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ASSISTANCE IN ESTABLISHING A GARMENT SERVICES INSTITUTION  
US/JAH/88/277  
JAMAICA

Technical report: Assessment of garment factories\*

Prepared for the Government of Jamaica  
by the United Nations Industrial Development Organization,  
acting as executing agency for the United Nations Development Programme

Based on the work of D. A. Hague, expert in establishing garment  
technology development centres, and J. P. Moll, expert  
in industrial engineering for the garment industry

Backstopping officer: J. P. Moll, Agro-based Industries Branch

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\*This document has not been edited.

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ABBREVIATIONS

UNIDO	United Nations Industrial Development Organisation
SIDFA	Senior Industrial Development Field Adviser
JAMPRO	Jamaica's Economic Development Agency
E.E.A.R.T.	Human Employment and Resource Training
JIDC	Jamaican Industrial Development Corporation
CAIC	Caribbean Association of Industry and Commerce

**Exchange Rates:**

During the period of the mission 7 January 1989 to 29 January 1989, the following exchange rates prevailed.

US\$ 1	=	BD\$ 1.84
US\$ 1	=	EC\$ 2.67
US\$ 1	=	JA\$ 5.50

## I. INTRODUCTION

The purpose of the mission was to review garment factories and prepare a report containing recommendations on the steps to be taken to implement a Jamaican Apparel Services Cooperative. Because of the assumed requirements of potential donor countries, and conditions existing on the islands visited, parameters changed during the mission.

It had originally been hoped that at the end of the mission, a complete Project Document could be drafted. However, due to apparent misunderstandings on the smaller islands, and reluctance to give firm commitments on certain conditional requirements in Jamaica, a Project Outline document was produced. This is attached at Appendix 2.

### BARBADOS (7-8 January)

The UNIDO team comprising of Mr. J.P. Moll and Mr. D.A. Hague, arrived in Barbados on the evening of Saturday 7 January 1989. Following a brief meeting with Mr. Ryan, the UNIDO SIDFA, the team flew on to Grenada.

### GRENADA (9-11 January)

It was established that the especially following groups are in need of additional training:

- Operators
- Supervisors
- Pattern makers
- Mechanics
- Marketing
- Management.

### ST. LUCIA (11-12 January)

Visits to factories and meetings with interested representatives were arranged.

The training needs of the industry and the attitudes of the workforce are perceived to be the same as Grenada.

### ST. VINCENT (13 January)

The meeting with Mr. Claude Leach at the Development Corporation threw up a disturbing fact. Mr. Leach was adamant that no request for assistance had come from the Government of St. Vincent. This, coupled with the half-hearted response in Grenada, posed the question "just how widespread was the request for assistance, and how 'official' was it?"

No one was objecting to receiving assistance, but there did seem to be some confusion as to who had requested it.

JAMAICA (15-28 January)

This visit was extremely well organised by both UNDP/UNIDO and JAMPRO (Jamaica's Economic Development Agency). The itinerary had to be amended at the end of the first week in order to include some extra meetings thought to be more beneficial than some of the factory visits.

The training needs of the industry are virtually the same as in the other islands. Greater economic pressures brought about by high interest rates, greater dependence on 807 contracts from the USA and duties and tariffs on certain essential items, mean that training and development of the industry towards a higher level of efficiency is crucial if the industry is to survive.

The team were surprised at the level of equipment contained in the GARMEX facility of the H.E.A.R.T. Trust. Some 280 machines have been provided by USAID. Unfortunately, the machinery appears not to be very well maintained and the level of expertise displayed by the tutorial staff would indicate that considerable effort must be applied if this facility is ever to produce trainees who can successfully join a manufacturing unit. At the present time, the trainees leaving GARMEX are largely shunned by the industry.

GARMEX attempts to orientate/induct trainees into the attitudes required for industry - timekeeping, regular attendance, acceptance of managerial authority, honesty, hygiene, etc. But only limited success can be claimed in this area judging from the "horror" stories recounted by those manufacturers who had accepted GARMEX trainees.

The Apparel and Sewn Products Division of JAMPRO offers training courses aimed mainly at management. This organisation seems to be well organised and professionally managed. It is, however, part of a large bureaucracy and therefore subject to certain bureaucratic constraints.

In order for any useful training initiative to succeed, there needs to be a merging of the GARMEX facility and the Apparel and Sewn Products Division of JAMPRO under a single coordinating body. This new organisation could then provide all the training and consultancy requirements of the garment industry.

