

2023 ANNUAL REPORT



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



Words from the Chairman



Chairman, Mr. Donald Wu

In 2023, the global textile industry was affected by factors such as Fed's interest rate hikes, the volatile international political and economic situation, and the uncertain prospects for economic recovery. How would Taiwan's garment manufacturing industry respond to supply chain restructuring, digital transformation, ESG, talent cultivation, and other issues? Issues such as energy conservation and carbon reduction have attracted great attention from the textile industry. Garment manufacturers have been actively building a green supply chain with energy-saving and sustainable environmentally friendly processes, using innovative technologies to develop related materials and textiles while taking into account both sustainable development and product functionality. The labor-intensive traditional textile industry has been combined with the latest AI artificial intelligence, accelerating the pace of intelligent manufacturing and upgrading the garment manufacturing process, so that Taiwan's garment industry still has enough strength to shine internationally. TGIA will be taking tech digital transformation, sustainability, and inheritance as important directions to lead the industry in continuous innovation.

In 2023, in the face of the post-pandemic era and the everchanging global economy, TGIA not only continues to assist the government in the promotion of various revitalization measures, but also actively assists our members in strengthening their structure and resilience, so as to assist the overall industry in shortening the time period required for recovery and response to post-pandemic transformation, in which we organized and held the following activities:

1. Participated in textile and garment international exchange activities:

TGIA participated in “Taiwan-Korea Textile Conference”, “2023 Overseas Market Development Event in Dhaka, Bangladesh”, “2023 Taiwan-Vietnam Industrial Cooperation Forum” and “14th Cross-Strait Textile Industry Cooperation Seminar”, based on the development of the textile industry in-depth discussions and exchanges were held on issues such as the current situation and trend prospects, changes and key development directions.

2. Co-organize the first Artificial Intelligence Clothing Brand Entrepreneurship Competition of TMUST(Takming University of Science and Technology) :

It aims to encourage students to use artificial intelligence technology software to produce clothing brands with commercial potential, and fully present the early planning of their own clothing brands. This competition hopes to use the application of artificial intelligence software to allow participating students to develop another future trend skill for graduate employment. The winning works would also be displayed in the TITAS exhibition area of TGIA.

3. Assisted Members in Market Expansion:

TGIA participated in exhibition and sales activities including: “Outdoor Retailer Summer 2023”, “2023 ISPO Munich” and “TITAS 2023”.

4. Implement "Textile Industry 2030 Low-Carbon Transformation Promotional Plan" commissioned by Bureau of Industry, Ministry of Economic Affairs

TGIA visited and consulted 8 to 10 garment manufacturers, conducted carbon inventory reports and current status of the garment industry, and promoted industrial GHG emissions, and industry-wide low-carbon strategies and measures, etc., and finally compiled a low-carbon survey demand report for the garment industry. A carbon inventory sharing session for the garment industry was held on December 8 to share the carbon inventory reduction status and demand survey cases of the domestic garment industry to help the industry establish sustainable awareness, plan carbon reduction paths and adaptive strategies as soon as possible, and move towards the goal of zero-carbon transformation.

5. Assistance in improving product upgrading:

TGIA organized "2024 Spring/Summer Fashion Trends Presentation and Exhibition for New Products" and "2024/25 Autumn/Winter Fashion Trends Presentation and Exhibition for New Products", and actively cooperated with the garment industry to promote midstream and downstream environmental protection and functional fabrics of textiles.

6. Continuous Promotion of Industry-Academic Cooperation:

We hope to cultivate talents for the industry, and call on the government to follow the trends of actively cultivating talents of smart manufacturing and reserve professional and technical talents for the industry.

7. Seminars and Expert Speeches Related to the Industry:

All activities held by TGIA are carefully prepared and planned by the Directors, Supervisors, and the Chairpersons and Deputy Chairpersons of each and all Committees, and dedicatedly organized by the staff of the Association, which are enthusiastically participated in and recognized by the members and approved and valued by relevant government units.

TGIA will uphold the ideas and passion of serving members and continue to work harder to achieve such a goal. We are also looking forward to our members providing valuable comments or suggestions at any time for us as the reference for formulating our future work plans.

Last but not least, I hereby sincerely wish each and all of you good health, great fortune, and a bright new future! Thank you!

