



The Bulletin

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For Information & Feedback

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Comparison of Export for the Month of October 2022 & October 2023

S.#	COMMODITIES	UNIT	October 2022			October 2023			Unit Price	Change in Qty	% Change in Qty	Change in Value	% Change in Value
			QTY	VALUE		QTY	VALUE						
				IN US\$ (000')	Unit Price		IN US\$ (000')	Unit Price					
1	Raw Cotton & Cotton Carded OR Combed	M.T.	1,725	3,938	2.28	9,058	16,725	1.85	7333	425.10	12787	324.71	
2	Cotton Yarn	M.T.	13,197	49,052	3.72	33,140	92,160	2.78	19943	151.12	43108	87.88	
3	Cotton Cloth	TH.SQM.	28,095	169,591	6.04	33,033	170,348	5.16	4938	17.58	757	0.45	
4	Cotton Carded OR Combed	M.T.				20	64	3.20					
5	Yarn Other Than Cotton	M.T.	799	2,922	3.66	1,306	3,677	2.82	507	63.45	755	25.84	
6	Knitwear	TH.DOZ.	16,197	391,710	24.18	20,050	371,044	18.51	3853	23.79	-20666	-5.28	
7	Bed Wear	M.T.	31,093	217,137	6.98	40,360	243,611	6.04	9267	29.80	26474	12.19	
8	Towels	M.T.	15,137	79,580	5.26	19,853	93,853	4.73	4716	31.16	14273	17.94	
9	Tent, Canvas & Tarpulin	M.T.	1,970	7,589	3.85	3,790	10,451	2.76	1820	92.39	2862	37.71	
10	Readymade Garment	TH.DOZ.	4,750	275,545	58.01	7,502	274,363	36.57	2752	57.94	-1182	-0.43	
11	Art-Silk & Synthetic Textile	TH.SQM.	7,059	37,955	5.38	7,346	33,916	4.62	287	4.07	-4039	-10.64	
12	Made-ups (Other Textiles)	-		57,843			64,133						
13	Other Textile Products	-		64,176			62,944						
TOTAL			120,022	1,357,038		175,458	1,437,289						



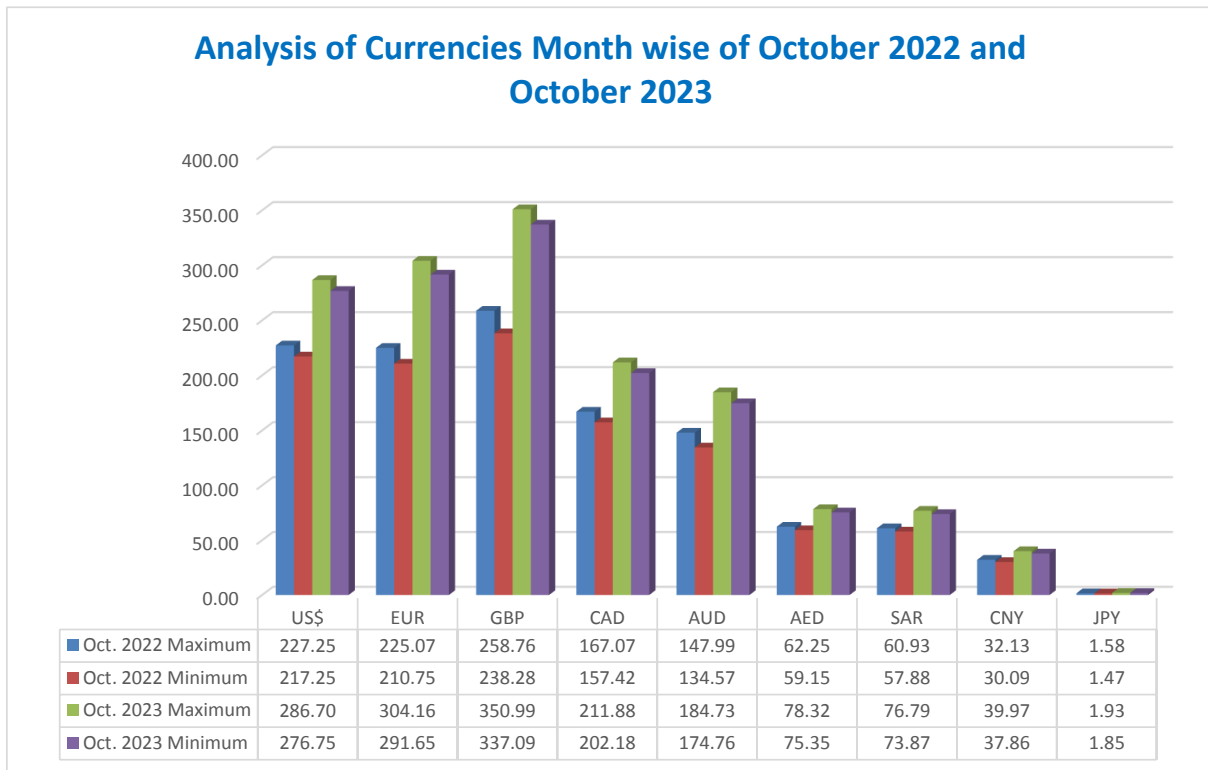
Comparison of Export Year wise of July-October 2022-23 & July-October 2023-24

S.#	COMMODITIES	UNIT	July-October 2022-2023			July-October 2023-2024			Unit Price	Change in Qty	% Change in Qty	Change in Value	% Change in Value
			QTY	VALUE		QTY	VALUE						
				IN US\$ (000')	Unit Price		IN US\$ (000')	Unit Price					
1	Raw Cotton & Cotton Carded OR Combed	M.T.	8,836	9,845	1.11	13,147	23,346	1.78	4311	48.79	13501	137.14	
2	Cotton Yarn	M.T.	90,110	285,315	3.17	147,958	407,564	2.75	57848	64.20	122249	42.85	
3	Cotton Cloth	TH.SQ M.	130,075	750,115	5.77	125,878	645,535	5.13	-4197	-3.23	-104580	-13.94	
4	Cotton Carded OR Combed	M.T.	293	213	0.73	321	518	1.61	28	9.56	305	143.19	
5	Yarn Other Than Cotton	M.T.	4,400	14,730	3.35	4,731	13,773	2.91	331	7.52	-957	-6.50	
6	Knitwear	TH.DOZ.	58,495	1,712,595	29.28	80,934	1,482,864	18.32	22439	38.36	-229731	-13.41	
7	Bed Wear	M.T.	144,948	996,841	6.88	155,806	945,182	6.07	10858	7.49	-51659	-5.18	
8	Towels	M.T.	59,624	316,860	5.31	72,094	337,987	4.69	12470	20.91	21127	6.67	
9	Tent, Canvas & Tarpulin	M.T.	10,596	37,355	3.53	12,170	37,763	3.10	1574	14.85	408	1.09	
10	Readymade Garment	TH.DOZ.	28,608	1,187,060	41.49	30,196	1,083,683	35.89	1588	5.55	-103377	-8.71	
11	Art-Silk & Synthetic Textile	TH.SQM.	25,517	146,275	5.73	26,362	117,241	4.45	845	3.31	-29034	-19.85	
12	Made-ups (Other Textiles)	-		238,010			234,555						
13	Other Textile Products	-		245,777			235,068						
TOTAL			561,502	5,940,991		669,597	5,565,079						



