4.4 million fans showed Michael in a rebellious attire, with attention to detail especially in a chrome body suit which was noted for being highly structured in basis, but appeared deconstructed with the accessories that Michael included in nearly all aspects of his tour attire. Outside of his shows, he wore similar get ups, but with a more relaxed, oversized appeal, as recognised in his Motown 25 performance in 1983, with the glove intact, showed him wearing a suit, which was tailored above the ankle, with white socks pulled high up stunning the audience with his signature moonwalk which caused a youth riot with young teens all wanting dance lessons. Another popular outfit was one that Michael

wore to the 63rd Academy Awards in 1991, where he wore a white jacket with a brooch centred between the collar and on his arm, the Princess of Pop, Madonna.



Sophia Loren

Sophia Loren represented the epitome of Italian beauty. Raven haired and curvaceous, she is viewed as the most successful and renowned Italian actress. With a tall striking figure, Loren cuts a unique image whilst always retaining a sense of glamour and elegant sophistication. Whilst off duty from filming, Loren was often seen in casual – yet classically stylish – attire. Black midi length pencil skirts paired with a minimal pair of heels and a short sleeved Breton striped top, Loren's personal sense of style was predictably European. However, Loren had an unmistakable air of glamour about her, which depicted the Golden Age of Hollywood very well. Dressed in lavish furs, and exquisitely adorned dresses, Loren always allowed the clothes to add to her feminine figure, and not the other way around. Oversized sunglasses and statement earrings were very popular with Loren, as well an array of hats.

Typical of many other actresses of the time, Loren created her own unique beauty signature and stuck to it. Her mane of dark brown – almost black – hair knew many different styles during her time filming, however one of her most memorable hairstyles is of it short and gently curled, just above her chin.

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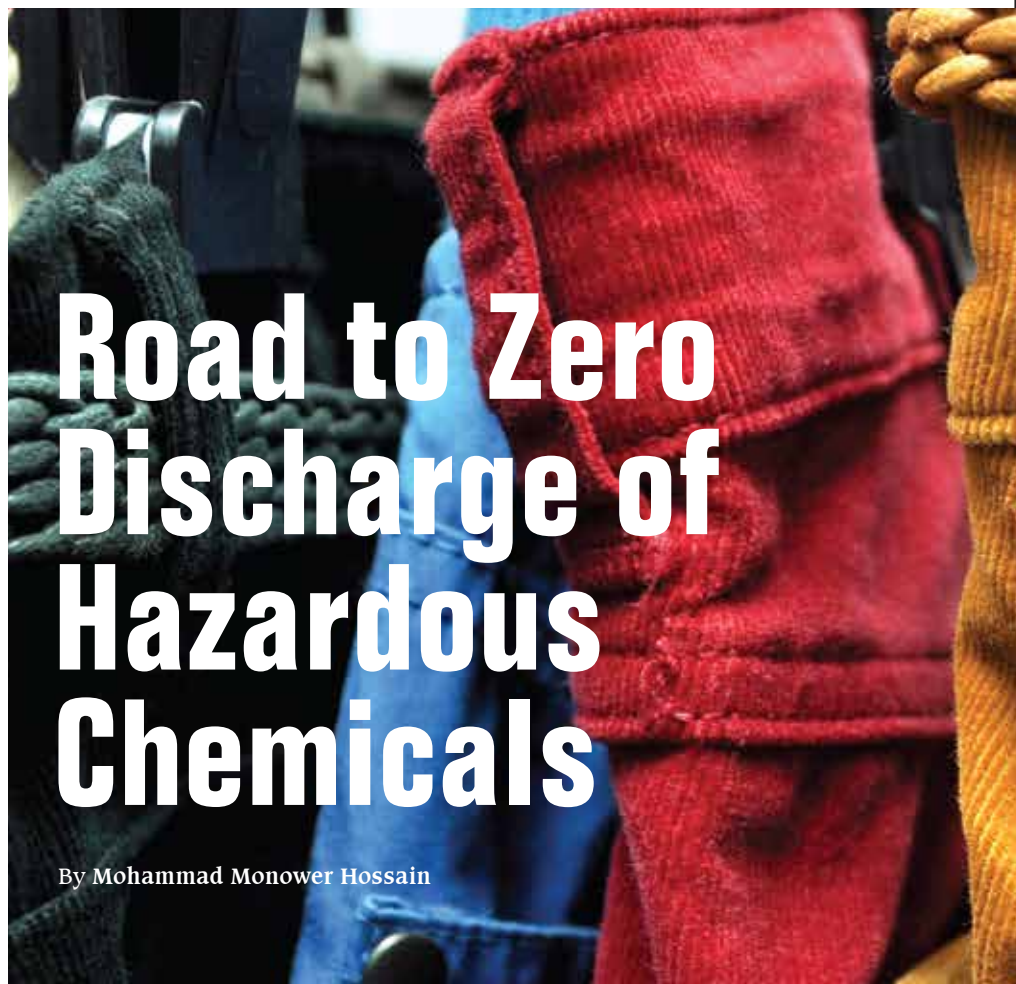
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In our daily life we cannot think of a single stuff made without chemicals. In the path of civilization chemicals played a significant role in easing our everyday life. Roughly 3000 chemicals and dye stuffs are used in the textile processing industry that make our outfit colorful and give us visual beauty. But do we know among these chemicals some have devastating environmental and health impact if come in to the ecosystem?

There are a numbers of chemicals and dyestuffs which have been banned globally due to its harmful impact on the environment and human health. There are some chemicals which are known as carcinogens (cancer causing substance), mutagens (physical or chemical agent that changes the genetic code); reproductive toxins (substance that cause birth defects or other reproductive distortion) have serious health impact and causes cancer, reproductive harm and fatal diseases.

In Bangladesh there are around 1700 units of wet processing factories employing around 2 million workers. Growth rate of new establishments of wet processing factories is 10% per year. It reflects that the consumption of chemicals is also increasing which may have severe consequences over environment and human health.

On this backdrop some of the leading global apparel brands aggregately took an initiative to minimize the impacts by lowering discharge of hazardous chemical in the textile supply chain. It was 2011 when six leading brands jointly published a Road Map and committed to ensure Zero Discharge of Hazardous Chemicals (ZDHC) in the supply chain by the year 2020. ZDHC group has updated its joint road map after receiving the comments and suggestions from a varied range of stakeholders including textile industry suppliers and associations, government agencies in Asia, Europe and the United States, non-governmental organizations, international development organizations and the chemical industry. The number of brands in ZDHC is now increased to



Road to Zero Discharge of Hazardous Chemicals

By Mohammad Monower Hossain

18 along with 3 associate members and diverse stakeholders. The signatory brands include Adidas, Benetton, Burberry, C&A, Esprit, G-Star Raw, Gap, H&M, Inditex, Jack Wolfskin, Levi Strauss, L Brands, Li Ning, M&S, New Balance Athletic Shoe, NIKE, PUMA and PVH Corp. Bangladesh Garment Manufacturers and Exporters Association (BGMEA) greeted the initiative taken by the leading brands. In the 1st stakeholder engagement workshop Md. Shahidullah Azim, Vice President of BGMEA, said, "ZDHC road map is a significant step towards building a sustainable textile industry for Bangladesh." The initiative taken by the leading brands would contribute to harmonization of environmental standards in the garment industry, he added.

