

**Annual Report**  
**Taiwan Garment Industry Association**

109年 年報  
台灣區製衣工業同業公會



**2020**

2020

## 目錄 CONTENT

### 04 理事長的話

### 08 壹 台灣區製衣工業同業公會

- 一、公會簡介
- 二、理監事會
- 三、會員服務
- 四、榮譽榜

### 15 貳 防疫先鋒

### 16 參 會務工作

- 一、市場拓銷
- 二、工廠觀摩
- 三、時尚脈動
- 四、人才培育
- 五、世代創新
- 六、國際交流
- 七、趨勢分享
- 八、產業升級
- 九、社會服務

### 36 肆 2020 製衣產業統計

### 40 伍 資產負債表

### 42 陸 展望

### 05 Words from the Chairman

### 09 I. About TGIA

- A. Introduction
- B. Board of Directors & Board of Supervisors
- C. Membership & Services
- D. Honors & Awards

### 15 II. A Pioneer in Pandemic Prevention

### 17 III. Overview of TGIA's 2020 Operations

- A. International Marketing
- B. Factory Tour
- C. Fashion Vibe
- D. Training & Talent Upgrading
- E. The Passing of the Torch
- F. External Relations
- G. Insight Sharing
- H. Industrial Upgrading
- I. Social Service

### 37 IV. Taiwan's Apparel Export Statistics 2020

### 41 V. Financial Affairs

### 42 VI. Prospects

## 理事長的話

2020 年，國際爆發新冠肺炎 (COVID-19)，牽動了全球經貿情勢之改變，也撼動了全球經濟之發展，導致全球經濟均有衰退現象。而以出口為導向的我成衣業者受此影響，遭逢客戶砍單、延後交貨，甚至品牌商宣佈破產保護等突如其來的打擊甚巨。

本會為協助會員廠度過疫情難關，在 109 年度裡，除協助政府宣導所提出的各項紓困措施外，亦積極協助會員廠因應變局，辦理：

### 一、「受嚴重特殊傳染性肺炎影響之傳統產業創新研發政策資源說明會」：

鼓勵有意申請創新研發計畫之會員廠與製衣產業相關業者參與，會議中邀請中國生

產力中心、中衛發展中心、台灣中小企業聯合輔導基金會、SBIR 計畫專案辦公室等相關計畫窗口出席說明，並協助釋疑。

### 二、「製衣業數位轉型與升級人才培力計畫」：

規劃製衣業數位轉型與升級人才培力、成衣業升級轉型專業技術培訓、商品設計企劃全方位養成等課程。邀請產、學、研專家針對數位轉型的發展趨勢以及產業應用模式進行授課，協助企業員工獲得製衣業數位轉型與商品企劃等專業知識。

### 三、協助會員廠拓銷方面：

參加「2020 年德國慕尼黑 ISPO 展」、「2020 年台北紡織展 (TITAS 2020)」等展覽拓銷活動。

理事長 林瑞岳 先生  
Chairman, Mr. Ray Lin



## Words from the Chairman

The outbreak of COVID-19 pandemic in 2020 not only shook the world economy but also reshaped the global trading landscape, leading to a universal economic downturn worse than the financial crisis in 2008-2009. Taiwan's export-oriented apparel industry is therefore inevitably heavily stricken by order cancellations, requests for delivery postponement, and even bankruptcies of brand/retailer clients.

In order to help our members survive the crisis, TGIA, besides effectively communicate government's relief and stimulus measures to the industry, also took the following actions in 2020:

- Holding the presentation "Innovation and Research Resources Available for Conventional Industries Impacted by COVID-19 Pandemic". In the presentation, which was open to members as well as industry-related companies, TGIA invited several executive organizations including CPC, CSD, SMECF and SBIR Project Office to introduce and explain the projects and grants available for innovation and R&D of conventional industries.

- Carrying out the Garment Industry's Digital Transformation and Talent Upgrading Project. The project offered courses in digital transformation, professional skills upgrading and product design and development for the garment industry. Experts from industry, academia and research communities were invited to better equip the trainees to face the post-pandemic era.

- Assisting members to develop markets during the pandemic. TGIA continued to assist members in participating trade fairs including both the physical and virtual ISPO Munich 2020 and TITAS 2020.

- Assisting members to optimize their product range and product development. TGIA hosted two fashion trend seminars for Spring/Summer 2021 and Autumn/winter 2021/22 respectively, as well as a new product exhibit to inform members of the latest trend information for the coming season. TGIA also promoted actively the cooperation between eco and functional textiles manufacturers and garment producers.

#### 四．協助提升產品品級方面：

舉辦「2021 春夏流行趨勢線上發表會」、「2021/22 秋冬流行趨勢及商品發表會」暨「秋冬新產品展示會」，並積極推動紡織中、下游環保及功能性布料與成衣產業共同合作。

#### 五．續推動「產學合作」：

期能為業界培育扎根人才，並呼籲政府順應潮流，積極培育智慧製造人才，儲備專業技術人才，以為業界所用。

#### 六．策略聯盟方面：

「成毛衣及服飾聯合拓銷聯盟」邀請「台灣智慧型紡織品協會 (tsta)」加入，更名為「台灣時尚科技紡織聯盟」，集紡織與科技能量，持續推動「智慧時尚園區」之設立。

#### 七．舉辦系列講座暨與本業有關之專題演講及研討會等活動。

本會所舉辦的各項活動，在全體理、監事及各委員會正、副主任委員精心擘劃、同心協力及會務人員之盡心盡力下，都獲得會員廠的熱烈參與及肯定，也獲得政府相關單位的迴響與重視。

本會將秉持以往服務會員廠之精神與熱忱繼續更努力的為會員服務，更期盼會員廠隨時提供寶貴意見或建議，俾供本會作為釐訂工作計畫之參考。

最後，敬祝各位平安健康、萬事如意、事業發達！謝謝各位！

台灣區製衣工業同業公會

理事長 **林瑞岳** 謹識

- Continuing to promote industry-academia collaboration. TGIA continued to call on the government to facilitate the cultivation of professional talents, in smart manufacturing particularly, for the garment industry.

- Strengthening cross-sector strategic alliances. The Garment and Sweater Marketing Alliance, a joint force of TGIA and Taiwan Sweater Industry Association, welcomed the joining of Taiwan Fashion and Smart Textiles Alliance in 2020. The alliance was then renamed as Taiwan Smart Fashion Alliance to integrate resources and capabilities of Taiwan's textile, electronics and information technology industries to promote the establishment of a smart fashion tech-park in Taiwan.

- Hosting seminars and presentations. TGIA organized a range of presentations and seminars to keep our members updated on the latest global development of the industry.

I hereby would like to extend my sincere gratitude and appreciation to our Directors, Supervisors and staff for their efforts and dedication in organizing TGIA's activities and serving our members. I would certainly also like to thank our members and the related government agencies for their firm support to and participation in our programs and events. TGIA will strive continuously to deliver better services to our members, and any feedback or suggestions from members will be highly welcome and valued.

Last but not least, I wish you all the best and a safe and healthy 2021.

Taiwan Garment Industry Association

*Ray Lin*

Chairman

## 壹 台灣區製衣工業同業公會

### 一、公會簡介

本會成立於民國 45 年，原名為「台灣區襯衫工業同業公會」，後為配合政府積極拓展外銷政策，於民國 50 年改稱為「台灣區製衣輸出業同業公會」，復於民國 63 年改組為「台灣區製衣工業同業公會」，自創立迄今已近 64 年，現有會員廠（含贊助廠商）約計 143 家。

為配合會員廠需要，培訓製衣技術人才，本會於民國 69 年 12 月 1 日成立職業訓練中心，開當今全國區級工業同業公會辦理職業訓練之先河，嗣為擴大訓練規模，於

林口興建校舍，民國 74 年 8 月落成，新校舍面積達 1,500 多坪，專攻各班別學員訓練之用，結訓學員逾萬人。後因成衣業生產環境改變，成衣廠多將營運總部留在國內，生產基地移往更具競爭力之海外地區生產。因此，學員日減，本會亦自民國 85 年 4 月起遷移至愛國東路會址繼續辦理在職訓練方面之課程，以嘉惠製衣業界。



監事會召集人 陳明輝 先生  
Convener of Board of Supervisors  
Mr. Ming-Huei Chen

## I. About TGIA



副理事長 吳道昌 先生  
Vice Chairman  
Mr. Donald Wu

### A. Introduction

Taiwan Garment Industry Association (TGIA) was founded in 1956 under the name of Taiwan Shirt Industry Association (TSIA) and was renamed as Taiwan Garment Export Industry Association (TGEIA) in 1961 in line with the government's export promotion policy. In 1974, the Association was restructured to expand its membership and adopted the current name ever since. With a history of 65 years, TGIA now has 143 members (including sponsors).