Taiwan Garment Industry Association

Donald Wu

Chairman

About TGIA

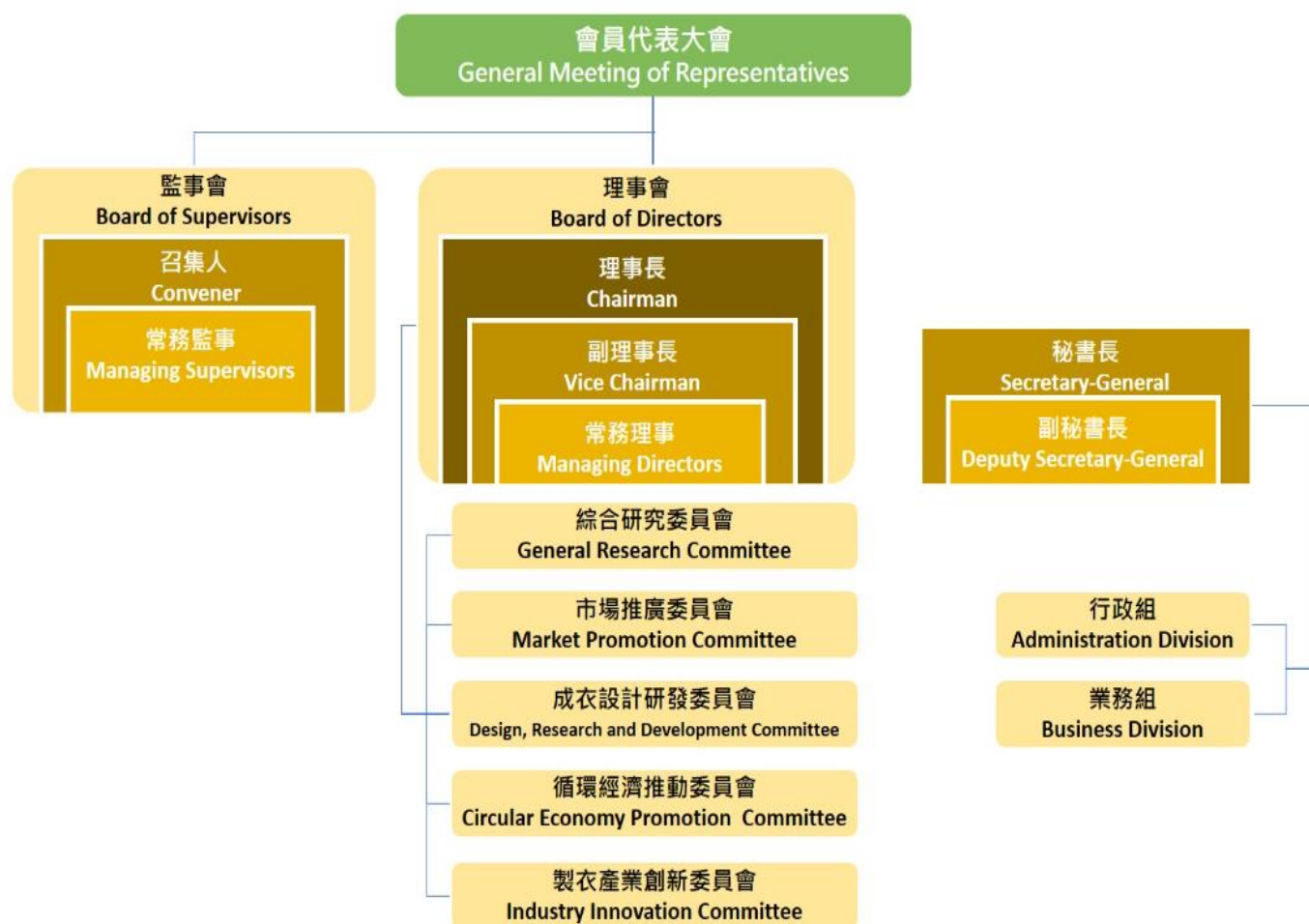


Taiwan Garment Industry Association "TGIA" is formerly known as "Taiwan Shirt Industry Association (TSIA)" founded in 1956. In response to the government's proactive policy of expanding garment export in 1961, the Taiwan Garment Export Industry Association (TGEIA) was therefore established. In 1974, TGEIA was restructured as TGIA. With a history of more than 67 years. A total of 122 members (including sponsors).

To meet the memberships needs of training garment -manufacturing experts, TGIA set up a vocational training center, the first institute of its kind by a national industry association, on December 1, 1980. Linko Campus, sitting on an area of more than 5,000 square meters, was inaugurated in August 1985 to provide training for a vast variety of trainees. So far, more than 10,000 people have received training sessions in this center.