Kazy Mohammad Iqbal Hossain, Senior Environmental Chemist from C&A, said that "The joint road map

towards Zero Discharge of Hazardous Chemicals intended to help Bangladesh textile and RMG factories to achieve positive changes in the area of environmental sustainability by minimizing the risk of hazardous chemicals".

The joint road map is a highly ambitious plan that sets a new standard of environmental performance for the global apparel and footwear industry. The road map serves as a first step towards achieving Zero Discharge of Hazardous Chemicals (ZDHC) by 2020.

The joint road map version 2 outlined the focus on seven key work streams as below:

Work stream 1: Chemical hazard assessment, prioritization and action

This actually works toward prioritization of the chemicals which have severe impact on human health and environment and



It was 2011 when
six leading brands
jointly published a
Road Map and
committed to
ensure zero
discharge of
hazardous
chemicals in the
supply chain by
the year 2020

developing a Manufacturers Restricted Substance List (MRSL) for priority chemical phase out. This work stream will also engaged in research for finding alternative safer chemicals to the hazardous substance. This work stream will also facilitate conducting a complete Benchmarking Study, testing and analyzing approximately 150 analytes at 20 sites in Bangladesh, China, India, Taiwan and Vietnam.

Work Stream 2: Training

This stream intends to provide training for textile suppliers aligned with their chemical management protocol and practices with expectations of ZDHC. The curriculum would cover basic steps for chemical management and includes an update on ZDHC tools and guidance available.

Work stream 3: Right to Know

This work stream aims at conducting extensive research on methodologies of chemical

disclosure which are hazardous in nature. This work stream has already recognized Pollutant Release and Transfer Register (PRTR) as one of the best methods for addressing the specific issues posed by ZDHC and advocated by the Right-to-Know principle. It also introduced a system, through the release of the MRSL, to prevent intentional use of hazardous chemicals in the manufacturing process as an interim action.

Work stream 4: Assessments and audits

This work stream has already created an environmental audit protocol and conducted 25 pilot audits across 8 countries. This work stream has developed audit tool in collaboration with Sustainable Textile Solution (STS), Hohenstein and OEKOTEX

Work stream 5: Management systems approach, structure and documentation

This work stream is specifically concerned on Chemical Management System (CMS) approach to make ZDHC functional. Following Plan-Do-Check-Act (PDCA) method means assessment, improvement monitoring /auditing and management review to ensure full-fledged functional chemical management system with continual improvement.

Work stream 6: Stakeholder Partnering

To make this approach meaningful and comprehensive partnering with relevant stakeholder is crucial; this particular work stream will facilitate collaboration amongst the stakeholder concerned.

Work stream 7: Chemicals Management Best Practices

This work stream will develop a monitoring plan to follow a factory's performance on some specific key criteria Including wastewater, air quality, water, energy and etc. Details of ZDHC can be found in the website: www.roadmaptozero.com



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Abdullah Al Mahmud Mahin, Managing Director and CEO of Hamid Fabrics Limited

Hamid Fabrics: A trendsetter in textile

By Omar Gias

Although the readymade garments (RMG) industry in Bangladesh flourished in the 1980s, there has been little development in the backward linkage sector. At present, only 25%-30% value addition takes place to the RMG products as manufacturers import bulk of the raw materials. Fabric is the main raw material for making garment and accounts for 75 percent of the garment cost. The finished garment relies on three

steps; first level for converting fibers/cotton to yarns, second step for converting yarns to grey fabrics and the final step for converting gray fabrics to dyed, printed or other finished fabrics. Out of three steps, Bangladesh is only capable of knitting and finishing in knitwear sector but far behind in producing yarn and fabrics which is a major factor for woven section. Hamid Fabrics Limited is one of the few companies that are shining as

luminaries in the bleak sky of Bangladesh's textile industry. Established in 1996 in Narsingdi, Hamid Fabrics Ltd, the textile division of Mahin Group, with a combined capacity of about 30,000,000 yards per year has positioned itself as one of the most reliable player in Bangladesh textile industry.

Abdullah Al Mahmud Mahin, the Managing Director and CEO of Hamid Fabrics, termed the high bank interest of the country as the main barrier to the growth of textile industry in Bangladesh. According to him, one of the pre-requisites to survive in the global textile market is that one should have a composite factory -- from spinning, weaving, printing, dyeing to finishing. Setting up the composite factory needs an estimated amount of at least Taka hundred crore. "So it is really difficult for an entrepreneur to succeed by taking loans from banks with an interest rate of 16-18 percent to establish such a composite factory", said Mr Mahin. Then pertinent question arises what is the secrets of success of Hamid Fabrics. "Hamid uses most sophisticated and advanced set of

textile machinery in the region. The weaving unit of it has 120 Ishikawa (Japan) rapier looms. Its dyeing and finishing units incorporate German and Japanese machinery of Kusters, Bruckner, Kyoto, Monforts etc. Besides, it has in-house laboratory fully equipped with all types of testing facilities, effluent treatment facilities as prescribed by the World Bank, caustic recovery plant to reduce effluent TDS and control pH -- all those assisted Hamid to remain true to its commitment of making quality products since its inception", the CEO of Hamid Fabrics replied. As a result, Hamid Fabrics has been nominated by the top apparel buyers across the globe like PVH, Abercrombie and Fitch, M&S, United Colors of Benetton, H&M, Esprit, C&A etc as their suppliers.

Mr Mahin thinks that there is ample scope of our textile industry to grow as we ourselves have a big domestic market for fabrics. The local textile can fulfill only 20 percent of domestic demand for woven fabrics. However, to tap the potential of the woven fabrics we need good infrastructure, uninterrupted supply of power and gas, and specialized textile zones, he added.

There is ample scope of our textile industry to grow as we ourselves have a big domestic market for fabrics. The local textile can fulfill only 20 percent of domestic demand for woven fabrics. However, to tap the potential of the woven fabrics we need good infrastructure, uninterrupted supply of power and gas, and specialized textile zones



Alliance for Bangladesh Worker Safety: Aiming to put RMG repairs within reach for factory owners

By Mesbah Rabin*



The garment industry in Bangladesh looks very different today from what it was a year and a half ago. Through diligent inspection of RMG factories, adoption of a unified safety standard and working with industry partners like the BGMEA, the Alliance for Bangladesh Worker Safety (Alliance) has made significant progress toward improving garment factory safety. Despite these efforts, more needs to be done to get fire safety equipment installed in all of Bangladesh's RMG factories.

