



# WERNER INTERNATIONAL

**Management Consultants to the world textile, apparel & fashion industry**



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## A MESSAGE FROM THE PRESIDENT

*It is a real honor for me to have the opportunity to address once more the International Textile and Clothing Community, especially at this delicate moment in its history, a period characterized by powerful evolving relocation dynamics and truly global competition.*

*I am especially proud of the tremendous benefits created in the industry by our people and our organization in over 65 years of activity. Werner International has always been committed to sharing its profound and vast knowledge of the textile and apparel business for the benefit of its clients and partners.*

*At present, each textile, apparel or fashion company -whatever its size, location or market- is confronted with a wide range of alternative strategic options, ranging from industrial structure to logistics and marketing activities. It becomes more and more impractical to make the right choices and carry out the necessary changes using only one's internal forces and competences.*

*Werner is in a unique position to offer professional advice, guidance and effective assistance to its clients, not only because of our decades of experience in the field, undeniably a vital ingredient of our strength, but also for our corporate culture focusing on innovation and effective implementation.*

*Our competences and organization have evolved continuously over time in conjunction with the developments and requirements of the industry. Over the years we have developed unique skills and tools in new areas such as Market Intelligence, Strategy & Branding, Networking & Global Supply Chain Orchestration and Information Management. These are in addition to our extensive industrial and technological capabilities, for which the Werner name is justly acclaimed.*

*The approach we take is to view each company or organization as an individual case, with its own history and vision, infrastructure, products and manufacturing set-up. We tailor our assistance to the precise and varying needs of each client, and since we are specialized and*

*dedicated solely to the textile, clothing and fashion world, we have an unrivalled advantage in bringing world class service. In addition our global presence results in our offering a unique and worldwide network of top tier contacts.*

*Many are the challenges ahead, but we feel very positive about the future. Admittedly the playing field will be more global and based on ever more open competition. But it will be a market in which companies capable of leading and innovating in their technology, in their business models and strategic approach will be able to secure a profitable future.*

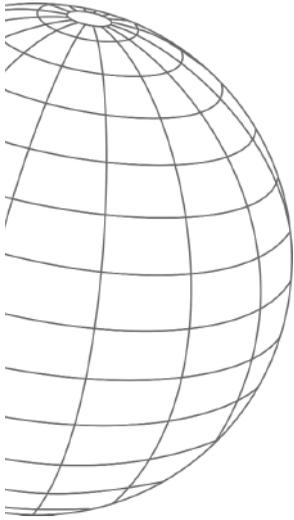
*Many have been predicting an inexorable commoditization of this industry, an industry that will only be driven by cost. We do not believe so. Plenty of opportunities will be there for companies capable of understanding consumers, companies that can provide differentiation, adaptation, localization through the development of incisive business models and the development of high performance manufacturing set-ups.*

*I look forward to offering our organization's unique specialist services in all areas of the industry in the years to come.*

Constantine Raptis  
President



## THE WERNER INTERNATIONAL ORGANISATION



Since its origin in 1939, Werner International has provided specialized management consulting services exclusively to the global textile, apparel and fashion industry. Over the years, Werner International has provided professional consulting services to over 5,000 organizations in more than 70 countries. We are often recognized as a key contributor to the success of many world leading companies and organizations.

Werner International operates today with an international multidisciplinary consulting force, through local representatives in more than 50 countries and three main support and research desks in Europe, the USA and China.

Our senior executives contribute to a wide range of seminars and conventions, while our annual International Textile Labor Cost Comparison Report is globally recognized as the most authoritative source of textile labor cost statistics.

Since the early 1960's Werner International has published a broadly appreciated industry newsletter New Twist, recently transformed into an electronic newsletter and distributed to more than 1,500 leading industry professionals and executives worldwide ([www.werner-newtwist.com](http://www.werner-newtwist.com)).

The advent of the 1980's meant providing our extensive global clientele with a wider array of strategy support services including market intelligence, supply chain management, global strategic networking, brand management, information technology and M&A assistance.

When the 'age of the internet' started in the nineties, Werner International proved to be again a pioneer in providing web-based market intelligence services to the textile & clothing industries through the development of an interactive database containing highly detailed data and information on over 65 countries worldwide ([www.wernerinfotex.com](http://www.wernerinfotex.com)).

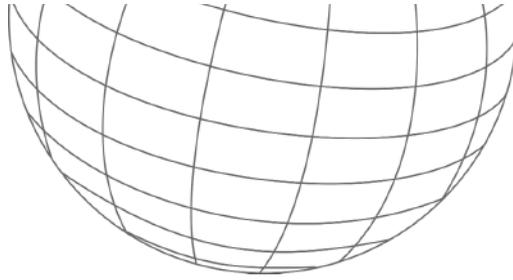
Werner International's clientele includes leading private-sector companies of the textile, apparel and fashion industry throughout the world, as well as governments, international agencies, financial institutions and investors.