Some difficulties will inevitably be experienced. GARMEX once belonged to JIDC, the forerunner of JAMPRO, and it may not be easy to obtain its release from the H.E.A.R.T. Trust, although the UNIDO team felt that this would be the best course of action. There is a reluctance to even make direct approaches to the appropriate authorities until the outcome of the forthcoming election is known. The H.E.A.R.T. Trust is a project of the last government (Jamaican Labour Party) and it is not known what attitude a new government (People's National Party) would take.

## II. OUTLINE OF ASSISTANCE PROPOSED

If the GARMEX and JAMPRO operations could be merged, then assistance could be given to improve, extend and develop the existing facilities to enable the following courses and services to be offered to industry:-

- Sewing Machine Operators
- Sewing Machine Mechanics
- Production Supervisors
- Pattern Cutters and Graders
- Training Instructors
- Garment Production Managers
- Cutting Room Managers
- Quality Control
- Styling and Product Development
- Garment Production Engineers
- Cutting Room Practice
- Production Planning and Control
- Budgetting and Product Costing
- Marketing and Material Sourcing
- Certificate Course in Garment Manufacturing
- Consultancy
- Computerised pattern production and grading service
- Computerised marker making
- Data base for:-
  - fabric sourcing
  - register of companies with capabilities
  - skills bank
  - register of specialised equipment
- Small part fusing service
- Library and information service
- In-house training

In addition there is a need to carry out an in-depth Backward Linkage Requirement Study in order to supply government with a set of recommendations which could lead to a strengthening of the garment exporting industry, not to mention the additional benefits of conservation of foreign exchange, increased employment opportunities and increased local value added content.

Some equipment will be required in order to make the new organisation fully functioning. This will mainly be CAD/CAM equipment and some pressing equipment.

All these services should be available throughout the region, wherever a government is prepared to participate. Satellite centres should be established to run continuous activities such as Operator Training; calling on the regional centre in Jamaica to provide additional services as required.

III. CONCLUSION

Even though the early part of the mission was disorganised, and there was a reluctance to give early commitment to the conditions required to obtain funding for such a project, it is felt that on balance the mission was successful.

A clear project outline has been formulated and a project document will be drafted over the next few weeks.

By this time, responses from the groups in Jamaica, plus additional information being gathered by Mr. Peter Gebert, should be available for the project to go to the next stage - funding.



LIST OF PERSONS MET DURING MISSION

BARBADOS

P F Ryan

UNIDO SIDFA

GRENADA

Edwin De Gaul  
Alston Johnson  
John Noel  
Hilda Gordon  
Auslyn Williams  
Nahla Hadee  
Anthony Boatswain  
Vaughn Renrick

Deco Industries  
Johnson's Sportswear  
Ideal Garments  
Liz Fashions  
President, Manufacturers Assoc.  
Nahla Limited  
Vice President, Manufacturers Assoc  
Director of Trade

ST LUCIA

Claudia P Jean Baptiste  
George Eugene

National Development Corporation  
Soft Furnishings Ltd (Pres Mfrs  
Assoc)

Primrose Bledman  
Joycelin Elsayed  
Edmund Leopold  
George Jude

Lawyer  
Pyramid Garment  
Manufacturers Association  
National Research & Development  
Foundation

Madilene Reneau  
Barbara Joseph  
Peter Morille

" " "  
" " "  
" " "

ST VINCENT

Castine I Quashie  
Claude M Leach  
Steve Francis  
Noel Verner  
Mrs Patterson  
Ronnie N Jack  
Ms Patrice

National Development Foundation  
The Development Corporation  
" " "  
Chamber of Industry & Commerce  
Elcon Garments  
Jax Enterprises Ltd  
Patrice Fashions