The fire at Mega Yarn Dyeing Mills Limited on September 28 - which took the life of one factory worker and injured two others - is a sobering reminder of the important role safety equipment plays in saving human lives during an emergency. Following the initial Alliance inspection, the factory started the remediation process, and essential equipment including fire doors, a central fire alarm, strategically placed hydrants and staircase hand railings were installed in the factory. Workers also underwent Alliance safety training. Further improvements were still forthcoming - but those that had been completed contributed to the swift evacuation of the factory and, we believe, helped prevent further loss of life.

The Alliance is taking a number of important steps to help facilitate and ease the financial burden of factory repairs. First, in partnership with the BGMEA, we have worked over the last year to improve access to affordable fire safety equipment. Until recently, high import tariffs

put repairs out of reach for many factory owners. Thanks to our collective advocacy, the government in May 2014 eliminated high tariffs on safety equipment like fire doors, sprinkler systems and emergency lights.

Second, Alliance members are financially invested in helping factory owners improve safety. To date, members have committed millions in affordable access to capital to help factories implement safety upgrades. The Alliance is also aggressively working to ensure all factories have the same access to such low cost loans. While this is not an easy or simple process, we are working hard with local banks, Alliance members and BGMEA to ensure affordable financing is available to all who need it.

Third, to connect RMG factory owners with vendors of essential safety equipment, the Alliance worked with partners including BGMEA to organize the first International Trade Expo for Building and Fire Safety on February 23-24, 2014 in Dhaka. Attendees included factory owners, brand representatives, government officials, trade union leaders, international safety experts, product and service company exhibitors, technical specialists, international development agencies and NGOs. In addition to providing information about the new fire and building safety standards, the event connected participants with equipment vendors and panels on worker safety initiatives, including the Alliance.

As factories begin remediation, it is more important than ever for factory owners to continue to learn about the latest advances in fire safety equipment and establish relationships with vendors. Due to the success of the first Expo, we are pleased to join with BGMEA and other partners once again to organize a second Expo on December 7-9, 2014. Registration is still open for participants at www.buildingandfiresafety.com.

Together, we can make factory remediation more accessible and affordable for factory owners - and achieve the goal of protecting the backbone of our industry - workers.

** Mesbah Rabin is the Managing Director of Alliance for Bangladesh Worker Safety.*



Emergence of garment positively impacts on school enrollment, employment and marriage for Bangladeshi women: Study

By Tamanna Mahin

‘Behind every successful man there is a woman’. This may be a true saying; however, do we ever stop to think who stands behind these women in Bangladesh. Who supports them, holds their hand during hardships and lends them a shoulder to cry. It is Bangladesh’s massive readymade garment (RMG) sector that has played a crucial role in helping millions of women to come out of their houses and earn a living for themselves. The independence they achieved through their careers is motivational for women all over the world. These working women have stepped out of the poverty zone with

blessing of this industry. ’

The role the RMG industry has been playing in transforming the lives of millions of women in Bangladesh has been reflected in a study jointly conducted by Rachel Heath, University of Washington and A. Mushfiq Mobarak, Yale School of Management. The study of The National Bureau of Economic Research in the US says that the arrival of garment factories has positively affected school enrollment, employment, marriage, and childbearing decisions for Bangladeshi women. With the help of the RMG industry many women have escaped the entrapment of



underage marriage, child bearing at a young age, domestic violence, poverty and illiteracy.

The findings of the research titled "Manufacturing Growth and the Lives of Bangladeshi Women" suggest that girls exposed to the garment sector are more likely to delay marriage and childbirth. This is partly because the arrival of garment jobs - which reward literacy and numeracy - are more likely to lead to young girls being enrolled in school; while for older girls there is a greater chance of being employed outside the home in villages close to garment factories. The study also reveals that the demand for education generated through manufacturing growth appears to have a much larger effect on female educational attainment compared to a large-scale government conditional cash transfer program to encourage female schooling.

The RMG sector in Bangladesh was virtually non-existent in 1980s, but has grown an average of 17% per year since inception, and now

accounts for over 80% of Bangladesh's total export earnings. The industry currently employs almost 4.4 million workers in Bangladesh and was the first to provide employment opportunities to women in large-scale in a country where women traditionally have not worked outside their home. In addition to raising the opportunity cost of being married and having children, attractive manufacturing jobs require basic literacy and numeracy. Thus women have felt the need for literacy.

The RMG industry has helped put more young girls in school than ever before. According to an August 2012 study by Rachel and Ahmed Mushfiq Mobarak, 27 percent more young girls were going to school than before the garment industry existed in Bangladesh. The garment industry has paved way for our women and girls to come out of poverty and illiteracy.

Women who are exposed to the prospects of working in the RMG sector have a changed perception about marriage and childbearing. They see how marriage is not their only ticket out of misery. They can work and support themselves. They can earn an honest living without others' help. And as a chain reaction there is a fall in the number of teen pregnancies in Bangladesh. Fertility has dropped from 5.9 children per woman in 1983 to 2.3 births per woman in 2009 (World Development Indicators), and woman's average age at marriage has risen from 14.6 for marriages between 1980 and 1985 to 17.0 for marriages between 2005 and 2009 (Demographic and Health Survey). These statistics show to what extent the start up of the RMG sector in this country has helped build the nation. Delayed marriages lead to a fall in the dropout rates of girls. Girls tend to stay in school longer attaining a higher education that is required of them. That also helps them to get a better understanding of the world. A good education opens up several windows of opportunities for them. They can venture out into the working platform with some hope. Parents have now been seen encouraging their daughters to learn how to read and write. If they are able to earn a living, they are most likely to support their parents and that is a good hope for the parents.

Alliance independent review: Bangladesh Worker Safety Indicate Major Progress

Two former US Senators have expressed their satisfaction over the significant progress made by the Alliance for Bangladesh Worker Safety, a platform of 26 North American brands and retailers, in enhancing worker safety after completing a year of their operations. Bipartisan Policy Centre (BPC) Co-founder George Mitchell and Senior Fellow Olympia Snowe expressed their observations while addressing a forum organised to review progress of the body over the past one year. They also added that the findings indicated that the Alliance has made “significant and laudable progress” in the effort to improve safety in Bangladesh garment factories.

“My review, including interviews with stakeholders from all perspectives, has confirmed that the Alliance has made laudable progress in enhancing worker safety in year one of operations,” said Mitchell.