To serve its prime clientele, Werner International employs a large group of highly qualified international consultants, selected for their in-depth experience within their specialties and for their problem solving skills, creative imagination, psychological maturity, communication abilities and intellectual competence. The majority of our consultants have held senior managerial positions prior to joining Werner and so are intimately aware of the rapid pace of development in the industry and the resulting need to communicate appropriate skills, knowledge and market vision. Werner also maintains a unique and extensive global network of external high profile senior experts, project contributors and specialized partners.

Werner International does not offer pre-packaged programs off the shelf as the solution to a company's needs. While methodologies have emerged from our extensive experience, at Werner we still believe that a company's problems are unique and have to be solved within their own frame of reference, frequently with the application of several disciplines, using the most advanced techniques, refined competences and thorough knowledge of best practices.

A long time has passed since Herbert Werner, our founder, started traveling the world; nevertheless the spirit of Werner International keeps faith to his founding principles of professionalism, specialization and passion, making our unique organization ideally positioned to support leading industry players and organizations into the dense challenges and opportunities of the future textile and fashion global markets.

It is with this steadfast spirit, a blend of a rich ethical tradition and the intimate understanding of future industry dynamics, that the Werner organization, with its specialized divisions, global presence and overall perspective, will continue to represent a unique management knowledge for the world's textile, apparel and fashion industry.



### TECHNICAL ASSISTANCE

Since its very beginning, the Werner International philosophy has always been centered on the credo that a sound and advanced manufacturing base is fundamental to the success of any textile and clothing organization in the highly competitive textile and fashion markets.

Our strong focus on manufacturing has led us to develop and pioneer an impressive number of registered systems in production management, processing technology, management information, material yield and personnel training. Werner International quality control and production planning systems have enabled textile and clothing companies around the world to respond to the market's demand for quality assurance, product-range flexibility and short delivery times. One of Werner International's strengths has been its ability to align production costs and increase productivity with internationally competitive levels through the physical implementation of technological improvements and production management techniques as well as through introduction of training programs for technical and supervisory personnel. Werner's technical intervention centers on themes such as Productivity Improvement, Asset Utilization, Automation and Robotics, Product Development, Quick Response and Quality Management.

A true measure of consulting success is the actual implementation of the recommendations and the achievement of pre-defined targets. At Werner International we take justifiable pride in our track record of full program implementation. Our consultants participate actively in the

implementation of productivity and upgrading of programs. As such, on-site presence and continued guidance are integral aspects of Werner's methodological approach.

For each technical assignment, Werner International selects a team of consultants covering a combination of disciplines, best suited to achieve and implement the planned improvements in the shortest possible time. We work in close harmony with local staff and work force and are able to generate enthusiasm and positive thinking throughout the organization. Since our consultants are continually involved and updated in the development of technology, equipment, automation and processing methods we are able to suggest and introduce innovative methods, improved techniques and better procedures.

Werner International's team of highly qualified textile and apparel experts provides world class assistance throughout the entire chain of fiber, textiles, clothing and fashion:

#### Processes:

- Filament extrusion and texturizing
- Spinning, winding, twisting, doubling.
- Yarn dyeing
- Warping and sizing
- Weaving
- Knitting
- Fabric dyeing, finishing, printing
- Laboratory testing and product standards
- Inspection and quality control
- Garment design and specification
- Cutting & sewing
- Washing, finishing
- Packing, warehousing and distribution

#### Systems:

- Technological improvements and automation
- Efficiency and performance improvement
- Manufacturing cost reduction
- Mill and line balancing
- Labor, supervision and management training
- Supply chain management & logistics
- Planning & costing
- Total Quality Systems, quality improvement and quality systems set-up

- Plant start-up
- Preventive maintenance processes
- Raw material and waste management
- Product development engineering
- Feasibility studies and evaluations
- Product mix optimization programs
- Lead times and flows reengineering

Werner's intervention is generally applied following the execution of a comprehensive audit and benchmarking exercise targeted at the specific area of company concern. We perform a thorough analysis, evaluation and benchmarking exercise comparing the actual company performance with world best practice and best-in-class players.

The audit's findings are elaborated and consolidated into a detailed report identifying key performance gaps as well as improvement opportunities. Our proposed intervention identifies the exact objectives and the financial and operational benefits that will accrue in the implementation phase. We ensure that the targeted results are achieved not only while we are present but also ongoing in the future.



