PROCESS BOOK
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Interesting Thesis Topics

1. Sustainability In Fashion
2. Fast fashion & impacts on the world
3. Dutch Textile and garment industry
4. The MADE IN label- Brand image
5. The Trend re-shoring in The Netherlands
6. Garment Development Process

The above thesis topics are all interesting to me, I do know I need to choose one or maybe combine few of them to come to a concrete thesis topic. Since my internship at Super Trash, I have development more interest on knowing how the garments are being produced even more interesting how are they being produced here in The Netherlands, if there are still any functioning production facilities here in The Netherlands.

Combining my love for garment production and my interest of the Dutch garment production industry I will a concrete foundation for my thesis.

Brain Storming Research Question

1. What is the present state of the Dutch garment and textile production industry and what trends will determine it’s future?
2. What could be the USP's of the Dutch garment production industry?
3. In there an opportunity to rebuild the Dutch textile and garment production industry?
4. Is outsourcing garment production overseas still a founded decision or a matter cost?
5. To what extend does producing in The Netherlands improve the production development process of the Dutch Fashion brands and for what kind of fashion brands could it be of a added value?
6. Is the Trend Re-shoring applicable to the Dutch garment production industry?
Thesis Question

To what extend does producing in The Netherlands improve the production development process of the Dutch Fashion brands and for what kind of fashion brands could it be of a added value?

Explanation

I choose this research question because it covers a lot of aspect that I find interesting. First being the Dutch garment production industry. It will look in to the current state of the industry and it capabilities. Secondly it will analysis on going trends and developments that can have positive influence on the Dutch garments production industry. Thirdly it will look at the added values that comes with producing in The Netherlands and what kind of fashion brands will this be useful.

Problem Analysis

After experiencing both production processes, the problem I see is that local brands are not aware of the savings in time, money and effort they can achieve by producing locally whilst creating added value to the label and contributing to a sustainable supply chain. Therefore the fashion brands might choose to produce oversees leaving behind a great opportunity for local companies to show their worth and contribute to growth of the Industry.
TRENDS & DEVELOPMENTS
Granny’s Finest: ‘Rotterdam is een stad voor productie, niet voor verkoop’


Wat doen jullie en waarom?

Source: versbeton, 2013

A good initiative that stimulate local production is Granny's Finest. This fashion brand links the creativity of young designers and the skill of grannies in a socially sustainable manner. This is also a good opportunity for the young creative talents, because they get a chance to practice their profession in the labor market.
Fast fashion's fickle market demands manufacturers closer to home

Labels now cite European countries as high street retailers find benefits in a simple, local supply chain

Mention the phrase “fast fashion” and most people will think of a scratchy high street sweater with one of a predictable trio of countries listed on the inside label: Cambodia, China, or Bangladesh. But increasingly, observant European consumers are finding a new collection of countries on the label of their fast fashion finds – countries that are a lot closer to home.

A number of factors are pushing major fast fashion chains to start expanding their production chains beyond Asia and into eastern Europe, including the benefit of being close to European retail markets and simplifying their supply chains. When a country such as Turkey, Portugal, Romania, Slovakia or Bulgaria appears on a label, the brand may also get a boost to their reputation, as consumers assume the ethics behind a skirt made in Portugal are better than those behind one made in China (though this isn’t necessarily the case).

“There are a number of factors providing an incentive to look to Europe for production, such as minimum-wage increases in Asia and political instability and commercial instability in response to major safety incidences like the collapse of Rana Plaza,” says Hannah Smith, media and outreach manager for the UK-based NGO Labour Behind the Label.

Inditex can perhaps be credited for proving the efficacy of basing fast fashion production in Europe. The company, which has brands including Zara and Pull&Bear, states that more than 50% of its clothes are produced in Spain (where it is headquartered) or surrounding nations such as Portugal and Morocco. The remainder is produced in “clusters” around the world, including Turkey, China, and Latin America.

This Europe-centric approach – the company calls this its “proximity model” – allows the chain to frequently restock its stores and respond to a fickle market at will, with store managers constantly reporting back on what’s selling and what’s not. Being able to alter what it is producing and in what quantities so quickly gives brands an advantage over chains that have to provide a longer lead time to Asian factories, and then wait for their goods to be transported.