Nonetheless, owing to the dramatic change in the garment industry, garment manufacturers relocate their factories abroad for competitiveness while keeping operation headquarters in Taiwan. The number of people trained in this center gradually decreased. As a result, the Association moved the venue of vocational training to its building at Ai Kuo East Road in April 1996, continuing to benefit Taiwan's garment industry.

Organizational Structure



Taiwan Garment Industry Association (TGIA) is a civil organization approved by the Ministry of the Interior. A board of directors and a board of supervisors are established in accordance with the Associations' Charter of Incorporation. The board of directors includes several executive directors and elects a chairman and vice chairman to manage all affairs of the Association. Under the board of directors, Fives professional committees : General Research Committee, Market Promotion Committee, Design Research and Development Committee, Circular Economy Promotion Committee, Industry Innovation Committee, taking charge of studies, analysis and recommendation with regard to laws and regulations concerning garment industry. The board of supervisors includes executive supervisors and supervisors, who are in charge of electing a convener responsible for supervising all Association's affairs and property. Under the board of directors, a Secretary-General is in charge of all affairs; and administration division and business division in charge of various Association affairs respectively.

The 17th Directors & Supervisors

Tenure from 2021/4/14 to 2024/4/13

| | |
|------------------------------|---|
| Chairman of the Board | Donald Wu |
| Honoured Chairman | Roland Tsai 、 Walter Huang 、 Ray Lin |
| Vice Chairman | Philip Chen |
| Executive Directors | Allen Yang 、 Huang-Ching Ho 、 Edward Wu 、 Steve Chang 、 M. J. Liu 、 Chi-Lu Lin 、 Hebert Chan |
| Directors | Ruej-Fwu Lee 、 Debbie Chang 、 Judy Lee 、 Phillip Chen 、 Leo Tsai 、 Yung-Kuang Chen 、 Cloudia Yang 、 Frank Lin 、 Chien-Fu Chiang 、 Yi-Chun Wu 、 Jin-Chen Hong 、 Andy Wang 、 Tony Tu 、 Warren Huang 、 Alex Young 、 Yao-Chin Huang 、 James Huang 、 Eric Ying |
| Convener of | Ming-Huei Chen |
| Board of Supervisors | |
| Executive Supervisors | Jason Chen 、 Jeff Y. Wu |
| Supervisors | Wen-Teh Kuo 、 Aric Chiu 、 Chun-Lang Tseng 、 Samuel Hsu 、 C. H. Lee 、 Pei-Ling Bao |

Membership & 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) – NT\$500 million

C: Members with a registered capital of between NT\$50(included) – NT\$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

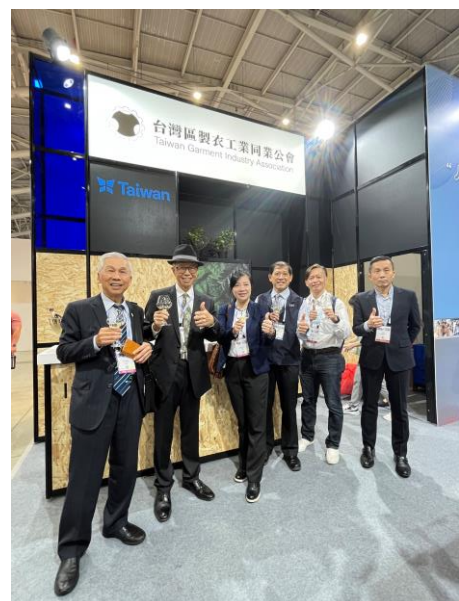
5. Collecting and distributing the latest textile/apparel information via newsletters

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



2024/25 Autumn/Winter Fashion Trends
Presentation and Exhibition for New Products



TITAS 2023

Honors and Awards

1. TGIA was awarded by Ministry of Internal as “High Distinction” Group in Industrial and Professional Group Assessments in 2022

In order to supervise people's organizations at all levels, the Ministry of the Interior improves the organizational operations of various organizations, strengthens service functions, and handles performance evaluations of industrial and commercial freelance groups. TGIA was rated as “HIGH DISTINCTION” group in 2022. The evaluation objects are groups that have been established for more than one year. Groups that are rated as high distinction are exempted from the evaluation for two years.

