

Annual Report
Taiwan Garment Industry Association

108年 年報
台灣區製衣工業同業公會



2019

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	4. Garments Were Displayed in the Window at 1F, Taiwan Textile Federation Building
	5. Accepted the Commission from the Bureau of Foreign Trade to issue the "Agreement for Import Commission to Mainland China for Garment Processing"
	B. Assist members to direct international market expansion
	1. Participated in "ISPO MUNICH 2019"
	2. Participated in "CHIC 2019"
	3. Participated in "2019 American Outdoor Retailer summer Outdoor Sports Supplies Exhibition"
	4. Participated in "Fashion World Tokyo 2019"
	5. Participated in "2019 Taipei International Textile Fair (TITAS)"
	6. Formed "2019 Overseas Director/Supervisor and Africa Delegation Team"
	C. Promote development in Garment industry to upgrade product quality
	1. Organized "2020 Spring-Summer Fashion Trend Press release" and "New Product Press"
	2. Organized "2020/2021 Autumn-Winter Fashion Trend Press release and New Product Press"
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	1. Organization of "Garment/Knitting/Silk Printing and Dyeing Union Alliance"
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壹 前言／理事長的話

2019 年，國際最重要的經貿情勢為「美中貿易戰」，其牽動著全球政經情勢之改變，美國對中國大陸之關稅制裁，也撼動了全球經濟之發展。因此，全球經濟均有衰退現象，而以出口為導向的我成衣業者宜密切注意此經濟情勢之發展並尋因應之道。

近年來，成衣業不論在生產端或消費端市場真可謂千變萬化，除了人工智慧（AI）、物聯網（IoT）、大數據（Big data）、虛擬實境（VR）、擴增實境（AR）、混合實境（MR）……等外，目前已朝向人工智慧聯網（AIoT）、區塊鏈、5G 等方向發展，顛覆了傳統生產與銷售。而紡織與科技跨業結合的智慧型紡織產品，更是未來發展的方向。未來，我們除仍續以傳統發展紡織外，更應朝向成衣與科技結合的目標邁進。

在 108 年度，本會亦積極協助會員廠開拓市場，重要會務工作包括：

（一）協助會員廠拓銷方面：

參加「2019 年德國慕尼黑 ISPO 展」、「2019 年美國丹佛 Outdoor Retailer 展」、「2019 年日本東京 Fashion World Tokyo 展」、「2019 年中國國際服裝服飾博覽會（CHIC）」、「2019 年台北紡織展（TITAS 2019）」等展覽拓銷活動；另外，為協助會員廠瞭解主要成衣生產國及銷售市場，籌組「2019 年非洲考察團」活動。

理事長 林瑞岳 先生
Chairman, Mr. Ray Lin



I. Preface

The most important economic-trade situation worldwide in 2019 was the "U.S.-China Trade War," which had effects on the changes in global political and economic situations. The tariff sanction imposed by U.S. to China also shook the development of global economy. For this reason, the global economy showed recession while the apparel industries of Taiwan based on export must draw close attention to the development of such economic situation and seek for responses.

In recent years, the apparel industries are facing fast and varying changes in the production or consumer markets. Apart from artificial intelligence (AI), internet of things (IoT), big data, virtual reality (VR), augmented reality (AR), and mixed reality (MR), the industries have shifted to the development in direction of artificial intelligence of things (AIoT), blockchain and 5G, subverting the conventional production and sales. Moreover, smart textile products from strategic alliance of textile and technology remain the direction of future development. In the future, we will shift toward the goal of apparel and technology apart from continuing the development of traditional textile.

In 2019, Taiwan Garment Industry Association continued to assist members in developing the market with the following priorities:

1. Marketing:

Assisted members in participating in ISPO Munich 2019, Outdoor Retailer 2019, Fashion World Tokyo 2019, CHIC 2019, Taipei Innovative Textile Application Show (TITAS) 2019, and marketing; organized the 2019 Delegation to African Expedition to help members understand major garment producing countries and sales markets.

(二) 協助提升產品品級方面：

舉辦「2020 春夏流行趨勢發表會」暨「春夏新產品展示會」、「2020/21 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。

(三) 積極參與紡織相關交流合作會議：

參加「兩岸企業家峰會」、「台越紡織業論壇」、「台史經濟論壇」、「紡織科技國際論壇」等，期藉論壇活動，達到相互交流合作之目的。

(四) 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。

(五) 策略聯盟方面：

1. 「成毛衣及服飾聯合拓銷聯盟」：
旨在「智慧時尚園區」之推動
2. 「製衣 / 針織 / 絲綢印染等公會聯盟」：
旨在「智慧製造」之推動。

(六) 舉辦系列講座暨與本業有關之專題演講及研討會等活動。

而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

2. Product Upgrade:

Organized the 2020 Spring/Summer Fashion Show & Spring/Summer Product Reveal and 2020/2021 Fall/Winter Fashion Show and Store Presentation & Fall/Winter Product Reveal and promoted the cooperation between eco-friendly and functional fabric manufacturers and the garment industry.

3. Attended textile-related conferences:

Including Cross-Strait CEO Summit, Taiwan-Vietnam Textile Industry Forum, Taiwan-Eswatini Economy Forum, and Textile International Forum, to promote industrial interaction and cooperation.

4. Promoted industry-academia cooperation:

To facilitate the cultivation of talents for textiles and reserve professionals for the industry.

5. Strategic Alliance:

- (1). The sweater and garment marketing alliance aimed to promote a smart fashion park;
- (2). The garment/knitting/filament fabrics printing dyeing industry alliance aimed to promote smart manufacturing.

6. Held a series of lectures, industry-specific lectures and seminars.

Various activities organized by the Association with the careful planning, teamwork, and efforts made by directors, supervisors, the chairman, the vice chairman, and clerks, have been attended and recognized by the members and valued by related government agencies.

In the future, Taiwan Garment Industry Association will continuously strive to serve the members with great passion and welcome the members' feedback or suggestions, which can be referred to in the formulation of future work plans.

Last, I wish you health, luck and success. Thank you.

Taiwan Garment Industry Association

Ray Lin

Chairman

貳 沿革

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 138 家。

本會為配合會員廠需要，培訓製衣技術人才，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，於民國 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，而目前更積極希望能協助會員廠往設計與行銷方向發展，期能直接走向消費者市場。

本會在歷任理事長黃理事長定、王理事長木發、蔡理事長永勳、蔡理事長光職、林理事長希哲、徐理事長榮華、蔡理事長昭倫、黃理事長華德及現任理事長林理事長瑞岳等卓越領導下，會務運作順暢，績效斐然，連年獲得政府及相關單位之肯定與讚揚，此為本會無上之榮譽，並期能持之以恆且更發揚光大。



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

II. Background

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 64 years. A total of 138 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 1,500 pings, 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. In the meanwhile the TGIA is actively looking forward to assisting member manufacturers to cultivate in design and



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

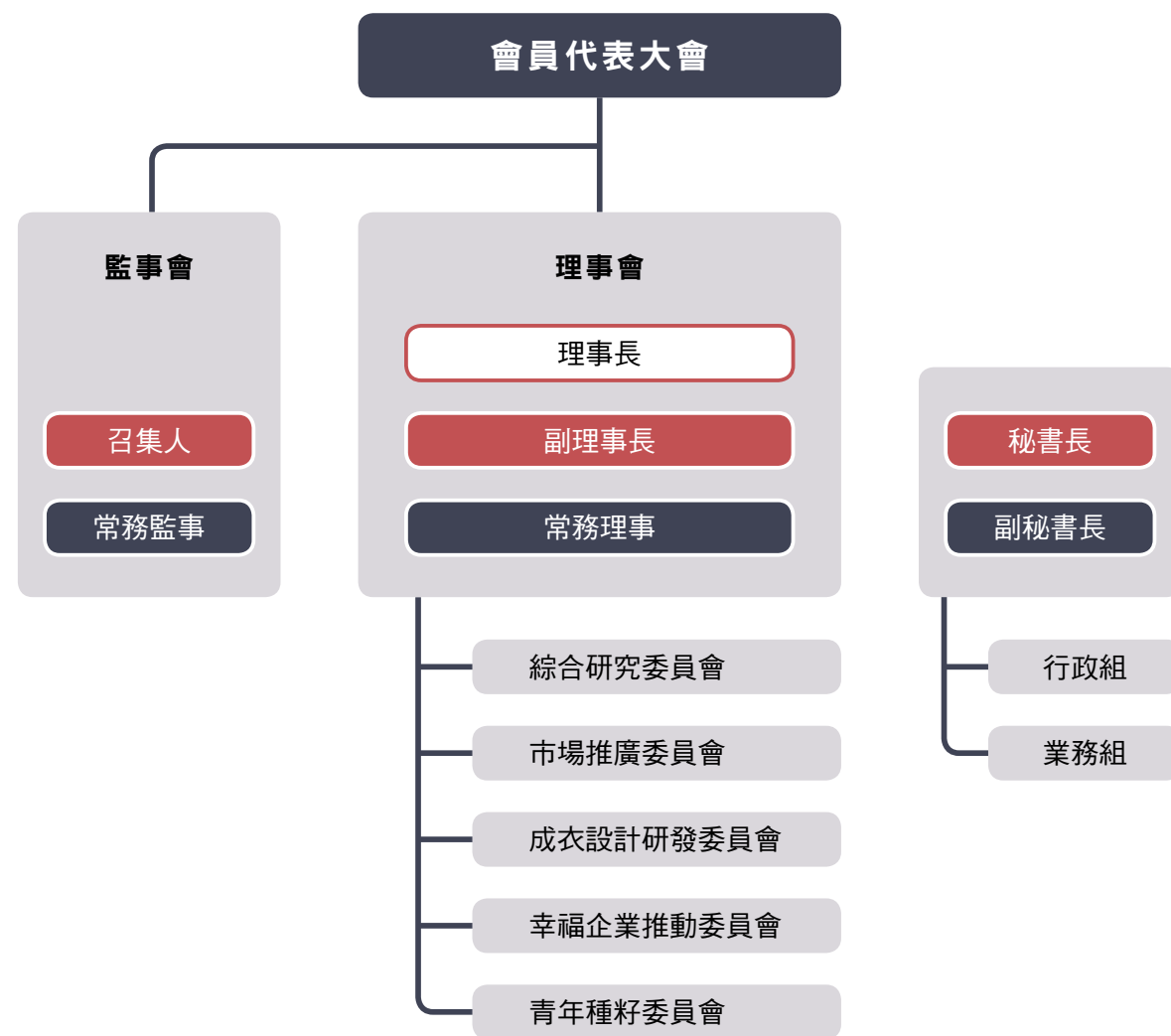
marketing, in order to enter the consuming market directly.

Under the outstanding leadership of the current Chairman of the Association, Mr. Ray Lin, and the former chairman, including Mr. Huang Ting, Mr. Wang Mu-Fa, Mr. Tsai Yuon Hsiung, Mr. Tsai Kuang- Chih, Mr. Lin Shi-Che, Mr. Jung-Hua Hsu、Mr. Roland Tsai、Mr. Walter Huang, TGIA has been prospering with excellent performance and honored with accreditation and acknowledgements from the government and authoritative agencies. The Association expects to preserve with its honor and enhance its glory in the future.