### HUMAN RESOURCES

Werner International's training systems have been refined and proven in hundreds of textile and apparel plants throughout the world while Werner's manuals represent a recognized point of reference for international best practice in the industry. Based on scientific principles of behavior modification, the "Analytical Method Productivity System" (AMPS) provides an intensive program for training operators, supervisors and management reflecting the need of the industry for continuous training and improvement.

All Werner International training systems revolve around two practical considerations: they must allow the individual to acquire knowledge and skills which are of immediate benefit to the individual and his/her company, and the training must be done in-house in order to address directly the company's needs without interruption of production. Training activities are particularly focused upon supervisors and executive managers, stressing a combination of processing knowledge, operational control and troubleshooting, while great emphasis is placed on the design of the most suitable "organizational" architecture.

The capability to compete is in fact increasingly dependent on the ability to adopt and manage change within the organizational structure of a company and to properly leverage knowledge and new technologies while guaranteeing responsive action to fast changing customer needs and stringent market conditions.



## INDUSTRIAL SERVICES

### INNOVATION

The capability to innovate and differentiate is a key success factor allowing leading companies to strive in the very competitive global textile and fashion environment.

Werner has developed a wealth of experience in supporting textile companies with their innovation programs. One dramatic example is our extensive involvement with the Italian textile industry especially during the 80's and 90's. They were driven to reposition themselves by the growing competition from low cost countries. Italian textile mills and fashion companies at that time decided en masse to abandon the more conspicuous lower segments of the market and to embrace instead the complexity of higher market segments and niches where innovation and flexibility are the rule, thus ensuring higher profit margins. Werner has been involved in a very large number of Italian textile companies during this period of re-generation. As a consequence of their re-orientation, the Italian textile mills continue to be able to defend their unique positioning in the higher value fashion market, through a combination of locally produced and outsourced intermediate and final products.

Too often, when thinking about innovation in fashion, much of the emphasis is directed towards the creative side. In reality, more often, once a specific marketing positioning is chosen, it is the complexity of manufacturing, supply chain management and servicing innovation that really differentiates winners.

To create new ideas requires imaginative thinking. To apply those ideas requires a winning knowledge-oriented organization combined with a properly structured industrial set up. When repositioning and moving up-market, companies are required to face a much greater manufacturing complexity and often need to totally change their manufacturing management models and approaches to properly respond to the needs and requirements of top market segments.

Too often, companies believe such a repositioning may be done without a total re-thinking of their manufacturing model.

Implementation of a new product-mix “architecture” requires a rigorous redesign of many functions and activities, from material sourcing to sampling and prototyping, from order size optimization to working procedures, from quality control activities to customer service methodology.

Werner's assignments in this area are developed with a strong focus on the specifics of the customer's strategic needs and with the support of a multidisciplinary team of marketing & strategy, design and technical experts. Werner International also provides an experienced international network of top profile creative style partners and designers.

Werner International is heavily involved in developing new technologies with leading equipment manufacturers and is at the forefront when guiding companies in the market testing of new technologies and the application of new fibers and fabrics.



### QUALITY MANAGEMENT

In recent times the development of quality systems and quality assurance models has been facilitated by increasingly reliable and almost fault-free production methods, including robotics and as a consequence reduced reliance on manpower. Nonetheless the textile and apparel industry is still searching for a commonly accepted universal approach to quality management.

Quality Assurance involves the application of an integrated approach to quality management that focuses on the issues arising from the design of the process in order to create a continuous self-improving system which will eventually guarantee that quality is “built in” and not just something “inspected into” products. Werner has accumulated a unique set of experiences and competences in supporting textile and apparel companies in the development of their quality management approach.

We have special capabilities in all levels of quality management. The first level is defect tracking back to the production process of origin, along with elimination of the problem perhaps with re-setting equipment, re-training of operators or even through purchase of new machines. The second level, often called “total quality control” involves sustained quality performance, within the organization and extended also to include suppliers. The third level requires commitment to quality by all individuals in the organization and applied to all aspects of operation, and not just to the production areas. This often focuses on such techniques as quality circles.

Charged with the increasing weight of intangibles, the definition of quality largely depends on the specific strategic positioning of a product proposition or brand. No matter what techniques are used for assessing quality, it is vital that the company sets goals and is measuring itself against them.

These goals must be seen as interim steps in the process of continuous improvement, knowing that such a process cannot be successful without participative management and an environment which promotes employee empowerment and a “quality culture”.