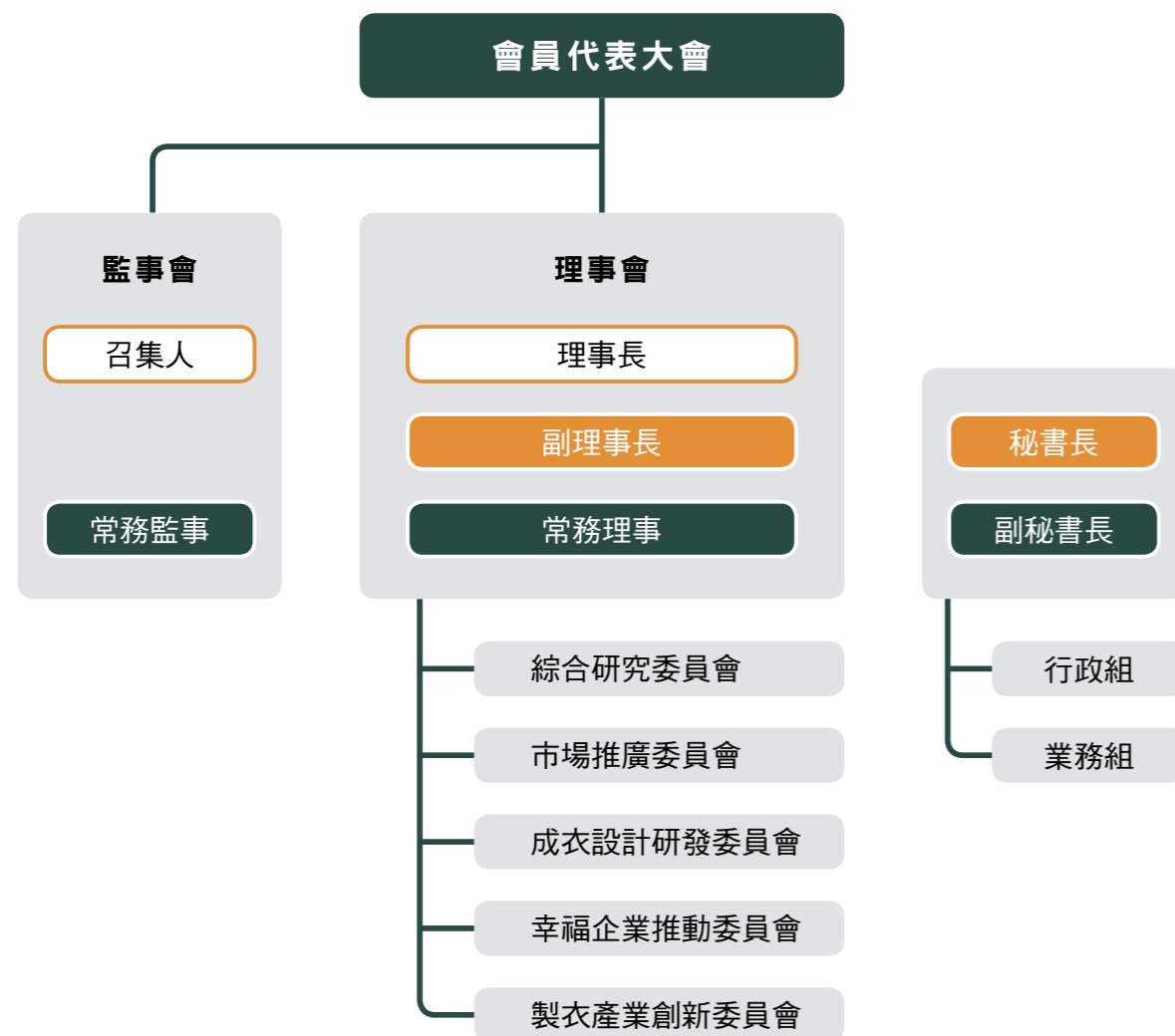
To meet members' need for a more skilled workforce for the industry, TGIA set up a vocational training center, first of its kind by an industry association, on December 1, 1980. Then in August 1985,

the Linko campus, sitting on an area of nearly 5,000 m<sup>2</sup>, was inaugurated to accommodate more trainees. Over the years, more than 10,000 people have received training sessions in this center and contributed their expertise to the industry. In April 1996, the Association moved the training center to its office at Ai Kuo East Road due to the fact that most of the member companies, while keeping their operation headquarters in Taiwan, have relocated their production facilities abroad.

## 二、理監事會

本會依章程規定設理事會、監事會；理事會設常務理事、理事，並推選理事長及副理事長一人，綜理一切會務。理事會下分設綜合研究、市場推廣、成衣設計研發、幸福企業推動、製衣產業創新委員會等 5 個專業委員會，分別負責有關本業法令之研究、分

析與建議事項。監事會置常務監事及監事，並推選監事會召集人，負責監察本會會務及財產等事項。理事會下置秘書長、副秘書長各一人，負責辦理一切會務，並設行政、業務兩組，分別處理各項會務。