參 組織系統圖

本會係奉內政部核准成立之人民團體，依本會章程規定設理事會、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、青年種籽委員會等 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

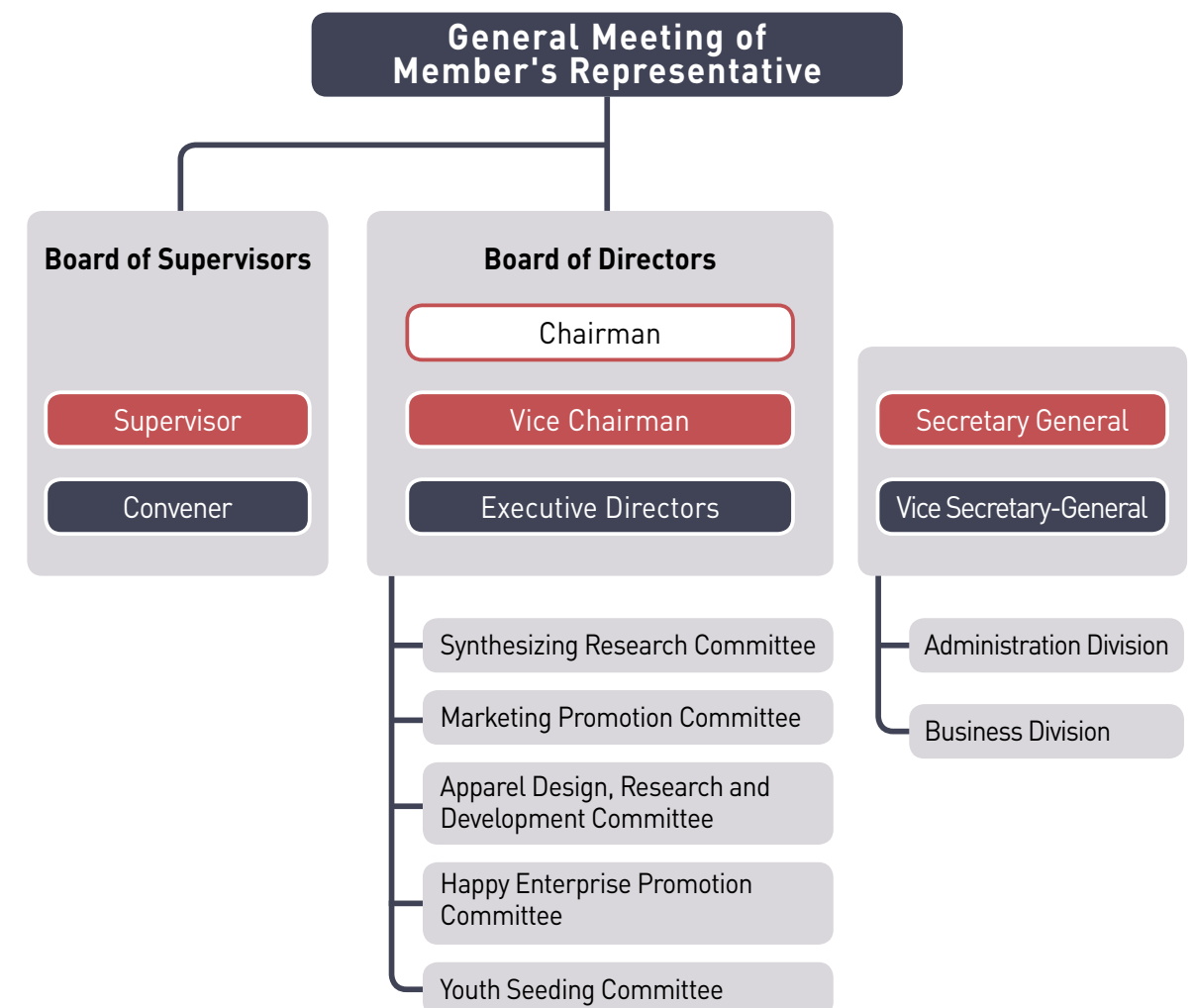
Administrators

Secretary General : Chuen-Mei, Lo
Vice Secretary-General : Chia-Hung, Tseng
Chief of Business Division : Hsiu-Chu, Chen
Chief of Administration Division : Ching-Chun, Lin

III. Organizational Chart

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 : Synthesizing Research、Marketing Promotion、Apparel Design, Research and Development、Happy Enterprise Promotion

and Youth Seeding Committee, take 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.



肆 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、陳啟斌、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
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



第 16 屆理監事大合照
The 16th Directors & Supervisors Group Photo

IV. The 16th Directors & Supervisors

Chairman of the Board	Ray Lin
Honoured Chairman	Roland Tsai, Walter Huang
Vice Chairman	Donald Wu
Executive 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、C.B.Chen, Samuel Hsu, Li-Feng Wu, Cloudia Yang, Judy Lee, Phillip Chen, Frank Lin, Terry Tsai, Jason Chen, Rusell Chen
Convener of Board of Supervisors	Ming-Huei Chen
Managing Supervisor	Chi-Lu Lin, Edward Wu
Supervisor	Warren Huang, Chien-Fu Chiang, Yi-Chun Wu, Eric Ying, Jin-chen, C.H.Lee



第 16 屆理監事大合照
The 16th Directors & Supervisors Group Photo

伍 會員結構

凡依法取得工廠登記證照並經營成衣業務之工廠，依規定均應加入本會為會員，本會按縫衣機台數區分為甲、乙、丙、丁四級：

- 甲級：縫紉機 301 台以上者
- 乙級：縫紉機 201 台至 300 台者
- 丙級：縫紉機 101 台至 200 台者
- 丁級：縫紉機 100 台以下者

截至 108 年 12 月 31 日止，本會會員廠家數及會員代表異動狀況如下表：

地區	等級	會員廠家數	會員代表
新北市區	甲	2	8
	乙	4	11
	丙	8	16
	丁	37	37
	小計	51	72
北部地區	甲	4	16
	乙	5	14
	丙	5	10
	丁	20	20
	小計	34	60
中部地區	丙	2	4
	丁	10	10
	小計	12	14
南部地區	甲	2	8
	乙	2	6
	丙	5	10
	丁	7	7
	小計	16	31
正式會員合計		113	177
贊助會員		25	--
總計		138	177

V. Member Structure

All manufacturers who are legally registered and engaged in the garment business should become a member of this Association according to the laws. Members are divided into four levels; A, B, C, and D, based on the number of sewing machines owned：

- A：Sewing machines exceeding 301 units
- B：Sewing machines between 201~300 units
- C：Sewing machines between 101~200 units
- D：Sewing machines fewer than 100 units

Up until December 31, 2019, the number of memberships, and members representatives are indicated as the table below：

Region	Level	Factory	Members Representative
New Taipei City	A	2	8
	B	4	11
	C	8	16
	D	37	37
	Sub-Total	51	72
Northern Taiwan	A	4	16
	B	5	14
	C	5	10
	D	20	20
	Sub-Total	34	60
Central Taiwan	C	2	4
	D	10	10
	Sub-Total	12	14
South Taiwan	A	2	8
	B	2	6
	C	5	10
	D	7	7
	Sub-Total	16	31
Full member Total		113	177
Sponsor member		25	--
Grand Total		138	177

陸 外銷統計

一、2015-2019 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 2015 年比		與上年比	與 2015 年比		與上年比	與 2015 年比
2015	259,867,400	100.00%	100.00%	551,994	100.00%	100.00%	470.78	100.00%	100.00%
2016	239,796,700	-7.72%	-7.72%	489,496	-11.32%	-11.32%	489.88	4.06%	4.06%
2017	233,994,800	-2.42%	-9.96%	385,835	-21.18%	-30.10%	606.46	23.80%	28.82%
2018	219,377,700	-6.25%	-15.58%	443,221	14.87%	-19.71%	494.96	-18.38%	5.14%
2019	214,518,000	-2.22%	-17.45%	394,604	-10.97%	-28.51%	543.63	9.83%	15.47%

製表：台灣區製衣工業同業公會

二、2019 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	6.04	6	-25	43.54	-13	1.39	-14
2. 紗線	14.39	16	-14	52.81	-10	2.72	-5
3. 布料	62.26	68	-6	78.44	-8	7.94	2
4. 成衣及服飾品	4.71	5	-8	2.46	-8	19.19	-0.2
5. 雜項紡織品	4.36	5	2	8.34	-4	5.3	6
合計	91.76	100	-9	185.59	-10	4.94	1

上述統計表係 2019 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 4.71 億美元，較前一年度衰退 8%；出口量為 2.46 萬公噸，較前一年度衰退 0.2%。

製表：台灣區製衣工業同業公會

VI. Statistics of Exports

A. Garment Export Figures for Year 2015~2019 (Excluding Knitwear)

Year	Export Amount (US\$)	Growth Rate		Export Q'ty (DZ)	Growth Rate		Average Price per Dozen (US\$)	Growth Rate	
		Over last year	Over 2015		Over last year	Over 2015		Over last year	Over 2015
2015	259,867,400	100.00%	100.00%	551,994	100.00%	100.00%	470.78	100.00%	100.00%
2016	239,796,700	-7.72%	-7.72%	489,496	-11.32%	-11.32%	489.88	4.06%	4.06%
2017	233,994,800	-2.42%	-9.96%	385,835	-21.18%	-30.10%	606.46	23.80%	28.82%
2018	219,377,700	-6.25%	-15.58%	443,221	14.87%	-19.71%	494.96	-18.38%	5.14%
2019	214,518,000	-2.22%	-17.45%	394,604	-10.97%	-28.51%	543.63	9.83%	15.47%

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	6.04	6	-25	43.54	-13	1.39	-14
2. Yarns	14.39	16	-14	52.81	-10	2.72	-5
3. Fabric	62.26	68	-6	78.44	-8	7.94	2
4. Garment and Apparel	4.71	5	-8	2.46	-8	19.19	-0.2
5. Miscellaneous Textiles	4.36	5	2	8.34	-4	5.3	6
Total	91.76	100	-9	185.59	-10	4.94	1

The above statistics is the woven apparel value from Jan. to Dec. of 2019. The total apparels & accessory export value (including woven, knitting, sweater and accessory) is US\$471 million, it was decreased 8% comparing to the last year. Export quantity is 2.46 thousand ton and was declined 0.2% comparing to the last year.

Made by Taiwan Garment Industry Association

三、2019 年 1 至 12 月與前一年同期衣著類外銷地區數值比較及排名統計表
(針織品除外)

根據紡拓會提供之電腦統計資料顯示，108 年度衣著類外銷金額 214,518,000 美元，數量計 394,604 打，每打平均單價為 543.63 美元，與前一年度比較，金額衰退 2.2%，數量衰退 11%，每打平均單價成長 9.8%，至 108 年度衣著類外銷地區數值，詳請參閱附表。