## MARKETING AND STRATEGIC ASSISTANCE

### STRATEGY SERVICES

Global textile and fashion markets are changing rapidly in both production and consumption. The competitive playing field is being contested by companies of all sizes from all corners of the world in response to the consumer's rapidly changing requirements, tastes and purchasing patterns. In addition, the aggressive global distribution sector comprising colossal retailers and logistic players continues to gain market share and negotiating power in all areas leaving those unprepared trailing far behind and losing business.

In order to survive and prosper companies need to avoid direct price competition and instead should leverage their competitive advantage. They can:

- Understand, anticipate and contribute to the market evolution;
- Play an active global role in the international arena through acquisitions, alliances and networking;
- Develop a clear vision of success factors for the future;
- Create winning organizations by investing in talented people and best technology.
- Think 'outside the box', through innovation and creation of new products, and product concepts;
- Orchestrate all processes along the entire supply chain.

The removal of trade barriers and the low labor cost in certain countries are two of the main driving forces behind the relocation of textile and apparel production around the globe. The ever increasing globalization of the textile and apparel industry is forcing all industrial players to revise their strategies and pose themselves the following two main sets of questions:

- How shall my company "internalize" rather than resist these changes?
- What makes and will make sense to produce in my home country?
- Are my competitive advantages sustainable in the long term?

Having understood what makes sense to produce in my home country, how shall my company re-position in new market segments?

- What changes does my organization need to undertake?
- What competences must be developed or acquired?
- What degree of "collaboration" shall we establish with other companies worldwide?
- How will our industrial strategy blend with our marketing strategy?
- How can we improve our control over the company's entire supply chain?

Entrepreneurs, owners and top managers are developing these new strategic visions for their companies and are aligning their organization, processes and technology to match. A properly communicated vision will galvanize people within the organization through the sharing of these objectives and priorities as well as providing the structure for coordinating, measuring and improving the many facets of their business.

The uniquely qualified Werner Strategy Team and its global network of associates offer to its international customers an interesting portfolio of strategic assistance projects. These are founded upon a rigorous methodology and our extensive knowledge of leading best practice. We offer:

- Marketing strategy development
- Market entry strategy development
- International sales organization development
- Top Management training and coaching
- Brand positioning analysis
- Brand development and repositioning
- Content branding strategy development
- Strategic market intelligence
- Exports development
- Partner search, strategic alliances and Joint Venture formation
- Project feasibility, risk and start-up studies and interim management
- Supply chain management and strategic networking
- Branding
- Retailing
- Organization re-engineering and Human Resources development programs
- Plan assessment and strategic due diligence
- Innovation research
- M & A – Mergers and Acquisitions

Werner International's approach to M&A is quite unique and very effective. We help identify best strategic fit parties, collect relevant intelligence and establish top-level contacts and negotiation lines - all this while guaranteeing the highest level of confidentiality.





### MARKET INTELLIGENCE

In today's world, competitive companies are navigating the rapidly changing business environment by charting their way with clear, precise and timely information. They are proactive, flexible, innovative, but most of all knowledgeable. This can only be achieved if business and market knowledge and information are considered a key strategic tool within the company's organization.



Werner International offers incisive support in these areas. Firstly there is our INFOTEX system, a widely applied industry intelligence portal, which provides subscribers with easy access through our web-site to proprietary information covering global trade flows and prices for textile and garment products, international duty rates as well as demographic and economic information on target markets.

In parallel, Werner's Market Intelligence Department, with its highly experienced team, coordinates the development of sophisticated ad hoc market analyses and direct market studies including primary and secondary information searches.

This is not only about externally acquired information. It is in fact surprising how much informally managed market information is held within a company, unused. Sales representatives, designers, buyers, customer account personnel: they all act as potential antennae, collecting a multitude of inputs, but in most cases lack the necessary tools to efficiently decode, process and elaborate them into strategic information that can be used across the entire organization.

The Werner approach is quite unique. Werner does not provide a specific information management software or standard solution.

Instead we take a very pragmatic approach which has been tried, tested, applied and verified over the years. We prepare and implement a custom-designed Marketing Intelligence Management System (MIMS) and ensure also the necessary training and coaching support. Custom-designed because only in differentiation can value be created.

### BRAND & RETAIL MANAGEMENT

Under the heavy competitive pressure of low cost and rapidly improving companies such as those in China and India, many players, particularly in medium to high cost countries are forced to develop new business models and strategic approaches in order to reposition and distance themselves from the commodity markets into higher value added segments and niches. Many are now left with no alternative other than to adapt, change and often revolutionize their business model, upgrade their value proposition and promote their own brands, in order to survive in this new globally competitive environment. For many such companies, long-term survival will depend on their ability to reposition themselves in the area of higher value market segments, where fashion, luxury and impulse buying dictate unpredictability.

