

IAF-CMAI-Gherzi Leadership Session @ Bharat Tex, Technology Panel

Date: 2026-07-15

Location: New Delhi

Moderator, Navdeep Sodhi, Gherzi Textil Organisation, Switzerland

Panellists:- Mario Machado, President Euratex; Justin Huang, President TTF; Sanjay Jain, Group CEO PDS Ltd; Edgar Tung, CEO Tessellation; Dhyanna van der Pols, CRO Ribb World; Edward Wu, CEO Minkwood

Executive Summary

The Technology Panel at the IAF-CMAI-Gherzi Leadership Session brought together global industry leaders representing Europe, Chinese Taipei, India and international technology providers to deliberate on how apparel manufacturing is entering a new era driven by digitalisation, artificial intelligence, automation, sustainability and human capital.

A common consensus emerged that future competitiveness will no longer be determined by labour cost alone, but by an industry's ability to combine intelligent manufacturing, trusted supply chains, digital collaboration and skilled talent.

The discussion highlighted five strategic shifts:

- Manufacturing is evolving from production excellence towards intelligence-led value creation.
- Artificial Intelligence is becoming an enabler of faster, smarter and more sustainable decision making across the value chain.
- Human capability remains central, with technology augmenting, not replacing, the workforce.
- Industry associations have an increasingly important role in advocacy, resolving trade agreement implementation issues, and ensuring economic sustainability.
- Sustainability and compliance are transitioning from customer expectations to fundamental business requirements.

The panel reinforced that countries capable of integrating technology, talent and trust will emerge as preferred global sourcing destinations.

Global Industry Context

The apparel industry is navigating one of the most significant transformations in its history. Rising geopolitical uncertainties, shifting sourcing strategies, increasing sustainability regulations, digital commerce, AI-driven consumer expectations and supply chain transparency are redefining global competitiveness.

Manufacturers are increasingly expected to deliver:

- Speed to market
- Full supply chain visibility
- Sustainability compliance
- Flexible production
- Digital collaboration
- Data-driven decision making

Technology therefore is no longer viewed as an operational tool but as a strategic business capability.

Panel objectives

The panel explored how technology and human capital are repositioning apparel manufacturers from production partners to strategic value creators. Core themes include technology's role in boosting efficiency, sustainability, and consumer responsiveness; the importance of collaboration between associations and industry; and the fusion of human skill with automation to build future-ready workforces.

Introduction

Navdeep Sodhi: As moderator, he introduced the theory of "creative destruction" as a process in which new technologies and entrepreneurial practices displace existing firms and established business procedures. He then highlighted its relevance to the apparel industry, framing the discussion around three drivers of technological innovation: shifting consumer behavior, manufacturing efficiency, and sustainability. He introduced each panelist and set guiding questions.

Introduction of panelists

2. Mario Machado: As President of Euratex, representing 1.2 million workers and 200,000 European companies, he underscored technology and innovation as essential for competitiveness and highlighted associations' roles in advocacy, resolving trade agreement implementation issues, and ensuring economic sustainability.

3. Justin Huang: Representing the Taiwan Textile Federation (TTF), he outlined Taiwan's shift to high-value, tech-driven products (functional and recycled textiles). He explained how TTF supports R&D, market promotion, and SME adoption of technologies like AI through guidance and enablement.

4. Sanjay Jain: As Group CEO of PDS Limited, he detailed technology's critical role across the buyer-supplier value chain—from data-informed design and digital sampling to smart factories and ensuring sustainable, compliant supply chains.

5. Edgar Tung: Representing Tessellation Group, he challenged the industry's status quo on trust and waste. He advocated "autonomation" (automation with a human touch), where technology empowers workers, turning them into technicians who engage with machines and even build their own efficiency-enhancing mobile apps.

6. Dhyanna van der Pols: As CRO of Ribu World, previously an apparel manufacturing consultant and co-founder of Nexus Discover, she discussed end-to-end supply chain platforms and the use of CGI and AI. She showed how technology shortens time-to-market, improves demand forecasting, and reduces waste via digital product testing before manufacturing—while cautioning that AI is not a simple cost-reduction panacea.

7. Edward Wu: CEO of Minkwood International, a high-end wedding and formalwear company of 41 years, he shared a personal India story, expressed excitement about India's massive wedding market, and introduced his wife, the chief designer and partner.

Discussion round

Moderator introduction: The industry's transformation is driven by evolving consumer behavior, manufacturing efficiency needs, and sustainability pressures. Technology and human capital enable manufacturers to shift from production partners to strategic value creators.

-Associations are vital, especially amid new FTAs, helping companies solve practical implementation issues. As the voice of companies, associations bring solutions to policymakers to create a business-friendly environment. Associations bridge business and policymakers, creating more competitive environments. Economic sustainability is foundational to all other sustainability goals. Examples are provided of associations helping SMEs to adopt AI, for instance by working with the government to offer incentives—tax deductions and low-interest loans—to lower risk and financial burden and by offering consulting support.

-Technology is essential for creating the right product, delivering it on time, at the right cost, and through a compliant supply chain. Retailer data refines design; digital sampling cuts waste and time; smart factories raise throughput; technology ensures a compliant, sustainable value chain. Retailers have a lot of access to data. Based on that data algorithms can predict demand so that leftovers are minimized. Digitalization trims waste and time—data-driven design reduces leftovers; digital sampling eliminates physical sample shipping. Ultimately, the industry needs end-to-end, real-time platforms that connect design, manufacturing, and logistics to cut time-to-market and overproduction and that work to improve the omnichannel experience.

-It's important to use technology to break out of 'low trust traps'. With technologies such as IoT companies are able to build a single source of truth by capturing data at origin.

-A panelist coins the term "autonomation"—automation with a human element—empowering workers to become technicians who interface with machines and even build mobile apps to improve their work, viewing technology as a helper. This approach reframes automation as assistance, not replacement—"autonomation."

-AI is often misconstrued as pure and easy cost-cutting; overlooking the time (learning curve) and investment it requires. Also, the fashion industry is very diverse. In high-end fashion, success and longevity rests on partnership and craftsmanship.

Concluding Observations

- The panel demonstrated that the apparel industry's future will be defined less by the pursuit of lower production costs and more by the ability to combine technology, talent, sustainability and trust into a competitive manufacturing ecosystem.
- Artificial intelligence, automation and digitalisation will undoubtedly reshape production; however, the panel repeatedly reinforced that people remain at the centre of innovation.
- Rather than replacing human capability, technology will increasingly augment creativity, improve decision making and enable more resilient and sustainable manufacturing systems.
- As global sourcing undergoes structural transformation, countries and enterprises that successfully integrate intelligent manufacturing with skilled human capital and collaborative ecosystems will emerge as the preferred partners in global value chains.