### 本會會務工作人員

秘書長：駱春梅  
副秘書長：曾家宏  
業務組長：陳秀珠  
行政組長：林靜君

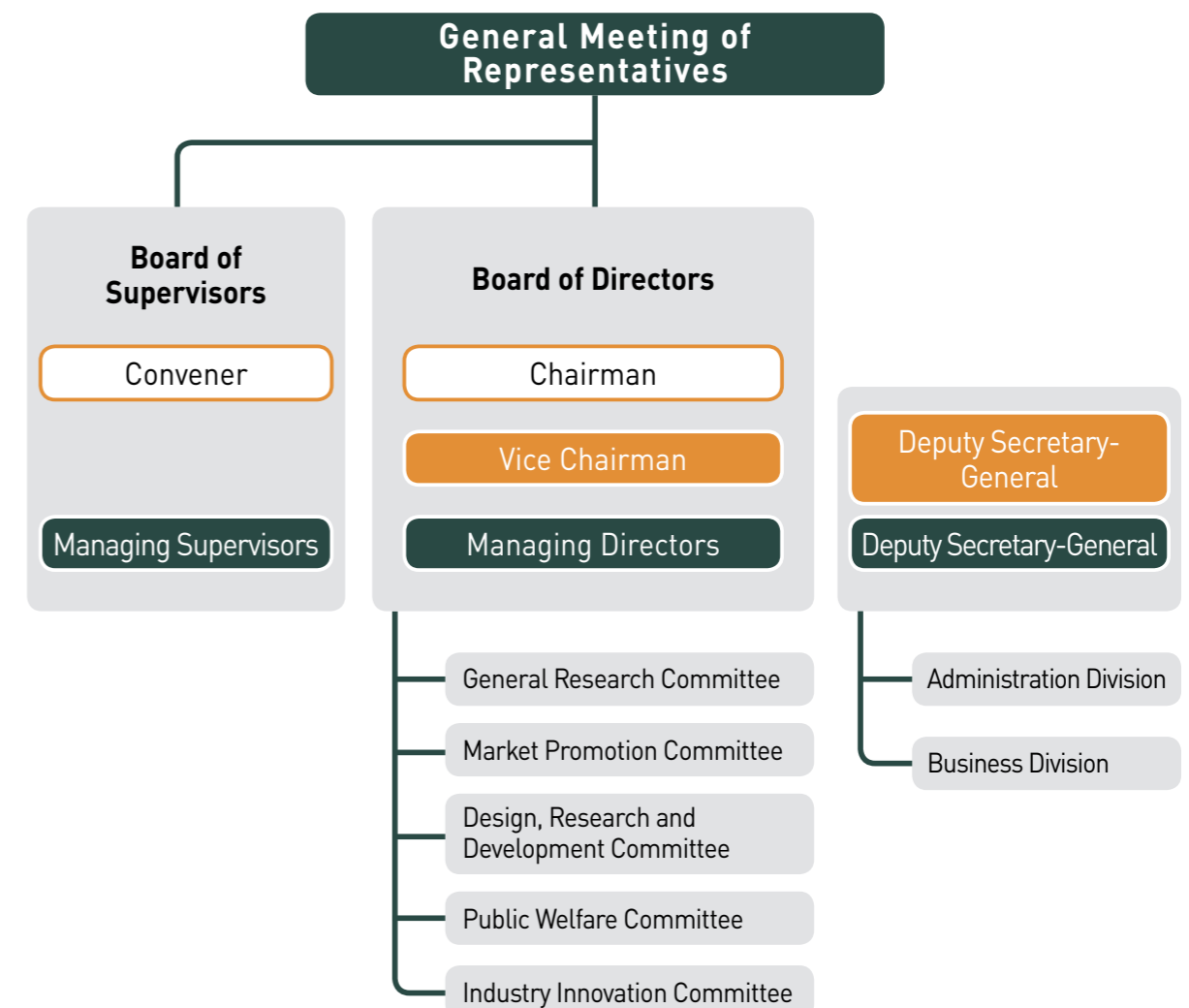
### Officers

Secretary General: Chuen-Mei Lo  
Deputy Secretary General: Chia-Hung Tseng  
Head of Business Department: Hsiu-Chu Chen  
Head of Administration Department: Ching-Chun Lin

## B. Board of Directors & Board of Supervisors

TGIA Board of Directors and Board of Supervisors are established in accordance with the Association's Rules. The Board of Directors is composed of Managing Directors and Directors who elect a chairman and a vice chairman to lead the board and oversee the Association. Under the board there are five special committees: General Research, Market Promotion, Design, Research and Development, Public Welfare and Industry Innovation, taking charge of the study, analysis and

recommendation with regard to the industry-related topics, issues, regulations and activities. The Board of Supervisors is composed of Managing Supervisors and Supervisors who elect a convener and are responsible for supervising the Association's affairs and assets. Under the Board of Directors are the Secretary-General and the Deputy Secretary-General who manage and oversee the operation of two Divisions: Business and Administration.



## 第十六屆理、監事

理事長	林瑞岳
名譽理事長	蔡昭倫、黃華德
副理事長	吳道昌
常務理事	楊紹欣、何煌清、張昭源、吳英朗、陳爾彪、黃奇輝、劉梅君
理事	曾俊郎、黃天發、李瑞福、郭文德、詹新長、張容維、蔡秋至、邱創琳、許春封、吳麗鳳、楊碧雲、李源珍、陳志榮、林學祥、蔡秋雄、陳國欽、陳彩能、蘇淵謨
監事會召集人	陳明輝
常務監事	林齊如、吳重行
監事	黃萬福、江乾甫、吳義春、英宗宏、洪金全、李清輝

## 2020 TGIA Board of Directors and Board of Supervisors

Chairman of the Board	Ray Lin
Honorary Chairman	Roland Tsai、Walter Huang
Vice Chairman	Donald Wu
Managing Directors	Allen Yang、Huang-Ching Ho、Steve Chang、Jeff Y. Wu、Philip Chen、Chi-Hui Huang、M.J.Liu
Directors	Chun-Lang Tseng、Louis Huang、Ruej-Fwu Lee、Wen-Teh Kuo、Martin Chan、Debbie Chang、Leo Tsai、Aric Chiu、Samuel Hsu、Li-Feng Wu、Cloudia Yang、Judy Lee、Phillip Chen、Frank Lin、Terry Tsai、Jason Chen、Russell Chen、Yuan-Mou Su
Convener of Board of Supervisors	Ming-Huei Chen
Managing Supervisors	Chi-Lu Lin、Edward Wu
Supervisors	Warren Huang、Chien-Fu Chiang、Yi-Chun Wu、Eric Ying、Jin-chen Hong、C.H.Lee

## 三、會員服務

誠摯邀請取得工廠登記證並經營成衣業務之業者加入本會，本會會員按資本額分為甲、乙、丙、丁四級。

甲級：資本額新台幣 5 億元 ( 含 ) 以上；  
乙級：資本額新台幣 2 億元 ( 含 ) 以上，未滿 5 億元；  
丙級：資本額新台幣 5 千萬元 ( 含 ) 以上，未滿 2 億元；  
丁級：資本額新台幣 5 千萬元以下。

## 本會提供之會員服務包括：

1. 協助會員參加國內外紡織成衣展拓銷國際市場；
2. 舉辦流行趨勢發表會與新產品展示會；
3. 辦理與本業相關之研討會及專題演講；
4. 籌組拓銷考察團協助會員貿易拓銷及工廠觀摩；
5. 彙整紡織成衣最新產業資訊並寄發電子報；
6. 協助會員申請各類創新研發計畫補助；
7. 本業相關政策、法規、行政措施之溝通與建議。

## C. Membership &amp; Services

All enterprises with factory registration certificate and engaged in the garment business are cordially invited to join the Association. There are four types of membership:

- A: members with a registered capital of over NT\$500 million (included)  
B: members with a registered capital of between NT\$200 (included)-500 million  
C: members with a registered capital of between NT\$50 (included)-200 million  
D: members with a registered capital of below NT\$50 million

## Our services:

1. Assisting members in participating both domestic and foreign textile and apparel trade fairs to develop international market
2. Hosting fashion trend and new product presentations
3. Holding seminars and conferences on apparel industry related topics and issues
4. Organizing trade missions and business study tours
5. Collecting and distributing the latest textile/apparel information via newsletters
6. Assisting members to apply various innovation and research project grants
7. Assisting the communication, coordination and recommendation of apparel industry related policies, regulations and administrative measures

#### 四、榮譽榜

##### 1. 本會榮獲「內政部辦理工商自由職業團體績效評鑑」優等團體：

內政部為督導各級人民團體，以健全各團體組織運作，強化服務功能，辦理工商自由職業團體績效評鑑，本會獲評為優等團體，已於 109 年 11 月 3 日接受內政部頒發獎狀表揚。

#### D. Honors & Awards

TGIA was rated as "Good" group in the Performance Evaluation of Industrial, Commercial and Professional Groups by the Ministry of the Interior in November, 2020.



駱秘書長春梅代表領獎

##### 2. 本會黃監事萬福榮獲「中華民國工礦團體優良理、監事」獎：

本會黃監事萬福係經本會第 16 屆第 9 次理監事聯席會議通過推荐參加選拔，嗣經該會選拔委員會審查評選，獲選為優良理、監事，已於 109 年 11 月 11 日工業節慶祝大會接受內政部及工業總會頒獎表揚。

TGIA Supervisor Warren Huang was awarded as the Excellent Director/Supervisor of ROC's Industrial and Mining Groups presented by the Chinese National Federation of Industries in November, 2020.