The luxury market segments will continue to grow steadily in the future, but will also demand differentiated and innovative products, high flexibility and responsiveness, clear brand positioning and a coherent image.

Too often “branding” is perceived as a simple escape from aggressive competition. It is not. One needs more than a retail presence, a recognizable logo and some publicity expenditure. One has to build-up an innovative recipe, find the right balance between a wide range of tangible and intangible ingredients, and leverage a clear vision of global market dynamics and opportunities. Brand management, retail management and supply chain management are the three key ingredients which, when linked to a winning idea, lead to successful brand building.

At Werner International we have developed a number of high level alliances with leading organizations, experts and gurus in the key areas of branding, retailing, public relations, communication, arts and design. We have invited them to contribute to many Werner International projects, integrating their strengths with Werner’s unique know-how and pragmatic project management.

Through seminars and workshops, planning sessions and coaching programs we have worked with the company’s top management team, to lay the foundations for the company’s branding vision and business model development.



### GLOBAL SOURCING & SUPPLY CHAIN MANAGEMENT

What does it really mean to play in a global market? One answer is that each company faces more threats, but at the same time has new opportunities. The removal of trade barriers and introduction of global trading rules to WTO standards has given advantage to large scale manufacturers and stimulated the concentration of business operations to certain geographical areas. Scale and scope economies are nowadays easier to reach and provide large players with relevant competitive advantages at all market levels. Are we then inevitably moving towards a market of giant companies and retailers? Not necessarily.

The very same dynamics, which are making the global market a single entity, are also allowing “isolated” companies to network at an international level and thereby grow and become more successful. Ever more strategic value in these industries is being created through the design and orchestration of a winning supply chain architecture.

However, the development of such architecture cannot be left to chance. Suppliers, clients and partners must all be identified, approached and selected with a clear strategy in mind. In addition, there are many external factors to contend with such as the cost of energy or labor, the level of taxation and the availability of investment incentives. These must be scrutinized in combination with other aspects such as logistics and political stability. Today, western textile players need to perform a critical but also creative analysis of current and future supply chain requirements and need to be put in touch with sourcing opportunities to match the profiles already defined in their company strategy. Features to analyze include competitiveness, design, distinctive content, time to market and overall responsiveness, as well as reliability and integrity.

With a consolidated experience in partner search, global sourcing and supply chain management, the Werner team and our international network of experts is focusing on supporting our clientele not only in the “design or development” phase but also at all levels of implementation. The secret of success lies in the execution, where our assistance becomes essential in fine-tuning activities, monitoring results and establishing effectively operating supply chains.



## MARKETING AND STRATEGIC ASSISTANCE

selection. Companies need forecasting models to analyze trends and seasonal components as well as database manipulation tools for budget creation and analysis. Systems need to apply in all business areas including marketing and sales information analysis, planning and budgeting support, production analysis, cost control, activity-based cost management and quality analysis.

The Werner approach allows management to leverage knowledge and information into workable competitive strategies.

### INFORMATION MANAGEMENT

Information Management (IM) or Information and Communication Technology (ICT) is today considered to be an essential facility for internal control, product development, customer service and future planning.

It is a fundamental instrument in the execution and monitoring of a company's competitive strategy.

The path leading to each strategic goal must be carefully monitored through the establishment of measurable Key Performance Indicators (KPIs). Awareness of the connections between the different "leading" KPIs in the company's value chain, the measuring of "gaps" in relation to predefined targets or to previous situations and the ability to forecast trends, are all keys to incisive improvements and a successful company competitive strategy. It is clear that any one strategic decision will be based on sound information, whether sourced internally or externally.

We at Werner have been assisting our customers in the art of continual improvement and knowledge management through the application of consolidated IM methodologies and Enterprise Requirements Planning (ERP) systems.

Our methodology integrates executive information systems and decision support systems to allow management to make informed decisions from real world current data. Manipulation of management information requires a fast and efficient multidimensional database system, powerful Report Generator features, charting and model building to allow creation of support simulations and 'what-if' scenarios. In addition, by applying techniques such as Balanced Scorecard and management intelligence we have encouraged goal-sharing and a more constructive, competitive and team-spirited environment.

Over the years, we have analyzed and evaluated the specific computer packages and business solutions available for textiles, garment and fashion applications, and are able to advise on their





Werner International provides general management, economic, regulatory and technical consulting services in the highly specialized field of environmental management.

Industrial clients all over the world are advised on topics ranging from regulatory compliance and waste management to product life-cycle environmental impacts.

Werner International has acquired the know-how to offer a complete management perspective on each environmental issue, combining market and business considerations with regulatory and specialized engineering and scientific expertise.

In evaluating human health-risk potential, not only is the ecosystem analyzed but also the potential toxicity is identified.