Source: theguardian, 2014


The ability to make changes in the quantities during the production process gives brands an advantage over brands that work with longer lead times with Asian factories. The flexibility that comes with the proximity model is what modern day supply chain need, making this model increasingly desirable for fashion brands.
Technological developments are becoming increasingly important in the fashion industry. Through initiatives such as the Smart Industry, "Dutch Industry Fit for the Future" which support garment production in the Netherlands. This project was made possible through a collaboration between the Ministry of Economic Affairs, FME-CWM, TNO, VNO-NCW and the Chamber of Commerce. It was established on behalf of the Dutch industry by making use of the latest information and technological developments so the industry becomes more efficient, more flexible and with increased quality. This initiative is set up for digitalization in the industry by creating new opportunities for the manufacturing companies. This also applies to the possible return of the garment production to the Netherlands, so the higher labor and production costs can be limited by the technology. This will be made possible through automation, digitization and robotics.
Denim City is a new approach on ways to improve the denim production process and at the same time creating a sustainable work frame. It is a place where technology and local production comes together. Through Projects such as, Kingsping, the Global Denim Awards, the AmsterdamDenim Days and Jean School (the first denim training worldwide), the founders of House of Denim, James Veenhoff and Mariette Hoitink, are both working on making Amsterdam the denim capital of the world.

House of Denim wants to contribute to a durable denim industry with the slogan “Towards a Brighter Blue”. Thanks to the motivated mind behind this project, Denim City became official through the opening on the 16 of April 2015. This is a place where crafts meets innovation, with a network platform for the largest operators in the denim industry. The face of this project is the Blue Lab, a high-tech research and development center which is focuses on technology and sustainable solutions for the entire washing and finishing industry. The Blue Lab uses spray instead of water in the machines. These chemicals are sprayed by a robot on the fabric, making the working conditions more sustainable. This platform is a good start for putting the Netherlands back again on the map as a production country.
FASHION BRAND PRODUCING IN THE NETHERLANDS
Company: Dress Me Dutch
Date: 14-03-2016
Name: Danellia

1. Who do you sell to?
   Retail / Individuals / Wholesale

2. How is your collection divided?
   Woven / Knitted / Both

3. Which types of clothing make up your collection?
   Dresses, pants, tops, accessories

4. How much of your collection do you produce in the Netherlands?
   All / Part

5. Why do you choose to produce in the Netherlands?
   For sustainable reasons such as good working condition, transparency, short communication line, quality, short lead time, more influence on the end product and transportation cost.

6. How efficient is the production process from design, product development to the final product?
   Quite efficient, for instance I only need to approve one sample for bulk production, very little mistakes happen during production.

7. What are the average quantity per garment produced?
   100 pieces

8. What is the maximal acceptable lead-time?

9. How do you experience working with Dutch production companies?
   I have working with only one supplier since we started our brand 3 years ago and will still working together so that tell you am very happy with our partnership.

10. What is in your opinion the main benefit of producing in the Netherland compared to other country?
    The flexibility that come with producing close to consumer is very beneficial since we are able to react to consumers buying behavior very quickly. Communication also play a big role, no language barrier so every go very smooth.

11. How will you describe the current state of the Dutch garment production industry?
    • Bad
    • Not good
    • Neutral
    • Reasonable
    • Good
Company: MLY
Date: 14-03-2016
Name: Emily Hermans

1. Who do you sell to?
Retail / Individuals / Wholesale

2. How is your collection divided?
Woven / Knitted / Both

3. Which types of clothing make up your collection?
Dresses, bottom tops

4. How much of your collection do you produce in the Netherlands?
All / Part

5. Why do you choose to produce in the Netherlands?
We choose to produce in the Netherlands because we believe it is high time fashion brands actively work in contributing for a better sustainable world and I try to do this by producing our garments here in the Netherlands. Apart from sustainable aspect, it is very easy to produce in the Netherlands, no long distance travel, long lead times, the famous communication problem and let not forget very little transportation cost, all these are the reason I choose to do production in the Netherlands.

6. How efficient is the production process from design, product development to the final product?
Very efficient, you have the short communication line, I am always physically involved in the development process which help in dismissing mistake and misunderstanding. Furthermore no need no for back and forth send since my supplier is very close by.

7. What are the average quantity per garment produced?
100 pieces

8. What is the maximal acceptable lead-time?
8 weeks

9. How do you experience working with Dutch production companies?
I have working with only one supplier since we started our brand 3 years ago and will still working together so that tell you am very happy with our partnership.