2. TGIA Executive Supervisor M. J. Lau was awarded with Director / Supervisor Excellence Award of Taiwan Industrial & Mining professional Groups

M. J. Lau, TGIA Executive Supervisor, was recommended to participate in the selection by the 9th directors and supervisors joint meeting of the 17th session. After the review and evaluation by the selection committee, Jason Chen was elected the excellent director and supervisor and was awarded by Ministry of Internal Affairs and Chinese National Federation of Industries at the Industry Festival Celebration Assembly on November 10, 2023.

Expansion into international markets

1. Outdoor Retailer Summer 2023

The exhibition was held at Salt Palace Convention Center in Salt Lake City, USA, from June 19 to 21, 2023. There were four companies participating in the exhibition, including Singtex Industrial Co., Ltd., Magictex Apparel Corp., G-FUN Industrial Corp. and Hansc & Co. This year, we participated in the exhibition by setting up booths in the conference room. This way of participating in exhibition can save the cost of decoration and construction, and use the layout to present the characteristics and themes of each company, which can be regarded as a high-efficiency exhibition option.

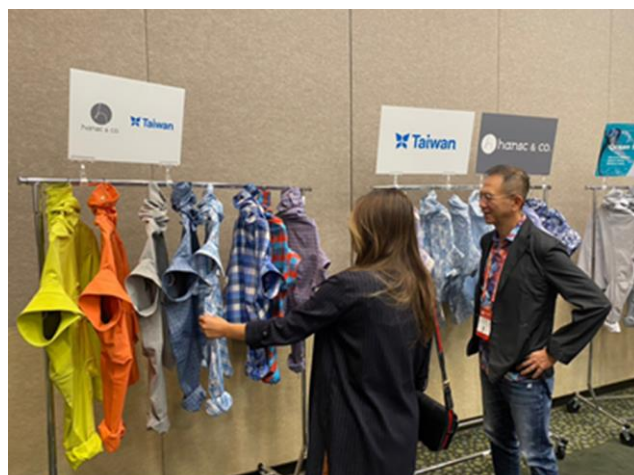
OR Show served the entire outdoor leisure and extreme sports ecosystem by seamlessly connecting manufacturers, retailers and consumers, cultivating symbiotic relationships and promoting collective growth and success, making it the first choice for overseas exhibitors for outdoor product manufacturers.



Magictex exchanged information and introduces styles with customers



Hansc & Co. interacted with guests



2. TITAS 2023

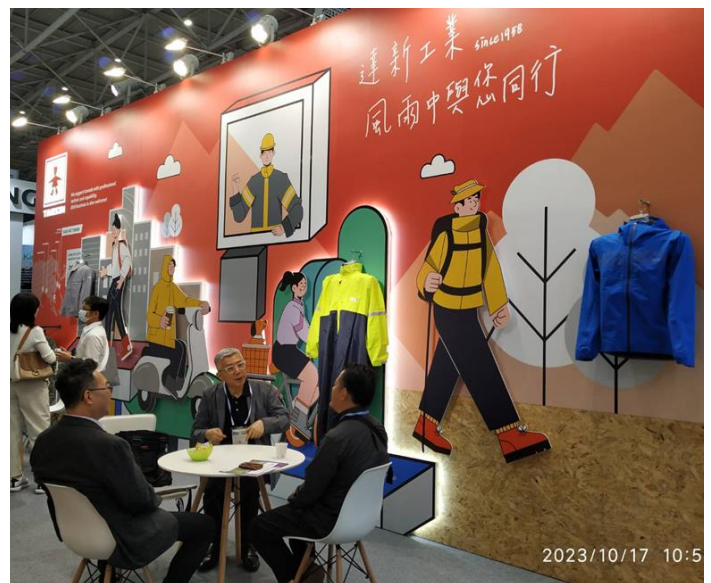
TITAS 2023 was held on the 4th floor of Taipei Nangang Exhibition Center from October 17th to 19th, 2023. TGIA has rented 21 booths and 6 member factories displayed a series of high-quality products, including M&J Textile Co., Ltd., Minkwood International Co., Ltd., Happy Plastic MFG. Co., Ltd., Texma International Co., Ltd, Tahsin Industrial Corp. and Hansc & Co. participated in the exhibition, focusing on the themes of circular economy, fashion and sports performance to show the charm of Taiwan's garment products.