Werner International offers consulting services on several environmental issues: ISO 14000 implementation, resource utilization, waste management, environmental policies and standards, “green manufacturing”, waste water treatment, air quality control, health-risk assessment, business strategies in environmental markets, the impact of environmental legislation.

## INSTITUTIONAL PROJECTS



Werner International continues to play an influential and advisory role with governments and institutions through a whole range of projects to support the textile and apparel sector. Often working behind the scenes, our organization has been offering structured support to governments, organizations, associations and other policy makers in the form of industry evaluations, restructuring, industry growth, privatization, training schemes, productivity improvements, brand building, market intelligence, and project management. Over the past decade, Werner International is proud to have conducted over 100 such projects for government agencies, industrial development corporations, regional and national textile organizations, R&D organizations, consumer groups and financial institutions.

In most cases, studies cover complete sectors of the industry on a regional, national or international basis and include implementation programs to ensure successful outcome.

Werner International also has a significant track record in international cooperation work. Our clients include state, local and national governments, multilateral and bilateral development agencies such as USAID, the European Commission and the World Bank as well as the private sector. Our international development skills draw on our extensive experience of working in every continent, to give us an intimate knowledge of the political, institutional, technical and market conditions. These are factors that characterize each individual economic context and that shape the manufacturing and trading environment in which the textile and apparel industry operates.

Werner's extensive experience in the global private sector makes it a unique source of understanding of specific textile and apparel market dynamics and an ideal candidate for conducting in depth benchmarking exercises. We are able to swiftly assess the level of capability of companies in a specific cluster or geographical area and develop and apply methodologies for improvement and growth.

Herbert Werner, the Founder, portrait 1964



**SELECTED CLIENT LIST****PAN EUROPE**

Abaloglu, Turkey  
 Akin Tekstil ,Turkey  
 Akteks, Turkey  
 Arco Têxteis, Portugal  
 Arovovale, United Kingdom  
 BASF, Germany  
 Benetton, Italy  
 Berdan, Turkey  
 Birko, Turkey  
 Birlik, Turkey  
 Blydenstein-Willink, Netherlands  
 Borås, Sweden  
 Boselli, Italy  
 Bossa, Turkey  
 Bossi, Italy  
 C&A, Netherlands  
 Çalik holding, Turkey  
 Canclini, Italy  
 Cantaart, Belgium  
 CDI, Calitri Denim, Italy  
 Cerruti, Italy  
 Chargeurs, France  
 Coats Vijella, United Kingdom  
 Colini's, Turkey  
 Costas Doudos, Greece  
 Cotonificio Albini, Italy  
 Courtaulds, United Kingdom  
 Çukurova, Turkey  
 Damart, France  
 Damat Tween-ADV, Turkey  
 De Witte Lietaer, Belgium  
 DEBA, Turkey  
 Delta Galil, Israel  
 Desso, Netherlands  
 DMC, France  
 Drummond, United Kingdom  
 E. Lang Textiles, France  
 Edip Iplik, Turkey  
 Ebit Vision System, Israel  
 ELVE, Greece  
 Enka, Germany  
 Epengle, Turkey  
 EXSA, Turkey  
 Finlayson, Finland  
 Fritz + Caspar Jenny, Switzerland  
 Ganzoni, France  
 Gap, Turkey  
 Garnier-Thiebaut, France  
 Gemona Manifatture, Italy  
 Geteca, Italy  
 Getzner, Austria  
 Hammerle, Austria  
 Harmanli, Turkey  
 Harris Tweed, Scotland  
 Hatzioannou, Greece  
 Hellenic Fabrics, Greece  
 Honegger, Italy  
 IBICI, Italy  
 Ipekyol, Turkey  
 Jalla, France  
 João Ribeiro da Cunha, Portugal  
 José Machado Almeida, Portugal  
 Karsu Tekstil, Turkey  
 KBC, Germany  
 Kilan, Israel  
 Klopman, Italy  
 Koniteks, Turkey  
 Kunz Textil Windisch, Switzerland  
 La Preparacion Textil, Spain  
 Lameirinho, Portugal