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	108年(US\$) 2019 (US\$)	107年(US\$) 2018 (US\$)	金額 +/- % Value +/- %	108年(KG) 2019 (KG)	107年(KG) 2018 (KG)	重量 +/- % Weight +/- %	108年(DZ) 2019 (DZ)	107年(DZ) 2017 (DZ)	數量 +/- % Q'ty +/- %	108年US\$/KG 2019 US\$/KG	107年US\$/KG 2018 US\$/KG	增減率 Rate of increase	108年US\$/DZ 2019 US\$/DZ	107年US\$/DZ 2018 US\$/DZ	增減率 Rate of increase
亞洲 Asia	越南 Vietnam	42,592,800	50,765,200	-16.1	2,515,671	2,804,630	-10.3	1,670	4,763	-64.9	16.93	18.10	-6.5	25504.67	10658.24	+139.3
	日本 Japan	11,156,200	10,631,300	+4.9	436,528	463,459	-5.8	20,379	26,215	-22.3	25.56	22.94	+11.4	547.44	405.54	+35.0
	中國大陸 MainlandChina	10,358,000	21,813,300	-52.5	220,826	463,730	-52.4	25,927	31,362	-17.3	46.91	47.04	-0.3	399.51	695.53	-42.6
	亞洲其他 Others	42,872,000	50,943,700	-15.8	2,740,430	3,712,021	-63.2	141,712	184,588	-23.2	15.64	6.84	+128.6	302.53	275.99	+9.6
	亞洲合計 Total	106,979,000	134,153,500	-20.3	5,913,455	7,443,840	-20.6	189,688	246,928	-23.2	18.09	18.02	+0.4	563.97	543.29	+3.8
中東 Middle East	約旦 Jordan	1,807,000	2,037,900	-11.3	142,873	168,548	-15.2	35	2,982	-98.8	12.65	12.09	+4.6	51628.57	683.40	+7454.7
	阿聯 Arab League	679,200	1,394,400	-51.3	38,283	94,033	-59.3	9,912	9,153	+8.3	17.74	14.83	+19.6	68.52	152.34	-55.0
	沙烏地 Saudi land	669,900	975,000	-31.3	14,411	23,895	-39.7	13	495	-97.4	46.49	40.80	+13.9	51530.77	1969.70	+2516.2
	中東其他 Others	285,700	506,000	-43.5	18,313	42,348	-56.8	382	1,126	-66.1	15.60	11.95	+30.6	747.91	449.38	+66.4
	中東合計 Total	3,441,800	4,913,300	-29.9	213,880	328,824	-35.0	10,342	13,756	-24.8	16.09	14.94	+7.7	332.80	357.18	-6.8
歐洲 Europe	荷蘭 Netherlands	3,623,300	4,439,800	-18.4	89,187	100,413	-11.2	17,490	23,893	-26.8	40.63	44.22	-8.1	207.16	185.82	+11.5
	英國 UK	2,229,100	1,699,100	+31.2	55,226	54,608	+1.1	1,933	2,288	-15.5	40.36	31.11	+29.7	1153.18	742.61	+55.3
	德國 Germany	1,906,400	2,287,900	-16.7	63,203	65,497	-3.5	3,861	4,495	-14.1	30.16	34.93	-13.7	493.76	508.99	-3.0
	歐洲其他 Others	5,089,600	5,572,400	-8.7	158,506	176,421	-10.2	15,137	8,512	+77.8	32.11	31.59	+1.7	336.24	654.65	-48.6
	歐洲合計 Total	12,848,400	13,870,200	-7.4	366,122	375,369	-2.5	38,421	39,804	-3.5	35.09	36.95	-5.0	334.41	348.46	-4.0
非洲 Africa	賴索托 Kingdom of Lesotho	5,944,900	7,721,200	-23.0	592,574	712,429	-16.8	12	16	-25.0	10.03	10.84	-7.4	495408.33	482575.00	+2.7
	馬達加斯加 Madagascar	1,672,500	703,100	+137.9	195,972	66,179	+196.1	567	803	-29.4	8.53	10.62	-19.7	2949.74	875.59	+236.9
	南非 South Africa	707,900	600,600	+17.9	41,574	39,608	+5.0	269	355	-24.2	17.03	15.16	+12.3	2631.60	1691.83	+55.5
	非洲其他 Others	1,567,900	1,332,700	+17.6	116,686	112,263	+3.9	649	-169	-484.0	13.44	11.87	+13.2	2415.87	-7885.80	-130.6
	非洲合計 Total	9,893,200	10,357,600	-4.5	946,806	930,479	+1.8	1,497	1,005	+49.0	10.45	11.13	-6.1	6608.68	10306.07	-35.9
北美洲 North America	美國 USA	73,691,000	45,616,400	+61.5	2,750,322	1,725,032	+59.4	121,657	114,007	+6.7	26.79	26.44	+1.3	605.73	400.12	+51.4
	加拿大 Canada	2,255,700	3,137,200	-28.1	56,711	82,641	-31.4	14,666	7,295	+101.0	39.78	37.96	+4.8	153.80	430.05	-64.2
	墨西哥 Mexico	329,300	417,200	-21.1	10,365	11,951	-13.3	1,811	2,326	-22.1	31.77	34.91	-9.0	181.83	179.36	+1.4
	北美其他 Others															
	北美合計 Total	76,276,000	49,170,800	+55.1	2,817,398	1,819,624	+54.8	138,134	123,628	+11.7	27.07	27.02	+0.2	552.19	397.73	+38.8
中南美洲 Central & South America	宏都拉斯 Honduras	720,300	606,200	+18.8	11,276	11,639	-3.1	0	184	-100.0	63.88	52.08	+22.6	#DIV/0!	3294.57	#DIV/0!
	尼加拉瓜 Nicaragua	477,200	533,100	-10.5	131,447	170,320	-22.8	0	0	#DIV/0!	3.63	3.13	+16.0	#DIV/0!	#DIV/0!	#DIV/0!
	巴拿馬 Panama	241,000	405,700	-40.6	12,727	18,542	-31.4	2,010	3,069	-34.5	18.94	21.88	-13.5	119.90	132.19	-9.3
	中南美其他 Others	596,300	1,050,300	-43.2	45,575	76,709	-40.6	1,666	2,050	-18.7	13.08	13.69	-4.4	357.92	512.34	-30.1
	中南美合計 Total	2,034,800	2,595,300	-21.6	201,025	277,210	-27.5	3,676	5,303	-30.7	10.12	9.36	+8.1	553.54	489.40	+13.1
大洋洲 Oceania	澳洲 Australia	2,597,200	3,455,000	-24.8	67,651	90,619	-25.3	12,367	11,835	+4.5	38.39	38.13	+0.7	210.01	291.93	-28.1
	紐西蘭 New Zealand	146,100	494,800	-70.5	6,179	9,523	-35.1	175	200	-12.5	23.64	51.96	-54.5	834.86	2474.00	-66.3
	西薩摩亞 Western Samoa	138,800	152,700	-9.1	20,532	19,934	+3.0	5	0	#DIV/0!	6.76	7.66	-11.8	27760.00	#DIV/0!	#DIV/0!
	澳洲其他 Others	122,900	163,300	-24.7	9,970	15,803	-36.9	178	581	-69.4	12.33	10.33	+19.3	690.45	281.07	+145.7
	大洋洲合計 Total	3,005,000	4,265,800	-29.6	104,332	135,879	-23.2	12,725	12,616	+0.9	28.80	31.39	-8.3	236.15	338.13	-30.2
其他 Others	其他國家 Other Countries	39,800	51,200	-22.3	1,880	3,763	-50.0	121	181	-33.1	21.17	13.61	+55.6	328.93	282.87	+16.3
總計 Total		214,518,000	219,377,700	-2.2	10,564,898	11,314,988	-6.6	394,604	443,221	-11.0	20.30	19.39	+4.7	543.63	494.96	+9.8

C. Export Value of Woven Apparel by Geographic Regions in 2019

The computer statistics provided by Taiwan Textile Federation, the 2019 clothing exportamount summed up to USD 214,518,000 and 394,604 dozens in terms of quantity. The averageprice/dozen was USD 543.63 and the amount declined by 2.2% compared with that of last year. The quantity was declined by 11% with an average price/dozen grown by 9.8%. For moreinformation on the regions of 2019 clothing export gures, please refer to the Appendix.

柒 會務

一、會員服務

(一) 舉辦各類專題演講

舉辦日期	活動內容
108.04.10	專題名稱：企業資安風險與解決之道 主 講 人：精誠資訊公司黃健智經理
108.06.26	專題名稱：美中貿易戰的進展與影響 主 講 人：台灣經濟研究院景氣預測中心副主任 東海大學經濟系教授 邱達生博士

(二) 舉辦各類研討會

日期	活動名稱	內容摘要
108.03.14	台灣紡織業 永續發展的作法	為協助會員及紡織相關廠商了解台灣紡織業永續發展的作法，供業者作為擬訂經營與投資策略的重要參考依據，以利永續經營。
108.04.11	智慧紡織與物聯網 資安座談會	特依國際趨勢、產業需求現況分享與交流，協助業者了解物聯網資安的重要性與實務應用。 分享主題： 1. 政府資安政策－新興資安產業生態系推動計畫 2. 如何強化企業資安基礎架構 3. 商業間諜深暗網路 vs. 紡織接單資安要求



舉辦「台灣紡織業永續發展的作法」研討會情形
Sponsoring "Practice of Sustainable Development for Taiwan Textile" workshop

VII. Exposition Affairs



「美中貿易戰的進展與影響」研討會情形
Sponsoring "Progress and Influence of U.S.-China Trade War" workshop



「智慧紡織與物聯網資安座談會」研討會情形
Sponsoring "Smart Textile and IoT Security Workshop"

A. Member Service

1. Holding various project speech

Data	Description
108.04.10	Keynote Speech : Corporate Information Security Risk and Solutions Speaker : SYSTEX Corporation President Chih-Chien Huang
108.06.26	Keynote Speech : Progress and Influence of U.S.-China Trade War Speaker : Taiwan Institute of Economic Research Macroeconomic Forecasting Center Vice Director and Professor at Department of Economics, Tunghai University – Dr. Darson Chiu

2. Organized seminars

Date	Name of Activity	Summary of Content
108.03.14	Practice of Sustainable Development for Taiwan Textile Industries	To help members and textile related manufacturers with understanding of practice of sustainable development for Taiwan textiles, providing manufacturers with the key reference on the formulation of management and investment strategies in regards to sustainable management.
108.04.11	Smart Textile and IoT Security Workshop	Sharing and exchanging the international trends and current industry requirement to help the industries understand the importance and practical application of IoT security. Topics shared: 1. Government information security policy-Promotional program for emerging information security industries 2. How to boost corporate information security infrastructure 3. Commercial spy network vs. textile order security requirement

日期	活動名稱	內容摘要
108.04.16	「產業聚落供應鏈數位串流暨 AI 應用計畫」紡織業應用新知分享及政府資源說明會	工業局推動「產業聚落供應鏈數位串流暨 AI 應用計畫」，朝向「打造智慧製造標竿企業」及「提高中小企業數位化能力」兩大主軸辦理此次說明會，一為分享關於紡織業的應用新知及成功範例，二為說明政府計畫資源內容，期能協助業者鏈結紡織業供應鏈，瞭解自身產業現況，應用 AI 技術達成數位串流之目標。
108.08.23	台灣 AI 發展環境於紡織業之推動策略暨產業智慧化平台 (AI HUB) 分享會	紡織產業面臨短交期、少量多樣的智造趨勢，透過 AI 智慧應用服務發展環境推動計畫，共同分享紡織產業需求與其導入智慧製造技術能量。透過 AI-HUB 整合專家、案例與技術的資源協作平台，提供線上議題諮詢、線下訪視診斷、供需組隊、導入輔導等多種服務，推廣紡織產業製程智慧化擴散效應，協助產業提升效率與價值為目標。



舉辦「紡織業應用新知分享及政府資源說明會」
Sponsoring "Textile Application New Information Sharing and Government Resource Presentation"



舉辦「台灣 AI 發展環境於紡織業之推動策略暨產業智慧化平台 (AI HUB) 分享會」
Sponsoring "Strategies for Promoting AI Development Environment in Taiwan Textiles and AI HUB Sharing Session"

Date	Name of Activity	Summary of Content
108.04.16	"Industry Cluster Supply Chain Digital Streaming and AI Application Program" Textile Application New Information Sharing and Government Resource Presentation	Industrial Development Bureau promotes the "Industry Cluster Supply Chain Digital Streaming and AI Application Program" with emphasis on two themes in "building smart manufacturing benchmark enterprise" and "upgrading small and medium enterprise e-capacity." This presentation aims to share the new information and success stories of textile industries while on the other hand explains the content of government program resource in attempt to assist the industries to link with the textile supply chain, understand the position of their industries and apply AI technology for digital streaming.
108.08.23	Strategies for Promoting AI Development Environment in Taiwan Textiles and AI HUB Sharing Session	The textile industries are facing with short-term requirement and the intelligent manufacturing trends of diversities in small quantities. The program for promoting the development environment of AI application services can share the demand for textile industries and introduce technical energy for smart manufacturing. AI-HUB is a collaborative hub for experts, cases and technological resources, providing online agenda consultation, offline visit and diagnosis, supply/demand team, and introduction of counseling services. AI Hub not only promotes the dispersion effect of smart textile processing but also assists industries to upgrade efficiency and value.