黃監事萬福獲頒優良理監事獎

## 貳 防疫先鋒—隔離衣、防護衣國家隊

為防治新冠肺炎 (COVID-19) 疫情，本會徵召會員廠參與政府徵用隔離衣、防護衣國家隊之製作團隊，計有：聚陽實業、儒鴻企業、台南企業、神采時尚、旭榮製衣、南緯實業、得力實業、立安製衣、介強製衣、

崑洲實業、聚紡、年興紡織等會員廠將已接成衣訂單延後交貨，參與趕製作隔離衣、防護衣之急需，共同為防疫貢獻心力，發揮人饑己饑、人溺己溺之大我精神，實令人感佩！

## II. The National Protective Clothing Team - A Pioneer in Pandemic Prevention

To help prevent and control the COVID-19 pandemic, TGIA has called up member manufacturers to join Taiwan's national team to produce protective and isolation clothing. The list included Makalot, Eclat, Tainan, Magictex, New Wide, Tex-Ray, De Licacy, Li An, Jechiarng, QMI,

G-Fun and Nien Hsing. These members have postponed the delivery of apparel orders already placed with them to ramp up national output of protective clothing for immediate demand. It is indeed a story of expertise, devotion and selflessness.



本會林理事長瑞岳 (圖右二) 代表領取隔離衣、防護衣國家隊獎座

## 參 會務工作

### 一、市場拓銷

#### 〔一〕2020 年德國慕尼黑運動用品 (ISPO 2020)：

於 109 年 1 月 26 日至 29 日在德國新慕尼黑展覽館 New Munich Trade Fair Centre 舉辦，計有永樂塑膠、南緯實業、金鼎科技、皮耶洛實業、翰享實業、旭榮製衣、聚陽實業等 7 家會員廠參加。

據主辦單位統計，ISPO 2020 計有 50 國家共 2,800 家廠商參展，80,000 人次買主進場參觀。買主來自超過 120 個國家及地區，德國以外的買主比例已經達到 70%，其中法國、日本、南韓及紐西蘭等國買主有明顯增加。

由於受到新冠肺炎病毒疫情的影響，本年度買主較為減少，根據紡拓會統計，展出四日約有 2,000 位買主到台灣館參觀，駐法蘭克福經濟組黃青雲組長及慕尼黑台灣貿易中心鄒慧玲主任皆親臨會場為台灣參展廠商打氣加油。

## III. Overview of TGIA's 2020 Operations

### A. International Marketing

#### 1. ISPO Munich 2020

Held from January 26 to 29 at Munich, Germany, ISPO 2020 showcased products and services of 2,800 exhibitors from 50 countries, and received around 80,000 industry visitors from 120 countries. The ratio of visitors from outside Germany rose to 70%, and there was an increase of visitors from France, Japan, South Korea and New Zealand.

7 TGIA's member companies exhibited at the trade fair, including Ever Safetex,

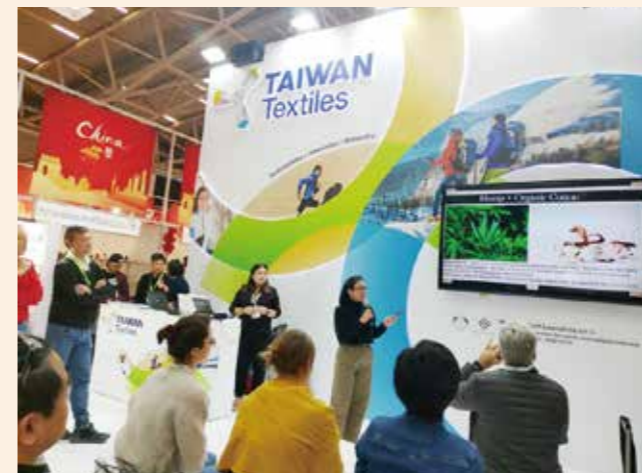
Tex-Ray, King's Metal Fiber, Piero Pacco, Hansc, New Wide and Makalot. According to the Taiwan Textile Federation (TTF), who organized the Taiwan Pavilion inside the fair, around 2,000 buyers visited the Pavilion, a slight decrease from the previous edition due to the impact of the pandemic.



南緯實業與客人洽談情形



旭榮製衣與客人洽談情形



翰享實業的新產品發表



聚陽實業攤位

## 〔二〕2020 年台北紡織展 (TITAS 2020)：

於 109 年 10 月 13 日至 15 日假台北南港展覽館 4 樓舉辦，本會共承租 21 個攤位，計有中阿行、立安製衣、皮耶洛實業、天然纖維、永樂塑膠廠、南緯實業、神采時尚、德式馬企業、翰享實業、龍笛實業等 10 家會員廠參展，展現台灣流行成衣的時尚魅力及休閒運動成衣的軟實力。

TITAS 2020 規劃五大主題—機能應用、永續環保、個人防護、智慧紡織、智慧製造，最大的特色在於以線上線下整合行銷以因應疫情、搶攻疫後商機，包括啟動 TITAS 線

上型錄系統，參展商可透過線上平臺進行聯繫及詢價，提供雙方即時、快速及零距離的互動；最大的亮點為因應疫情在大會形象區設置「解封概念防疫區」，展示各樣醫療防護用及後疫情解封防疫用紡織品，以利日後籌建國內醫療用紡織品供應鏈具有指標性意義。

公會於 14 日當天中午舉辦 Happy hour，讓參展廠商跟到場加油的理監事及貴賓們充份交流，希望藉此凝聚成衣業的參展能量，讓展會能發揮更大的效用及商機。

## 2. TITAS 2020

Taipei Innovative Textile Application Show (TITAS) 2020 was held from October 13 to 15 at the Taipei Nangang Exhibition Center. To display the soft power of Taiwan Fashion with a special focus on athleisure style, TGIA has rented 21 booths inside the show to accommodate 10 members, including Minkwood, Li An, Piero Pacco, Genuine, Ever Safetex, Tex-Ray, Magictex, Texma, Hansc and Long Deed, to showcase their latest offerings. TGIA also hosted an

onsite "happy hour party" on October 14 to get members, buyers and special guests together for opinion-exchanging and partnership-making.



立安製衣與客人洽談情形



翰享實業與客人洽談情形



興采實業與客人洽談情形



Happy Hour 理監事合影

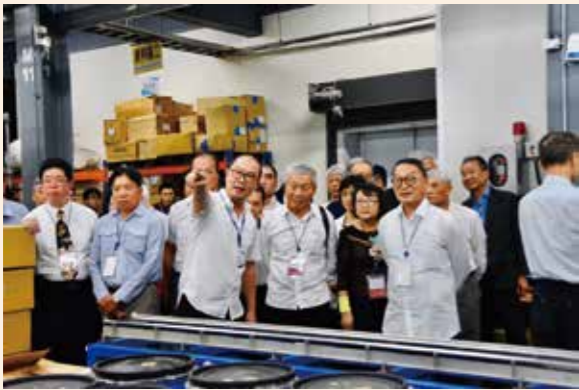


貴賓來訪合影

二、 工廠觀摩

6月17日，本會林理事長瑞岳率領理監事及會員廠同仁計43人，前往桃園觀音工業區參訪興采公司觀音廠、聚紡公司及台灣博迪公司，除了聽取各公司簡報及防護衣、隔離衣製程及驗證重點說明，並參觀防護衣工廠現場生產流程及各類防護衣貼條；

藉由本次參訪讓大家對防護衣有更進一步的認識，受益良多。



參訪興采公司觀音廠



興采公司觀音廠大合影



聽取防護衣介紹



參訪聚紡公司防護衣工廠

B. Factory Tour

A group of 43 people from member companies had a study tour arranged by TGIA on June 17, 2020. Led by Chairman Ray Lin, the group visited the Guanyin precision dyeing R&D center of Singtex Industrial Co., Ltd., G-Fun Industrial Corp.

and TSGS Inc. In addition to briefings on the production and certification of protective and isolation clothing as well as protective seam tape, the group also had the opportunity to observe the manufacturing processes at work.