Lanificio Polcarpo, Italy  
 Laura Ashley, United Kingdom  
 Legler, Italy  
 Legnano, Italy  
 Lissadel, Ireland  
 Manifattura di Valle Brembana, Italy  
 Mantero, Italy  
 Marks & Spencer, United Kingdom  
 Marzotto, Italy  
 Mavi Ege, Turkey  
 Mexx, Netherlands  
 Miroglio, Italy  
 MITI, Italy  
 Montereale, Italy  
 Monti, Czech Republic  
 Monti, Italy  
 Naoussa Spinning Mills, Greece  
 Neuhauss, Germany  
 Nijverdal Ten Cale, Netherlands  
 Niilit, Israel  
 Nova Mosilana, Czech Republic  
 Oli Rose, Greece  
 Orta Anadolu, Turkey  
 Parkdale, United Kingdom  
 Pharr, Netherlands  
 Picañol, Belgium  
 Polgat, Israel  
 Polo Garage, Turkey  
 Prado, Belgium  
 Puignero, Spain  
 Radici, Italy  
 Ramsey, Turkey  
 Ratti, Italy  
 Redaelli, Italy  
 Rhône Poulenc, France  
 Rieter, Switzerland  
 Riopelo, Portugal  
 SAIC, France  
 Sanko, Turkey  
 Santanderina, Spain  
 Santens, Belgium  
 Schlafhorst, Germany  
 SET, Italy  
 SITIP, Italy  
 Söktas, Turkey  
 Somelos, Portugal  
 Stork, Netherlands  
 Super Home, Turkey  
 Tavex, Spain  
 Textil Manuel Gonçalves, Portugal  
 Tiberghien, Italy  
 Torres Novas, Portugal  
 Tüp Merseizer, Turkey  
 Uster, Switzerland  
 UTT, Germany  
 Varvaressos, Greece  
 Yesim, Turkey  
 Yünsa, Turkey  
 Zambaiti, Italy  
 Zegna, Italy  
 Zinser, Germany  
 Zuechi Group, Italy  
**NORTH AMERICA**  
 Atlantic Yarns, Canada  
 Blue Bell, USA  
 Burlington Industries, USA  
 Calvin Klein, USA  
 Cambridge Towel, Canada  
 Canofil, Mexico  
 Carolina Textil, Mexico  
 Clinton Mills, USA  
 Cone Mills, USA  
 Cotton, Inc., USA

Crown Textile, USA  
 Culp, USA  
 Dan River, USA  
 Dixie Yarns, USA  
 Dominion Textiles, Canada  
 DuPont, USA  
 Esprit de Corp., USA  
 Freudenberg Nonwovens, USA  
 Fruit of the Loom, USA  
 Greenwood Mills, USA  
 Grupo Kallex, Mexico  
 Grupo Zagis, Mexico  
 Guilford Mills, USA  
 Hoechst, USA  
 Inman Mills, USA  
 Johnston Industries, USA  
 K-Markt Corporation, USA  
 Levi Strauss, USA  
 Liz Claiborne, USA  
 London Fog, Inc., USA  
 Marubeni Denim, USA  
 Milliken & Company, USA  
 Parras, Mexico  
 Parkdale, USA  
 Patagonia, USA  
 Quaker Fabric, USA  
 Reeves International, USA  
 Russell Corporation, USA  
 Sara Lee, USA  
 Sears, USA  
 Shell, USA  
 Spartan Mills, USA  
 Spiegel, USA  
 Springs Industries, USA  
 Tauro Textil, Mexico  
 Textil Miguel, Mexico  
 TNS Mills, USA  
 Tommy Hilfiger, Inc., USA  
 UTP - Unidad Textil Puente, Mexico  
 Wellman, USA  
 Westpoint Stevens, USA  
 Zatec Tepeji, Mexico  
**CENTRAL & SOUTH AMERICA**  
 Alpargatas Santista, Brazil  
 Alpargatas, Argentina  
 Bellavista Oveja, Chile  
 Brasperola, Brazil  
 Canatiba, Brazil  
 Cedro Cachoeira, Brazil  
 Colorfex, Argentina  
 COTECE, Brazil  
 Credisa, Peru  
 Delltex, Ecuador  
 Faddi Fita, Argentina  
 Fibratex, Uruguay  
 Fiotek, Brazil  
 Flexilon, Venezuela  
 Grafa, Argentina  
 Inta, Argentina  
 Karsten, Brazil  
 Maniffature del Este, Paraguay  
 Microlite, Brazil  
 Negociacion Lanera, Peru  
 Nova America, Brazil  
 Nuevo Mundo, Peru  
 Paylana, Paraguay  
 Pimafine, Peru  
 Protela, Colombia  
 Ritex - Lartex, Argentina  
 San Jacinto, Peru  
 Santista, Brazil  
 Sarco, Uruguay  
 Schlosser, Brazil