JAMAICA

Hugh Cholmondeley	Resident Representative A.I. UNDP
Peter Gebart	Programme Officer UNDP
Dr Volker Ducklau	Embassy of the Federal Republic of Germany
Mrs P Brown	Jampro
Mr W Gooden	"
Mr W Ridgard	"
Mr I Boyne	"
Mrs B Dinham-Smith	"
Mrs D Elliott	"
Miss V Veira	"
Mr C Rattray	"
Miss D Palmer	"
Miss M Wiggan	"
Mr D Dodson	"
Mr N Foga	"
Mrs Carmel McIntosh	"
Mr S Anderson	"
Mr J Peterman	"
Miss C Fowles	"
Mr J Marks	"
Dr. The Hon Joyce Robinson	H.E.A.R.T. Trust
Mr Headley Brown	" "
Mr Stanley Durwell	" "
Dr Jeffrey Gayle	" "
Mr Van Hitchener	" "
Mrs Joyce McKenzie	" "
Miss Marlett Dobson	" "
Mrs Charlesworth	" " )
Mr Booth	" " ) Garmex
Guy Martin	President Jamaica Manufacturers Assoc
Mrs Deer	" "
Dr Blossom O'M Stokes	National Development Foundation of Jamaica
Noel L Bennett	National Export-Import Bank of Jamaica
Pamella McLean	" " " "
Winston Harris	Small Business Association
B Byfield	" " "
Mrs Masoph	" " "
Mr Aubrey Smith	Beautifit Career Fashions
Miss Andrea Stewart	PIQJ
Mrs Paulette Rhoden	Crimson Dawn
Jerise Williams	Casual Designs Ltd
Gail D Bell	Carillon Club Ltd
Nicola A Bell	" " "
Mrs C M Brown	Sidcile Custom Craft Mfg Co
Dorothy D Over	La Mode Mfg Co
David Chin	Davon Corporation Ltd
Cameron Bisland	Garment Accessories Ltd
Dr Alfred Sangster	College of Arts, Science & Technology

Gloria Hamilton

Gordon Marzouca

Anthony Shih

Diepak Paul

Jodha Samaroo

Don R Burkhalter

Hon Robert Lightbourne O.J.

Mr Warren Woodham

Norman Garcia

Mr Chuck Connolly

College of Arts, Sciences  
& Technology

Classic Manufacturing

Gasapati Jamaica Ltd

" " "

CAIC

Kurt Salmon Associates

JAMPRO

Foundation for Investment and  
Development of Exports, Honduras

Costa Rica

PROJECT OUTLINE - GARMENT INDUSTRY CENTREJAMAICA, for THE CARIBBEAN REGIONINTRODUCTION

Technical Assistance is required to improve the garment manufacturing industries on all the Caribbean islands visited during the mission (Barbados, Grenada, St. Lucia, St. Vincent and Jamaica). Whether the companies are large or small; catering for 807 operations, CMT, or designing and manufacturing for the domestic market, almost without exception, the companies are inefficient and lacking in many, or most, aspects of management and technical expertise.

In Jamaica in particular, the industry is beset by many problems outside the control of the entrepreneur:-

- high interest charges
- high duties on certain essential items
- considerable delays incurred in both importing and exporting due largely to both search procedures for contraband, and inefficient operation of documentation procedures
- the need to import every item and all materials involved in the garment making process.

The close proximity of the North American market, and the ease of securing 807 contracts has lulled the manufacturers into a false sense of security that is now being shown to be a hinderance to the development of a strong garment manufacturing industry. 807 contracts do not require any backward linkage, and so, the supporting industries such as textiles (both woven and knitted), ancillaries manufacturing (buttons, zips, fasteners, stiffeners etc), and packaging and service industries, have either been difficult to establish and maintain, or have never been established at all. The low intensity or absence of these industries is placing severe constraints on the sector of the industry that does not operate 807 contracts. All materials for this sector must be imported with all the attendant problems, plus the loss of valuable foreign exchange, and the loss of potential to increase Local Value Added content.

The solution to any of the problems outlined above does not lie within the scope of any UNIDO Technical Assistance Programme. Technical Assistance however, will assist the industry to operate more efficiently under the constraints above; in other words, it will help the industry to do what it is already doing better, resulting in higher profit margins.

GARMENT INDUSTRY CENTRE

In Jamaica, there already exists some of the necessary components to establish a Garment

Industry Centre to deal with training, development and consultancy at all levels and across a wide cross-section of services.

The H.E.A.R.T. organisation has a training facility, fully equipped with sewing machines, and JAMPRO has staff in the Apparel and Sewn Products Division, who are currently offering a range of mainly management-related training activities, plus some consultancy.

The merging of these two facilities is an essential part of any plan to build an institution capable of catering for the needs of the garment industry into the 21st century, by providing an adequate supply of properly trained men and women at ALL levels.

The combined facility should be capable of developing, offering and delivering training courses for:-

Sewing Machine Operators

Sewing Machine Mechanics

Production Supervisors

Pattern Cutters & Graders

Training Instructors

Garment Production Managers

Cutting Room Managers

Quality Control

Styling and Product Development

Production Engineering (specifically for the garment industry)

Cutting Room Practice

In addition, shorter courses should be offered in:-

Production Planning and Control

Budgetting and Product Costing

Marketing and Material Sourcing

Because many companies are very small, special attention should be given to conducting seminars and short courses aimed at the problems of small businesses.

In order to create a longer term development of staff for the industry, a special programme should be operated, primarily for school leavers, to provide the first stage of career development into the garment industry. This course could be designated a Certificate Course in Garment Manufacturing.