日期	活動名稱	內容摘要
108.09.19	「智慧工廠縱深聯防轉型之路」論壇	經濟部工業局辦理「智慧工廠縱深聯防轉型之路」論壇，活動主軸是「製造業邁向工業4.0之產業動起來」，邀請產官代表從「政策工具」與「產業智慧製造發展」、「物聯網與資訊安全落地實務」等面向進行分享與交流。
108.09.19	邁向新紡織智慧工廠時代跨域資安應用系列推廣活動	目前智慧製造已是各製造業積極轉型的目標，傳統紡織業可利用台灣既有的ICT、精密機械產業優勢，投入資源全力布局物聯網、大數據相關智慧化、AI人工智慧自動化產業，朝著數位轉型之路邁進。 特以「紡織接單自動化與智慧排程」、「染整智慧化解決方案」、「機密資料防護解決方案」及「物聯網應用資安防護對策」，進行主題分享與交流，協助紡織業者兼顧數位化與安全性，攜手邁向新紡織時代。



舉辦「智慧工廠縱深聯防轉型之路論壇」
Sponsoring "Smart Path to Smart Factory Transformation in Depth and Breadth Forum"

Date	Name of Activity	Summary of Content
108.09.19	"Path to Smart Factory Transformation in Depth and Breadth" Forum	Industrial Development Bureau, Ministry of Economic Affairs sponsored the "Path to Smart Factory Transformation in Depth and Breadth" Forum with emphasis on "Industrial Shifting for Manufacturing Industries to Industry 4.0." Industry and government representatives were invited to share and exchange information on "policy tools," "development of industry smart manufacturing" and "IoT and Practice of Information Security Implementation."
108.09.19	Promotional Activities for Shift Towards New Textile Smart Factory and Interdisciplinary Information Security Applications	Currently smart all manufacturing industries are taking action in targeting at smart manufacturing. Traditional textile industries utilize the advantages of existing ICT and precision machinery industry of Taiwan to invest resources fully for lot marketing, big data related smart progress, and AI automation industries, making progress towards digital transformation. The sharing and exchange session features "textile order automation and smart scheduling," "Dyeing and Finishing Smart Solutions," "Confidential Security Protection Solutions," and "IoT Application Security Protection Actions" to enhance the digitalization and security of textile industries and collaborate towards the new textile epoch.

日期	活動名稱	內容摘要
108.10.07	108 年「成衣服飾產業智慧化供需交流會」	中美貿易開打凸顯台灣紡織業全球產業供應鏈管理更需要因應全球趨勢發展，及時掌握市場商機，以面對少量多樣、急單、轉單、委外等接單需求，並透過智慧製造資訊應用，掌握生產過程中的各類生產數據提供管理者決策參考。
108.10.08	參觀 2019 台北紡織展智慧縫製區	108 年首次於展場設立微型工廠（Micro Factory）示範專區，以工業 4.0 高端科技製程，整合「設計系統、縫前設備、縫紉設備、整燙設備」等 4 段流程，打造成衣縫製自動化概念。呈現一貫生產線的縫製設備，讓整體成衣生產擺脫傳統勞力密集作業的現場型態，有效提升成衣技術的品質與實力。邀請本會會員廠參觀「智慧縫製形象區（Micro Factory）」，展出內容結合製衣設備科技自動化、友善智慧操作環境、時尚環保產業趨勢，以期邁向智慧轉型新時代。



參觀「2019 台北紡織展」智慧縫製區
Visiting "2019 Taipei Innovative Textile Application Show" : Smart Sewing Pavilion



參觀「2019 台北紡織展」智慧縫製區
Visiting "2019 Taipei Innovative Textile Application Show" : Smart Sewing Pavilion

Date	Name of Activity	Summary of Content
108.10.07	Sponsoring "Smart Path to Smart Factory Transformation in Depth and Breadth Forum"	U.S.-China trade war highlights the urgent need for the global industry supply chain management of Taiwan textiles to respond to the development of global trends and timely grasp market opportunities in order to face order requirement for diversities in small quantities, emergency order, order transfer, and outsourcing. Moreover, Taiwan textile industries shall apply smart manufacturing information to control the various production data from the production process to provide reference for managers in decision-making.
108.10.08	Visited 2019 Taipei Innovative Textile Application Show-Smart Sewing Pavilion	The Micro Factory was setup in TITAS in 2019 for the first time. The factory adopts 4 steps of industry 4.0 advanced technology process to integrate "design system, pre-sewing equipment, sewing equipment, and dyeing and ironing equipment." The process establishes the automation concept of garment sewing and manufacturing to present one-stop production by sewing equipment. The overall garment production breaks away from the traditional labor-intense processing to effectively upgrade the quality and potential of garment technology. Member manufacturers were invited to visit the "Micro Factory" with content featuring the combination of garment production equipment automation, friendly environment operation, and fashion and eco-friendly industry trends, encouraging members to shift towards the new epoch of smart transformation.

(三) 紡拓大樓一樓櫥窗展示本會會員廠成衣精品

紡拓大樓一樓櫥窗於 108 年 1 月至 3 月，展示會員廠南緯實業及傑凡尼公司之系列衣服，南緯公司的 L'Armure 是一功能性都會服飾品牌，為顛覆消費者對於機能服飾的刻板印象，結合創新面料及流行設計，以合理的價格

讓消費者獲得全新的穿衣體驗。傑凡尼公司的女性運動生活服飾品牌 MACACA，針對女性的不同角色所需而設定，提供健康快樂、力量滿盈，藉此感受生命中的美好。

(四) 接受貿易局委託辦理簽發「輸入委託大陸加工之成衣同意書」

經本會建議經濟部國貿局開放廠商利用台灣成品布委託大陸加工成衣進口供內銷，自 86 年 3 月 28 日正式開始，廠商可依「廠商申請輸入委託大陸加工之成衣處理要點」之規定，向本會等申請利用台灣成品布委託大陸加工之

成衣進口供內銷。

108 年度向本會申請核發「輸入委託大陸加工之成衣同意書」者共計有 19 筆。



紡拓大樓一樓櫥窗展示本會會員廠成衣精品
Garments Were Displayed in the Window at 1F, Taiwan Textile Federation Building

3. Garments Were Displayed in the Window at 1F, Taiwan Textile Federation Building:

Garments of member manufacturers, Tex-Ray Industrial Co., Ltd. and GNI, were displayed at 1F display window of Taiwan Textile Federation Building from January to March 2019. L'Armure of Tex-Ray Industrial Co., Ltd. is a functional metropolitan garment brand that overthrows consumers' stereotype on functional apparel. The series combines

innovative fabric and fashion design to provide consumers with brand-new wearing experience at reasonable price. GNI's female sportswear brand, MACACA, is designed according to the need of different female roles, providing healthy, happiness, and full of vigor for users to perceive the beauty of life.

4. Accepted the Commission from the Bureau of Foreign Trade to issue the "Agreement for Import Commission to Mainland China for Garment Processing"

Based on the Association recommendation, the Bureau of Foreign Trade of Ministry of Economics opened suppliers to utilize Taiwan Finished Goods with Commission to mainland China garment processing for import in supply of domestic market. Starting from 3/28/1997, the suppliers can follow the provisions in "Guidelines for Supplier Application for Import Commission

to Mainland China for Garment Processing" to apply from the Association for the use of Taiwan finished products commissioned to mainland China garment processing for domestic market.

There were 19 applicants to the Association for the "Agreement for Import Commission to Mainland China for Garment Processing."



紡拓大樓一樓櫥窗展示本會會員廠成衣精品
Garments Were Displayed in the Window at 1F, Taiwan Textile Federation Building

二、協助會員廠直接拓銷國際市場

(一) 參加「2019 年德國慕尼黑運動用品展 (ISPO 2019)」

本展於 108 年 2 月 3 日～2 月 6 日在德國新慕尼黑展覽館 New Munich Trade Fair Centre 舉辦，計有南緯實業、金鼎科技、皮耶洛實業、翰享實業等 4 家會員廠參加。

本次參加紡拓會所籌組的參展廠商共計 50 家，另有自行向大會報名的廠商，如：儒鴻、興采、宏遠、力鵬、佳和、遠東新世紀……等，渠等分佈不同展區展出，效果均不錯。

據紡拓會調查：展出四日約有 1,800 人次

的買主蒞臨臺灣館參觀。綜觀本展，因為主辦單位確實落實 CRM 管理僅對專業買主開放，所以每年都吸引了大量參觀者蒞臨參觀與採購，目前已成為全世界最重要的貿易展會及交流平台。

B. Assist members to direct international market expansion:

1. Participated in "ISPO MUNICH 2019" :

The ISPO MUNICH 2019 was held at New Munich Trade Fair Centre from February 3, 2019 to February 6, 2019. Tex-Ray Industrial Co., Ltd., King's Metal Fiber Technologies Co., Ltd., Piero Pacco Textile Industry Co., Ltd., Hansc & Co. participated in the exhibition.

A total of 50 exhibitors participated in the exhibition under the organization of Taiwan Textile Federation. Other exhibitors, such as Eclat, Singtex, Everest Textile Co., Ltd., Li Peng Enterprise Co. Ltd., Chia Her Industrial Co., Ltd, and Far Eastern New Century, registered by themselves. Exhibitors were located in different areas, and the results of exhibition were great.

According to the investigation launched by TTF : Approximately 1,800 buyers visited Taiwan Pavilion during the 4 days of expo. In sum, the organization truly implemented CRM for opening only to professional buyers and the expo draws many visitors each year for visiting and purchasing. Currently the expo has become the most important trade expo and exchange platform worldwide.



2019 年德國慕尼黑運動用品展 - 南緯公司買主洽談
2019 Munich Sports Expo - Tex-Ray Industrial Co., Ltd. talking to buyers



2019 年德國慕尼黑運動用品展 - 翰享公司買主洽談
2019 Munich Sports Expo -Hansc & Co. talking to buyers

(二) 參加「2019 年中國國際服裝服飾博覽會 (CHIC2019)」

「2019 年中國國際服裝服飾博覽會」於 108 年 3 月 12 日至 14 日在上海虹橋國家會展中心舉行。

本會於 2 號館環球風尚參展，參展之會員廠有一昌實業、中阿行公司、立安製衣、杰昌國際、南緯實業、金鼎聯合科技、柏帝服裝、德式馬企業等 8 家報名參展。三天共計有 103,722 人到場參觀洽談。117,200 平方米的展館集聚了來自法國、德國、義大利、英國、比利時、瑞士、波蘭、美國、加拿大、厄瓜多爾、日本、韓國、印度、香港、台灣及中國國內等

16 個國家和地區的 1,365 家展商、1,453 個品牌參加。

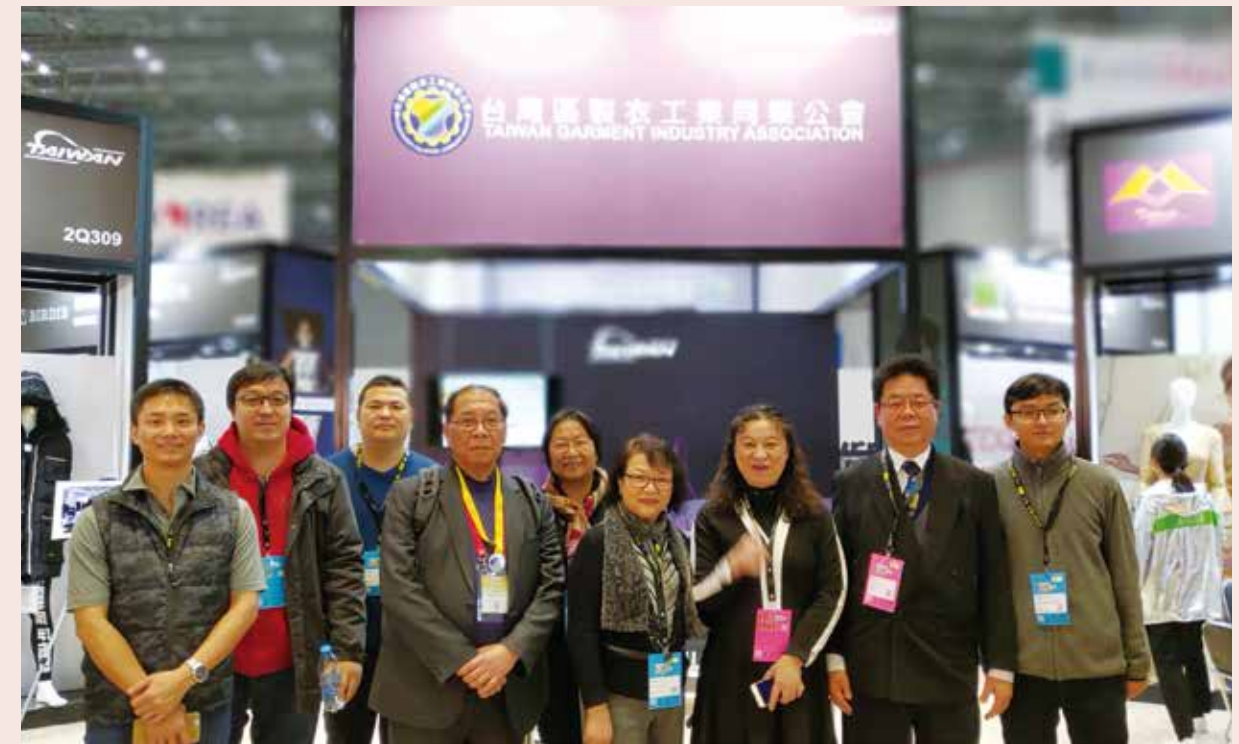
本次展覽館規劃為半開放式的台灣時尚館，希望本展在加強整體攤位形象外，參展廠商也能真正拓展大陸市場。本會在林理事長瑞岳領導下，積極扮演產業推手的角色，期許由公會內部凝聚力量，結合所有的同業串連成衣產業的供應鏈，主動創造商機的同時，以更靈活的產業實力，同心協力將台灣的成衣業帶入中國大陸廣大的消費市場。

2. Participated in "CHIC 2019"

The CHIC 2019 was held at National Exhibition and Convention Center (Shanghai) from March 12, 2019 to March 14, 2019.