Sudamtex, Venezuela  
 Tecotex, Argentina  
 Telares de Palo Grande, Venezuela  
 Texpinal, Colombia  
 Textilia, Colombia  
 Thalys, Argentina  
 Vicunha, Brazil  
**ASIA & OCEANIA**  
 Abhishek, India  
 Alliance Textiles, New Zealand  
 Argo Pantex, Indonesia  
 Arvind Mills, India  
 Bhihwara, India  
 Binzhou 'Small World', India  
 Binzhou CRC, India  
 Birla Group, India  
 Bradmill Textiles, Australia  
 Calum Textiles, Australia  
 China Resources, China  
 China Textile Council, China  
 Crescent Textil Mills Ltd, Pakistan  
 Erdos, China  
 Far Eastern Textiles, Taiwan  
 GHCL, India  
 Guang Ming Silk Mill, China  
 Himatsingka, India  
 Hong Kong Spinners, Hong Kong  
 Hualon, Taiwan  
 Huimin CRC, China  
 Indo-Thai Synthetics, Thailand  
 Jinggong, China  
 Jinhua Spinning Co. Ltd., China  
 Kanindotex, Indonesia  
 Kohinoor Maple Leaf Group, Pakistan  
 Li Peng, Taiwan  
 Liaochung Ahandong, China  
 Linqing CRC, China  
 Macquarie Textiles, Australia  
 Marubeni, Japan  
 Mitsubishi Rayon, Japan  
 Mohammed Farooq, Pakistan  
 Moon Light, Pakistan  
 Nagreeka Export Ltd, India  
 National Textiles, Australia  
 Norwellan, Australia  
 Piramal/Morajjee, India  
 Premier Mills, India  
 PT Grand Textiles, Indonesia  
 Rajasthan Spinning & Weaving, India  
 Regent Knitwear, Pakistan  
 Ruyi, China  
 R.M.Mohite, India  
 Saniao, China  
 Shanghai Hsin Craine Garment, China  
 Super Spinning, India  
 Tai Yuen, Taiwan  
 Tenkong, China  
 Tessitura Monti India, India  
 Texmaco, Indonesia  
 TIA, Australia  
 Tongzhou Printing and Dyeing, China  
 Toray, Japan  
 Toyobo, Japan  
 Trident Group, India  
 Venture International Laos Co, Laos  
 Wan Hsu Garment Co., China  
 Weifang Shandong, China  
 Weihai Small World, China  
 Welspun, India  
**AFRICA & MIDDLE EAST**  
 Afprint, Nigeria  
 Aranda, South Africa  
 Asmara Textil Gruppo Zambaiti, Eritrea

BTM Bishara, Egypt  
 Cottix, Algeria  
 Da Gama, South Africa  
 Denim de l'Île, Mauritius  
 Dice, Egypt  
 El Giza, Egypt  
 Filartex, Mauritius  
 Frame Textile Corp., South Africa  
 Goldentex, Egypt  
 Hensi (Egyptian Weavers), Egypt  
 Hylic, Uganda  
 Intl Cie for Readymade Garments, Egypt  
 Kabo, Egypt  
 Kobba Dyers, Egypt  
 Mulliez Spinning, Morocco  
 Oman Textile Mills, Oman  
 Puttmann, Egypt  
 SA Fine Worsted, South Africa  
 Sitex, Tunisia  
 Sunflag, Nigeria  
 SWIFT, Tunisia  
 Textile Corporation, Tanzania  
 Utexafrica, Congo  
 Zenotex, Egypt  
**INSTITUTIONS**  
 - ADOZONA, Dominican Republic  
 - APTMA, Pakistan  
 - Associazione Cotoniera Italiana, Italy  
 - Caribbean Association of Industry, Barbados  
 - Cotton Incorporated, USA  
 - CBWT Confederation of British Wool Textiles, UK  
 - Consejo Intertextil Español, Spain  
 - EBRD European Bank for Reconstruction and Development, UK  
 - ETBA Hellenic Development Bank, Greece  
 - European Commission, Belgium  
 - Federation de l'Ennobissement Textile, France  
 - FTQ Fonds des Travailleurs de Québec, Canada  
 - Generalitat de Catalunya, Spain  
 - IFC International Finance Corporation, USA  
 - IDA Irish Development Association, Ireland  
 - ITKIB, Turkey  
 - IWS International Wool Secretariat, UK  
 - Ministry of Economy, Kazakhstan  
 - Ministry of Industry and Trade, Indonesia  
 - Ministry of Industry, France  
 - MITI, Japan  
 - ODI Office pour le Développement Industriel, Morocco  
 - Ontustik Authority, Kazakhstan  
 - TCFDA Textiles Clothing Footwear Development Authority, Australia  
 - Textiles Importers Association, Sweden  
 - Turkish Privatisation Agency, Turkey  
 - Textile Industries Holding, Egypt  
 - Turkish Development Bank, Turkey  
 - UNIDO, Austria  
 - USAID, USA  
 - World Bank, USA

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