Analysis of Currencies Month wise of October 2022 and October 2023

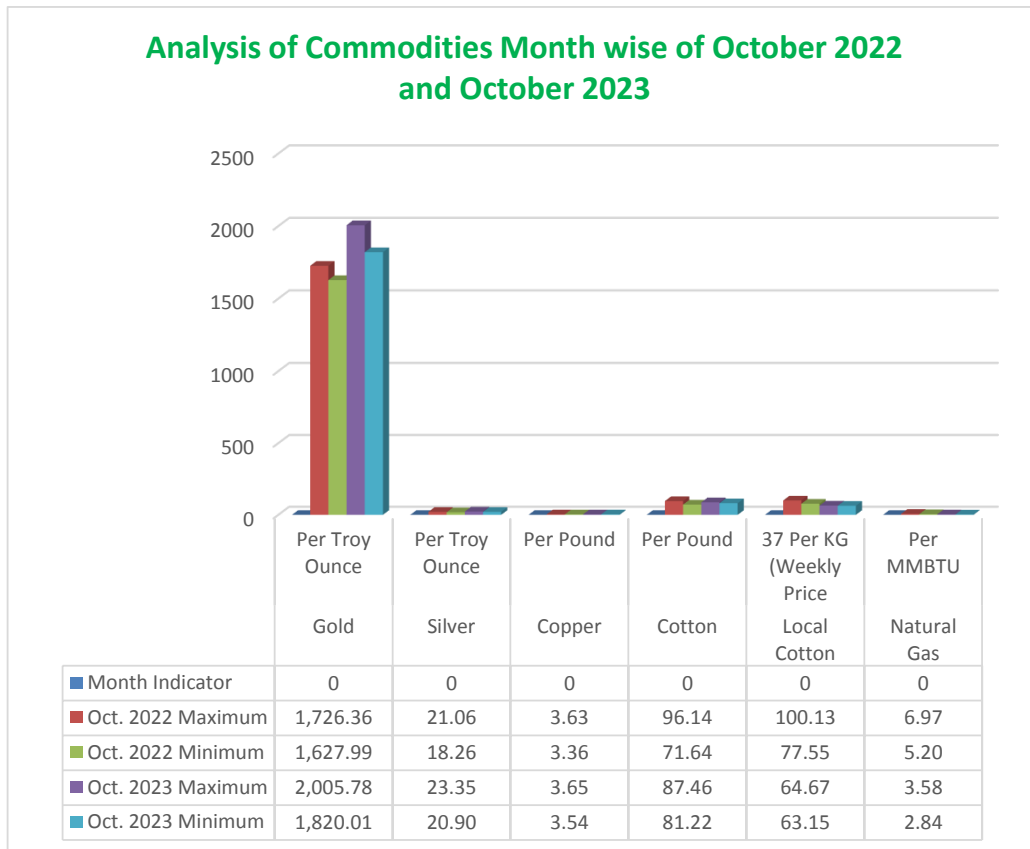
Month	Indicator	US\$	EUR	GBP	CAD	AUD	AED	SAR	CNY	JPY
Oct. 2022	Maximum	227.25	225.07	258.76	167.07	147.99	62.25	60.93	32.13	1.58
	Minimum	217.25	210.75	238.28	157.42	134.57	59.15	57.88	30.09	1.47
Oct. 2023	Maximum	286.70	304.16	350.99	211.88	184.73	78.32	76.79	39.97	1.93
	Minimum	276.75	291.65	337.09	202.18	174.76	75.35	73.87	37.86	1.85





Analysis of Commodities Month wise of October 2022 and October 2023

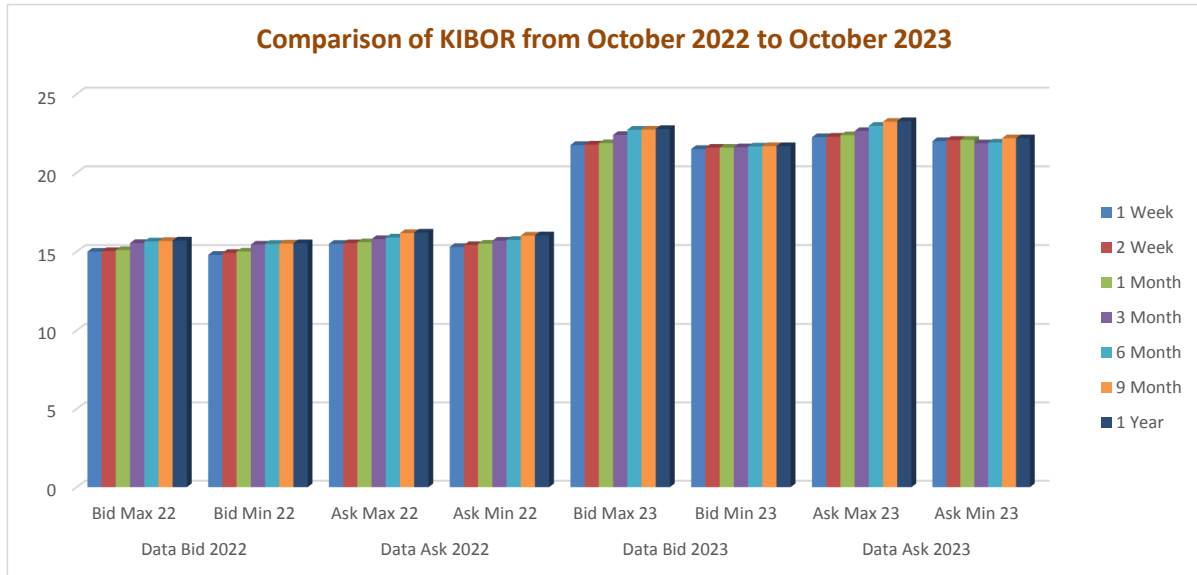
		Gold	Silver	Copper	Cotton	Local Cotton	Natural Gas
		Per Troy Ounce	Per Troy Ounce	Per Pound	Per Pound	37 Per KG (Weekly Price)	Per MMBTU
Month	Indicator	US\$	US\$	US\$	US\$	US\$	US\$
Oct. 2022	Maximum	1,726.36	21.06	3.63	96.14	100.13	6.97
	Minimum	1,627.99	18.26	3.36	71.64	77.55	5.20
Oct. 2023	Maximum	2,005.78	23.35	3.65	87.46	64.67	3.58
	Minimum	1,820.01	20.90	3.54	81.22	63.15	2.84





Comparison of KIBOR from October 2022 to October 2023

	Data Bid 2022		Data Ask 2022		Data Bid 2023		Data Ask 2023	
	Bid Max 22	Bid Min 22	Ask Max 22	Ask Min 22	Bid Max 23	Bid Min 23	Ask Max 23	Ask Min 23
1 Week	14.99	14.79	15.49	15.29	21.76	21.51	22.26	22.01
2 Week	15.03	14.91	15.53	15.41	21.79	21.59	22.29	22.09
1 Month	15.09	15	15.59	15.5	21.88	21.59	22.38	22.09
3 Month	15.54	15.44	15.79	15.69	22.4	21.62	22.65	21.87
6 Month	15.64	15.49	15.89	15.74	22.73	21.67	22.98	21.92
9 Month	15.67	15.51	16.17	16.01	22.74	21.69	23.24	22.19
1 Year	15.7	15.53	16.2	16.03	22.78	21.69	23.28	22.19





**BUSINESS
RECORDER**

Founded by M.A. Zuberi

November 14, 2023

Hike in gas tariffs: Exporters in deep trouble: TMAP

KARACHI: Towel Manufacturers Association of Pakistan called an extraordinary general meeting on Saturday (Nov 11), which was held at TMA Head Office here to discuss the exorbitant increase in the industrial gas tariff wherein a large number of exporters participated and showed their deep concern over the exorbitant increase.