“I commend this effort and challenge the Alliance to continue this hard work in the years to come,” he added.

According to the annual report, the Alliance has completed 100% inspection of its 587 RMG units from where its signatories brand source products while it has found that 50% RMG units completed remediation. Mitchell further added that the Alliance also plans to continue to establish a culture of safety in Bangladeshi factories, which include training factory security guards and supervisors to prioritize human lives over property, to ensure that owners truly understand the proper way to make factories safe for their workers.

The platform has already submitted a list of 16 factories to the Expert Review Panel, of which 5 are fully closed, 9 are partially closed while the rest are not suggested for closure as yet.



H&M CEO meets Commerce Minister

H&M Group CEO Karl-Johan Persson met Commerce Minister Tofail Ahmed at the secretariat in Dhaka on October 14 2014. BGMEA President Md. Atiqul Islam was present at the meeting.

Persson also met BGMEA leaders at the H&M office in Dhaka to discuss different issues related to RMG industry and visited a couple of garment factories.

The commerce minister apprised the H&M CEO of the steps taken to improve workplace safety in the garment industry.

“The process yielded an unprecedented, five-year agreement among the overwhelming majority of US importers of ready-made garments from Bangladesh which established an ambitious blueprint for change, legally binding upon its members, and built upon the principles of cooperation, transparency, and accountability,” said Olympia Snowe in the statement.

Over the past year, the Alliance also trained 1.1 million workers on basic fire safety of which 97.8% can correctly identify what to do in case of fire, the statement said.

“We are pleased with the progress at our one-year mark and believe the right plan and partners are in place to continue this momentum and create lasting change in Bangladesh. But we also seek to constantly strengthen our approach so that we leave behind the process and capacity that is needed to ensure long-term and sustainable changes to factory safety,” said Ellen Tauscher, Independent Chair to the Alliance board.

Apart from that, the body also conducted a comprehensive baseline survey and findings that showed workers, who could correctly identify what to do in case of a fire, increased from 39% to 98%, and those who could correctly identify the five most common fire hazards increased from 2% to 51% following the basic fire safety training.

The retailer’s platform also compensated more than 1,000 workers displaced as a result of factory remediation or closure and pledged to provide 50% of lost wages for up to 4 months.

The Alliance committed itself to improve safety standard, including fire, electrical and structural safety following the collapse of Rana Plaza, which killed 1,135 workers and injured over 2,500 last year.

The future is dazzling for garment sector

Bangladesh will continue to be a hotspot for garment sourcing for its price competitiveness and quality products, German retailers said.

Furthermore, garment exports from Bangladesh will continue to grow and that too at a faster rate, as China, the world's largest apparel supplier, is struggling to retain its position owing to shortage of manpower and higher production costs.

As a result, Bangladesh will achieve the McKinsey & Company's predicted \$44.56 billion garment export by the end of 2020, the retailers said at a seminar on sustainable management in the textile and apparel industry at Stuttgart in Germany.

Garment exporters from Bangladesh, Myanmar and Ethiopia attended the seminar, organised by the Foreign Trade Association of German Retail Trade, IHK, German Asia Pacific Business Association and Bangladesh-German Chamber of Commerce and Industry.

Currently, Germany is the top destination of Bangladeshi garment products of the 28 European Union nations, with almost all of its major retailers that include Hugo Boss, Adidas, Olymp, KiK, s.Oliver and Gerry Webber now sourcing from Bangladesh.

The country exported \$4.38 billion of garment items to Germany in fiscal 2013-14, according to the Export Promotion Bureau.

At the seminar, in his keynote speech on the global market scenario, Stefan Wengler, managing director of the Foreign Trade Association of German Retail Trade, said China started losing its market share to other countries mainly for higher costs of production.

"Interestingly, in the last few years, labour costs have increased the most in China. This results in a higher domestic demand at the expense of exports and has a corresponding impact on the domestic price level."

With regards to Turkey, Wengler said it lost its long-term position as the second biggest apparel supplier to Bangladesh in 2013.

Wengler, however, said future garment businesses depend on fulfilment of five conditions including wage, freight charge, cotton price, infrastructure and stable relationship between suppliers and retailers.

Timo Prekop, an executive member of the board of German Asia Pacific Business Association, said Bangladesh would remain a significant sourcing destination for retailers.

Md. Atiqul Islam, President of Bangladesh Garment Manufacturers and Exporters Association, said the country will need to address the five issues of manpower, power, port, workplace safety and political stability to achieve \$44.56 billion garment export by 2020.

Hedayetullah Al Mamoon, Senior Secretary to the



Commerce Ministry of Bangladesh, said the country has already fulfilled almost all of the conditions asked on it in the US Action Plan and the Sustainability Compact signed with the EU.

"We had little compliance when the garment sector started developing in Bangladesh in early 80s, but with the growth of the sector the compliance has improved."

Buyer awards garment workers

Workers of a garment factory in Ashulia, Savar were awarded by the owners and the US clothing giant VF Corporation for putting out a fire on their own.

Medlar Apparels Limited employees received the token gifts in a ceremony at their factory on Friday. VFC Country Manager Dunham Grey handed out the gifts, namely a packet for each worker containing ingredients with which they can make sweetest.

Irtiza Zulfiqar Arif, Executive Director of Medlar, Shahidul Haque, General Manager of Administration, and other officials of the Medlar were also present on the occasion.

Owners said a total of 7,000 packets were given to the workers in their Ashulia and Shewraparha factories.

The packets contain one kilogram of rice and sugar, a packet of semolina, a packet of powdered milk, raisin, cardamom, cinnamon and a mug. Grey said, "We are very happy to buy products from a factory where workers are not only skilled in their own work but also in tackling crises."

Zulfiqar Arif said, "Last June 20, during Zohr prayers, an electric short circuit sparked a fire on the ground floor of the factory. As soon as the workers saw the fire, they used the firefighting equipment at the factory to extinguish it within 15 minutes." "Before the fire service arrived they had put out the fire; 130 workers took part in this. At least 11 were seriously injured in the attempt," he added. Shahidul Haque said the factory lost at least Tk 250,000 worth of equipment in the fire.

Zulfiqar Arif said when VFC heard of the incident they expressed the interest to provide incentives to the workers.

"At first they offered to give 10 kg rice and 10 kg lentils. We discussed it with workers, who said it sounded like relief supplies. Then we decided on this gift and arranged this appreciation program," he said.



BGMEA President Md. Atiqul Islam receiving 'Recognition Award 2014' from Bangladesh Bank Governor Dr. Atiur Rahman. The Centre for Non Resident Bangladeshis presented the award to BGMEA for its socio-economic contributions to Bangladesh development. Honorable State Minister for Foreign Affairs Md. Shahriar Alam, MP, among others, was present at the program.