10. What is in your opinion the main benefit of producing in the Netherlands compared to other country?
The honesty behind the product, knowing that your garment are being made without harm any human or animal is very important to me.

11. How will you describe the current state of the Dutch garment production industry?
- Bad
- Not good
- Neutral
- Reasonable
- Good
1. In which branch of clothing production are you specialized?  
Woven / Knitted / Both

2. What type of clothing do you produce?  
Women & Kids cloths

3. Who are your customers? Big/small? Local? foreign? Luxury or lower segment?  
Small to Medium size / Foreign brands

4. Which parts of production take place in your factory?  
Pattern  
Cut  
Sewing  
Presses  
Finishing  
All of the above

5. What’s your maximum production capacity?  
Up to 500 to 1000 pieces per week

6. Do you only Produce samples or Bulk production?  
Yes/No Both

7. How many pieces do you produce on average per month? Large  
Small (up to 200)  
Large (from 200)

8. What do you believe is your companies usp’s?  
Attention to details, we only deliver good quality garments.

9. How do you currently reach out to fashion brands? How do you market your brand capabilities?  
Only through our website.

10. What do you think the Dutch garment production industry is currently lacking?  
Finding good qualified staff is very challenging in this industry, there are just too little people working or willing to work in this sector.
ACTIVE DUTCH PRODUCTION COMPANIES
Company: Wijnen Confectie.
Date: 17-03-2016
Name: Frank van Asten

1. In which branch of clothing production are you specialized?
   Woven / Knitted / Both.
2. What type of clothing do you produce?
   Ladies wear
3. Who are your customers? Big/small? Local? foreign? Luxury or lower segment?
   Small-medium / local and foreign / luxury
4. Which parts of production take place in your factory?
   Pattern
   Cut
   Sewing
   Presses
   Finishing
   All of the above
5. What is your maximum production capacity?
   Depends on the type of product. From 50 to 150
6. Do you only produce samples or bulk production?
   Yes/No – Samples and smaller series
7. How many pieces do you produce on average per month?
   Small (up to 200)
   Large (from 200) x
8. What do you believe is your company’s up’s?
   Flexibility, price/quality and experience.
9. How do you currently reach out to fashion brands? How do you market your brand capabilities?
   Website / Google. Most brands find us by word of mouth.
10. What are the biggest changes in the Dutch production industry and how did it affect your company?
    Internet cowboys. Some offer services for almost impossible prices. Can’t expect to do this in the Netherlands due to all the regulations laid on by the Government. This is why we only produce for the upper segment of the market. Smaller quantities, fair prices.
11. What do you think the Dutch garment production industry is currently lacking?
    Qualified staff. They all want to design (is this the only thing they learn at the academies?)
    Real good experienced production staff who want to work is more and more harder to find.
12. How can this be improved in the future?
    Make the production jobs more interesting. By for instance less tax so employees can be paid higher wages. Higher wages always attracts people.
Company: Wijnen Confectie.
Date: 17-03-2016
Name: Frank van Asten

1. In which branch of clothing production are you specialized?
   Woven / Knitted / Both.

2. What type of clothing do you produce?
   Ladies wear

3. Who are your customers? Big/small? Local? foreign? Luxury or lower segment?
   Small-medium / local and foreign / luxury

4. Which parts of production take place in your factory?
   Pattern
   Cut
   Sewing
   Presses
   Finishing
   All of the above

5. What's your maximum production capacity?
   Depends on the type of product. From 50 to 150

6. Do you only Produce samples or Bulk production?
   Yes/No – Samples and smaller series

7. How many pieces do you produce on average per month?
   Small (up to 200)
   Large (from 200) x

8. What do you believe is your companies up's?
   Flexibility, price/quality and experience.

9. How do you currently reach out to fashion brands? How do you market your brand capabilities?
   Website / Google. Most brands find us by word of mouth.

10. What are the biggest changes in the Dutch production industry and how did it affect your company?
    Internet cowboys. Some offer services for almost impossible prices. Can’t expect to do this in the Netherlands due to all the regulations laid on by the Government. This is why we only produce for the upper segment of the market. Smaller quantities, fair prices.