TGIA participated in TITAS 2023



Display of winning works of TMUST AI Design Competition



TGIA Members were in business talk

3. 2023 Munich ISPO

ISPO Munich is the most important and largest global comprehensive exhibition of sporting products, functional textiles, and apparel. ISPO Munich is the melting pot, the trend showcase, the source of inspiration and therefore the leading trade show for the global sports community. It was held at New Munich Trade Fair Centre in Germany from November 28 to 30, 2023, in which TGIA 6 members Tahsin Industrial Corp., Hansc & Co., Piero Pacco Textile Industry Co., Ltd., Duet Fashion Co. Ltd., Shuang-Bang Industrial Corp. and Shine Lux Enterprise Co., Ltd. participated.



Representatives of Tahsin business discussing with international buyers



Representatives of Hansc & Co. business discussing with international buyer



Representatives of Shine Lux business discussing with international buyers

Fashion Vibes

(1) 2024 Spring/Summer Fashion Trends Presentation and the Exhibition for New Products

TGIA held “2024 Spring and Summer Fashion Trend Conference” on March 14, 2023. This year, we invited the trend forecasting authority WGSN to analyze global popular women’s clothing trends, and the Textile Design Office of TTF to share the latest western fashion trends, including trend themes, fabrics, color matching, material application, clothing outline and detail expression, etc.; and TTF also indicated the latest market info.- 2024 spring/summer Première Vision Paris exhibition theme, color and fabric trends and focused on clothing trends of leading western fashion brands, including the international fashion city Milan , Paris, London and other regional fashion, to help companies grasp the trends of the European market in the current season and understand market demand. Finally, “Terminal New Product Planning and Design Counseling Program” was explained. This program assisted manufacturers in completing clothing development, design, and production of a series of clothes. In addition to being displayed at the press conference, the counseling results exposed in Paris PV Exhibition as well , strived for international media exposure opportunities.



To strengthen services, TGIA sponsoring members and cooperative cooperative manufacturers, at the same time the "New Product Exhibition" was held in the 2nd conference room on the 17th floor of the TTF Building. The sponsoring members participated for free to promote their new products developed. 10 manufacturers participating in this exhibition include Oshima Co. Ltd., New Woosun Trading Co. Ltd., Dotec Needle Co. Ltd., Max Zipper Co. Ltd., KCC Group, Triumph Needle Corp., Taiwan Taffeta Fabric Co. Ltd., Ifabrix Taiwan Co. Ltd., TTF Sewing Technology R&D Center, and Rehow; KCC Group and Rehow provided "product highlights" briefings.



Product highlight briefing



Venue for New Product Exhibition



Venue for New Product Exhibition

(2) 2024/2025 Autumn/Winter Fashion Trends Presentation and the Exhibition for New Products

The presentation had been completed at 17F of TTF building on September 6, 2023. WGSN and TTF Design Center were invited to publish 24/25 Autumn/Winter fashion trends, providing fashion trend boards and European and American fashion leading brand trends focus. Presented by TTF for 24/25 Autumn/Winter Première Vision Paris professional exhibition theme and color trends and real-time trend focus - European and American fashion leading brand trend focus collection (including AW23 Milan, Paris, London and other regions)

In order to implement the practical application of fashion information in brand development and production toward each member factory's target market, TTF guided 4 member manufacturers participating in the program (Chia Her Industrial Co. Ltd., New Wide Enterprise Co. Ltd., Everest Textile Co. Ltd, and Long Deed Corp.) in accordance with fashion trends and product characteristics of each manufacturer, produced 3 sets of clothing series for each company and displayed them at the venue. This activity helps businesses understand international fashion trends and develop products that meet market demand.



event photos



fashion trend boards



The clothing series produced by members displayed at the presentation venue

External Relations

(1) Participated in the "Taiwan-Korea Textile Conference"

In order to promote exchanges and cooperation between Taiwan and South Korea's textile industry, the Taiwan-Korea Textile Conference was held annually by Taiwan Textile Federation and Korea Federation of Textile Industries (KOFOTI). The 17th Taiwan-Korea Textile Conference was hosted by us on 11th April in Taipei. It successfully established an exchange and cooperation platform for Taiwan and South Korea's textile industry.