BGMEA President Md. Atiqul Islam is seen speaking at the opening ceremony of 15th Textech Bangladesh 2014 International Expo in the capital.



US Ambassador Dan Mozena held a meeting with BGMEA Leaders, including BGMEA President Md. Atiqul Islam and Vice President Md. Shahidullah Azim, at BGMEA office.



BGMEA Vice President Md. Shahidullah Azim addressing a symposium on 'Energy Saving during Dyeing and Finishing' as Special Guest at Radisson Hotel in Dhaka. Adviser to the Prime Minister for Power, Energy and Mineral Resources Affairs Dr. Tawfiq-e-Elahi Chowdhury was present at the program as Chief Guest.

BGMEA President met with German Minister Peter Friedrich in Germany. (From left) Abdur Rauf, Commercial Counsellor, Bangladesh Embassy in Germany, Dr. Michael Brauch, Honorary Consul of Bangladesh in Baden Wuerttemberg, Farooq Siddiqui, Senior Vice President, BGCCI, Hedayetullah Al Mamoon, Senior Secretary, Ministry of Commerce Bangladesh, Peter Friedrich, Minister for Bundesrat, Europe and international Affairs, Germany, Md. Atiqul Islam, President, BGMEA, and Daniel Seidl, Executive Director, BGCCI, posed for photograph after the meeting.



BGMEA President Md. Atiqul Islam attended 'ILO-OECD Roundtable on Responsible Supply Chains in the Textile and Garment Sector' at OECD Conference Centre in Paris recently. Dan Rees, Director, Better Work Programme, ILO and Sandra Gallina, Acting Director Sustainable Development; Economic Partnership Agreements – African, Caribbean and Pacific; Agri-food and Fisheries, Trade Directorate-General, European Commission, among others, were also present at the roundtable.

Bangladesh's RMG Export to World (July-September, FY13-14 & FY 14-15)

Million US\$	Woven			Knit			Total		
	July-Sept	July-Sept	Growth %	July-Sept	July-Sept	Growth %	July-Sept	July-Sept	Growth %
Major EU Countries	2013-14	2014-15		2013-14	2014-15		2013-14	2014-15	
Austria	5.82	4.53	-22.21	9.14	8.05	-12.00	14.96	12.57	-15.97
Belgium	91.46	101.00	10.43	114.44	117.42	2.61	205.90	218.42	6.08
Bulgaria	0.01	0.01	-40.90	0.32	0.14	-57.31	0.34	0.15	-56.69
Denmark	31.01	38.94	25.54	109.08	143.90	31.92	140.10	182.83	30.50
Finland	1.93	1.95	1.02	5.49	6.59	20.18	7.42	8.54	15.19
France	117.41	111.74	-4.83	233.80	232.41	-0.60	351.21	344.15	-2.01
Germany	440.66	455.49	3.37	701.65	741.14	5.63	1142.31	1196.63	4.76
Greece	2.14	1.27	-40.42	3.25	4.06	24.84	5.39	5.34	-1.05
Italy	95.82	96.88	1.10	174.13	189.17	8.64	269.95	286.05	5.96
Ireland	17.53	24.29	38.61	41.02	38.55	-6.03	58.55	62.84	7.33
Netherlands	68.69	59.63	-13.20	99.81	91.93	-7.90	168.51	151.55	-10.06
Portugal	1.76	2.67	51.42	7.19	6.09	-15.25	8.95	8.76	-2.13
Romania	0.50	0.47	-6.51	0.69	1.03	47.98	1.20	1.50	25.10
Spain	143.94	151.00	4.90	224.84	238.82	6.22	368.78	389.82	5.71
Sweden	26.30	26.00	-1.12	57.23	66.41	16.04	83.52	92.41	10.64
U.K.	296.75	304.46	2.60	355.55	380.05	6.89	652.31	684.51	4.94
Cyprus	0.05	0.20	0.00	0.96	0.36	-62.81	1.01	0.56	-44.69
Czech Republic	12.52	16.35	30.53	11.86	13.45	13.38	24.38	29.79	22.19
Estonia	0.06	0.21	0.00	0.25	0.06	-74.79	0.31	0.27	-13.73
Hungary	0.01	0.05	411.41	1.29	0.61	-53.03	1.30	0.66	-49.32
Latvia	0.11	0.73	562.60	0.67	1.14	69.48	0.78	1.87	139.29
Lithuania	0.00	0.03	0.00	0.14	0.17	23.26	0.14	0.20	45.03
Malta	0.01	0.01	0.00	0.60	0.24	-60.57	0.62	0.24	-60.51
Poland	43.77	44.98	2.76	70.34	72.60	3.22	114.11	117.58	3.04
Slovakia	8.25	6.82	-17.34	12.07	9.96	-17.51	20.32	16.78	-17.44
Slovenia	1.22	1.92	57.71	4.62	4.47	-3.06	5.83	6.39	9.61
Sub-Total (EU)	1407.76	1451.62	3.12	2240.43	2368.80	5.73	3648.19	3820.42	4.72
EU % of World	46.25	49.00		70.90	72.43		58.80	61.29	
USA	999.50	911.22	-8.83	356.58	339.00	-4.93	1356.08	1250.22	-7.81
% of USA	32.84	30.76		11.28	10.37		21.86	20.06	
Canada	145.88	124.80	-14.45	123.00	105.44	-14.28	268.88	230.24	-14.37
% of Canada	4.79	4.21		3.89	3.22		4.33	3.69	
Non-Traditional Markets									
Australia	42.30	48.81	15.39	79.40	77.94	-1.84	121.70	126.75	4.15
Brazil	20.25	24.51	21.04	17.00	22.59	32.82	37.25	47.09	26.42
Chile	2.63	3.28	24.92	4.43	4.02	-9.21	7.05	7.30	3.49
China	29.90	39.37	31.65	23.15	34.59	49.42	53.06	73.96	39.41
India	25.08	28.36	13.08	5.82	7.29	25.17	30.91	35.65	15.36
Japan	90.33	86.01	-4.79	69.95	73.57	5.17	160.28	159.57	-0.44
Korea Rep.	19.27	32.39	68.07	17.08	17.32	1.40	36.35	49.71	36.75
Mexico	16.79	12.00	-28.57	26.79	23.88	-10.87	43.58	35.87	-17.69
Russia	11.52	12.63	9.64	20.43	23.10	13.08	31.95	35.73	11.84
South Africa	10.19	10.57	3.69	5.02	5.08	1.11	15.21	15.64	2.84
Turkey	119.30	72.85	-38.94	52.46	34.43	-34.36	171.76	107.28	-37.54
Other Countries	102.99	104.30	1.28	118.66	133.42	12.44	221.65	237.72	7.25
Sub-Total (Non-Trad.)	490.55	475.07	-3.16	440.19	457.22	3.87	930.74	932.29	0.17
% of Non-Traditional	16.12	16.04		13.93	13.98		15.00	14.96	
GRAND TOTAL	3043.69	2962.71	-2.66	3160.20	3270.46	3.49	6203.89	6233.17	0.47

Source: EPB, Compiled by RDTI Cell of BGMEA

New Market: **RUSSIA**

By A. K. M. Marzanul Islam Joy & Ratan Saha

Russia is one of the major players in the world market. Russian economy is the sixth largest in the world by PPP. The country has an abundance of natural resources, including oil, natural gas and precious metals, which make up a major share of Russia's exports. Their daily necessity is growing high as a nation resulting in a growth of import every year.