Syed Usman Ali, Chairman of South Circle of the Towel Manufacturers Association of Pakistan, said it is next to impossible for export-oriented units to continue their manufacturing process after the steep increase in the industrial gas tariff.

The prominent members of the association shared their views that “we are already not competitive in the international market due to high energy costs and now the government has put another burden of extraordinary increase in the industrial gas tariff which will create lots of problems with regard to export of goods to the international market.”

TMA concerned at ‘exorbitant’ hike in gas tariffs

Syed Usman Ali said our members belong to the export sector and our cost of doing business is already very high in the region. After the increase in the gas tariff, it is very difficult for the export export-oriented units to continue their export business. He also added that the towel sector uses waste raw materials to manufacture exportable goods through local machines and avoid importing new machinery from abroad for the processing of the same & saving precious foreign exchange of the country. The manufactured goods from the waste raw materials are usually used in the USA for cleaning purposes only.

The Participants of EOGM further said it is impossible for the export industries to carry on their production activities with such exorbitant increases in gas tariffs. The members unanimously said that the industrialists never accepted the decision of gas price increase and the cost of production has become out of control now.

The house also advised to safeguard industries and prevent the economy from descending into deeper crises, potentially reaching an irreparable point of no return.

The participants of EOGM also stated that the Oil and Gas Regulatory Authority (OGRA) had initially set a marginal increase in the industrial gas tariff. However, the energy ministry unilaterally decided to raise the tariff by an additional 100-130%. It made the export industry unsustainable to operate.



Export industrialists urged for a fair industrial gas tariff which will support to growth of our exports. Failure to implement reasonable tariffs may lead to the closure of a significant number of export industries.

The industrialists of Karachi have vehemently opposed the excessive hike in gas tariff, attributing it to the imposition of cross-subsidies benefiting the other sectors, which is unjustified and the industry has no potential to bear the burden of cross-subsidies.

The exorbitant gas prices are making it really hard for the Exporters to sell their manufactured goods in the international market while our competitors are selling the same goods at low prices because our cost of production is very high as compared to the regional countries. This is happening when our country really needs valuable foreign exchange for the national exchequer.

The government's choice to keep the gas prices high will cause huge problems for the beloved country of Pakistan. It will lead to the closure of the industry and decline in the exports and earnings in foreign exchange for the national exchequer.

The exorbitant increase in the gas tariff will also lead to unemployment, which will lead to increase in street crimes in the country as well as an adverse impact on industrial growth.

Chairman South Circle warned that Export Oriented Industries closure will lead to Pakistan defaulting on its foreign payments and the currency rate will deteriorate even further, reaching a point of no return.

The government must take appropriate measures to ensure gas supply to export-oriented industries at a reasonable price, 24/7 at required industrial pressure otherwise it will lead to a huge decline in exports and revenue, including the closure of industries and laying off workers which lead to unemployment.

It will also lead to jamming the wheel of economic activities in the country as well as have a negative impact on the law and order of the country.

The participants of EOGM also showed deep concern about the billions of rupees of the exporters are stuck up in FBR on account of Sales Tax refunds and they are unable to use their own money and take loans at hefty rates from the banks which absolutely enhances their cost of doing business as well as cost wise they become incompetent in the international market.

The reinstatement of the zero-rated status for the five export-oriented sectors "no payment no refund" as per SRO 1125(I)/2011 is the viable solution to arrest the declining trend of country exports.

The participants of EOGM further urged the economic managers to save the export sector from its total collapse. "We have the only option to increase our exports for survival. We should trust our own resources rather than loans," they added.



BUSINESS RECORDER

Founded by M.A. Zuberi

November 18, 2023

Govt should adopt pro-exporter policies: TMA

KARACHI: The Senior Vice Chairman Syed Usman Ali along with the prominent exporters of the Towel Manufacturers Association showed their significant level of concern about the anti-exports government policies which are hurting the country's exports badly. They said that our economy is passing through a very crucial time and we should jointly work for the growth of our economy particularly for the export sectors of Pakistan.

The Senior Vice Chairman of TMA said that the business community especially the exporters stood with the government to surpass its revenue generation target despite all odds but the government should come forward with compressive planning and facilitate the business community/exporters so that they can play their significant role effectively for the growth of the economy as well as collection valuable foreign exchange for the country as well.

The SBP issued FE Circular No. 02 of 2023 wherein the exporters are again left facing a new difficult situation. If exporters receive their export proceeds late/ after the due date, the banks will mark lien 3 percent, 6 percent or 9 percent according to its delayed period. The SBP and the Ministry of Commerce should realize that the exporters of this country are the backbone of the economy and they are bringing billions of dollars for the beloved country. The Senior Vice Chairman said that our government should facilitate/ appreciate the exporter's role in earning billions of dollars for the national exchequer rather than penalize them.

He further said few exporters are exporting their manufacturing goods to Nigeria and other African countries and unfortunately, Nigeria and other African countries have a similar problem of forex as Pakistan is facing nowadays, therefore, the importers of these countries take time to release their payment against imported textile goods. Nigeria and other African countries have made a priority list for releasing foreign exchange against the imports of goods. Unfortunately, textile imports are the lowest number on the priority list of Nigeria. Hence, our exports are receiving their export proceeds late/ after the due date and the SBP penalizes them instead of facilitating to exporters as well as appreciating their positive efforts/role in the growth of exports.

Another problem faced by the exporters is that after the lien marked against the late repatriation of export proceeds, they have neither received any notice from the SBP adjudication department nor received the amount of the marked lien. The amount of marked lien increased sharply and the exporters are facing severe problems with cash flow which is another factor hurting our exports. Unfortunately, our exports are showing continuously declining trend which needs to be arrested on top priority basis otherwise our economy may reach the point of no return.



The SBP made an excellent decision and established a facilitation desk for the exporters to address the exporter's grievances/problems but the officials of this help desk are not performing up to the mark as exporters need to resolve their problems on top priority in a day or two day. He added that we are forwarding our problems to the SBP export facilitation desk but the matters are still unresolved.

He furthermore clarified the misconception in government circles that the exporters willingly delay their remittances from abroad in order to gain the benefits of the currency devaluation which is absolutely wrong. Every exporter is trying their best to repatriate their amounts as early as possible. For this purpose, from time to time, exporters remind their buyers to release their payments well before time to improve their cash flow.

It must be noted that the exporters also have liabilities to pay against their purchases which they have to pay in a timely manner in order to continue their business smoothly. The timely remittance ensures that their cash flow runs smoothly so they can continue their production and exports. Delays in the remittances cause supply chain issues which is the most difficult situation for the exporter.