11. What do you think the Dutch garment production industry is currently lacking?
    Qualified staff. They all want to design (is this the only thing they learn at the academies ?) Real good experienced production staff who want to work is more and more harder to find.
Company: Alliance Mode  
Date: 15-03-2016  
Name: Sabri Karatas

1. In which branch of clothing production are you specialized?  
   Woven / Knitted / **Both**

2. What type of clothing do you produce?  
   **Every kind of cloth (except swimwear)**

3. Who are your customers? Big/small? Local? foreign? Luxury or lower segment?  
   **All segments**

4. Which parts of production take place in your factory?  
   Pattern  
   Cut  
   Sewing  
   Presses  
   Finishing  
   **All of the above**

5. What’s your maximum production capacity?  
   **More than 2000 per week**

6. Do you only Produce samples or Bulk production?  
   Yes/No **Both**

7. How many pieces do you produce on average per month? Large  
   Small (up to 200)  
   **Large (from 200)**

8. What do you believe is your companies usp’s?  
   **We can give service on all levels and every type of services. That makes us strong**

9. How do you currently reach out to fashion brands? How do you market your brand capabilities? **Mainly through our website. We are well known so they reach out to us most of the time**
Company: Tomax Confectie
Date: 15-03-2016
Name: Tomax

1. In which branch of clothing production are you specialized?  
Woven / Knitted / Both

2. What type of clothing do you produce?  
Women & Functional cloths

3. Who are your customers? Big/small? Local? foreign? Luxury or lower segment?  
Small to Medium size / Foreign brands

4. Which parts of production take place in your factory?  
Pattern
Cut
Sewing
Presses
Finishing
All of the above

5. What’s your maximum production capacity?  
Up to 500 to 1000 pieces per week

6. Do you only Produce samples or Bulk production?  
Yes/No Both

7. How many pieces do you produce on average per month? Large
Small (up to 200)
Large (from 200)

8. What do you believe is your companies usp’s?  
The service and flexibility, our ability to improvise when needed. Also our honesty is one of the brands come back.

9. How do you currently reach out to fashion brands? How do you market your brand capabilities?  
Most of our client are attracted through the month to month advert and our website.

11. What do you think the Dutch garment production industry is currently lacking?  
The problem the industry is facing is the high wage, it is just too expensive to run clothing factory. Another problem is the lack of skillful people in the industry, so little people are doing this job, so there is not enough study out there to stimulate the students to choose this direction. Investment and trained
1. In which branch of clothing production are you specialized?  
Woven / Knitted / Both

2. What type of clothing do you produce?  
Women & Kids cloths

3. Who are your customers? Big/small? Local? foreign? Luxury or lower segment?  
Small to Medium size / Foreign brands

4. Which parts of production take place in your factory?  
Pattern  
Cut  
Sewing  
Presses  
Finishing  
All of the above

5. What’s your maximum production capacity?  
Up to 500 to 1000 pieces per week

6. Do you only Produce samples or Bulk production?  
Yes/No Both

7. How many pieces do you produce on average per month? Large  
Small (up to 200)  
Large (from 200)

8. What do you believe is your companies usp’s?  
Attention to details, we only deliver good quality garments.

9. How do you currently reach out to fashion brands? How do you market your brand capabilities?  
Only through our website.

10. What are the biggest changes in the Dutch production industry and how did it affect your company?  
in the past the fabric came from China and now they lost the market because they fabric now come from Turkey. The knitted fabric are now better and that improve our company too because we mostly work with knitted fabric so we are able to deliver good quality garments.

11. What do you think the Dutch garment production industry is currently lacking?  
Finding good qualified staff is very challenging in this industry, there are just too little people working or willing to work in this sector.
Company: koopman-work
Date: 10-03-2016
Name: Miss Green

1. In which branch of clothing production are you specialized?
   **We give advise brands on production sourcing, organize where to buy fabric.**

2. Who are your customers? Big/small? Local? foreign? Luxury or lower segment?
   **Small to Medium size sustainable e retail brands**

4. Which parts of production take place in your factory?
   **We mostly do the sourcing.**

5. What’s your maximum production capacity?
   **Up to 100 to 1000 pieces per week**

6. Do you only Produce samples or Bulk production?
   **Yes/No Both**

7. How many pieces do you produce on average per month? Large
   Small (up to 200)
   **Large (from 200)**

8. What do you believe is your companies usp’s?
   **Providing solution in how on producing in sustainable/commercial way.**