Russia got access to World Trade Organization (WTO) on 22 August 2012. Russia is an \$8.20 billion apparel market. Bangladesh's share of the Russian Apparel Import is 5.78% in 2013. Apparel export growth from Bangladesh to Russia was 38.23% in 2013 compared to 2012. In 2009, Apparel export to Russia was \$92.30million which was \$490.88 million in 2013. Russia is one of the five emerging (BRICS) economies in the world. It is one of the new emerging markets for Bangladesh.



Demographic and Economic Overview: Russia

Territory	: 17,098,242 sq km
Population	: 142,470,272 (July 2014 est.)
Population growth (annual %)	: - 0.03% (2014 est.)
Currency exchange rate	: 1 Ruble = US Dollar 0.026 = Euro 0.020 (21 September 2014)
Major Ports	: Kaliningrad, Nakhodka, Novorossiysk, Primorsk, Vostochnyy

Source: CIA, World Fact Book,

Major Economic Indicators:

1. GDP (current US\$)	: 2096.78 billion (2013)
2. GDP growth (Annual)	: 1.3%
3. GDP per capita (current US\$)	: 14,612
4. Inflation (Annual)	: 6.8%

Source: World Bank

5. Bilateral trade between Bangladesh and Russia:

Bangladesh's Export to Russia in 2012 – 13	: US\$ 208.29
Bangladesh's Import from Russia in 2012 – 13	: US\$ 337.76
Bangladesh's Trade Deficit with Russia in 2012 – 13	: US\$ - 129.47

Source: EPB & Bangladesh Bank; Value in million US\$

Import Scenario of Russia's Clothing Industry

Russia's Clothing Import from the world:

Table 3

Russia's clothing import from World						
Product Code	Product label	Value in US\$ million				
		2009	2010	2011	2012	2013
61	Knit	1629.28	2580.65	3271.39	4099.76	4189.68
62	Woven	2045.03	2971.43	3470.07	4097.25	4298.66
Total (61+62)		3674.31	5552.08	6741.47	8197.01	8488.34
Growth		-13.04%	51.11%	21.42%	21.59%	3.55%

Source: ITC

Table 4

Russia's clothing import from Bangladesh						
Product Code	Product label	Value in US\$ million				
		2009	2010	2011	2012	2013
61	Knit	60.36	97.03	183.23	207.14	283.32
62	Woven	31.94	48.60	86.58	147.97	207.56
Total (61+62)		92.30	145.63	269.81	355.11	490.88
Growth		6.96%	57.78%	85.27%	31.62%	38.23%
% of Russia's total apparel import		2.51	2.62	4.00	4.33	5.78

Source: ITC

Russia's Clothing Import from Bangladesh:

From the table, it can be seen that import of apparel products from Bangladesh by Russia radically increased from 2009. It was USD 92.30 million in 2009 and it reached USD 490.88 million in 2013. In 2010 and 2011, the import increased by 57.78% and 85.27% respectively. In 2013, the import grew by 38.23% and it was 5.78% of Russia's total apparel import from the world. Bangladesh's share of Russian apparel import grew significantly as it was only 2.51% in 2009.

2013 scenario:

Table 5

Russia's clothing import in 2013 Q2 & 2014 Q2 from the World				
Product Code	Product Level	Value in US\$ million		
		2013-Q2	2014-Q2	2014-Q2 Change %
61	Knit	810.94	790.02	-2.58
62	Woven	806.73	792.24	-1.80
Total (61+62)		1617.67	1582.26	-2.19

Source: ITC

In 2013, Russian import from Bangladeshi apparel showed significant increase. In quarter two (Q2) 2014 knit import from Bangladesh grew by 25.36% respectively. For woven, it grew by 11.33% respectively. The overall import from Bangladesh grew by 19.21% in 2014 Q2.

Table 6

Russia's clothing import in 2013 Q2 & 2014 Q2 from the Bangladesh				
Product Code	Product Level	2013-Q2	2014-Q2	2014-Q2 Change %
61	Knit	60.36	75.66	25.36
62	Woven	47.13	52.47	11.33
Total (61+62)		107.49	128.13	19.21

Source: ITC

Apparel Sourcing Trend

Top 10 Knitwear and woven Garment exporting countries to Russia in 2013:

From the following table, it is seen that in Knitwear, Bangladesh is the 3rd largest exporting country to Russia. In 2013, Bangladesh exported \$ 283.32 million worth of knitwear and the market share is 6.76%. China is the top supplier followed by Turkey and Belarus with market share of 42.68%, 7.10% and 5.32% respectively.

Bangladesh is the 5th largest exporting country to Russia for woven product with a market share of 4.83%. China is the market leader with 46.50% market share. We need to increase our share for these items by our increased presence in the market.

Table 7

Knitwear (61)				Woven (62)			
Imported value in US\$ million			Market Share %	Imported value in US\$ million			Market Share %
Rank	Exporters	2013	2013	Rank	Exporters	2013	2013
	World	4189.68			World	4298.66	
1	China	1788.32	42.68	1	China	1998.73	46.50
2	Turkey	297.64	7.10	2	Belarus	256.85	5.98
3	Bangladesh	283.32	6.76	3	Italy	255.82	5.95
4	Belarus	223.06	5.32	4	Turkey	251.54	5.85
5	Uzbekistan	188.00	4.49	5	Bangladesh	207.56	4.83
6	Italy	184.50	4.40	6	Viet Nam	197.29	4.59
7	Serbia	139.77	3.34	7	Kazakhstan	184.82	4.30
8	Kazakhstan	138.38	3.30	8	India	135.71	3.16
9	India	97.89	2.34	9	Indonesia	77.61	1.81
10	Ukraine	83.81	2.00	10	Morocco	72.36	1.68

Product analysis

Knitwear:

From the table 8, it can be seen that among the top 10 Bangladeshi knitwear items, T-shirts, singlets and other vests are the main item to Russia as total value is US\$ 102.05 million in 2013.