He further added that another factor which is hurting the export sectors is pending sales Tax refunds with the FBR. The exporters always emphasized the restoration of zero rating is entirely needed of the hour and billions of rupees are stuck up with the FBR which is creating a financial crunch for the exporters.

In the export sector, 90 percent of production is being exported while only 10 percent is being used domestically. This massive cycle of sales tax collection and refund operates for a collection of Sales Tax, and as a result, exporters suffer in the form of delayed, deferred, and pending refunds. This is the main reason why the textile industry wants RESTORATION OF THE SRO 1125 i.e. NO PAYMENT NO REFUND for the entire textile value chain which will provide the additional working capital requirement to the industry.”

He said that we are already paying high gas tariffs in the region, therefore the export-oriented sector is unable to observe the exorbitant hike in gas prices. The biggest victims of the gas tariff enhanced decision would be the SMEs and export sector because they do not have sufficient resources and are working on marginal profit. It will be very difficult for the SMEs/export sector to continue their manufacturing activities in the countries. Unfortunately, the Finance Minister announced further hike in gas prices in the month of January 2024 which is completely unacceptable for the exporters and next to impossible to carry on manufacturing activities in the country.

Syed Usman Ali urged the economic managers/institutions to provide a level playing field to the exporters of the country so that they can compete with the regional countries in the international market. It will also impact our national reserves, generate employment and more tax collection for the national kitty. We should also make a comprehensive plan to get rid of the IMF and its unnecessary and ruthless conditionality which evaporates any possibility of business and economic growth.—PR



Delegation of GIZ visited TMA

A delegation of GIZ head by Ms. Julia along with Mr. Paul, Mr. Ubaid, and Mr. Noor visited TMA House on November 27, 2023 at 12:30pm. The delegation also met with CEC / SCC members and also exchanged future initiative of GIZ in the House. Members of the House also asked various questions for the growth of trade between EU and Pakistan.

At last Mr. Khurshid Alam, Mr. Haroon Shamsi presents TMA handouts to the members of the delegation.









Mr. Muzzammil Husain, Mr. Junaid Makda along with other participants attended FABRIC Asia organized by GIZ China

Sustainable Textiles of the Asian Region (STAR)

Meeting Minutes – November 15th Meeting

Location: Dongguan Yingbin Hotel

<p>STAR Member Attendance (Alphabetical Order):</p> <p>AG (Azizullah Goheer) – PTEA EF (Ehsan Fatullah) - BKMEA JM (Junaid Makda) – PHMA KL (Ken Loo) - TAFTAC LX (Liang Xiaohui) – CNTAC / JZ (Zheng Jian) – CNTAC YY – (Yan Yan) - CNTAC MA (Miran Ali) – BGMEA MH (Muzzammil Hussain) - TMA MT (Mai Tuyet) - VITAS RK (Rosaline Kine) – MGMA</p>	<p>Other Speakers:</p> <p>MB (Marc Beckmann) – GIZ FABRIC Project Director CC (Constantia Chirnside) – (GIZ - Supplier White Papers) LR (Lisa Ramershoven) – (GIZ & STTI, Moderator) TH (Thomas Hesketh – (GIZ, STAR & TAFTAC), Secretariat Coordinator</p>
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1. Meeting Minutes

Meeting Moderators: Lisa Ramershoven, Thomas Hesketh

The STAR and STTI Collaboration Meeting brought together stakeholders in the textile and sustainability industry to discuss the future of the Secretariat, updates on the industry, and a focus on addressing audit fatigue in the GFT sector supply chain.

Opening Speeches

YY, representing CNTAC President Mr. Cheng Dapeng, started the meeting by sharing statistics on the Chinese textile industry over the last three years. Following her speech, MB, the Director of GIZ FABRIC Project, emphasized the importance of the STAR network as a partner of GIZ. He expressed GIZ's commitment to the STAR network and its intention to continue collaborating. Marc also mentioned that regional fabric support would conclude in March 2025, though there could be future support via other GIZ projects with sufficient buy in from the STAR member. MB also expressed interest in seeing the STAR network collaborate with the supplier meetups.

STAR Recap by Thomas Hesketh

Thomas provided a recap of STAR's activities and plans. He highlighted STAR's collaboration with stakeholders, emphasized the Secretariat's timeline, structure, and proposed fees, and discussed the benefits of STAR membership. STAR's activities included rebranding, increased online presence via the Asia Garment Hub, an upcoming audit fatigue position paper, a position paper focused on the promotion of renewable energy in the garment sector, and the development of Country Guide booklets for each STAR member. The STAR x AFTEX collaboration concept was also introduced, focusing on a trade and sustainability summit that strengthens both regional networks of garment associations.

Letter of Agreement for STAR Secretariat Formation

TH presented a Letter of Agreement for the formation of a formalized STAR Secretariat. He outlined the potential role of the secretariat, its potential budget, and budget allocation among STAR members. Discussions also revolved around the formation and commitment of STAR members. TH emphasized that GIZ wants all 9 association members to continue in the STAR network, and can adapt the Letter of Agreement

So far, 8 of 9 association members have signed the letter to establish a more formal secretariat. The next steps will involve editing the terms of the Letter of Agreement so that they can be acceptable for CNTAC, which has its own unique circumstance as a part of the Chinese party.

Discussion on the Future of the Secretariat

This part of the meeting covered various aspects related to the future of the STAR Secretariat. Topics included the location and logistics of the secretariat, its operation, past and future activities, and any other business.

- **Location and Fund Logistics:** Participants engaged in an exchange about the ideal location for the secretariat. MA and EF (Bangladesh) expressed readiness to host and contribute to the secretariat's operation. MH proposed a rotating system where each member country could take turns hosting, allowing for diversity and shared responsibility. TAFTAC suggested that the Secretariat be hosted in one country for a 2–3-year period and put TAFTAC forward as the current and potential future host for the first 2–3-year period.
- **Rotation vs. Permanent Host:** The issue of whether the secretariat should rotate among member countries or have a fixed host at the beginning was debated. JM suggested that China (CN) or Bangladesh (BD) serve as the secretariat location initially, China due to its market size. TAFTAC suggested that hosting duties should not be an annual exercise due to logistical complexities.
- **STAR Coordinators:** TH mentioned that for the Secretariat to function, it would partially rely on STAR Coordinators from each STAR Association who would dedicate a maximum of 1-2 days per month collecting information requested by the Head of STAR Secretariat. There were no objections to this during the meeting.
- **Transition Period for any New Staff and In-Kind Contributions:** TH emphasized the importance of a transition period for the new secretariat staff and that there was the potential for in-kind contributions to ensure a smooth and sustainable transition of responsibilities on the ground. MB from GIZ showed interest in finding suitable forums and exploring the best possible onboarding process for any new staff member potentially onboarded.
- **Budget Allocation and Contribution:** Participants discussed the budget of the STAR Secretariat and how it would be derived from financial contributions. A deliberation took place regarding how these contributions would be allocated among STAR members.
- **Information Sharing:** Participants also discussed the sharing of information between STAR members and what kind of data should be provided by members. Topics ranged from sustainability case studies and export figures to employment, wages, and the actual situation on the ground. Suggestions included sharing productivity data, insights into industrial policies, and hosting conferences and seminars at regional and international levels. The idea of a digital app was proposed to facilitate information exchange and a potential activity that the STAR Network could engage in in the future. TH mentioned that any case studies of sustainability could be shared on the Asia Garment Hub or STAR LinkedIn page.