Participants from both countries were highly representative of the meeting. Mr. Donald Wu, Chairman TGIA, attended on behalf of TGIA. The Taiwan delegation was led by Wang Wen-yuan, Chairman of Taiwan Textile Federation, who led Taiwan Man-Made Fiber Industries Association, Taiwan Spinner's Association, Taiwan Silk & Filament Weaving Industrial Association, Taiwan Weaving Industry Association, Taiwan nonwoven Fabrics Industry Association, Taiwan Regional Association of Filament Fabrics Printing Dyeing & Finishing Industries, Textile Printing Dyeing and Finishing Association, Taiwan Knitting Industry Association, Taiwan Garment Industry Association, Taiwan Hosiery Manufacturers' Association. A total of 35 representatives from medical and biotechnology equipment associations, as well as corporate representatives such as Formosa Plastics and Far East New Century attended the event.

On the Korean side, Lee Sang-woon, president of KOFOTI, leads Korea Fiber Import and Export Association, Chemical Fiber Association, Daegu Gyeongbuk Fiber Industry Association, Korea Dyeing and Finishing Technology Institute, Fiber Development Institute, FITI Test Institute, Clothing Test Institute and other research institutes, Fashion Designers Federation, Textiles Center. A total of 31 representatives from South Korea's Hyosung TNC, Yongyuan Trading, CLO Virtual Fashion, Woojoo Global and other companies attended the meeting.



The 17th Taiwan-Korea Textile Conference concluded successfully in Taipei on April 11

In the morning of the meeting, representatives from Taiwan Textile Federation and KOFOTI reported respectively on the current status and future development trends of the textile industry in Taiwan and South Korea. In response to the issues of global textile sustainable development and supply chain restructuring, representatives from Secretary-general of Taiwan Textile Federation, Justin Huang, and KOFOTI Vice Chairman Nagasuma Suzu served as the introducers and guided a total of 6 talkers and representatives from the upper, middle and lower reaches of both parties to have in-depth interaction.

In the afternoon, the conference held special discussions on the circular economy of the polyester textile industry and the digital transformation of the Korean textile and fashion industry. During the conference, representatives from both sides interacted and exchanged relevant information. They both had a deep understanding of the sustainable development of the textile industry. In addition to pursuing the development of differentiated and innovative products, it is also necessary to embrace changes, use the opportunities brought by changes to strengthen corporate competitiveness, focus on sustainable corporate ESG governance, and enhance young people's understanding of the textile technology industry to facilitate the reserve of future talents. Affected by factors such as high inflation, policy tightening, and financial market fluctuations, the global economic climate has turned weak, and the destocking adjustment of the industrial chain has continued, resulting in a decline in Taiwan's exports, export orders, and production data, impacting overall demand and sales. It shows that the textile production and marketing market is facing multiple headwind challenges. How to promote future competition and cooperation has become the common expectation of the Taiwan and South Korea textile industries.

At this meeting, the textile industries of Taiwan and South Korea gathered together to exchange candid views on issues of concern to both parties. In the future, the two sides will further build bridges and build platforms to strengthen economic, trade and information exchanges in the textile industry to integrate the strengths of Taiwan and South Korea's industry and strengthen bilateral trade and competitiveness, allowing Taiwan and South Korea's textile industry to work together to achieve a win-win goal.



(2) Participated in the "2023 Overseas Market Development Event in Dhaka, Bangladesh"

According to WTO statistics, Bangladesh was the world's third largest garment exporter in 2021. The country has more than 4,500 garment factories employing more than 4 million people. In 2022, Bangladesh's garment export value reached US\$45.7 billion, mainly exported to tariff-free preferential countries such as the European Union, Canada and Japan. The United States and the European Union are the world's top two garment import markets. According to 2021 US import statistics, Bangladesh's garment imports ranked third (accounting for 8.2%); among EU textile and garment importers, Bangladesh ranked second (accounting for 19.8%). In 2022, Taiwan's textiles sold to the global market, with approximately 26.69% passing through Vietnam and only 3.4% going to Bangladesh. Strengthening cooperation with Bangladesh would effectively create new business opportunities and connections.

According to the U.S. Green Building Council, 49 factories in Bangladesh account for the Top 100 Green Factories in LEED statistics. At present, Bangladesh has comprehensively developed factories with intelligent and automated equipment, and manufacturers are actively investing in sustainable development and product transformation and upgrading. R&D and investment conform to international market scale. The development strategies of Bangladeshi manufacturers are very consistent with the development of Taiwan's textile industry.