Taiwan Garment Industry Association exhibited at Fashion Journey in Hall 2. A total of 8 member suppliers participated, including I-Chong Development Co., Ltd., Minkwood International Co., Ltd, Li An Garment Enterprise Co., Ltd., Amity Jc Textile Co., Ltd., Tex-Ray Industrial Co., Ltd., King's Metal Fiber Technologies Co., Ltd., Birdie Dress Co., Ltd., and Texma International Co., Ltd. A total of 103,722 visited the expo in 3 days. The pavilion is 117,200 square meter, gathering 1,365 exhibiting manufacturers and 1,453 brands from 16 countries and regions, including France, Germany, Italy, England, Belgium, Switzerland, Poland, U.S., Canada, Ecuador, Japan, Korea, India, Hong Kong, Taiwan, and China.

This expo designed Taiwan Fashion Pavilion was semi-open for exhibiting manufacturers to truly expand their market in China apart from strengthening the overall booth image. Taiwan Garment Industry Association takes action in playing the push-hand role of the industry under Chairman Lin, Jui-Yueh. It is expected that Taiwan Garment Industry Association will cohere internal power to integrate all industries in forming the supply chain for apparel industries through the voluntary generation of business opportunities while work in collaboration to take Taiwan's apparel industries into the vast consumer market of China through more flexible industry strength.



2019 年中國國際服裝服飾博覽會 - 紡拓會黃秘書長與本會參展廠商合影
2019 China International Fashion Fair (CHIC) -
Photo of TTF Secretary General Huang and TGIA Exhibiting Manufacturers

2019 年中國國際服裝服飾博覽會 - 買主洽談
2019 China International Fashion Fair (CHIC)- Buyer negotiations





2019 年美國 Outdoor Retailer 夏季戶外運動用品展 -
買主洽談
Outdoor Retailer Summer Market Trade Show 2019-
Buyer negotiations

台灣形象展示區
(南緯、台南企業、翰享、永樂等提供展品展示)
Taiwan Image Expo
[Exhibits displayed by Tex-Ray Industrial Co., Ltd.,
Tainan Enterprises Co., Ltd., Hansc & Co., and Happy
Plastic Mfg. Co., Ltd.]



2019 年美國 Outdoor Retailer 夏季戶外運動用品展 -
買主洽談
Outdoor Retailer Summer Market Trade Show 2019-
Buyer negotiations



駐丹佛台北經濟文化辦事處劉坤成組長及駐洛杉磯台北經濟文化辦事處侯文奇副組長參觀本會攤位並與會員廠同仁合影
Taipei Economic and Cultural Office in Denver Section Chief Liu, Kun-Cheng and Taipei Economic and Cultural Office in Los Angeles Deputy Section Chief Hou, Wen-Chi visited TGIA booths and took photo with peers from member manufacturers.

(三) 參加「2019 年美國 Outdoor Retailer 夏季戶外運動用品展」

本會為協助會員廠能直接與美國各地買主洽談，增加銷售美國成衣市場之機會，並提昇我產品之形象及提高我參展廠商之知名度，經申請推廣貿易基金補助參加本展，共申請 5 個攤位，計有台南企業、皮耶洛實業、永樂塑膠、南緯實業、翰享實業等 5 家會員廠報名前往參展，本展於 108 年 6 月 18 日至 20 日在美國丹佛舉辦。

根據主辦單位發布的資訊：本屆共有 1,395 家廠商參展，三天展期約計 3 萬人次入場參觀。參展 5 家會員廠，在展覽期間，均主動出擊，到主展館的品牌商展示區介紹公司產品，有不錯的效果，而且亦蒐尋到新客戶，對渠等拓銷北美市場有助益。

3. Participated in "Outdoor Retailer Summer Market Trade Show 2019" :

Taiwan Garment Industry Association applied for the trade promotion fund of 5 booths to participate in order to assist member manufacturer in negotiation with buyers from the U.S. directly, increase opportunities to sell into American garment market, enhance the product image and expose visibility of Taiwan exhibitors. A total of 5 member suppliers, namely Tainan Enterprise Co., Ltd., Piero Pacco Textile Industry Co., Ltd., Happy Plastic Mfg. Co., Ltd., Tex-Ray Industrial Co., Ltd., and Hansc & Co., participated in the exhibition in Denver, U.S

from June 18 to June 20, 2019.

According to the statistics published by the organizer: A total of 1,395 manufacturers exhibited and 30,000 buyers visited the 3-day exhibition. The 5 member manufacturers have all taken initiative during the exhibition period to introduce company products at the brand display zone of the main exhibition pavilion with excellent effect. These companies have collected new customers and indicated that the exhibition was beneficial to the market expansion to North America.

(四) 參加「2019 年東京國際時尚匯集展 (Fashion World Tokyo 2019)」

「2019 年東京國際時尚匯集展 (2019 Fashion World Tokyo)」於 108 年 10 月 2 日至 10 月 4 日在東京 Big Sight 展覽館南一館舉辦，參加之會員廠計有中阿行、比克斯、永樂塑膠、上野百貨、柏帝等 5 家會員廠報名參加。另外，為壯大台灣館聲勢，經聯合織襪、手套公會在同一展區共同展出。

本會已連續第五年組團參展，3 天展出，綜合展效：

本次 5 家參展會員廠都各有所獲，也有渠等想接觸的新客人到攤位洽談：

1. **中阿行**：展示各式新娘禮服、晚禮服，3 天計有 20 餘組新買家洽詢。
2. **比克斯**：展示運動服飾及布料，第一次參展，3 天計有 40 餘組買主到訪。
3. **永樂**：展示免車縫外套、運動服飾等休閒運動服，第一次參加本展，3 天計有 70 組以上買主到訪。
4. **上野百貨**：展示女性時裝，3 天計有 20 多組買主到訪。
5. **柏帝**：本次以團體服為展示，據表示，參展 4 年來，已經有日本往來的客戶，也都有續談採購。

4. The Fashion World Tokyo 2019

The Fashion World Tokyo 2019 was held at Big Sight Pavilion in Tokyo from October 2 to October 4, 2019. Five member manufacturers registered to participate in the exhibition, including Mlnkwood International Co., Ltd., Because Garment Co., Ltd., Happy Plastic Mfg. Co., Lucky Mascot Co., Ltd., and Birdie Dress Co., Ltd. Additionally, to add momentum to Taiwan Pavilion, hat and hosiery manufacturers associations were exhibiting together at the same exhibition zone.

Taiwan Garment Industry Association has formed delegation to participate in this exhibition for 5 years in a row. The following is a summary of the effect from the 3-day exhibition:

For this exhibition, the 5 manufacturers have received rewards and collected new customers who negotiated at their booths:

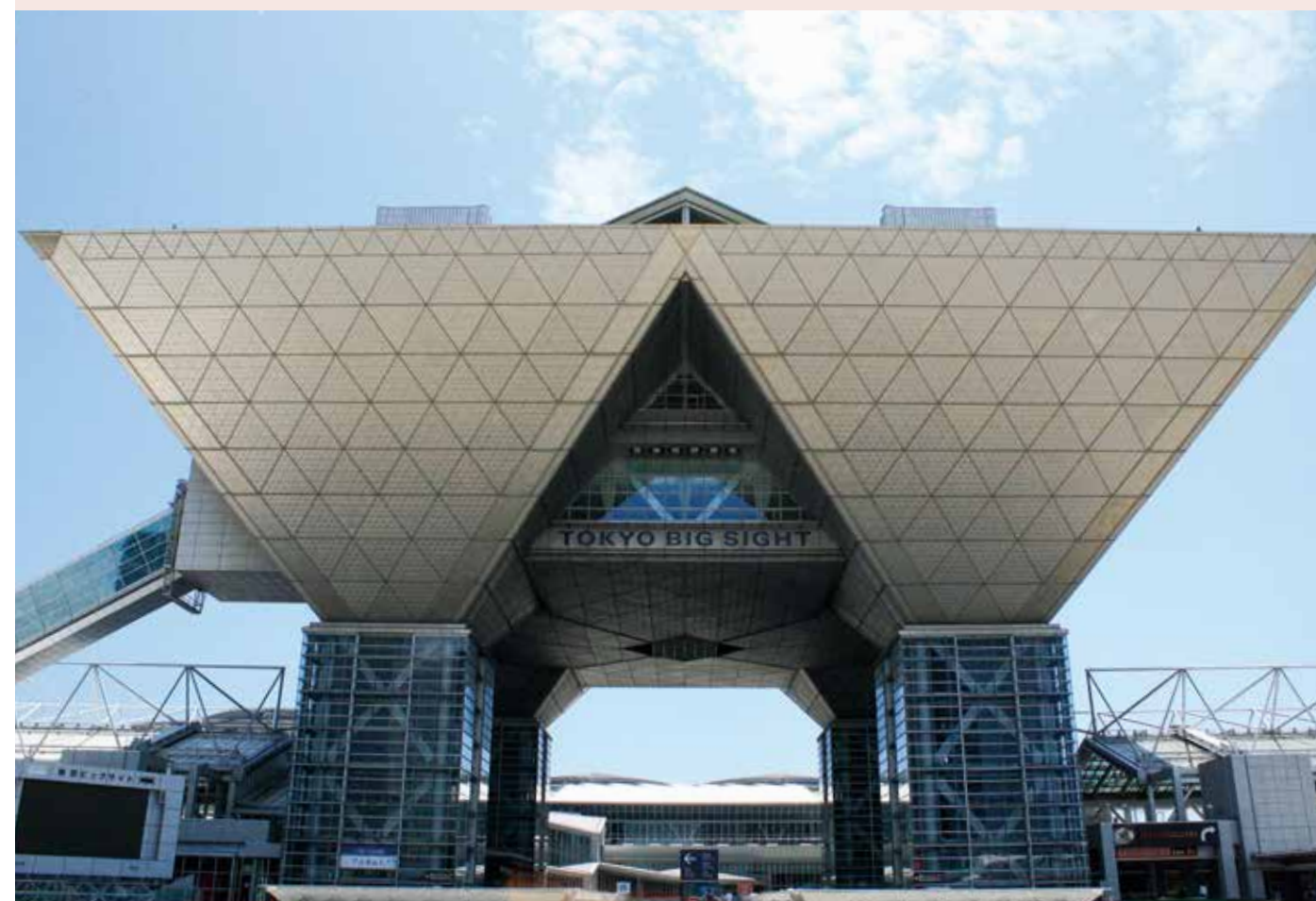
1. **Minkwood International Co., Ltd.:** Exhibited wedding gowns and formal dresses. About 20 new buyers negotiated in 3 days.
2. **Because Garment Co., Ltd.:** Exhibited sportswear and fabric; first time exhibition and 40 some buyers visited in 3 days.
3. **Happy Plastic Mfg. Co., Ltd.:** Exhibited sewing-free jacket, sportswear and other casual sportswear. First time exhibition and 70 buyers visited in 3 days.
4. **Lucky Mascot Co., Ltd.:** Exhibited female clothing and 20 some buyers visited in 3 days.
5. **Birdie Dress Co., Ltd.:** Exhibited group uniforms. According to the manufacturer, they have conducted business with Japanese customers in the 4 years of exhibition and those customers all follow up on purchase.