Addressing Audit Fatigue

Gherzi, a consulting firm specializing in various aspects of the textile industry, addressed the issue of audit fatigue in the GFT sector supply chain. They identified challenges such as complex relationships between buyers and manufacturers, minimum wage concerns, and the cost of audits, which manufacturers often bear. Buyers' preference for tier-1 suppliers was also discussed. The session highlighted the need for social compliance

solutions to alleviate audit fatigue. MA emphasized that its important that any solution put forward in the position paper does not favor initiatives perceived as brand led.

Supplier Meet Ups x STAR Collaboration: This collective, known as the **Fashion Producer Collective**, is self-organized and producer-led, providing a secure space for discussions on fashion sustainability. The primary objective is to amplify producer voices interested in sustainability, enabling them to propose and lead projects. Monthly Supplier Meetups facilitate the sharing of sustainability challenges and feedback. Initiatives include an Apparel Supplier's Guide on sustainability legislation in the EU, US, and UK, exploring the Work in Fashion Act, and developing innovative financing models for decarbonization. Collaboration with STAR offers endorsement opportunities and profile elevation, and the **Fashion Producer Collective warmly invites STAR to take part in its future initiatives.**

2. Industry Updates

Bangladesh (BD):

- Complete minimum wage review with a remarkable 56% growth, particularly in the apparel sector.
- LDC Graduation expected in 2026, with sustainability challenges still prevalent and rooftop solar implementation underway.

Cambodia (KH):

- Facing a 16% decrease in the industry for 2023, with expectations of similar situation in 2024.
- Concerns related to the graduation from the LDC status and GSP+ double transformation.
- Emphasizing the need for training and productivity improvement to counter challenges in the chemical fabric sector and rooftop solar installation.

Myanmar (MY):

- Experiencing a 10% decline in exports, with a target to achieve a 5 billion USD exports in 2023.
- Addressing electricity problems by gradually installing solar panels, especially after an increase in orders from a major brand.

Vietnam (VN):

- Achieving significant growth in worker recruitment with a 12.5% increase, but challenges exist in terms of staff turnover.
- Facing challenges including rising logistic costs and demands for higher human resources.

Pakistan (PK):

- 19.3 billion USD in exports in 2022, around 16 billion in 2023.
- Tackling challenges related to water scarcity, energy price hikes, and chemical management.
- Extending the GSP+ status until 2027 while dealing with political issues that impact industry growth.

China (CN):

- Experiencing a 10% drop in international garment exports amid political stress.
- Rising prominence of Chinese mega brands in the industry such as Shein.
- Implementing sustainable schemes such as the "Family-Friendly Factory" project to attract workers for longer and working towards circularity.

3. Conclusion

The STAR Meeting provided an opportunity to share updates on industry challenges, initiatives, and secretariat plans. There are still hurdles to overcome to approach a formalized secretariat, but the STAR Network has crucial momentum it must not let dissipate.

Next Steps:

- **Audit Fatigue Position Paper underway:**
 - Gherzi will reach out to each STAR Member individually to understand thoughts on the topic, and a consensus position the STAR Members can take.
 - The paper will be developed from November 2023 to March 2024.
 - This will involve 1:1 interviews with each STAR member and focus group discussions with all STAR members.
- **Secretariat Function:**
 - TH to follow up with CNTAC to understand the formats of the STAR Network that CNTAC could endorse, support, or contribute to in-kind.
 - TH to further explore the options of the STAR Secretariat location. The current options put forward are Bangladesh and Cambodia.
 - TH will post sustainability case studies put forward by the STAR Members on various social media channels.
- **Supplier Meet Ups:**
 - TH to follow up with CC and the **Fashion Producer Collective** to understand how STAR and the suppliers can work together. Easy initial options include: the suppliers add their perspective to the STAR audit fatigue position paper, the STAR members support or review the next supplier paper.
- **Proceed With Other Activities:**
 - STAR x AFTEX Collaborations: GIZ x TAFTAC meeting to decide potential agenda for Trade & Sustainability Summit. Timeline: December 2023 to August 2024.
 - STAR Position Paper on Renewable Energy Promulgation: Consultant to be hired from December 2023. Timeline: December 2023 to May 2024.

Press Mentions:

Cambodian Investment Review: <https://cambodiainvestmentreview.com/2023/11/22/china-and-cambodia-collaborate-to-enhance-their-sustainable-garment-industry-bolstering-global-supply-chains-with-cntac-and-giz-fabric-support/>

Press Release: STAR Network Convenes to Chart a Sustainable Path for the Garment Industry

FOR IMMEDIATE RELEASE

[YINGBIN HOTEL, DONNGGUAN CITY, GUANGDONG, CHINA, 15-NOV-2023] – Leading figures from the Sustainable Textiles of the Asian Region (STAR) Network and the Sustainable Terms of Trade Initiative (STTI) gathered for a meeting to chart a part for international collaboration on the future of the textile and garment industry. Held on November 15, 2023, the event set the path forward for the STAR Network, the first inter-Asian network of producer associations focused specifically on sustainability.

The event was hosted by the China National Textile and Apparel Council (CNTAC) and GIZ FABRIC. The conference kicked off with a welcome address by CNTAC Vice President, Mr. Chen Dapeng, and GIZ FABRIC Project Director, Marc Beckmann.

In his opening remarks, Mr. Chen Dapeng stated the importance of global collaboration: *“China’s textile and apparel industry is one of the earliest to implement the ‘Going Global’ policy”,* and that the launch of the STAR Network represented “a positive implementation of the concept of ‘joint construction and sharing’, part of China’s wider Belt and Road Initiative. *“It is also a good practice for the Asian textile and garment industry across different cultures, social systems and development stages to build a new framework for international cooperation”,* he added.

A Recap of Achievements: Thomas Hesketh, Head of STAR Secretariat, presented a recap of STAR’s recent developments, including its recent rebranding, participation in the Asia Garment Hub communications platform, upcoming STAR position papers tackling the long-standing industry issue of Audit Fatigue, and the promotion of renewable energy in global garment supply chains, as well as newly developed Country Guides for each STAR member. The workshop also unveiled new events planned with regional entities such as the ASEAN Federation of Textile Exporters (AFTEX) in 2024.

“There are social and environmental challenges in Asian textile and apparel chains across multiple national jurisdictions, as well as supply chain structural imbalances and governance gaps that contribute to these challenges, which should be addressed systematically by the value chain participants with common but differentiated responsibilities. The STAR Network is a timely and collective response to these challenges.” **Mr. Chen Dapeng, Vice-President of CNTAC.**

Exploring the Future of the STAR Secretariat: Participants engaged in a detailed discussion on key aspects of STAR’s future, including the location and logistics of the secretariat, its operations, interactions, and priorities for future initiatives. The STAR Secretariat is currently based in Cambodia, hosted by the Textile, Apparel, Footwear & Travel Goods Association in Cambodia (TAFTAC).