Taiwan's garment industry is internationally renowned. In order to help Taiwanese manufacturers understand the development trends and business opportunities of the international garment industry. TTF, TGIA, Taiwan Silk & Filament Weaving Industrial Association, and Taiwan Knitting Association joined with the BGMEA to organize an overseas market visit to Dhaka, Bangladesh. In May 2023, with Taiwanese textile and garment leaders, we visited local industries such as: YoungOne, the world's largest outdoor sportswear manufacturer, 4A Yarn Dyeing Ltd, a garment factory under the Bangladeshi enterprise group TEAM Group, apparel manufacturer SNOWTEX Group, and textile integrated factory Fakir Fashion Limited, etc. TGIA Chairman, Donald Wu participated on behalf of TGIA, and association's member factories: Tainan Enterprise, Tuntex Incorporation, Tah Hsin Industrial Corp. and Singtex Group also participated.



Visited Factory YoungOne



Visited 4A Yarn Dyeing Ltd.



Visited Snowtex Group



Visited Urmi Group

(3) Participated in the "2023 Taiwan-Vietnam Industrial Cooperation Forum"

Among the "New Southbound Policy" countries, Vietnam has strong development potential and is also one of the global focuses. In recent years, due to geopolitical and epidemic factors, the country's position in the global manufacturing industry has become more important; coupled with its high economic growth rate, strategic location in the regional supply chain, and preferential tariffs, it has attracted a large amount of foreign investment to set up factories, including the textile industry. For Taiwan, Vietnam has always been an important partner in terms of investment and trade, and the relationship is also quite close in terms of textile supply chain.

In order to strengthen industrial cooperation with Vietnam, "2023 Taiwan-Vietnam Industrial Cooperation Forum" was held on 7th September, 2023, at the New World Hotel in Ho Chi Minh City, Vietnam, and the forum covered three major groups: textiles, automation, and smart cities. For the textile subgroup, Vice Chairman Mrs. Phuong Rong Huang Zhuang of Taiwan Textile Federation and Chairman Vu Duc Giang of the Vietnam Textile and Apparel Association (VITAS) served as co-conveners. TGIA Chairman Mr. Donald participated on behalf of Taiwan Garment Industry Association, focusing on practical practices in textile industry's "cleanliness", "Zero Carbon Emissions" and "Digital Transformation" was deeply discussed.



Chinese National Federation of Industries held a Taiwan-Vietnam Industrial forum, and more than a hundred Taiwanese businessmen gathered at the New World Hotel in Ho Chi Minh City.

(4) Participated in the "14th Cross-Strait Textile Industry Cooperation Seminar"

In order to promote interactions and cooperation between cross-Strait textile industry, Taiwan Textile Federation(TTF) and China National Textile and Apparel Council(CNTAC) have taken turns hosting the "Cross-Strait Textile Industry Cooperation Seminar" every two years since 1992. This cooperation seminar has become the most important, representative and credible exchange platform for the cross-strait textile industry.

The 14th Cross-Strait Textile Industry Cooperation Seminar was held in Taipei, Taiwan, from 10th to 13th September 2023. It was chaired by Mr. Guo Shaoyi, Chairman of the Taiwan Textile Federation, and Mr. Donald Wu, Chairman of TGIA participated in the event on behalf of TGIA, and a total of 34 guests from the other side of the Taiwan Strait attended.

The themes of this seminar covered the current situation, trends, innovation and environmental protection of the cross-strait textile industry, and aims to promote the cooperation and development of the cross-strait textile industry.



The 14th Cross-Strait Textile Industry Cooperation Seminar 2023 was held in Taipei

Social Service

A strong earthquake with a magnitude of 7.8 occurred in Turkey and Syria on 6th February 2023. As many as 10 provinces were affected in Turkey, and one province in Syria was also the hardest hit area. The number of casualties in the two countries with more than 30,000 people affected, countries around the world continue to pay attention to the disaster and work together for humanitarian relief.

In order to respond to the disaster relief and allow love and warmth to travel across the ocean, TGIA decided at the 8th joint meeting of the 17th Board of Directors to donate NTD200,000 to help the Turkish people tide over the difficulties and rebuild their homes after the disaster. TGIA deputy secretary-general, Ms. Mia Lin participated in the "Praying for Lighting Lamps for Turkey's Post-Earthquake Reconstruction" event on behalf of TGIA and donated NT\$200,000 on 28th April 2023.



TGIA donated NT\$200,000 in the event of "Praying for Lighting of Lights for Turkey's Post-Earthquake Reconstruction".



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