2019 年東京國際時尚匯集展
台北駐日經濟文化代表處葉承岳課長補佐訪本會攤位
Fashion World Tokyo 2019
Section Chief Ye, Cheng-Yue of Taipei Economic and Cultural Representative Office in Japan visited the booth



2019 年東京國際時尚匯集展
製衣公會展位買主洽談情形
Fashion World Tokyo 2019
Buyer negotiations at the booth



2019 年東京國際時尚匯集展 Tokyo Big Sight 入口
Fashion World Tokyo 2019 Tokyo Big Sight Entrance

(五) 參加「2019 年台北國際紡織展 (TITAS)」

2019 年台北紡織展 (TITAS) 於 108 年 10 月 7 日至 9 日假台北南港展覽館 4 樓舉辦。本會共承租 18 個攤位供會員廠展出系列精品，共有中阿行、立安製衣、皮耶洛實業、永樂塑膠廠、南緯實業、德式馬企業、翰享實業、豐祥實業、杰昌國際等 9 家會員廠參展，展現台灣流行成衣的時尚魅力及台灣休閒運動成衣的軟實力。

TITAS 是台灣唯一的專業紡織展，提供符合全球買家需求的創新紡織品，TITAS 2019 展覽的四大主題「機能應用」與「永續環保」「智慧紡織」與「智慧製造」，展出具新技術及高質量的智慧機能兼具環保與流行之紡織品。

108 年首次於展場設立微型工廠 (Micro Factory) 示範專區，以工業 4.0 高端科技製程，整合「設計系統、縫前設備、縫紉設備、整燙設備」等 4 段流程，打造成衣縫製自動化概念。呈現一貫生產線的縫製設備，讓整體成衣生產擺脫傳統勞力密集作業的現場型態，有效提升成衣技術的品質與實力。展出內容結合製衣設備科技自動化、友善智慧操作環境、時尚環保產業趨勢，以期邁向智慧轉型新時代。



2019 年台北國際紡織展 (TITAS) 買主洽談
Buyer negotiations in TITAS 2019



5. Participated in Taipei Innovative Textile Application Show (TITAS) 2019

Participated in Taipei Innovative Textile Application Show (TITAS) 2019 was held on 4F of Taipei Nangang Exhibition Center from October 7, 2019 to October 9, 2019. Taiwan Garment Industry Association rented 18 booths designed with an industrial, simple style for 9 members, namely Minkwood International Co., Ltd., Li An Garment Enterprise Co., Ltd., Piero Pacco Textile Industry Co., Ltd., Happy Plastic Mfg. Co., Ltd., Tex-Ray Industrial Co., Ltd., Texma International Co., Ltd., Hansc & Co., Feng Shyang Industrial Co., Ltd., and Amity Jc Textile Co., Ltd., to exhibit their products and show Taiwan's fashion and soft power of leisure and sports clothing.

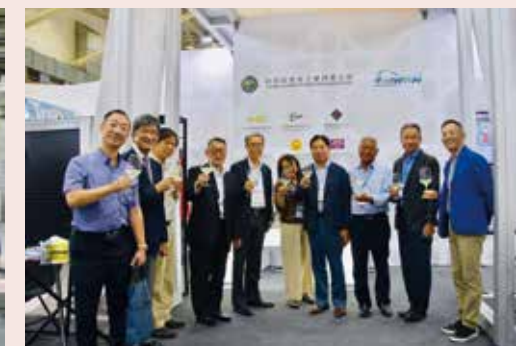
TITAS is the only professional textile exhibition of Taiwan, which provides innovative textile products meeting the needs of global buyers. TITAS 2019 exhibited four themes, including "functional application," "sustainable and environmental-friendly," "smart textile," and "smart manufacturing," exhibiting new-

technology, high-quality, smart, functional, eco-friendly, and stylish textile. TITAS set up a Micro Factory demonstration.

Zone in 2019 for the first time to demonstrate the integration of 4 sections in "design system, pre-sewing equipment, sewing equipment, and finishing and ironing equipment" through Industry 4.0 advanced technology. The concept of garment sewing automation was established to present the one-stop production sewing equipment so the overall garment production can detach from the traditional labor-intensive operation and effectively upgrade the quality and potential for garment technology. The exhibition shows the combination of garment equipment technology automation, friendly smart operation, and fashion and eco-friendly industry trends, in attempt to shift towards smart transformation.



1



2



3

1. 2019 年台北國際紡織展 (TITAS) 林理事長與參展廠商合影
2019 TITAS Director Lin took photo with exhibiting manufacturers
2. 2019 年台北國際紡織展 (TITAS) 本會理監事與參展廠商交流合影
TGIA Director/Supervisor taking photo with exhibiting manufacturers at the 2019 TITAS
3. 參觀 2019 台北紡織展智慧縫製區
Visited 2019 Taipei Innovative Textile Application Show- Smart Sewing Pavilion

(六) 籌組「2019 年海外理監事會議暨非洲考察團」

本項考察於 108 年 8 月 28 日至 9 月 5 日前往南非開普敦及史瓦帝尼參訪南緯實業股份有限公司史瓦帝尼工廠完竣，考察重點：參訪南緯實業股份有限公司史瓦帝尼工廠

1. 垂直整合一條龍：2001 年，南緯實業股份有限公司在史瓦帝尼成立第一家工廠，目前有 5 個廠，包括 3 成衣廠（含刺繡廠、印花廠）、1 織布廠、1 染整廠，員工人數多達 4,000 多人。

2. 織、染整理廠：生產創新系列、機能系列、運動時尚系列，色紗、印花，480,000 公斤 / 月。

3. 成衣廠：生產休閒、運動、繡花成衣，100,000 打 / 月。

4. 善盡企業社會責任：

- (1) 2006 年成立教育獎助金；
- (2) 2007 年成立南緯慈善基金會，每年至少舉辦 4-5 場慈善捐助活動，如與台灣醫療團聯合賑災暨義診、孤兒院及贍養中心照顧計畫、捐贈員工大米活動、捐贈冬衣至非洲等，化小愛為大愛，「愛」撒史瓦帝尼。

6. Formed "2019 Overseas Director/Supervisor and Africa Delegation"

The survey took place in Cape Town of South Africa and Kingdom of Eswatini to visit the completion of Eswatini factory of Tex-Ray Industrial Co., Ltd. between August 28 and September 5, 2019. The key survey includes: Visited the Eswatini factory of Tex-Ray Industrial Co., Ltd.

1. Vertical integration: In 2001, Tex-Ray Industrial Co., Ltd., established its first factory in Eswatini. There are currently 5 factories, including 3 garment factories (including embroidery factory and printing factory), 1 weaving factory, and 1 dyeing and finishing factory. The number of employees reach as many as 4,000 some people.

2. Weaving/dyeing and finishing factory: producing innovative series, function series, sports fashion series, dyed yarn and printing: 480,000 kilograms/month.

3. Garment factory: producing leisure, sportswear, embroidery garment, 100,000 dozens/month.

4. Fulfilling corporate social responsibility:

- (1) Establishing education scholarship in 2006;
- (2) Tex-Ray Industrial foundation was founded in 2007 and at least 4-5 sessions of charity donation events are held each year, including the joint disaster relief and free diagnosis by Taiwan medical teams, orphanage and foster center care plan, donation of employee rice events, donation winter clothes to Africa, and other events that turn neighboring love to global love, spreading love in Eswatini.



參訪南緯實業股份有限公司史瓦帝尼廠 - 團員在大門前合影
Visited the Eswatini factory of Tex-Ray Industrial Co., Ltd., - Member manufacturers taking photo at the front gate



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- 1. 參訪南緯實業股份有限公司史瓦帝尼廠 - 林理事長致歡迎詞
Visited the Eswatini factory of Tex-Ray Industrial Co., Ltd., - Director Lin delivering a speech
- 2. 成衣廠現場 - 縫製區
Garment Factory Site - Sewing Zone

三、推動製衣工業發展，提升產品品級

(一) 舉辦「2020 春夏流行趨勢發表會」暨「新產品展示會」

為協助會員廠掌握最新流行資訊，本會於 108 年 4 月 17 日辦理「2020 春夏流行趨勢發表會」，由林千惠設計師針對 2020 春夏流行色彩、款式、圖案、布料作分析整理，內容包括：女裝流行色彩預測、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（歐美時尚領導品牌趨勢焦點）；以多媒體方式播放解析，輔以流行趨勢看板，十大最佳春夏服裝穿搭組合分析，以期增加整個發表會的豐富性及有效性。

又本會為加強服務贊助會員廠及合作廠商，於 2020 春夏流行趨勢發表會發佈之同時，假紡拓大樓 17 樓第 2 會議室舉辦「新產品展示會」，贊助會員廠及名錄廣告商皆可免費參

加，使其藉此將所研發之新產品推廣。本次參展的廠商有南緯實業、台灣歐西瑪、千盛實業、伍舜貿易、多特針業、宏大拉鍊、墾青工業、德富製針、勝利蕾絲、巨一科技、松芝公司、勤倫公司等 12 家公司。

本次發表會共有 80 人參加。



2020 春夏流行趨勢發表會暨新產品展示會
"2020 Spring-Summer Fashion Trend Press release" and "New Product Press"



C. Promote development in Garment industry to upgrade product quality:

1. Organized "2020 Spring-Summer Fashion Trend Press release" and "New Product Press" :

To help member manufacturers with grasping the latest fashion information, TGIA sponsored the "2020 Spring/Summer Fashion Trends Release" on April 17, 2019. Designer Jien-Hui Lin analyzed and compiled data on the 2020 spring/summer fashion colors, styles, patterns, and fabric. The content includes: female apparel color forecast, fashion material analysis, trending pattern compilation, fashion clothing key profile, instant trends focus (Western fashion leading brand trend focus). Designer Lin also analyzed through multimedia planning, supplemented with fashion trend board to analyze the combination of top 10 spring/summer clothing, in order to boost the overall abundance and effectiveness of the release.

Moreover, to boost the services to sponsoring member manufacturers and cooperating manufacturers, TGIA held the "new product exhibition" at Conference Room 2 at the 17F of TTF Building while publishing the 2020 spring/summer fashion trend



十大最佳春夏服裝穿搭組合分析
Top 10 Best Spring/Summer Clothing Combination Analysis



2020 春夏流行趨勢發表會流行趨勢看板
2020 Spring/Summer Fashion Trends Release -
Fashion Trends Board

release. Sponsoring member manufacturers and listed advertisers may participate for free, which helped the manufacturers promote their new products developed. Participating manufacturers included 12 companies, namely Tex-Ray Industrial Co., Ltd., Oshima Co., Ltd., TSM, New Woosun Trading Co., Ltd., Dotec Needle Co., Horng Dah Zippers Co., Ltd, Keen Ching Industrial, Triumph Needle Corporation, SUNNY LACE CO., LTD., Vast Technologies, Matsushiba, and CHANCE LINE INDUSTRIAL Co.

80 people participated in this release.