“Since establishment by the GIZ FABRIC program in 2016, the STAR Network has worked hard to forge ties between the 9 STAR associations. There are now strong bonds between members, and willingness to put a joint voice forward on key industry challenges affecting sustainability. With this meeting, we look forward to building on this momentum and further strengthening the STAR Network as a voice for producers.” **Thomas Hesketh, Operational Head of STAR Secretariat.**



Figure 1 STAR Members on the 15th of November STAR & STTI Meeting

The Future of the Sustainable Terms of Trade Initiative (STTI): The afternoon session represented the 10th Working Group Meeting of STTI. STTI is dedicated to promoting ethical purchasing practices in the industry between global brands and manufacturers. STTI represents the first, and flagship initiative launched via the STAR Network. During the STTI session, moderated by Ms. Lisa Ramershoven, Project Manager of STTI, significant progress was reported in Phase 3 of the initiative. This included discussions on grievance mechanisms, partnership agreements, pilot projects with brands to demonstrate the potential for change, governance structure, and increased visibility of the initiative.

The initiatives and buy in from the producer associations come at an important time for the world's garment industry, as brands, suppliers - driven by consumer trends, are under increasing pressure to lower their global footprint.

“The EU has implemented several strategies and legislations that will drive the entire fashion sector to adopt more carbon-neutral and circular methods of production, such as the EU Green Deal under which falls the EU Textile Strategy. These legislations are designed to reduce the environmental impacts of the textile industry by encouraging the use of green technology, sustainable materials, and promoting closed-loop production in supply chains.” **Marc Beckmann, GIZ FABRIC Project Director.**



Figure 2 Opening of the Asian Dialogues Conference, 2023, In Dongguan, China

1. ABOUT:

About the STAR Network

The Sustainable Textiles of the Asian Region (STAR) Network is the first inter-Asian network of producer associations dedicated to driving positive change and innovation in the textile and garment industry. Established in 2016, STAR connects industry players across Asia, fostering dialogue, trust-building, and the exchange of best practices to promote sustainability and shape a brighter future. The STAR Network is made up of 9 leading associations from 6 countries, and their respective representatives:

Country	Association	Full Name	Representative
Bangladesh	BGMEA	Bangladesh Garment Manufacturers and Exporters Association	Mr. Miran Ali
Bangladesh	BKMEA	Bangladesh Knitwear Manufacturers and Exporters Association	Mr. Ehsan Fazlee Shamim
Cambodia	TAFTAC	Textile, Apparel, Footwear & Travel Goods Association in Cambodia	Mr. Ken Loo
China	CNTAC	China National Textile and Apparel Council	Dr. Liang Xiaohui

Country	Association	Full Name	Representative
Myanmar	MGMA	Myanmar Garment Manufacturers Association	Mrs. Khine Khine Niew (Rosaline)
Pakistan	PHMA	Pakistan Hosiery Manufacturers & Exporters Association	Mr. Junaid Esmail Makda
Pakistan	PTEA	Pakistan Textile Exporters Association	Mr. Azizullah Goheer
Pakistan	TMA	Towel Manufacturers Association of Pakistan	Mr. Muhammad Muzzammil Hussain
Vietnam	VITAS	Vietnam Textile and Apparel Association	Ms. Mai Tu Yet

About STTI

The Sustainable Terms of Trade Initiative (STTI) is a collaborative platform for actors in the textile and garment sector. STTI is dedicated to promoting ethical purchasing practices in the industry. STTI represents the first, and flagship initiative launched via the STAR Network.

About CNTAC

The China National Textile and Apparel Council (CNTAC) is a leading voice in the global textile and apparel industry. CNTAC is committed to advancing the industry's sustainable development and promoting innovation and collaboration among industry stakeholders.

About GIZ FABRIC

GIZ FABRIC is a project by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH. It aims to strengthen sustainable and responsible production in the textile and garment sector by fostering partnerships, knowledge sharing, and capacity building.

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Email: starnetwork@giz.de

Website: <https://asiagarmenthub.net/star-network>

LinkedIn: <https://www.linkedin.com/company/star-network-asia>

Opening Remarks: Marc Beckmann

Asian Dialogues Conference

Role of Collaboration on Green Development Based on German and EU Legislative Requirements

Venue: Furong Hall, Dongguan, China

- Respected Ms. Yan Yan, Director of the Office for Social Responsibility, CNTAC;
- Respected representatives of CNTAC;
- Respected partners from the STAR Network;
- Distinguished speakers and guests at today's Asian Dialogues Conference;
- A very good morning to you all –

I am honored to welcome you to the 13th “Asian Dialogues Conference for Sustainable Production” today. On behalf of the GIZ FABRIC project, I would like to express my sincere appreciation to our partners at CNTAC and to the organizers of the Global Apparel Conference, who supported us through every step of this event.

The mission of GIZ FABRIC Asia regional project is to connect decision makers of the Asian garment and textile industries to support the transformation towards fair production for people and the environment through knowledge transfer & cooperation. The project includes Bangladesh, Cambodia, China, Myanmar, Pakistan, and Vietnam.

To promote sustainability across the textile supply chain and among countries, FABRIC works as a think tank to facilitate regional exchange and learnings. FABRIC has established the first inter-Asian network of producers' associations, the STAR Network. Among others, the STAR network launched the Sustainable Terms of Trade Initiative (STTI) for a more balanced commercial relation between buyers and suppliers in the textile and garment industry, now joined by 13 producing associations. Also worth mentioning is the Asia Garment Hub a knowledge platform that makes learnings and information on sustainability in the sector accessible.

Furthermore, the cooperation resulted in the conference series "Asian Dialogues on Sustainable Production in the Textile and Garment Industry". This conference series brings together representatives from all sides of the supply chain across Asia – including brands, producers, civil society, associations, and technical experts. Since 2015, the conference has provided around 9000 participants an opportunity to discuss their experiences of sustainable production issues and learn about initiatives in other countries.

This year, we are excited to organize our conference in China – one of the largest and most important stakeholders in the textile industry – and one that has demonstrated significant leaps and innovations in terms of sustainable manufacturing of textiles and garments. Thus, we are honored to be part of the Global Apparel Conference, which is taking place in Dongguan – an apparel manufacturing hub with an impressive history – to promote conversations about increased environmental and social sustainability in the light of upcoming EU and German legislations.

As most of us are aware, the EU has implemented several strategies and legislations that will drive the entire fashion sector to adopt more carbon-neutral and circular methods of production, such as the EU Green Deal under which falls the EU Textile Strategy. These legislations are designed to reduce the

environmental impacts of the textile industry by encouraging the use of green technology, sustainable materials, and promoting closed-loop production in supply chains.

As the German development cooperation, we want to support this transition among producers in the Asian region through supporting regional knowledge exchange. This year's theme of "Role of Collaboration on Green Development Based on German and EU Legislative Requirements" will discuss conversations in the areas of circularity and decarbonization financing – the two upcoming areas that will play the biggest role in the coming days, and around which there are numerous opportunities for collaboration.

We hope today will be an opportunity to identify success stories from our wide network across Asia, and to learn from technical experts working in the field but also openly discuss the challenges that the new legislations might imply. The Dialogues will foster discussions among a diverse group of stakeholders to bring to light some of the areas where collaborative action can support the EU's and Asian producer countries' sustainability goals. I would like to thank you all for your presence today – including those joining us in Guangdong and those online.