Table 8: Bangladesh's Top 10 knitwear exports to Russia

Product Code	Product Label	Russia imports from Bangladesh		
		Value in US\$ million		
		2011	2012	2013
6109	T-shirts, singlets and other vests, knitted or crocheted	74.59	71.39	102.05
6110	Jerseys, pullovers, cardigans, etc, knitted or crocheted	68.48	75.52	94.82
6104	Women's suits, dresses, skirt etc & short, knit/ croch	14.26	20.48	26.10
6105	Men's shirts, knitted or crocheted	7.15	8.92	15.99
6103	Men's suits, jackets, trousers etc & shorts, knit/croch	2.76	5.75	9.95
6111	Babies' garments, knitted or crocheted	3.54	5.92	8.98
6106	Women's blouses & shirts, knitted or crocheted	5.54	8.08	8.98
6108	Women's slips, panties, pyjamas, bathrobes etc, knitted/crocheted	2.59	4.49	6.22
6107	Men's underpants, pyjamas, bathrobes etc, knit/ croch	1.36	2.36	3.80
6112	Track suits, ski suits and swimwear, knitted or crocheted	0.42	0.59	1.78

Source: ITC

Table 9: Russia's top 10 knitwear imports from the world

Product Code	Product Label	Russia's imports from World		
		Value in US\$ million		
		2011	2012	2013
6110	Jerseys, pullovers, cardigans, etc, knitted or crocheted	827.33	934.84	1042.27
6104	Women's suits,dresses,skirt etc&short, knit/croch	440.72	947.05	727.12
6109	T-shirts, singlets and other vests, knitted or crocheted	552.27	579.80	651.80
6115	Panty hose, tights, stockings & other hosiery, knitted or crocheted	512.00	600.64	608.81
6108	Women's slips, panties, pyjamas, bathrobes etc, knitted/crocheted	204.42	228.48	247.28
6103	Men's suits, jackets, trousers etc& shorts, knit/croch	84.59	100.09	150.48
6107	Men's underpants, pyjamas, bathrobes etc, knit/croch	100.36	105.59	126.82
6111	Babies' garments, knitted or crocheted	93.51	102.16	124.60
6112	Track suits, ski suits and swimwear, knitted or crocheted	97.14	107.82	118.59
6106	Women's blouses & shirts, knitted or crocheted	100.53	103.89	96.85

Source: ITC

Woven:

From table 10, it can be seen that among the top 10 Bangladeshi woven wear items, women's suits, jackets, and dresses skirts, shorts are the main items worth of US\$ 64.47 million in 2013. The second top item was Men's suits, jackets, trousers, shorts etc worth of US\$ 63.18 million.

Table 10: Bangladesh's Top 10 woven items to Russia

Product Code	Product Label	Russia imports from Bangladesh		
		Value in US\$ million		
		2011	2012	2013
6204	Women's suits, jackets, dresses skirts etc & shorts	24.39	46.71	64.47
6203	Men's suits, jackets, trousers etc & shorts	31.08	46.72	63.18
6205	Men's shirts	13.23	20.38	27.60
6201	Men's overcoats, capes, wind jackets etc o/t those of hd 62.03	5.29	12.75	21.68
6206	Women's blouses & shirts	4.68	8.65	11.72
6202	Women's overcoats, capes, wind-jackets etc o/t those of hd 62.04	4.26	7.04	9.72
6209	Babies' garments and clothing accessories	1.44	2.39	3.48
6211	Track suits, ski suits and swimwear; other garments	1.16	1.41	2.35
6212	Brassieres, girdles, corsets, braces, suspenders etc & parts	0.44	0.99	1.45
6210	Garment made up of fabric of heading no 56.02,56.03,59.03,59.06/59.07	0.19	0.37	1.07

Source: ITC

Table 11: Russia's top 10 woven imports from the world

Product Code	Product Label	Russia imports from World		
		Value in US\$ million		
		2011	2012	2013
6204	Women's suits, jackets, dresses skirts etc & shorts	1011.33	1146.92	1246.09
6203	Men's suits, jackets, trousers etc & shorts	557.29	603.74	703.25
6202	Women's overcoats, capes, wind-jackets etc o/t those of hd 62.04	543.51	535.31	610.50
6201	Men's overcoats, capes, wind jackets etc o/t those of hd 62.03	418.24	432.87	521.40
6206	Women's blouses & shirts	243.06	310.28	305.55
6212	Brassieres, girdles, corsets, braces, suspenders etc & parts	138.32	314.44	218.80
6205	Men's shirts	193.85	190.16	209.70
6208	Women's singlets, slips, briefs, pyjamas, bathrobes etc	26.08	206.40	115.85
6211	Track suits, ski suits and swimwear; other garments	78.78	103.43	103.10
6210	Garment made up of fabric of heading no 56.02,56.03,59.03,59.06/59.07	89.17	76.84	78.21

Source: ITC

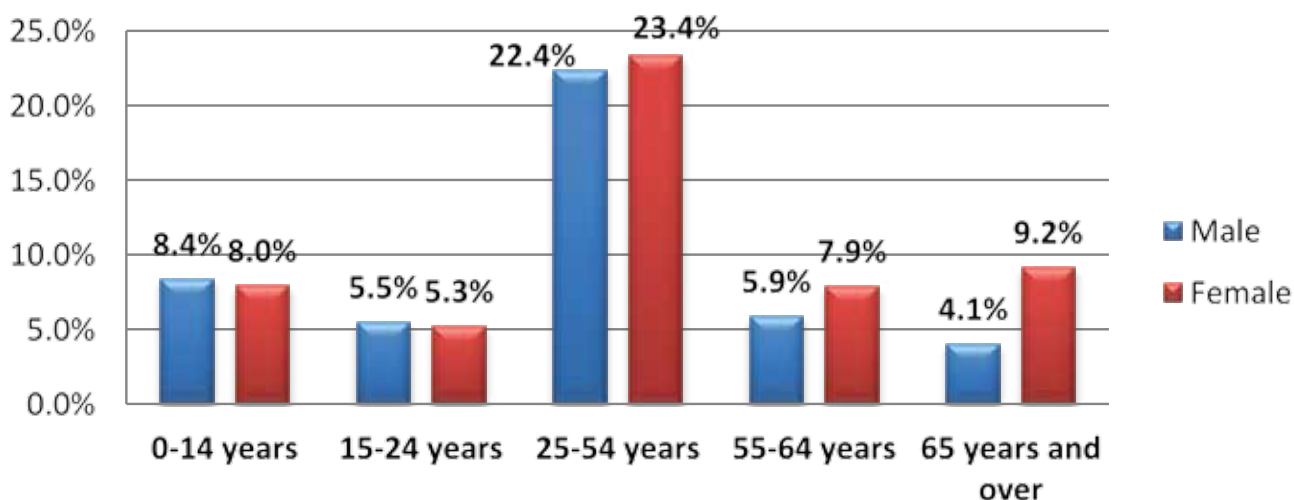
Market segmentation:

By age: From the following table, it can be seen that people aging from 20 to 50 are the highest numbers in Russia. Persons at the age group of 25-55 which are within the working ages constitute more than 45.8% of the total population and can be a good target customer for Bangladesh RMG for the day to day clothing.