參訪台灣博迪公司



台灣博迪公司大合影

### 三、時尚脈動

#### （一）舉辦「2021 春夏流行趨勢發表會」

為協助會員廠掌握最新流行資訊，本會原訂 109 年 4 月 9 日舉辦「2021 春夏流行趨勢發表會」，因新冠肺炎疫情延燒，不宜辦理群眾活動，故改以趨勢看板作陳列展示，展示時間由 4 月 9 日至 30 日止，供會員廠自由參觀。

現場陳列的趨勢看板是由林千惠顧問針對 2021 春夏流行色彩、款式、圖案、布料作分析整理，內容包括：流行色彩預測、流行材質分析、流行圖案整理、流行服裝關鍵輪廓、即時趨勢焦點，及最佳春夏服裝穿搭組合分析，輔以千惠顧問四大主題語音解說，讓與會者可以清楚掌握流行重點。

### C. Fashion Vibe

#### 1. Fashion Trends for Spring/Summer 2021

Due to the COVID-19 pandemic, the seminar "Fashion Trends for Spring/Summer 2021" was rescheduled to April 9 to 30 in the format of a static presentation of story and trend boards with narratives. Hosted by TGIA and organized by fashion consultant Cynthia Lin, the presentation explored four fashion themes for the season with focuses on colors, materials, patterns and styles.



2021 春夏流行趨勢發表會會員廠參觀現場



2021 春夏流行趨勢發表會最佳春夏服裝穿搭組合看板

## 〔二〕舉辦「21/22 秋冬商品發表會暨趨勢說明暨新產品展示會」

109年10月6日假紡拓大樓17樓舉辦，邀請大林國際設計有限公司林千惠設計顧問主講，針對21/22秋冬商品發表會暨趨勢說明秋冬流行色彩、款式、圖案、布料進行分析。

為落實流行資訊能應用之服飾開發以提昇企業競爭力，由林顧問針對流行趨勢挑選適合的主題，指導會員廠立安製衣、柏帝服裝、德式馬公司、龍笛實業，配合4大主題——街頭覺醒、科技混型、緩和自然、風華妝點——製作衣服款式並陳列於發表會現場。

為加強服務贊助會員廠及合作廠商，當天亦舉辦「新產品展示會」，由本會會員展示成衣副料，並邀請織布公會的布料廠商參與展示，參加的有南緯實業、多特針業、宏大拉鍊、偉凱實業、德富製針、墾青工業、台灣歐西瑪、長安纖維、昌竈實業、美立信實業、政祥實業、勝利蕾絲等12家公司。

本次發表會共有81人參加，千惠老師精準的掌握流行脈絡，讓學員有滿滿的視覺分享，獲得一致肯定。

## 2. Fashion Trends for Autumn/Winter 2021/2022 and New Product Exhibit

Hosted by TGIA, the seminar "Fashion Trends for Autumn/Winter 2021/2022" plus a new product exhibit was held on October 6, 2020 at TTF Building. In addition to giving an in-depth trend analysis and forecast for the season, the presenter Cynthia Lin also worked with TGIA member companies Li An, Birdie, Texma and Long Deed to create clothing styles interpreting the four fashion themes of the season. An exhibit displaying

new garment, trimming and fabric products of twelve member companies from both TGIA and Taiwan Weaving Industry Association was held at the same venue conjointly.



21/22 秋冬趨勢發表會由劉主任委員梅君主持



21/22 秋冬趨勢發表會吳常務監事重行致詞



21/22 秋冬趨勢發表會林千惠講師



新產品展示會現場



21/22 秋冬趨勢發表會由會員廠立安製衣、柏帝服裝、德式馬公司、龍笛實業製作衣服款式並陳列於發表會現場

#### 四、 人才培育－製衣業數位轉型與升級人才培力計畫

為因應數位轉型對製衣產業帶來的發展挑戰與契機，在經濟部工業局的支持下，本會執行「製衣業數位轉型與升級人才培力計畫」，安排產、學、研專業講師針對研發、設計、生產、行銷、企劃不同階段之數位轉型議題進行剖析，帶領學員對於智慧科技發展趨勢與應用模式有更多了解，並成為企業推動數位轉型的關鍵力量。

本年度一共辦理 3 個班次，其中分別在本會會員廠東豐纖維、台南企業以企業包

班方式辦理《製衣業數位轉型與升級人才培力》課程，並於公會會議室辦理《商品設計企劃全方位養成》課程，另外更運用餘絀開辦一班線上課程，以利更多學員能有效運用時間參與課程，最後計有 80 名學員完成培訓。

#### D. Training & Talent Upgrading

In response to the challenges and opportunities brought about to the garment industry by digital transformation, TGIA, with the support of the Industrial Development Bureau, Ministry of Economic Affairs, implemented the Garment Industry's Digital Transformation and Talent Upgrading Project in 2020. The aim of this project is to cultivate trainees to become the key force to drive digital transformation within enterprises. The project provides in-depth knowledge and analysis by experts and professionals in related fields on the digitalization of

value chain from R&D, planning and development, design to production and marketing, as well as the development trends and application models of smart technology.

In 2020 the project held twice the session "Garment Industry's Digital Transformation and Talent Upgrading", once the session "Product Design and Development", and an extra on-line session to accommodate remote-learning trainees.



東豐纖維陳裕隆總經理致詞



台南企業楊順輝總經理致詞



講師授課情形



學員上課參與情形

## 五、 世代創新

今年在青年種籽聯誼會的策劃下舉辦數場活動，讓製衣產業前輩與青年主管得以充分交流。

6月12日舉辦「高階主管決策能力的提升研討會」，邀請美國 Vistage CEO 發展機構總裁教練張聿超先生，針對如何提升高階主管決策能力的訓練及高階決策智慧的進一步探討；尤其聚焦高階主管在企業突發性危機或關鍵性問題中，決策思考上應有的技巧，如何在推論、洞察與決斷的流程中，建構良好與正確的決策品質。

9月4日邀請旭榮集團黃冠華執行董事分享新冠肺炎疫情影響下之集團佈局方向，及如何建立全球協作的經營管理制度。旭榮以台灣為核心，連結在中國大陸、越南、非洲等營運據點，並善用台灣財務調度、IT 管理的人力優勢，有助於極大化各地區經營利

基。而對於與會者提出 IT 管理及海外廠管理等問題，黃執行董事皆無私分享，與會者皆獲益良多。

12月11日邀請本會陳彩能理事以「單一大客戶的經營策略—如何從依賴客戶到讓客戶依賴」為主題，分享在印尼深耕之經驗，包括近年政情變化觀察、設廠優劣勢分析及印尼勞工管理經驗談，知無不言；另分享他與夫人於2016年成立「亞信台灣樂學築夢獎助學金協會」的經過，包括如何支援陷入困境的單親弱勢家庭孩子，透過獎學金持續學習，並透過定期面談勉勵他們繼續努力迎向未來，勇敢逐夢。

## E. The Passing of the Torch

The Seed Club organized three activities in 2020, providing opportunities for the younger generation to enjoy professional exchanges as well as connection building with their seniors in the garment industry.

A speech titled "How to Elevate the Decision-Making abilities of Senior Executives" was presented on June 12 by Samuel Chang, a CEO coach from Vistage, addressing the training for raising decision-making skill level with a focus on the decision-making process in unexpected crises.

Sunny Huang, Executive Director of the New Wide Group was invited on September 4 to share New Wide's development

roadmap under the pandemic and how the Group established its global collaborative operation and management system. There was a lively discussion and interaction on the issues of IT management and overseas operations management.

TGIA Director Russell Chen was invited on December 11 to share his experience in Indonesia in a presentation titled "Managing a Single Big Client: from Relying on Your Clients to Making Your Clients Rely on You". Mr. Chen gave without any reservation a thorough SWOT analysis and labor management experience in terms of operating a factory in Indonesia.