9. How do you currently reach out to fashion brands? How do you market your brand capabilities?
   **We write blog about sustainability , through our website and month to month advert.**

10. What are the biggest changes in the Dutch production industry and how did it affect your company?
    **More and more fashion brands with small collection production line are willing to pay more for good quality garments in the Netherlands and this has lead to more work for my company.**

11. What do you think the Dutch garment production industry is currently lacking?
    **The currently lacking the man power and skill, investments and the wages are too expensive.**
The whole discussion about the producing in the Netherland started when we started thinking about RESHORING. Because restoring comes from USA where made in the USA really mean something but here in Europe is different. What you see is that companies are trying to have faster line to their consumer, shorter lead time so they are pulling back some of their production from China or far east and putting them back to the countries around Europe. One can this of eastern Europe, North Africa, Turkey etc. Then we really needed to investigate what will be possible here in the Netherlands, but note that is the extreme. The first thing it the labor, just from the cost perspective RESHORING will never going to work in Holland. Secondly it is also very clear that that production is moving away china but than it moving to Pakistan Bangladesh maybe Ethiopia but it all moving to low wage countries. The amount of production been done in far east is just to huge to determine how much to moving back to Europe let only moving back to Holland. The next thing if we do what to have production back in Holland, how could we do it. Well the sewing industry will be come back because it is too labor intensive, the second thing we have no textile here so the textile still needs to be imported and thirdly they are no people to make this demand, training people for such a fast consumption will take up to 4 years. These are three reasons we will never have a successful sewing volume in the Netherlands. Nevertheless there are still small production going on for sample and specialized workmanship garments.
PRODUCT
FASHIONCLASH is an international and interdisciplinary fashion platform with a main focus on new generation of designers/artists. Main goal of FASHIONCLASH is to connect talent, various disciplines, cultures and reach a broad audience through the art of fashion. FASHIONCLASH provides the platform by developing and organizing projects where young designers/artists can show their work. The main project where all the goals are coming together is the successful ‘FASHIONCLASH Festival’, an annual international fashion festival.

From the moment FASHIONCLASH started it has increasingly grown. By means of projects such as the annual FASHIONCLASH Festival, and spin-offs like FASHIONCLASH Market, Pop-Up Stores, Theatrical Encounters projects, Fashion Procession 2011, FASHIONCLASH Cape Town, 200 Years of Kingdom and numerous presentations within the Netherlands and abroad, FASHIONCLASH possesses a unique position within the international fashion industry. Ever since the first edition in 2009 over 900 talents coming from 40 different countries have joined the event.

Jolien contact me a few weeks back wanting to see down with me regarding my thesis finding. She was directed to me through Tap from Modint. I was very surprise that fashion brand is interested my research. Fashion clash is as online platform with upcoming fashion designs and brands. They are currently orientating on the possibility for sourcing for active production facility in The Netherlands. The goal is to be able to produce garments close to home hence the MADE IN HOLLAND name and more importantly producing in a sustainable way.

According to Jolien: Finding production companies is quite difficult than I thought it will be. The industry is lacking exposure. Very little companies know what the possibility of producing in the Netherlands are. There are too little information out there. The Industry is missing a database, like a website, a platform, a forum, somewhere all the production companies in the Netherlands can be find and easy accesses. That was why I am very happy I could speak with you today because your findings will defiantly make my sourcing process more easier now. I won't forget to inform you which company or companies we decide to work with in the future.
THE PLATFORM

La petino, Hoogkarspel
Destiny Mode, Zwanenburg
Els Roosensboum, Amsterdam
Ria Pattern, Amsterdam
Fashion and Pattern Design, Amsterdam
Alliance mode, Amsterdam
Arola, Amsterdam
De Gouden Naad, Woerden
Van Gelderop, Vianen
Mochinale Breij, Haarlem

Sturr V.O.F., Dinneperlo
Tomax Confecie, Enschede
De Bikkelen bv, Beneden-Leeuwen
Biznik Confecie bv, Anderlecht
Hearse Fashion V.O.F., Mierlo
Bultur Textiel, Tilburg
Wijnen Confeccties, Someren
J. Theo Kwapan bv, Meerssen

Lapetina

Is a Production / workshop, with 15 years experience in producing children's clothing and women's clothing. Our production capacity is between 25,000 and 30,000 units per year.