Thank you.

Welcome Address by Mr. Chen Dapeng, Vice President of CNTAC, at the STAR/STTI

Meetings in Humen, China, Nov. 15th, 2023

Distinguished representatives of the National Associations of the Sustainable Textile Industry Network in Asia (STAR), colleagues and friends, First of all, as the representative of the host, let me formally welcome you all back to China seven years after the establishment of the STAR Network and thank you for your excellent efforts in the development of the STAR Network over the years!

As you may know, this year marks the 10th anniversary of the Belt and Road Initiative, and not long ago, we held the 3rd Belt and Road Summit Forum on International Cooperation in Beijing. In his keynote speech at the Summit Forum, President Xi Jinping pointed out that the construction of the Belt and Road Initiative adheres to the principle of "common cause, common construction and sharing", which has transcended the differences in civilisations, cultures, social systems and stages of development, opened up new paths of interaction among countries, establishes a new framework for international cooperation, and brought together the greatest common denominator for the common development of humankind.

In 2016, all of you and CNTAC jointly signed the "Declaration on Regional Cooperation and Governance for Responsible Supply Chain in the Asian Textile and Apparel Industry" and jointly launched the "Sustainable Textile Network in Asia", which is a positive implementation of the concept of "joint construction and sharing" of the BRI. It is also a good practice for the Asian textile and garment industry across different cultures, social systems and development stages to build a new framework for international cooperation. China's textile and apparel industry is one of the earliest industries in China to implement the "Going Global" policy. With the gradual deepening of the "Belt and Road"

initiative and the promotion of the industry's task of building a strong textile country, strengthening the optimal allocation of global resources and industrial layout has become an important channel for China's textile industry to expand its scale, build a new advantage in international competition, and make full use of the two international and domestic markets and two kinds of resources. In 2022, although the industry's foreign investment was greatly affected by the epidemic, the industry's total outward direct investment for the year also exceeded \$700 million. Actually, since 2010, the proportion of China's textile and apparel industry's outward investment in the manufacturing industry has basically remained stable in the 7%-9% range. It is worth mentioning here that the various participating countries of the STAR network

are also the most important overseas investment destinations and trading partners of China's textile and apparel industry. In this process, we encourage Chinese enterprises to bring capital, technology, employment, management talent and ideas to their investment host countries and trading partners while also helping promote local industrialisation and better integration into globalisation, and laying the foundation and creating the conditions for achieving the goal of sustainable development locally. Our joint efforts have now given Asia an irreplaceable position in the global textile and apparel supply chain and great potential for development. On the other hand, there are social and environmental challenges in Asian textile and apparel supply chains across multiple national jurisdictions, as well as supply chain structural imbalances and governance gaps that contribute to these challenges, which should be addressed systematically by the global textile and apparel value chain participants with common but differentiated responsibilities. The STAR Network is a timely and collective response to these challenges!

As the first regional consortium of textile and apparel producer organisations in Asia, the STAR Network's mission is for its members to share information in the area of sustainability through the establishment of a web-based platform, to increase transparency in the textile and apparel industry, and to address common sustainability issues in all countries through innovative initiatives. Since the establishment of the STAR Network, we have exchanged information on the current status of development of our respective industries through a series of seminars and mutual visits, and have conducted thorough communication and in-depth discussions on specific topics to promote a better understanding of the various topics within and outside the industry, in order to collaborate in shaping the long-term sustainability of the industry. In particular, in 2020, the COVID pandemic swept across the globe and had a severe impact on the Asian textile and apparel supply chain. In April 2020, the STAR Network released the joint statement on the implementation of responsible sourcing practices during the crisis, which received widespread attention and active support from the international community and contributed significantly to the international discussion on responsible sourcing practices in building resilient supply chains.

Building on this, in January 2021, the STAR Network officially launched the Sustainable Terms of Trade Initiative (STTI), with the goal of improving sourcing practices in the apparel industry, which is important and unique because it is the first time that manufacturers in the global apparel and textile industry have taken the initiative to drive change and create improvements across the entire industry on a global scale. Now supported by a number of international organisations, this important initiative has become the baseline

standard and common understanding for the global textile and apparel industry to advance sustainable sourcing practices, and defines the improved sourcing practices that manufacturers around the world are most eager to see. Not long ago, STTI was awarded the ITMF 2023 International Cooperation Award at the annual ITMF conference in Keqiao, Shaoxing! These are prominent recognition of the STAR Network's philosophy of building consensus, working closely together, and coordinating actions to catalyse change, and reflect more of what is expected of the STAR Network!

Therefore, I hope that the STAR Network will be more dynamic, ambitious and strategic. On the one hand, we support the STAR Network to develop in a more compact and organised direction, and to establish a more effective working mechanism and work plan for this purpose; on the other hand, we also hope that the STAR Network can uphold the spirit of openness and inclusiveness, and bring in more partners and more external resources to support the long-term, sustainable and high-quality operation of the STAR Network. Finally, let me wish this conference a success, and also wish all delegates a happy and fulfilling week in Humen!

Thank you all

Study Tour Report – EU Green Deal and related Legislation, Directives, and Strategies

I. Overview

Item	Description
Title	Study Tour Report – EU Green Deal and related Legislation, Directives, and Strategies
Date(s)	October 15-21, 2023
Location	Bonn, Germany and Brussels, Belgium
Objective	To build an understanding on the EU Green Deal, its various legislations, directives, related strategies leading towards the identification of priority areas for policy development and support interventions for the textile industry of Pakistan with the Ministry of Commerce taking the lead in the process along with private sector representatives.

Pretext

TextILES, GIZ supports the adoption of sustainable business practices in the textile and fashion industry of Pakistan. It supports the Ministry of Commerce in addressing key industry requirements and developing approaches for public and private sector stakeholders for the adoption of international labour and environmental standards.

The second phase of the project 'TextILES II' would be starting in January 2024. The focus would be on the EU Green Deal and relevant EU legislation and trade requirements that will have implications for the textile and fashion industry of Pakistan going forward. It would also focus on promoting circular business practices and circularity principles in Pakistan's textile and fashion industry.

With this understanding, a study tour was conducted with representatives from the Ministry of Commerce, private sector, and academia. The aim of the study tour was to build an understanding on the EU Green Deal, its various legislations, directives, related strategies leading towards the identification of priority areas for policy development and support interventions for the textile industry of Pakistan with the Ministry of Commerce taking the lead in the process. The study trip was focused on the following key EU Green Deal legislations.

1. EU Strategy on Sustainable and Circular Textiles
 - EU eco-design for Sustainability Products Regulation
 - EU microplastics Regulation
 - EU textile regulation
2. EU Corporate Sustainability Due Diligence Directive (CS3D)
3. Carbon Border Adjustment Mechanism (CBAM)
 - Understanding the EU Emissions Trading System and the Carbon Pricing Model

Additionally, it also included a session on a GIZ initiative – Responsible Business Hubs.