To give depth to any training initiative, there should be some form of training which could be delivered outside normal working hours. Courses, particularly in the Middle Management range and in Quality Control, could be given by the College of Arts, Science and Technology (CAST), as part-time evening activities for those persons who would have difficulty in attending normal daytime courses. The curricula should be identical to the corresponding courses operated by the Garment Industry Centre, and should be regarded as a supplement to the mainstream activities of that Centre.

Services to industry should be supplied covering such areas as:-

- Consultancy in all aspects of garment manufacturing
- Computerised pattern production and grading service
- Computerised marker making
- A Data base for supplying of market intelligence information on fabric and material sources, plus a register of companies with capabilities to match to foreign buyer enquiries. This data base could also include a skills bank and specialised equipment bank
- Small part fusing service
- Specialised industry-related library and information service
- In-house training services wherever numbers allow.

#### REGIONALISATION

Jamaica, whilst not geographically the best site, should be the focal point of any regional development programme, because of the size of the population and the industry, and also because facilities already exist which only need extending and improving.

A South-South development plan for the Caribbean can be initiated as other Caribbean islands could take advantage of a Garment Industry Centre in Jamaica by having Satellite Centres operating wherever they are needed, covering basic operator training programmes on a continuing basis and calling for assistance for other programmes whenever the need arises and the numbers for training justify the running of a course. As the smaller island industries develop, then additional on-going activities could be added to each satellite centre's repertoire.

During the setting-up period of the Garment Industry Centre, counterparts from other islands interested in participating in the project, could be sent to work alongside the expatriate

experts and Jamaican counterparts. In this way, the early programmes could be established very quickly throughout the region and the islands would not have to wait for the complete establishment of the Garment Industry Centre. Additionally, should any other island wish to establish extra facilities, the experts could be assigned to assist when their primary objective in Jamaica has been met, thus allowing the benefits of the project to be more widely felt throughout the entire Caribbean region.

#### FORM OF TECHNICAL ASSISTANCE

UNIDO would supply assistance, funded by a donor country, as follows:-

- A Chief Technical Adviser/Project Co-ordinator, who would remain with the project for its full duration of approximately two years.
- A team of experts to provide the expertise and to transfer that expertise to Jamaican and Caribbean area counterparts.
- Selected items of specialised equipment to enhance the equipment already in situ.
- Arrange for the experts to carry out a Backward Linkage Requirement Study, culminating in a report to Government, with recommendations for future action required to strengthen and develop the garment industry.

The above assistance would be conditional on the agreement and commitment to action on the part of the relevant authorities both in Jamaica and in the other islands seeking assistance.

The main conditions would be:-

1. Garmex and the Apparel and Sewn Products Division of JAMPRO must come together under a single co-ordinating body/Board of Governors.
2. The co-ordinating body/Board of Governors should have members drawn from all interested organisations, such as HEART, JAMPRO, Industry, Commerce, Education, CAIC, etc.
3. The staffing of the Centre, up to the required levels, should be the responsibility of the co-ordinating body, with funding from existing sources.
4. Existing operating budgets for the two principal organisations should remain at least for the present.
5. The Garment Industry Centre should be set up in such a way as to allow the selling of services both in Jamaica and elsewhere throughout the region, in order to allow the Centre to progress some way towards becoming wholly or partly self-financing. The present levy on industrial payrolls to finance the HEART programme should be modified

in such a way as to allow that portion of the levy collected from the garment and textile sectors to be directly channeled to the GIC to cover part of the operating costs.

If these conditions cannot be met, then UNIDO, as the responsible executing agency, would be unable to approach any potential donor country with a request for funding in the establishment of a project which would inevitably fail to meet its objectives.

Kingston, Jamaica

27 January 1989



APPENDIX 3

ITINERARIES ARRANGED BY JAMPRO FOR UNIDO CONSULTANTS

DURATION

JANUARY 16 - JANUARY 27, 1989

Monday 16th

9:00 - 10:30

Briefing session at UNIDO  
1 Lady Musgrave Road

11:00 - 12:00

Introduction to staff and briefing  
by General Manager, Modernisation

Venue: JAMPRO Board Room, 5th Floor  
35 Trafalgar Road

12:00 - 1:30

LUNCHEON

Host: General Manager, Mr. Gooden  
Programme Director, Apparel, Mrs. Smith  
Technical Assistance Unit, Miss Valerie  
Veira, Miss Dorothy Palmer