張聿超先生演講



陳理事彩能與夫人分享經營心法



旭榮集團黃冠華執行董事合影



本會駱秘書長代表致贈獎座予黃會長耀進

## 六、國際交流－臺越產業合作論壇

臺灣在面對區域經貿整合趨勢下，於2016年正式推動「新南向政策」，以促進區域交流發展與合作；在東協國家中，越南更是重中之重，是我紡織成衣產品第一大出口市場及第二大進口來源，因此臺灣與越南自2017年起，每年舉辦「臺越產業合作論壇」，其中紡織分論壇的與會者最多，為最重要的分論壇。

今年受疫情影響，無法在台辦理實體會議，但為了落實雙邊交流，紡織分論壇於9月28日改以視訊方式進行，持續推動產業合作。本次紡織分論壇由本會林瑞岳理事長與越南紡織服裝協會 (VITAS) 武德江主席擔任共同召集人，並針對「臺灣創新紡織品及技術導入」及「協助越南自動化及智慧化系統導入」兩個議題進行交流與討論。

## F. External Relations

In line with government's New Southbound Policy, Taiwan's industry has co-organized with Vietnam the annual Taiwan Vietnam Industrial Collaboration Forum since 2017. Due to the pandemic, the 2020 Forum was conducted through video conferencing. The textile sub-forum was co-hosted by TGIA Chairman Ray Lin and VITAS Chairman Vu Duc Giang on September 28. Opinions and commentaries were exchanged enthusiastically in the meeting on two topics: exporting Taiwan's innovative textile products and technologies into Vietnam and assisting Vietnamese enterprises to adopt automated and smart manufacturing systems.



臺越產業合作論壇與會者合影

## 七、趨勢分享－專題演講

為協助業者掌握最新經濟情勢與產業脈動，公會持續邀請專家顧問辦理專題演講。109年度辦理之研討會活動詳見下頁表。

## G. Insight Sharing

TGIA organized a range of seminars and presentations to share insightful information and observations on economic situation, apparel industry trends, advanced textile technologies, and branding and marketing, among others.



109.7.28 中華經濟研究院區域發展研究中心楊書菲副主任演講



109.10.20 2020 台灣品牌耀飛計畫 - 疫情逆境下建立品牌好商機論壇



109.12.3 紡織所新產品新技術分享會



109.12.23 台經院景氣預測中心 孫明德主任演講

日期	活動名稱	內容摘要
109.06.30	掌握趨勢・創造未來—談創新創業新思維及紡織業可運用之資源 - 「經濟部中小企業處能為紡織業做些什麼？」	經濟部中小企業處何晉滄處長分享全球產業大趨勢，以及顛覆常態的國內外紡織業案例，提供業者與時俱進的創新創業思維，以及紡織業可運用的政府重要資源。
109.07.16	「環保紡織品開發經驗分享—寶特瓶等回收再生作法與應用」演講會	遠東新世紀是國內第一家生產寶特瓶的公司，基於社會責任成立了回收事業體，回收寶特瓶製成綠色產品的歷史已超過 30 年。隨著全球暖化日益嚴重、環保意識逐漸抬頭，與環保相關的綠色產品逐漸受到消費市場青睞，居全球聚酯材料領導地位的遠東新世紀，因應這樣的趨勢勇於開發創新產品。 在環保產品已成為全球消費市場最銳不可擋的綠色浪潮之時，遠東新世紀的綠色產品營收佔比超過 1/4，而且均獲得高規格的綠色產品認證標章。
109.07.28	「後疫情時代全球產經趨勢即對我國產業的影響與因應」演講會	COVID-19 疫情席捲全球，本會特邀請中華經濟研究院區域發展研究中心楊書菲副主任針對疫情對全球總體經濟、乃至於成衣產業與供應鏈之影響進行分析，最後並提出四大因應策略：善用政府紓困方案、強化數位化能力、加強供應鏈韌性、分散風險。
109.08.26	紡織產業智慧化實務交流會	本活動邀請工業局「紡織產業資訊應用跨域服務團」專家顧問，依產業需求現況針對「紡織品表面瑕疵檢測系統」、「超微智慧顯影」、「數據分析應用」以及「AI 導入實務」等主題，進行精彩的軟硬體整合實務案例分享，如何運用智慧科技隨時掌握與監控，大幅提高產品良率與溝通效率，轉而專注在客戶服務等企業營運策略發展。

日期	活動名稱	內容摘要
109.9.22	「COVID-19 疫 情 對 智 慧紡織發展的影響與契機」演講會	本次活動係由智慧型紡織品協會沈乾龍秘書長針對智慧紡織重要發展議題與趨勢進行分析；全球智慧型紡織品市場規模預計在 2025 年達到 55.5 億美元，體育與健身領域是最被期待的應用領域。
109.10.20	2020 台灣品牌耀飛計畫 - 「疫情逆境下建立品牌好商機」論壇	本活動為 2020 台灣品牌耀飛計畫所支持、由經濟部工業局主辦、台經院與商發院執行、本會協辦之論壇活動，以「疫情逆境下品牌建立好商機」為主軸，邀請智策慧行銷顧問股份有限公司 陳茂鴻 執行長、宇萌數位科技股份有限公司 白璧珍 執行長及旭榮集團 / 識富天使會創始人黃冠華執行董事蒞臨演講希望可藉由知識串聯，提供我國中小企業品牌策略思維，推動品牌行銷國際，在疫情逆境下打造出成功的品牌。
109.12.03	紡織所新產品新技術分享會	為協助會員及紡織同業分享紡織產業綜合研究所近期研發的新產品及新技術，以促進升級轉型、開發新產品、提升競爭力，特邀請紡織所各部門主管代表分享研發成果，對協助紡織相關廠商，因應疫情開拓商機，助益頗大。
109.12.23	「2021 年全球經濟及產業展望」演講會	2020 年疫情擾亂產業布局，展望未來，本會特邀請台經院景氣預測中心孫明德主任針對 2021 年政經形勢進行剖析，盼能協助業者即時掌握趨勢，積極布局。

## 八、產業升級－協助傳統產業技術開發計畫 (CITD)

2020 年新冠肺炎疫情造成全球性的產業衝擊，經濟部運用既有「協助傳統產業技術開發計畫 (CITD)」機制，結合相關產業公會，擴大協助受影響產業或企業開發新產品或技術，以促成企業留用研發人員，並提升技術水準，蓄積成長動力。

### H. Industrial Upgrading – Conventional Industry Technology Development (CITD)

To reduce the impact to the industry sector caused by the COVID-19, the Ministry of Economic Affairs joined forces with relevant associations to get industries and enterprises well prepared for the post-pandemic era. MOEA integrated its COVID-19 relief measures and economic stimulus into the existing CITD scheme to assist industries in developing new product

承此，本會辦理數場計畫說明會，邀請相關研發補助計畫之承辦人員出席說明，包括 TIIP 產業創新平台特案補助、SBIR 小型企業創新研發、CITD 協助傳統產業技術開發、中小型製造業即時輔導等，協助會員廠了解計畫執行方式與補助內容。

and technology, upgrading technological levels, and retaining R&D personnel.

TGIA held several introductory presentations in 2020 to inform its members of the project information including project scope, the grants available, Small Business Innovation Research program, real time advisory services, etc.



與會講師合影



說明會實景

## 九、社會服務

### 〔一〕捐贈醫療用氣墊床予花蓮門諾醫院慈善基金會：

回饋社會是產業重要使命之一，公會每年持續捐款台灣天主教安老院支持照顧貧困無依或子女無力奉養的長者，盼能安享晚年；今年度更於年終捐贈 5 床醫療用氣墊床予花蓮門諾醫院慈善基金會愛心輔具銀行，作為提供花蓮偏鄉家貧的失能長者，協助翻身避免長期臥床長褥瘡之用。

### 〔二〕畢展贊助：

人才是產業最珍視的資產，為鼓勵年輕學子持續投入製衣產業，本會持續贊助輔仁大學織品服裝學系服裝設計組、實踐大學服裝設計系及亞東技術學院材織系服裝設計組畢展活動。

### I. Social Service

Social responsibility is nowadays a significant mission for the industry. TGIA makes regular donations to the Little Sisters of the Poor Home for the Aged to support the Catholic senior care facilities for the elderly. In 2020 TGIA also donated 5 medical air mattresses to the Mennonite Christian Hospital in Hualien for the disabled elderly.

Talent is the most valuable asset for the development of the industry. TGIA is also a regular sponsor for the graduation shows of the Dept. of Textiles & Clothing, Fu Jen Catholic University, the Fashion Design Dept., Shih Chien University, and the Dept. of Materials and Textiles, Oriental Institute of Technology.