1. 20/21 秋冬商品發表會暨趨勢說明暨新產品展示會
2020/2021 Autumn-Winter Fashion Trend Press release and New Product Press
2. 成衣設計研發委員會劉梅君主任委員致詞
Speech Addressed by Garment Design and R&D Commission Chairman Liu, Mei-Jun
3. 趨勢發佈會場 Trend Release Pavilion
4. 新產品展示會場 New Product Exhibition Pavilion



(二) 舉辦「20/21 秋冬商品發表會」暨「趨勢說明暨新產品展示會」

本次發表會於 108 年 10 月 16 日假紡拓大樓 17 樓舉辦，係由大林國際設計有限公司林千惠流行設計顧問，針對 20/21 秋冬商品發表會暨趨勢說明秋冬流行色彩、款式、圖案、布料作分析整理，內容如下：

1. **流行趨勢簡報發佈：**配合流行主題、素材、色彩、商品市場、方向做講解分析，包括當季流行概念、細節表現、色盤搭配、流行 print & pattern 布花分析報告、流行素材 material 整理報告、即時趨勢焦點、歐美時尚領導品牌趨勢焦點整理。
2. **流行趨勢看板：**針對趨勢主題之背景、色彩、布料及款式圖型等，供本會會員廠提前企劃，以掌握最新資訊，順應全球化趨勢，提昇競爭力，以達服務會員廠並供參考。
3. **展示4家會員廠（共12個模特兒）主題性衣服：**為落實流行資訊能實際應用於各會員廠

目標市場之品牌開發及製作以提昇企業競爭力，林千惠設計顧問預先將流行趨勢挑選適合的主題，指導參與製作的廠商，配合 4 大主題奇異雅緻、實用民俗、虛華偶像、精藝原型製作出每家 3 套系列衣服陳列展示於發表會現場，參加之會員廠有台南企業、立安製衣、南緯實業、德式馬公司。

又為加強服務贊助會員廠及合作廠商，於 20/21 秋冬商品發表會暨趨勢說明秋冬流行趨勢發表會發佈之同時，舉辦「新產品展示會」，除了本會的廣告廠商展示成衣副料之外也加入了織布公會的布料廠商，參加的有南緯實業、多特針業、宏大拉鍊、德富製針、墾青工業、偉凱實業、勝利蕾絲、長安纖維、美立信實業、宏良國際、益笙實業、貫興實業等 12 家公司。

本次發表會共有 108 人參加，千惠老師精準用心的掌握流行脈絡及時尚流行重鎮流行焦點分享，讓學員有滿滿的視覺分享，也獲得學員的一致肯定。

2. Organized "2020/2021 Autumn-Winter Fashion Trend Press release" and "New Product Press" :

The press was held at the 17th floor of Taiwan Textile Federation Building on October 16th, 2019, where the Fashion design consultant Qian-Hui Lin of Dalin International Design Co., Ltd. analyzed and organized the data on the colors, styles, patterns, and fabrics for 2020/2021 Autumn-Winter. The content is described below :

1. Fashion Trend Presentation Release:

Analysis in cooperation with popular themes, materials, colors, product markets, including the fashion ideas in concept, details of presentation, color pallet, fashion print& pattern fabric analysis report, fashion material compilation report, instant trend focus, Western fashion leading brand trend focus.

2. Fashion trend board: The background, colors, fabrics and patterns related to the trend themes are provided for member suppliers to plan ahead in order to control the latest information, cope with globalized trend, enhance competitiveness, and thereby providing reference services for member suppliers.

3. Exhibiting theme-based clothing from 4 member suppliers (12 models in total) :

To apply fashion trends to the members' product development in target markets, fashion design consultant Lin, Chien-Hui of Dalin International Design Co., Ltd. selected 4 themes (Bizarre and elegant, practical folklore, vanity idols, fine art prototypes) to create 3 sets, Participating members have

Tainan Enterprise Co., Ltd., Li An Garment Enterprise Co., Ltd., Tex-Ray Industrial Co., Ltd.,and Texma International Co., Ltd.,

To boost services to sponsoring member manufacturers and cooperating manufacturers, the 20/21 autumn/winter product release and trend presentation for autumn/winter fashion trend presentation release will be held jointly with "new product exhibition." Apart from the advertising manufacturers of TGIA that exhibit secondary material for garment, fabric manufacturers of Taiwan Weaving Industry Association also participated, including 12 companies, namely Tex-Ray Industrial, Dotec Needle Co., Horng Dah Zippers Co., Ltd, Triumph Needle Corporation, Keen Ching Industrial, TWK Zipper, SUNNY LACE CO., LTD., IFABRIX TAIWAN CO., LTD., Merryson Corporation, HITEX TEXTILE CO., LTD. YEE SAINT ENTERPRISE CO., LTD., and Q&S CO., LTD.

108 people participated in this release while designer Jien-Hui fully grasped the fashion movement and key fashion center, sharing with members for plenty of visualization and collective recognition from the members.

四、推動紡織中下游策略聯盟

(一)「製衣／針織／絲綢印染三公會聯盟」辦理情形

三公會聯盟會議決議，108 年仍以延續「智慧製造」議題，加入「由三公會主導成立一貫的小型自動化工廠，垂直整合染紗、織布、噴墨印染、成衣上中下游，未來目標成為一個紡織業的示範工廠，提振紡織業智能化發展」。嗣經召開三公會與六公會聯盟聯席會議決議：

1. 有關「成衣上中下游一貫作業的小型自動化示範型計畫」，期以公版示範型計畫為本，請紡織所與製衣／針織／絲綢印染等三公會先研議實驗型計畫製程段；
2. 俟示範型計畫完成後，再結合三公會、六公會聯盟及台灣智慧型紡織品協會，共同推動整合設立於「紡織矽谷時尚產業園區」示範場域，供廠商觀摩。

(二)「台灣成毛衣服飾六公會對外拓銷聯盟」辦理情形

1. 六公會是否進駐永樂市場 4 樓「T Fashion 時尚實驗基地」

經六公會秘書長和各理事長討論後，一致認為本案較適合個別廠商進駐，並告知會員廠商前往參觀並進駐 T Fashion 基地；經 108 年 8 月 14 日第 4 次理事長會議決議：

- (1) 六公會聯盟仍以「桃園紡織矽谷時尚園區」為目標，因此決定不進駐。
- (2) 個別廠商如有興趣進駐該基地，請直接與該基地連絡。

2. 參觀「林口新創園區」

「林口新創園區」原是世大運選手村，共有 26 棟大樓，中小企業處將其定位為「物聯網」及「資通訊」新創基地，委託台北市電腦公會經營；經於 108 年 7 月 15 日六公會及台灣智慧型紡織品協會秘書長前往參觀後，理事長會議決議：

- (1) 此園區規劃進駐對象似以「加速器」創育模式的公司為主要對象，而六公會聯盟仍以「桃園紡織矽谷時尚園區」為目標，因此決定不進駐該基地。
- (2) 台灣智慧型紡織品協會的會員則具備此能量，因此請協會沈秘書長號召會員廠商前往參觀研究進駐的可能性。

3. 推動桃園「紡織矽谷時尚園區」進程

端視桃園市政府規劃為何才能繼續執行，據悉該園區要到民國 112 年才得以完工。在場域準備期間，經建議：希望在六公會與 TSTA 的媒合下舉辦媒合會，結合彼此的能量，開發出更多新的智慧型紡織品。

D. Promote textile midstream and downstream strategic alliance

1. Organization of "Garment/Knitting/Silk Printing and Dyeing Union Alliance" :

The Three Union Alliance resolved to continue "smart manufacturing" for 2019, adding "the one-stop small automation factory led by the three union to vertically integrate dyed yarn, fabric, ink printing, garment up-mid-lower stream, in order to become the textile industry demonstration factory in the future, thereby invigorating the smart development of textile industries."

- 1."Small automation demonstration

plan for garment upstream, midstream and downstream operation" is expected to employ standard demonstration plan and request the TTRI and garment/textile/silk printing union to analyze the experimental plan process.

2. After completing the demonstration plan, the three union and six union alliance as well as TSTA will collaborate to promote the integration and establishment of demonstration field for "Textile Silicon Fashion Industry Park" for manufacturers to observe.

2. Organization of "Taiwan Garment and Sweater Apparel Six Union Export Alliance"

1. Should the six union station into the 4F

"T Fashion Experiment Base" in Yongle Market

After the six union secretary general discussed with all chairmen, they have reached unanimous agreement that this case was more suitable for the stationing of individual manufacturer. Member manufacturers were notified to visit and station into the T Fashion Base. It was resolved at the 4th director meeting held on August 14, 2019:

- (1) The six union alliance still targets at "Taoyuan Textile Silicon Fashion Park" and decided not to station.
- (2) Individual manufacturers shall directly contact with the base if interested in stationing into the base.

2. Visited "Linkou Innovative Park"

"Linkou Innovative Park" was the former Athletes' Village consisting of 26 buildings. The SME defined the village as the innovative base for "IoT" and "Information Communication." The base is commissioned to Taipei Computer Association for management. After the six union and TSTA

secretary general visited on July 15, 2019, the chairman resolved the follows at the meeting:

- (1) This park is designed for targeting at companies with similar incubation model of "accelerator." The six union alliance still targets at "Taoyuan Textile Silicon Fashion Park" and decided not to station in the base.
- (2) Members of Taiwan Smart Textile Association (TSTA) are equipped with such energy while TSTA Secretary General Shen calls for member manufacturers to visit and analyze the possibility of stationing in the park.

3. Promoting Taoyuan "Textile Silicon Fashion Park" Progress

Observing Taoyuan City Government's plan for continuation of execution. It is known that the park will be completed by 2023 and during the preparation of the site, it is suggested that the six unions and TSTA shall hold the matching session in order to combine mutual energies and develop more new smart textile products.

五、積極培育製衣工業人才－舉辦「製衣青年種籽聯誼」活動

舉辦日期	活動內容
108.05.31	舉辦「成衣產業的創新及紡織產業的數位改造新知研討會」
108.12.20	舉辦「成衣生產製造與零售 AI 智能化論壇」及種子會年終活動－新舊任會長交接



聚陽公司廖顧問白蓉主講「成衣產業的創新」
Makalot Counselor Liao, Bai-Rong Speaking
on "Innovation in Garment Industry"



研討會後全體合影
Post-Seminar Group Photo



成衣生產製造與零售 AI 智能化論壇
Garment Production and Manufacturing
and Retail AI Forum



青年種籽參加本會春酒聯誼合影
Group Photo of Youth Seeds
Participating TGIA Post-CNY
Banquet

E. Actively fostering garment industrial talents –
hosting "Garment Youth Seed Club" activity

Date	Activity
108.05.31	Held "Garment Industry Innovation and Textile Digital Renovation and New Information Seminar"
108.12.20	Held "Garment Production and Manufacturing and Retail AI Forum" and Seed Club Year-End Activity – Handover between former and new chairman

六、國際交流、促進邦誼

(一) 參加「2019 年台韓紡織會議」

為增進台韓紡織業者之互動交流與產業合作，由韓國主辦的第 16 屆「2019 年台韓紡織會議」，於本年 4 月 25 日在韓國慶尚南道昌寧圓滿閉幕。

本次會議以「紡織與時尚產業之永續發展及其未來挑戰」為題，邀請台韓雙方專家進行專題演講。我方係由遠東新世紀公司研究發展中心許嘉夫經理以「遠東新世紀為清潔大自然提供友善環保方案」為題，分享該集團積極投入海洋廢棄物環保回收工作的努力，以及該集團針對廢棄紡織品回收再製的解決方案—FENC® TopGreen® rTex，透過化學回收過程，使廢棄紡織品再次變身全新的服裝，可望為發展循環經濟再下一城。

韓方則由 FITI 試驗研究院研究開發本部金裕謙部長就「紡織服裝永續發展的現況與前景」，分享全球市場為確保永續性所做的努

力，金部長指出平價快時尚（Fast Fashion）風潮席捲全球，滿足了消費者時尚潮流的穿衣需求，品牌營業額也節節高升。不過，這樣的消費模式背後，地球生態危機已成為難以忽視的嚴重問題，因為有「1/3 的服飾從未售出」，只是「消失」。此種情況逐漸被揭發出來，消費者也對紡織成衣產業的過量生產進行反思。金部長建議紡織業界應積極利用全球如 ZDHC、Higg Index 及 Material Sustainability Index 等共同平台，考慮時尚產品週期設計，且結合工業 4.0 帶來的數位化智慧製造及客製化銷售，實現適量生產，做到滿足現代消費者之需求，同時不損及後代需求之永續發展。

台韓雙方代表均認為，紡織業必須順應全球消費者環保意識的潮流，持續研發及創新，並進一步導入綠色生態與循環經濟概念，成為全球友善環境的先驅，不僅為生態環保盡一份心力，也開創企業永續發展的前瞻新局。

業融合發展等議題展開熱烈討論，為未來雙方進一步推動兩岸產業的融合發展，奠定了更為堅實的基礎，本會由林理事長瑞岳及黃名譽理事長華德代表參加。

(二) 參加「2019 兩岸企業家紫金山峰會」

「2019 兩岸企業家紫金山峰會」於 108 年 12 月 4-5 日在南京盛大舉行，共有來自兩岸的 1,000 多位企業家出席。針對當前經濟形勢挑戰、推動兩岸企業交流合作、深化兩岸產



2019 年台韓紡織會議
2019 Taiwan-Korea Textile Meeting



F. International Exchange, promotion of foreign diplomacy:

1. Participated in the 2019 Taiwan-South Korea Textile Meeting:

To boost the interaction, exchange and industry cooperation between Taiwan and Korean textile companies, Korea hosted the 16th "2019 Taiwan-Korea Textile Meeting" and was completed with success in Changnyeong-gun, Korea on April 25, 2019.