II. Agenda

Date	Sessions	Location
15 th October 2023	Travel from Islamabad, Pakistan to Bonn, Germany	
16 th October 2023	Capacity Development Session: EU Strategy on Sustainable and Circular Textiles	GIZ Office, Bonn, Germany
17 th October 2023	Capacity Development Session: EU Corporate Sustainability Due Diligence Directive	
18 th October 2023	Capacity Development Session: Responsible Business Hubs	
19 th October 2023	Capacity Development Session: CBAM in the context of the Green Deal and international trade	KREAB Office, Brussels, Belgium
	Meeting with EU commission's Directorate General Environment (ENV) representatives	EU Commission Office, Brussels, Belgium
20 th October 2023	Debriefing Session and Action Plan Development	Hotel Board Room, Brussels, Belgium
21 st October 2023	Travel from Brussels, Belgium to Islamabad, Pakistan	

III. List of Participants

Sr.	Name	Designation	Organisation
Participants			
1.	Dr. Muhammad Irfan	Director General, Trade Policy Wing	Federal Ministry of Commerce
2.	Mr. Atif Aziz	Joint Secretary, FT-III	Federal Ministry of Commerce
3.	Mr. Mudassar Raza Siddiqui	Director General, Textile Wing	Federal Ministry of Commerce
4.	Mr. Salman Ahmad Choudry	Deputy Secretary, Exim Wing	Federal Ministry of Commerce
5.	Mr. Fawad Hassan	Director to Secretary Commerce	Federal Ministry of Commerce
6.	Mr. Muhammad Suleman Mahsud	Section Officer	Federal Ministry of Commerce
7.	Mr. Ahmad Ali	Research Officer	Trade Development Authority Pakistan
8.	Mr. Muhammad Muzzammil Hussain	Secretary General	Towel Manufacturers Association
9.	Mr. Azizullah Goheer	Secretary General	Pakistan Textile Exporters Association
10.	Mr. Muhammad Aasim Syed	Chairman	All Pakistan Bedsheets and Upholstery Manufacturers Association
11.	Mr. Shoaib Sultan	Chairman	Marble, Granite, and Mineral's Council

12.	Mr. Khadim Rasool	Secretary General	Pakistan Hosiery Manufacturers Association
13.	Dr. Tanveer Hussain	Rector	National Textile University, Faisalabad
14.	Ms. Noreen Akhtar	Research Associate	All Pakistan Textile Manufacturers Association
15.	Mr. Imran Salahudin	Managing Director	Faaz International
16.	Mr. Al Assad, Muhammad Ammar Faisal	Managing Director	South Asian Sourcing Pvt. Ltd.
Organisers			
1.	Ms. Yulia Bazhenova	Project Manager	GIZ Pakistan
2.	Mr. Noor Khan	Component Manager	GIZ Pakistan
3.	Mr. Abdul Rauf Anjum	Technical Advisor Governance	GIZ Pakistan
4.	Mr. Hassan Hameed	Technical Advisor Policy Reform	GIZ Pakistan

IV. Summary of Proceedings

EU Strategy on Sustainable and Circular Textiles

The EU Strategy on Sustainable and Circular Textiles session focused on its key features such as the EU eco-design for Sustainability Products Regulation, Digital Product Passport along with increased traceability requirements, Microplastics from Textiles, and waste shipment regulation pertaining to restrictions on EU waste being exported.

The strategy pursues circularity principles to be implemented within the EU textile industry supply chains. These include focus on recyclability, reusability, longevity of textile products.

The session also included case studies being shared with regards to product design on circular economy principles as well as a case study on tackling traceability requirements.

EU Corporate Sustainability Due Diligence Directive (CS3D)

The EU CS3D attempts to ensure due diligence regarding human, labour, and environmental rights in EU supply chains.

The session on the EU Due Diligence Directive conveyed the concept of due diligence, what it refers to, why it is important, along with developing an understanding of the underlying concept of human rights and environmental due diligence.

It discussed the various legislative processes within the EU including the German Supply Chain Due Diligence Act and the EU Corporate Sustainability Due Diligence Directive.

EU Carbon Border Adjustment Mechanism

The EU CBAM's primary aim is to address carbon leakage by ensuring that production outside of the EU is also subject to carbon pricing.

The discussion on the Carbon Border Adjustment Mechanism started with the discussion on the overall functioning of the EU, its various legislative processes, and its various types. It covered the key features of the EU Green Deal and how the CBAM fits into the overall objectives, its key features, and instruments.

It included the discussion on reporting requirements, the various actors, and the role each would play. The EU Emissions Trading System was covered along with an understanding of how Carbon Pricing is implemented in the EU.

The overall sessions discussed each legislative timeline, transition periods, reporting and compliance requirements, the implementation process, and resultant implications for EU trading partner countries including Pakistan.

As an outcome of the sessions, the following key priority areas were identified after the delegations' deliberations regarding the input received. It was noted that in some cases, initiatives were already underway.

- Promotion of Sustainable Value Chains, recycling, and circular business models in Pakistan's textile industry.
- Supporting Technology upgradation especially green technology especially for low carbon emission technologies.
- Carbon Pricing policy option available to Pakistan in the future.
- Supporting Public-Private efforts to market sustainable Pakistani products and processes in the International Market.
- Supporting stronger negotiation for shared responsibility between brands and manufacturers and inclusion of responsible contracting clauses.
- Supporting the development of domestic waste management systems.
- Supporting increased traceability, data gathering, reporting, and monitoring on sustainability indicators including water, chemical consumption and carbon emissions, and due diligence indicators (human, labour, and environmental rights).
- Supporting resource efficient production processes in the textile industry.
- Targeted support to SMEs with regards to the above.
- Promoting Risk Management processes for human, labour, and environmental rights in supply chains.
- Improving Pakistan's Country risk profiling against human, labour, and environmental rights specifically in addressing the requirements that are part of the EU Corporate Sustainability Due Diligence Directive.
- Promoting Occupational Health and Safety in the textile industry along with setting up Grievance Mechanisms at the firm and sectoral tiers.
- Supporting Just Transition in the Pakistani Textile Industry.
- Increased focus on collaboration between academia, private and public sector.
- Supporting SMEs for international sustainability certification and accreditation, lack of funds for compliance and acquiring certifications.
- Cotton Origin Testing and Isotope Testing Lab for supporting increased traceability. Recycled Polyester Traceability System.

- Development of Pilot Project and Case studies to provide SMEs with an understanding on how to improve upon various sustainability indicators, increased certification, and other aspects.
- Awareness Sessions to be conducted to communicate a consolidated understanding of upcoming EU trade requirements.
- Increased engagement with Pakistan's International Trade Missions, EU brands, EU country office for communicating information on Pakistan's progress to compliance.

V. Way Forward

- An Assessment proposal would be drafted and shared with the Ministry of Commerce.
- For Due diligence assessment, task force led by Ministry of Commerce will further initiate the survey form to respective trade associations for assessment and identify potential topics to work in future.
- Textile Industry Sustainability Forum dialogue event would be taking place in November 2023, where further discussions around the topics would be held.
 - Task force would be constituted particularly for the Responsible Business Hub and will develop action plan for year 2024 and 2025 activities of Responsible Business Hub in Pakistan.
- Initial dissemination sessions would be conducted by trade associations on the topics covered during the study tour to apprise the industry of upcoming EU requirements.

End of Document



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