Table 12:

Age	Male	Female	share of total population		Total
			Male	Female	
0-14 years	11,980,138	11,344,818	8.4%	8.0%	23,324,956
15-24 years	7,828,947	7,482,143	5.5%	5.3%	15,311,090
25-54 years	31,928,886	33,319,671	22.4%	23.4%	65,248,557
55-64 years	8,408,637	11,287,153	5.9%	7.9%	19,695,790
65 years and over	5,783,983	13,105,896	4.1%	9.2%	18,889,879
Source: CIA			Total		142,470,272

Share of total population



Market access requirements:

Custom tariff policy in Russia is a bit complicated. The government of Bangladesh along with the industry representatives is trying to get duty free access to Russia. Besides, banking and payment system in Russia is a problem for Bangladeshi entrepreneurs. They don't follow the system we follow for doing business with other countries. We need to establish relationships with their financial institutions to ease mode of payment. Every year, very few of our garment exporters participate in the Fashion Industry International Fair held in Russia although there is the potential to capture the large market share of Russia.

Important contact addresses:

Russian Federation

Federal State Statistics Service
39, Miasnitskaya St., bldg. 1, 107450, Moscow, Russia
Phone: (495) 607-4902.
Web: <http://www.gks.ru/>

Embassy of the Russian Federation in Bangladesh

House NE(J) 9, Road 79,
Gulshan-2, Dhaka 1212
Phone: Consular Department
(8802) 988-48-47, (8802) 988-16-80
Reception Desk
(8802) 988-42-24, (8802) 988-93-79
(8802) 988-00-11
Fax: (8802) 986-32-85
E-mail: rusembbd@gmail.com
Facebook ID: <https://www.facebook.com/rusembassy>

Fair Calendar:

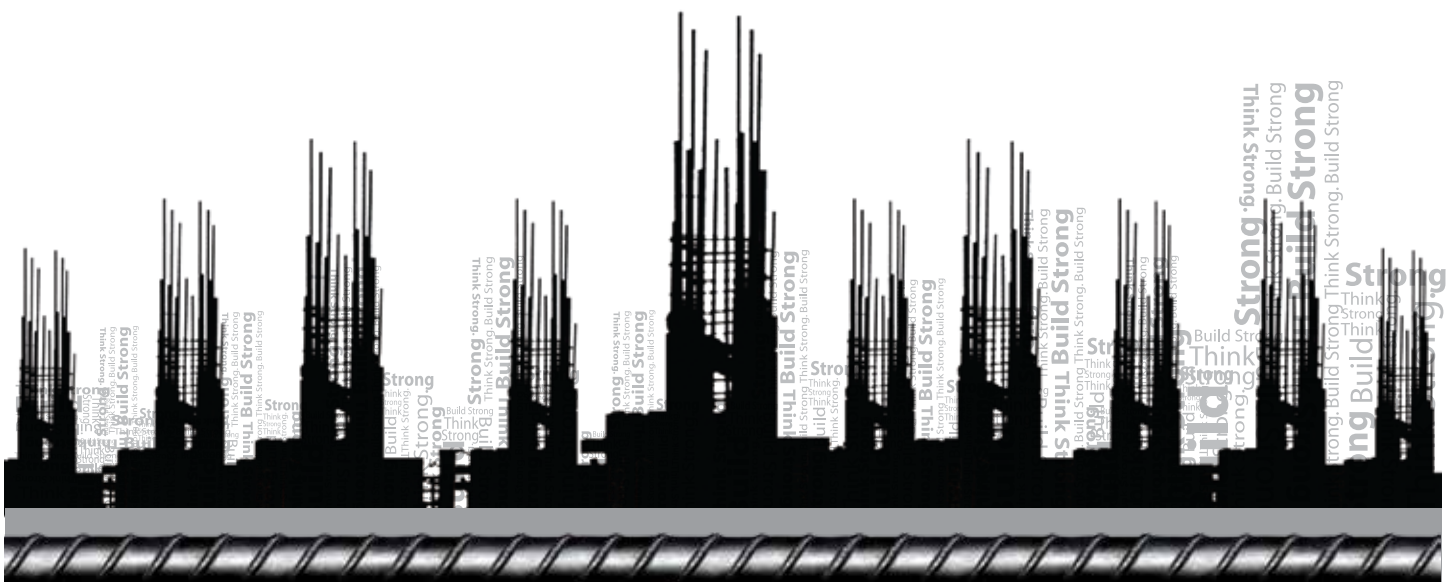
Fair Name	VENUE & ADDRESS	Date	Contact Details
Emergency prevention and elimination. Fire safety.	University of Nizhni Novgorod 23 Prospekt Gagarina, 603950, Nizhniy Novgorod, Russia	07-09 Oct 2014	Organizer: ZAO Expocentre 14 Krasnopresnenskaya Moscow, Russia
Fashion Industry Exhibition	Saint Petersburg Sports and Concert Complex Yuri Gagarin Ave, Building 8 St. Petersburg, Russia	09-12 Oct 2014	Farexpo Limited 8, Gagarina pr, Peterburgskiy SCC St. Petersburg, Russia
Texcare Russia	Expocentre Fairgrounds 14, Krasnopresnenskaya nab. Moscow, Russia	01-02 Oct 2014	Crocus Expo 143400, Moscow Area, Krasnogorsk, 65-66 km mkar, Trade Exhib Ition Complex Russia
Autumn Dictate The Style	Expocentre Eurasia 194100, Ul Captain Voronin, 13 St. Petersburg, Russia	16-20 Oct 2014	Congress and Exhibition Association SIVEL 194100, Ul Captain Voronina, 13 St. Petersburg, Russia
Autumn Salon Togliatti	UIC Olympus Primorsky Boulevard 49, Togliatti Tolyatti, Russia	23-26 Oct 2014	Expo- Togliatti RF 445003 Togliatti, Komzina Street 6 Samara, Russia
Textilelegprom	All-Russian Exhibition Center (V.V.C) GAO VVC, Estate 119, Mir Prospect, 129223 Moscow, Russia	23-26 Sep 2014	RLP-Fair LLC 119021, Zubovsky Blvd 22/39 Moscow, Russia

Source: <http://10times.com/babytime-siberia>

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