Venue: Gordon's Restaurant & Lounge  
36 Trafalgar Road

1:45 - 2:45

Briefing by Apparel & Sewn Products Staff

Venue: Conference Room, 5th Floor, Towers

3:30 - 4:30

Meeting with J.M.A. President, Mr. Guy Martin

Venue: Duke Street or Molyne's Road

Tuesday 17th

9:00 - 10:00

Meeting with N.D.F., Dr. Blossom Stokes &  
Mr. Barrington Whyte

Venue: 22B Old Hope Road

10:00 - 11:45

Factory visit - Creative Garments

Venue: 121 Duke Street  
Contact: Mr. Laing

12:00 - 1:30

LUNCH

Tuesday 17th

2:00 - 4:00 Meeting with Paulette Rhoden and  
Factory visit at Crimson Dawn  
Venue: 5 Central Avenue

Wednesday 18th

9:00 - 10:00 Garmex  
10:45 - 11:45 Visit Singer  
Venue: JAMPRO 5th Floor, The Towers  
Patrick Duncan  
12:00 - 1:30 LUNCH  
2:00 - 3:00 Exim Bank  
Venue: 48 Duke Street  
Contact: Mr. Noel Bennett or Ms. Pamelie McLean  
3:30 - 4:30 Visit Beautifit  
Venue: 53 Ocean Boulevard  
Contact: Aubrey Smith

Thursday 19th

9:00 - 10:00 Meeting with JEA President  
Venue: 13 Dominica Drive  
Contact: Prakash Vaswani/Representative  
10:30 - 11:30 Apparel Export International - Factory visit  
Venue: 19-23 Harbour Street  
Contact: Mr. Ralston Smith  
12:00 - 1:30 LUNCHEON  
2:00 - 3:00 Casual Design factory visit  
Venue: 30 Constant Spring Road  
Contact: Mrs. Jerise Williams

Thursday 19th (Cont'd)

3:30 - 4:30                   NDF Factory  
Venue: 90 Hope Road or  
          30 Constant Spring Road  
Contact: Gayle Bell

Friday 20th

9:00 - 10:00               Meeting with S.B.A.'s President  
Venue: 2 Trafalgar Road  
Contact: Mr. Winston Harris

10:30 - 11:30              La Moda Manufacturing - factory visit  
Venue: 22-26 Victoria Avenue  
Contact: Miss Dorothy Over

12:00 - 1:30               LUNCHEON

2:00 - 4:00               Summary of Report  
Venue: JAMPRO, 25 Dominica Drive  
          The Towers

Monday 23rd

8:00 - 9:00               Flight to Montego Bay

9:30 - 10:30              Briefing with Mr. Marzouca, Miss Simmonds,  
                          and private sector personnel  
Venue: JAMPRO Office, Market Street

11:00 - 12:00             Classic Manufacturing - factory visit  
Venue: Free Port  
Contact: Mr. Marzouca

12:30 - 2:00              LUNCHEON  
                          Hosts: Mr. Marzouca & Miss Simmonds

2:30 - 4:00               Glendevon Complex

4:00 - 4:30               HEART Training Centre

5:30 - 6:30               Flight to Kingston

Tuesday 24th

8:30 - 1:00

Seminar - Apparel Sourcing in the Caribbean  
Caribbean Fashion Carnival 1989

Venue: Wyndham Hotel

1:30 - 2:30

LUNCH  
Wyndham Hotel

3:00 - 4:30

Visit J.E. Kerr, Regal Plaza (U.S. representative)  
L.P. Azar, Marescaux Road (Fabric wholesale)

7:00 - 9:00

Cocktail Reception

Venue: Pegasus

Wednesday 25th

9:00 - 10:00

Sharon Lyn - factory visit

Venue: 7½ Constant Spring Road  
Contact: Clair Zadie

10:30 - 11:30

Citizens Bank

Venue: 4 King Street, Kingston  
Contact: Mr. Eion Beckford

12:00 - 1:30

LUNCH

2:00 - 3:00

Mikemo - factory visit

Venue: JIDC Complex, Marcus Garvey Drive

3:30 - 4:30

Cloth World (Fabric wholesale)

Venue: Harbour Street 7 Orange Street

7:30 - 9:00

Fashion Show C.F.C., Devon House East Lawn

Thursday 26th

8:30 - 10:30

Panel discussion on "Contract Apparel  
Manufacturing in the Caribbean Basin"

Venue: Wyndam Hotel

11:00 - 12:00

Visit German Embassy

12:00 - 2:00

LUNCH

2:30 - 4:30

Preparation of reports

7:30 - 9:00

Jamaica Night - Cultural Evening

Venue: Port Royal

Friday 27th

9:00 - 12:00

Submission of Reports