The meeting featured "Sustainable Development and Future Challenges in Textile and Fashion Industries" to invite experts from Taiwan and Korea for delivery of keynote speech. Taiwan appointed Far Eastern New Century R&D Development Center manager Jia-Fu Xu to share the group's active devotion and efforts in marine waste recycling, based on "Far Easter New Century Providing Friendly and Eco-Friendly Solutions in Nature Cleaning." Moreover, manager XU emphasized on the group's solution for waste textile recycling and reproduction - FENC® TopGreen® rTex to explain how waste textile can be transformed into new clothing through chemical recycling process in order to make a one chapter in the development of recycling economy.

Korea appointed FITI minister Yu-Chien Jin to share the efforts from global market in assuring sustainability based on "Status and Prospects of Textile Clothing Sustainable Development." Minister Jin suggested that affordable fast fashion has swept

the world by satisfying the consumers' wearing demand in fashion and trends, which leads to increasing sales revenue for brands. Nonetheless such consumer model is hidden with severe problems of ecological crisis in earth that could not be neglected since "1/3 of clothing has never been sold" but just "disappeared." Such situation is eventually disclosed while consumers also reflect on the over production of textile apparel industries. Minister Jin suggested the textile industries to utilize joint global platform such as ZDHC, Higg Index, and Material Sustainability Index to take consideration of the fashion product cycle design and combine the digital smart manufacturing and customized sales brought by Industry 4.0. Such practice will implement production in suitable quantity and meet demand from modern consumers without infringing the sustainable development for the demand of future generations.

Korea and Taiwan representatives believed that the textile industries must follow the global consumer trends in eco-friendly awareness by continuing the R&E and innovation with further introduction to green ecology and recycling economic concept to become pioneers in global environmental-friendliness, which not only fulfill the responsibility for the environment but also opens up a forward-looking outlook of corporate sustainable development.

2. Participated in "2019 Cross-Strait CEO Summit at Zijinshan"

The "2019 Cross-Strait CEO Summit at Zijinshan" was held in Nanjing between December 4-5, 2019, and over 1,000 CEOs from Cross Straits attended. The CEOs held enthusiastic discussion on agenda including the challenge in current economic situation, promotion of Cross-Strait enterprise cooperation and

exchange, and in-depth and infused development of Cross-Strait industries, which established more solid foundation for the two sides in further promotion of integrated development in Cross-Strait industries. TGIA Chairman Ray Lin and Honorary Chairman Hua-De Huang participated on behalf of the association.

七、社會服務－舉辦會員廠聯合淨灘公益活動

為推廣「企業社會責任」概念，落實企業對大地環保的認知，由本會幸福企業推動委員會策劃「會員廠聯合淨灘公益活動」，108 年 5 月 25 日一早在三芝淺水灣舉行，本次活動計有 23 家會員廠公司同仁及親友共計 508 人參加淨灘。

當天豔陽高照大人、小孩都開心地戴起手套拿著夾子拎著垃圾袋，迅速散佈在沙灘各個角落認真撿拾垃圾，藉著淨灘活動淨化心靈，增加親子教育寓教於樂的機會。

本次淨灘活動主要的宣導重點是：希望大家將「減塑」習慣變成一種生活態度，從源頭做好垃圾減量，減少海洋廢棄物污染，為愛地球及保護海洋動物盡一份心力。

本次贊助活動名單：

1. **幸福企業推動委員會**：黃主任委員美靜贊助『deya 環保托特袋』500 個，邱副主委創琳贊助『手工蛋捲』500 袋。
2. **會員廠東豐纖維企業公司**：贊助淨灘 T-Shirts 500 件。
3. **南加州餐飲生活概念店**：贊助總價值 1 萬元「抵用券」作為尋寶遊戲獎品，並捐出現金 1 萬元給弱勢團體，響應一起做公益。



幸福企業推動委員會邱副主委創琳致詞
Happy Enterprise Promotion Commission Deputy Director
Aric Chiu delivering a speech



會員廠聯合淨灘公益活動大合照
Group photo of member manufacturer joint beach cleaning charity event



G. Social Services-Holding Member Manufacturer Joint Beach Cleaning

To promote the concept of "corporate social responsibly" and implement the corporate recognition for earth and environment protection, TGIA happy enterprise promotion commission plans the "member manufacturer joint beach cleaning charity event" for holding in Sanzhi Jienshui Bay in the morning of May 25, 2019. A total of 508 peers and friends/families of 23 member manufacturers participated in the beach cleaning event.

It was a sunny day but all adults and children had fun wearing the gloves and using tongs and carrying the plastic bag to quickly spread on the beach and pick up garbage seriously at all corners. Everyone was cleansed with their spirit by cleaning the beach, enabling parents to enhance parental education on entertainment and education.

This beach cleaning event mainly advocated for everyone to develop "plastic cutting" habit as a lifestyle, reducing the amount of garbage from the origin by reducing pollution through marine wastes and dedicating efforts for earth and marine animals.

List of sponsorship:

1. **Happy Enterprise Promotion Commission:** Director Mei-Jing Huang sponsored 500 bags "deya green tote bag" while deputy director Chuan-Lin Qiu sponsored 500 bags of "handmade eggrolls".
2. **Member manufacturer TIC Group:** sponsored 500 beach cleaning T-Shirts.
3. **Southern California Restaurant:** Sponsored vouchers valued at "NT10,000" in total as the rewards for treasure hunting games in addition to donating NT10,000 to disadvantaged groups in response to charity.

捌 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 108 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	51,702,280	流動負債	2,730,841
基金及專戶	166,016,866	其他負債	888,000
固定資產	52,392,927	基金及專戶	220,032,892
其他資產	10,250	餘絀	46,470,590
合計	270,122,323	合計	270,122,323

VIII. Financial Affairs

Taiwan Garment Industry Association Balance Sheet

Taiwan Garment Industry Association			
Balance Sheet			
December 31, 2019			
Assets		Liability, Funds & Surplus	
Item	Amount	Item	Amount
Current	51,702,280	Current Liabilities	2,730,841
Funds & Special Accounts	166,016,866	Other Liabilities	888,000
Fixed Assets	52,392,927	Funds & Special Accounts	220,032,892
Other Assets	10,250	Surplus	46,470,590
Total	270,122,323	Total	270,122,323

玖 榮譽榜

1. 本會榮獲內政部「全國性及臺灣區職業團體績效評鑑」甲等團體：

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，本會獲評為甲等團體，已於108年9月10日接受內政部頒發獎狀表揚。

1. TGIA was awarded by the Ministry of Internal Affairs as Class A Group in "National and Taiwan Region Occupational Group Performance Appraisal"

The Ministry of Internal Affairs processes the industrial and commercial liberal occupational group performance appraisal to supervise the people's groups at all levels, improve the organizational operation of groups and strengthen services. TGIA has been evaluated as Class A Group and presented the award granted from Ministry of Internal Affairs on September 10, 2019.



駱秘書長春梅代表領獎
Secretary General Chuen-Mei, Lo received the award on behalf of TGIA

IX. Honors

2. 本會詹理事新長榮獲「中華民國工礦職業團體優良理、監事」獎：

本會詹理事新長係經本會第16屆第6次理監事聯席會議通過推薦參加選拔。嗣經該會選拔委員會審查評選，獲選為優良理、監事，已於108年11月11日工業節慶祝大會接受內政部及工業總會頒發表揚。

2. TGIA supervisor Chairman Xin-Zhang Zhan awarded with Director and Supervisor Excellence Award.

TGIA directors Xin-Zhang Zhan participated in the selection with the adoption and referral from the 16th TGIA 6th Director and Supervisor Joint Meeting. After the review and evaluation by the selection committee, directors Zhan was elected the excellent director and supervisor and was awarded by the Ministry of Internal Affairs and Chinese National Federation of Industries at the Industry Festival Celebration Assembly on November 11, 2019.



詹理事新長獲頒優良理監事獎
Directors Chan, Martin was awarded the excellent supervisor

拾 展望

展望 2020 年，姑且不論外在不確定因素之影響，台灣成衣業應朝開發創新性、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，是首要之務。因此，成衣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

台灣紡織業為全球品牌商精實、可靠的合作夥伴，堅持以合理的價格提供消費者高品質且具有創新性的產品，以滿足消費者追求時尚、功能、環保的需求。未來仍需朝機能環保成衣服飾品方向發展。

二、服裝與科技異業結合，開發智慧與智能衣著

整合台灣紡織成衣服飾業與 ICT 科技產業能量、發揮跨領域整合優勢，使能在智慧型服飾市場起飛時，順勢與國際接軌，是台灣成衣產業發展極重要的課題。

三、掌握數位世代的網路商機

隨著人工智慧 (AI)、物聯網 (IoT)、大數據 (big data)、虛擬實境 (VR)、擴增實境 (AR)、混合實境 (MR)、人工智慧聯網 (AIoT)、區塊鏈、5G 行動通訊，新類型消費世代以及消費模式已然形成。每支手機、每台電腦都是一個通路，如何成功的跨入行動商務，勢必成為業者思考的課題，更為成衣網購市場帶來另一新商業模式。

四、朝向「智慧製造」之自動化生產

目前世界各國紛紛思考如何帶動製造業升級轉型，以帶動產業發展與提升競爭力。除期望政府繼續輔導紡織及成衣服飾產業導入物聯網、大數據及雲端技術等外，業者亦應朝向設備智能化、工廠生產智慧化之智慧製造方向發展，以提高彈性生產、客製化生產之能力。

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。

X. Prospects

Looking into 2020, regardless of the impact from external uncertainties, Taiwan's apparel industries 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 apparel industry must make progress targeting at technology combination:

1. Develop functional and green apparel products

Taiwan textile industries are the lean and reliable partners for global brands, insisting in providing consumers with high-quality and innovative products at reasonable price, which meets consumers in pursuit of fashion, function and green requirement. Moreover, the industries will still develop in the direction of functional and green apparel.

2. Strategic alliance of clothing and technology, developing smart and intellectual wear

Integrate Taiwan textile apparel industries and the energy of CIT technology and bring interdisciplinary integration advantages into full play so that the industries will connect with the world as smart apparel market takes off. It is one important lesson for Taiwan's apparel industry development.

3. Grasp the online business opportunity for digital generation

Following the formation of artificial

intelligence (AI), internet of things (IoT), big data, virtual reality (VR), augmented reality (AR), mixed reality (MR), blockchain, 5G communication, new-type of consumer generation, and consumer model, mobile phones and computers have become the channels. It is inevitable for industries to take consideration of how to step into mobile commerce with success, in order to bring another new business model for the apparel online shopping market.

4. Shifting towards "smart manufacturing" based smart production

Currently countries worldwide are thinking about how to lead the manufacturing industries with upgrade and transformation in order to boost industry development and upgrade competition. It is expected that government shall continue counseling textile and apparel and garment industries with introduction of IoT, big data, and cloud technology while the industries shall shift toward smart equipment and smart manufacturing of factory production to increase production with flexibility and capacity for customized production.

Looking into the future, Taiwan's apparel 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 apparel industry is believed to create a new chapter of economy.



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

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