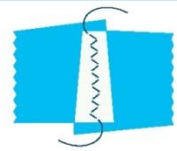
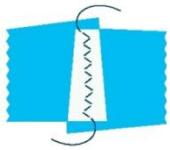


THE APPAREL & TEXTILE SECTOR IN GREECE



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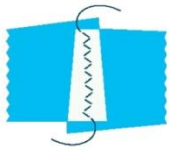
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The Apparel & Textile industry is one of the most important industrial sectors in Greece

The Apparel & Textile Sector in Greece

Key figures 2012

<u><i>Number of companies (manufacturing)</i></u>	<u><i>2.000</i></u>
<u><i>Number of employees (manufacturing)</i></u>	<u><i>35.000</i></u>
<u><i>Number of employees (trade)</i></u>	<u><i>30.000</i></u>
<u><i>Value of exports</i></u>	<u><i>1,3 billion €</i></u>
<u><i>% in the manufacturing exports</i></u>	<u><i>18%</i></u>
<u><i>Turnover</i></u>	<u><i>2.8 billion €</i></u>
<u><i>Retail Sales</i></u>	<u><i>4,0 billion €</i></u>

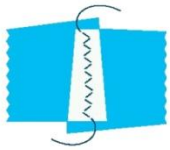


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MAJOR CHANGES

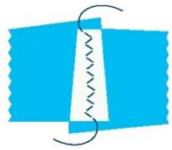
- ▶ *The Greek Apparel & Textile sector has undergone significant changes over the past decade*
- ▶ *These have been caused by systemic changes on the international stage, through globalization, the liberalization of textiles trade and the resulting increase in competition*
- ▶ *The Greek Apparel sector today:*
 - *focuses on products with higher added value*
 - *offers design services in addition to quality manufacturing and*
 - *has delocalized production activities to neighboring South-East countries*



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Cooperation of Greek Apparel companies in South-East Europe

<u><i>Number of companies</i></u>	<u><i>300</i></u>
<u><i>Number of employees</i></u>	<u><i>25.000</i></u>
<u><i>Greek production in SEE</i></u>	<u><i>75%</i></u>
<u><i>Type of cooperation</i></u>	
<u><i>Greek ownership</i></u>	<u><i>55%</i></u>
<u><i>Outsourcing</i></u>	<u><i>45%</i></u>



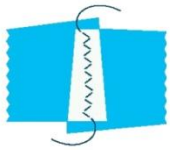
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TYPES OF GREEK APPAREL COMPANIES

A. PRIVATE LABEL MANUFACTURERS

B. GREEK BRANDS



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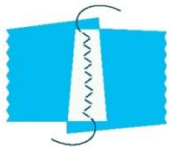
ADVANTAGES OF GREEK PRIVATE LABEL MANUFACTURERS

- ▶ *Excellent quality – design – price matrix*
- ▶ *Very flexible*
- ▶ *Quick response & fast delivery*
- ▶ *Ability to respond in small and medium size orders*

Plus

- ▶ *Greece is the leading cotton producer in EU*
- ▶ *Highest quality of cotton*
- ▶ *Fully integrated textile chain*
- ▶ *Long experience in exports*

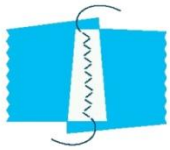
For the above reasons the top European brands & retailers prefer Greece for their added value products



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ADVANTAGES OF GREEK BRANDS

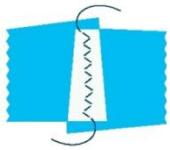
- ▶ *Good design & creativity*
- ▶ *Very good quality – price ratio*
- ▶ *Flexibility*
- ▶ *Ability to respond both in small and medium orders*
- ▶ *Development of big trade chains in Greek market*
- ▶ *Continuing increase of branded Greek exports*



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HELLENIC FASHION INDUSTRY ASSOCIATION (SEPEE)

- ▶ *Hellenic Fashion Industry Association (SEPEE) represents the apparel & textile industry in Greece*
- ▶ *300 members, the major companies in the sector*
- ▶ *Headquartered in Thessaloniki, with a branch office in Athens*
- ▶ *SEPEE organizes every year many promotional events abroad*



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Greek Fashion Exhibitions in Israel

- ▶ *The last two years SEPEE organized 2 Fashion Exhibitions in Tel Aviv*
 - *December 2011, for Greek brands*
 - *March 2012, for private label manufacturers*

Next Greek Fashion Exhibition in Israel

November 12th, 2013 at Carlton Hotel, Tel Aviv