公會捐贈醫療用氣墊床予花蓮門諾醫院慈善基金會愛心輔具銀行



輔仁大學織品服裝學系服裝設計組畢展活動

肆 2020 製衣產業統計

2016 ～ 2020 年衣著類外銷數值統計表（針織品除外）

年度	外銷金額 (US\$)	成長率		外銷數量 (DZ)	成長率		每打 平均單價 (US\$)	成長率	
		與上年比	與 2016 年比		與上年比	與 2016 年比		與上年比	與 2016 年比
2015	239,796,700	100.00%	100.00%	489,496	100.00%	100.00%	489.88	100.00%	100.00%
2016	233,994,800	-2.42%	-2.42%	385,835	-21.18%	-21.18%	606.46	23.80%	23.80%
2017	219,377,700	-6.25%	-8.52%	443,221	14.87%	-9.45%	494.96	-18.38%	1.04%
2018	214,518,000	-2.22%	-10.54%	394,604	-10.97%	-19.39%	543.63	9.83%	10.97%
2019	180,261,300	-15.97%	-24.83%	323,209	-18.09%	-33.97%	557.72	2.59%	13.85%

製表：台灣區製衣工業同業公會

2020 年 1 至 12 月我國紡織品出口情形

項目	出口值 (億美元)	比重 (%)	同期比較 (%)	出口量 (萬公噸)	同期比較 (%)	單價 (美元 / 公斤)	同期比較 (%)
1. 纖維	4.82	6	-20	40.11	-8	1.2	-13
2. 紗線	10.24	14	-29	39.83	-25	2.57	-6
3. 布料	50.6	67	-19	62.47	-20	8.1	2
4. 成衣及服飾品	4.12	6	-13	2.06	-16	19.93	4
5. 雜項紡織品	5.55	7	27	7.08	-15	7.85	50
合計	75.33	100	-18	151.55	-18	4.97	1

上述統計表係 2020 年 1 至 12 月份梭織成衣出口數值；  
而以整體成衣及服飾品（含梭織、針織、毛衣及服飾品）總出口值為 4.12 億美元，  
較前一年度衰退 13%；出口量為 2.06 萬公噸，較前一年度衰退 16%。

製表：台灣區製衣工業同業公會

III. Overview of TGIA's 2020 Operations

A.International Marketing

Year	Export Amount (US\$)	Growth Rate		Export Q'ty (DZ)	Growth Rate		Average Price per Dozen (US\$)	Growth Rate	
		Over last year	Over 2016		Over last year	Over 2016		Over last year	Over 2016
2015	239,796,700	100.00%	100.00%	489,496	100.00%	100.00%	489.88	100.00%	100.00%
2016	233,994,800	-2.42%	-2.42%	385,835	-21.18%	-21.18%	606.46	23.80%	23.80%
2017	219,377,700	-6.25%	-8.52%	443,221	14.87%	-9.45%	494.96	-18.38%	1.04%
2018	214,518,000	-2.22%	-10.54%	394,604	-10.97%	-19.39%	543.63	9.83%	10.97%
2019	180,261,300	-15.97%	-24.83%	323,209	-18.09%	-33.97%	557.72	2.59%	13.85%

Made by Taiwan Garment Industry Association

B. Domestic Textile Exports of Taiwan from January to December, 2019

Item	Export Value (100 Million USD)	Proportion (%)	Compared to the same period last year (%)	Export Q'ty (ten thousand tons)	Compared to the same period last year (%)	Unit price (USD/Kg)	Compared to the same period last year (%)
1. Fiber	4.82	6	-20	40.11	-8	1.2	-13
2. Yarns	10.24	14	-29	39.83	-25	2.57	-6
3. Fabric	50.6	67	-19	62.47	-20	8.1	2
4. Garment and Apparel	4.12	6	-13	2.06	-16	19.93	4
5. Miscellaneous Textiles	5.55	7	27	7.08	-15	7.85	50
合計	75.33	100	-18	151.55	-18	4.97	1

The above statistics is the woven apparel value from Jan.to Dec.2020. The total apparels & accessory export value (including woven, knitting, sweater and accessory) is US\$4.12 million, declined13% comparing to the last year. Export quantity is 2.06 thousand ton and was declined 16% comparing to the last year.

Made by Taiwan Garment Industry Association

109 年度梭織成衣類外銷情形：

根據紡拓會提供之電腦統計資料顯示，109 年度衣著類外銷金額 180,261,300 美元，數量計 323,209 打，每打平均單價為 557.72 美元，與前一年度比較，金額衰退 16%，數量衰退 18.1%，每打平均單價成長 2.6%。至於 109 年度衣著類外銷地區數值，請參閱附表。

項目 Item		金額（美元） Value (US\$)			重量（公斤） Weight (KG)				數量（打） Q'ty (DZ)			平均單價 Average Price (US\$/KG)			平均單價 Average Unit Price (US\$/DZ)		
地區 Region	國別 Country	109年(US\$) 2020 (US\$)	108年(US\$) 2019 (US\$)	金額 +/- % Value +/- %	109年(KG) 2020 (KG)	108年(KG) 2019 (KG)	重量 +/- % Weight +/- %		109年(DZ) 2020 (DZ)	108年(DZ) 2019 (DZ)	數量 +/- % Q'ty +/- %	109年US\$/KG 2020 US\$/KG	108年US\$/KG 2019 US\$/KG	增減率 Rate of increase	109年US\$/DZ 2020 US\$/DZ	108年US\$/DZ 2019 US\$/DZ	增減率 Rate of increase
亞洲 Asia	越南 Vietnam	34,832,300	42,592,800	-18.2	2,278,353	2,515,671	-9.4		2,371	1,670	+42.0	15.29	16.93	-9.7	14690.97	25504.67	-42.4
	中國大陸 MainlandChina	11,850,800	10,358,000	+14.4	231,571	220,826	+4.9		10,033	25,927	-61.3	51.18	46.91	+9.1	1181.18	399.51	+195.7
	日本 Japan	9,789,000	11,156,200	-12.3	397,047	436,528	-9.0		16,837	20,379	-17.4	24.65	25.56	-3.5	581.40	547.44	+6.2
	亞洲其他 Others	30,094,400	42,872,000	-29.8	2,250,877	2,740,430	-61.9		141,140	141,712	-0.4	13.37	7.25	+84.4	213.22	302.53	-29.5
	亞洲合計 Total	86,566,500	106,979,000	-19.1	5,157,848	5,913,455	-12.8		170,381	189,688	-10.2	16.78	18.09	-7.2	508.08	563.97	-9.9
中東 Middle East	約旦 Jordan	1,375,000	1,807,000	-23.9	105,539	142,873	-26.1		15	35	-57.1	13.03	12.65	+3.0	91666.67	51628.57	+77.6
	沙烏地 Saudi land	682,300	669,900	+1.9	16,034	14,411	+11.3		529	13	+3969.2	42.55	46.49	-8.5	1289.79	51530.77	-97.5
	阿聯 Arab League	379,300	679,200	-44.2	17,046	38,283	-55.5		7,259	9,912	-26.8	22.25	17.74	+25.4	52.25	68.52	-23.7
	中東其他 Others	184,500	285,700	-35.4	17,108	18,313	-6.6		787	382	+106.0	10.78	15.60	-30.9	234.43	747.91	-68.7
	中東合計 Total	2,621,100	3,441,800	-23.8	155,727	213,880	-27.2		8,590	10,342	-16.9	16.83	16.09	+4.6	305.13	332.80	-8.3
歐洲 Europe	荷蘭 Netherlands	2,896,600	3,623,300	-20.1	66,270	89,187	-25.7		11,505	17,490	-34.2	43.71	40.63	+7.6	251.77	207.16	+21.5
	德國 Germany	2,242,400	1,906,400	+17.6	76,817	63,203	+21.5		6,098	3,861	+57.9	29.19	30.16	-3.2	367.73	493.76	-25.5
	英國 UK	1,844,900	2,229,100	-17.2	40,657	55,226	-26.4		3,022	1,933	+56.3	45.38	40.36	+12.4	610.49	1153.18	-47.1
	歐洲其他 Others	3,556,400	5,089,600	-30.1	127,077	158,506	-19.8		13,628	15,137	-10.0	27.99	32.11	-12.8	260.96	336.24	-22.4
	歐洲合計 Total	10,540,300	12,848,400	-18.0	310,821	366,122	-15.1		34,253	38,421	-10.8	33.91	35.09	-3.4	307.72	334.41	-8.0
非洲 Africa	賴索托 Kingdom of Lesotho	4,962,800	5,944,900	-16.5	642,937	592,574	+8.5		46	12	+283.3	7.72	10.03	-23.1	107886.96	495408.33	-78.2
	馬達加斯加 Madagascar	952,100	1,672,500	-43.1	120,396	195,972	-38.6		0	567	-100.0	7.91	8.53	-7.3	—	2949.74	—
	南非 South Africa	549,300	707,900	-22.4	30,579	41,574	-26.4		237	269	-11.9	17.96	17.03	+5.5	2317.72	2631.60	-11.9
	非洲其他 Others	813,000	1,567,900	-48.1	85,879	116,686	-26.4		238	649	-63.3	9.47	13.44	-29.5	3415.97	2415.87	+41.4
	非洲合計 Total	7,277,200	9,893,200	-26.4	879,791	946,806	-7.1		521	1,497	-65.2	8.27	10.45	-20.8	13967.75	6608.68	+111.4
北美洲 North America	美國 USA	67,012,100	73,691,000	-9.1	2,625,330	2,750,322	-4.5		90,889	121,657	-25.3	25.53	26.79	-4.7	737.30	605.73	+21.7
	加拿大 Canada	1,924,200	2,255,700	-14.7	45,072	56,711	-20.5		3,978	14,666	-72.9	42.69	39.78	+7.3	483.71	153.80	+214.5
	墨西哥 Mexico	113,800	329,300	-65.4	3,771	10,365	-63.6		230	1,811	-87.3	30.18	31.77	-5.0	494.78	181.83	+172.1
	北美合計 Total	69,050,100	76,276,000	-9.5	2,674,173	2,817,398	-5.1		95,097	138,134	-31.2	25.82	27.07	-4.6	726.10	552.19	+31.5
中南美洲 Central & South America	尼加拉瓜 Nicaragua	477,200	477,200	+0.0	131,447	131,447	+0.0		0	0	—	3.63	3.63	+0.0	—	—	—
	宏都拉斯 Honduras	720,300	720,300	+0.0	11,276	11,276	+0.0		0	0	—	63.88	63.88	+0.0	—	—	—
	海地 Haiti	143,500	9,000	+1494.4	10,861	3,072	+253.5		52	0	—	13.21	2.93	+351.0	2759.62	—	—
	中南美其他 Others	79,200	828,300	-90.4	-14,531	55,230	-126.3		3,512	3,676	-4.5	-5.45	15.00	-136.3	22.55	225.33	-90.0
	中南美合計 Total	1,420,200	2,034,800	-30.2	139,053	201,025	-30.8		3,564	3,676	-3.0	10.21	10.12	+0.9	398.48	553.54	-28.0
大洋洲 Oceania	澳洲 Australia	2,294,300	2,597,200	-11.7	56,007	67,651	-17.2		10,290	12,367	-16.8	40.96	38.39	+6.7	222.96	210.01	+6.2
	西薩摩亞 Western Samoa	216,400	138,800	+55.9	30,971	20,532	+50.8		0	5	-100.0	6.99	6.76	+3.4	—	27760.00	—
	紐西蘭 New Zealand	134,500	146,100	-7.9	5,211	6,179	-15.7		151	175	-13.7	25.81	23.64	+9.2	890.73	834.86	+6.7
	澳洲其他 Others	106,900	122,900	-13.0	9,702	9,970	-2.7		203	178	+14.0	11.02	12.33	-10.6	526.60	690.45	-23.7
	大洋洲合計 Total	2,752,100	3,005,000	-8.4	101,891	104,332	-2.3		10,644	12,725	-16.4	27.01	28.80	-6.2	258.56	236.15	+9.5
其他 Others	其他國家 Other Countries	33,800	39,800	-15.1	2,011	1,880	+7.0		159	121	+31.4	16.81	21.17	-20.6	212.58	328.93	-35.4
總計 Total		180,261,300	214,518,000	-16.0	9,421,315	10,564,898	-10.8		323,209	394,604	-18.1	19.13	20.30	-5.8	557.72	543.63	+2.6

C. Taiwan's woven apparel export statistics 2020:

According to TTF's data compiled from Taiwan Customs statistics, Taiwan's woven apparel export value decreased to US\$180,261,300 in 2020, a decline of 16% compared to the previous year. The export quantity of the same product category during the same period declined 18.1% to 323,209 dozens, while the unit price per dozen rose to US\$557.72, a growth of 2.6%.

伍 財務

台灣區製衣工業同業公會資產負債表

台灣區製衣工業同業公會			
資產負債表			
中華民國 109 年 12 月 31 日			
資產		負債、基金暨餘絀	
科目	金額	科目	金額
流動資金	50,804,191	流動負債	1,919,354
基金及專戶	149,408,275	其他負債	797,000
固定資產	52,346,275	基金及專戶	203,377,649
其他資產	10,250	餘絀	46,474,988
合計	252,568,991	合計	252,568,911

V. Financial Affairs

Taiwan Garment Industry Association Balance Sheet

Taiwan Garment Industry Association			
Balance Sheet			
December 31, 2020			
Assets		Liability, Funds & Surplus	
Item	Amount	Item	Amount
Current	50,804,191	Current Liabilities	1,919,354
Funds & Special Accounts	149,408,275	Other Liabilities	797,000
Fixed Assets	52,346,275	Funds & Special Accounts	203,377,649
Other Assets	10,250	Surplus	46,474,988
Total	252,568,991	Total	252,568,911

## 陸 展望

展望 2021 年，台灣成衣及服飾業應朝開發創新性、獨特性、設計性、精緻性、差異性之產品上發展，並建構完整的供應鏈體系，發揮製造業服務化之精髓，深化客戶服務、分散生產區及客戶，是首要之務。成衣服飾業未來必須朝向與科技結合為目標之方向邁進：

- 一、發展機能環保成衣服飾品
- 二、服裝與科技異業結合，開發智慧與智能衣著
- 三、掌握數位世代的網路商機
- 四、朝向「智慧製造」之智動化生產

展望未來，我國成衣業亟需在既有之優勢利導下，加強改善產業本身劣勢，避開國際間之競爭與威脅，把握每一次機會，定可持續產業之生命力，相信成衣工業會有絢麗的第二春。

## Prospects

Looking into 2021, Taiwan's garment industry shall shift toward the development of innovative, unique, designer-based, sophisticated and differentiated products in addition to constructing complete supply chain system, elaborate the essence of manufacturing services and in-depth customer service as the foremost important task. Hence, the future garment industry must make progress targeting at technology combination:

- A. Develop functional and green apparel products
- B. Strategic alliance of clothing and technology, developing smart and intellectual wear

- C. Grasp the online business opportunity for digital generation
- D. Shifting towards "smart manufacturing" based smart production

Looking into the future, Taiwan's garment industry is in urgent need to take existing advantage, strengthen the improvement of industry associated disadvantage, avoid competition and threats between countries and grasp every opportunity, in order to sustain the vitality of the industry. The garment industry is believed to create a new chapter in economy.



**台灣區製衣工業同業公會**  
**Taiwan Garment Industry Association**

台北市愛國東路 22 號 8 樓  
8F., No. 22, Aiguo E. Rd., Zhongzheng Dist., Taipei City 100, Taiwan  
TEL: 886-2-23919113  
FAX: 886-2-23919055  
e-mail: [tgia@textiles.org.tw](mailto:tgia@textiles.org.tw)  
<http://www.taiwan-garment.org.tw>