



How Has COVID-19 Affected Haiti's Apparel Industry?

Survey Results 2020

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ASSOCIATION DES INDUSTRIES D'HAÏTI

About ADIH

The Association of Industries of Haiti (ADIH) is a non-profit employers' association that brings together companies mainly engaged in industrial activities, whose mission is to promote and develop the Haitian industrial sector on a competitive basis at the global level. Founded in 1980 and officially recognized by the Government of Haiti (GoH) as a public interest institution since January 5, 1989, ADIH is one of the most respected institutions in Haiti. ADIH seeks to enhance, support, and develop the manufacturing and service industries for both export and domestic markets. It is committed promotion a climate of sustainable social peace, high labor productivity, and policies and practices that protect the environment. For more information, www.adih.ht.



About the Facility for Investment Climate Advisory Services (FIAS)

Through the FIAS program, the World Bank Group and donor partners facilitate investment climate reforms in developing countries to foster open, productive, and competitive markets and to unlock sustainable private investments in sectors that contribute to growth and poverty reduction. The FIAS program is managed by the Equitable Growth, Finance & Institutions Practice Group of the World Bank Group and implemented by IFC Advisory teams. For more information, visit www.worldbank.org/fias.



Cover photo: S & H Global

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ACKNOWLEDGMENTS

This report presents the main conclusions of a survey of apparel producers in Haiti conducted between May and June 2020 to shed light on how COVID-19 is affecting the industry in Haiti and to help decision makers navigate the crisis. The survey was conceived by l'Association des Industries d'Haïti (ADIH) and the International Finance Corporation (IFC) of the World Bank Group. The report was prepared by Pedro Andres Amo, Ernesto Franco Temple, Martine Deverson, Daniela Yacaman, and Ji Woon Park, with the support of ADIH staff, especially ADIH's former president, Georges Sassine; executive director, Marie-Louise Russo; and administrative assistant Alexandra Erau. Barbara Karni edited the report, Carolina Gonzalez Ruiz provided invaluable support on logistics and publication planning, and Ambidiestra prepared the report layout and design for printing.

The export-oriented apparel industry is a major source of formal jobs in Haiti, employing nearly 53,000 people in 2019. The sector's exports, which doubled since 2009, accounted for 85 percent of Haiti's exports of goods in 2018. There is still room to grow, as the quotas for duty-free import into the United States have remained largely underutilized, and the Caribbean Basin Trade Partnership Act (CBTPA) is likely to be renewed before the end of 2020.

The unprecedented global economic crisis caused by the COVID-19 pandemic has very negatively affected Haiti's garment sector, jeopardizing its viability in the medium term. The government ordered a month-long shutdown of the industry in March as part of its measures to guarantee the safety and health of all in the industry, allowing it to reopen a month later only under strict sanitary conditions that helped ensure the safety of the sector's workers. Production had to be organized by rotation to limit personal contact, reducing plant output capacity and financial sustainability. The situation worsened as raw materials became increasingly difficult to source and orders from the United States were drastically reduced and very few new orders were received.

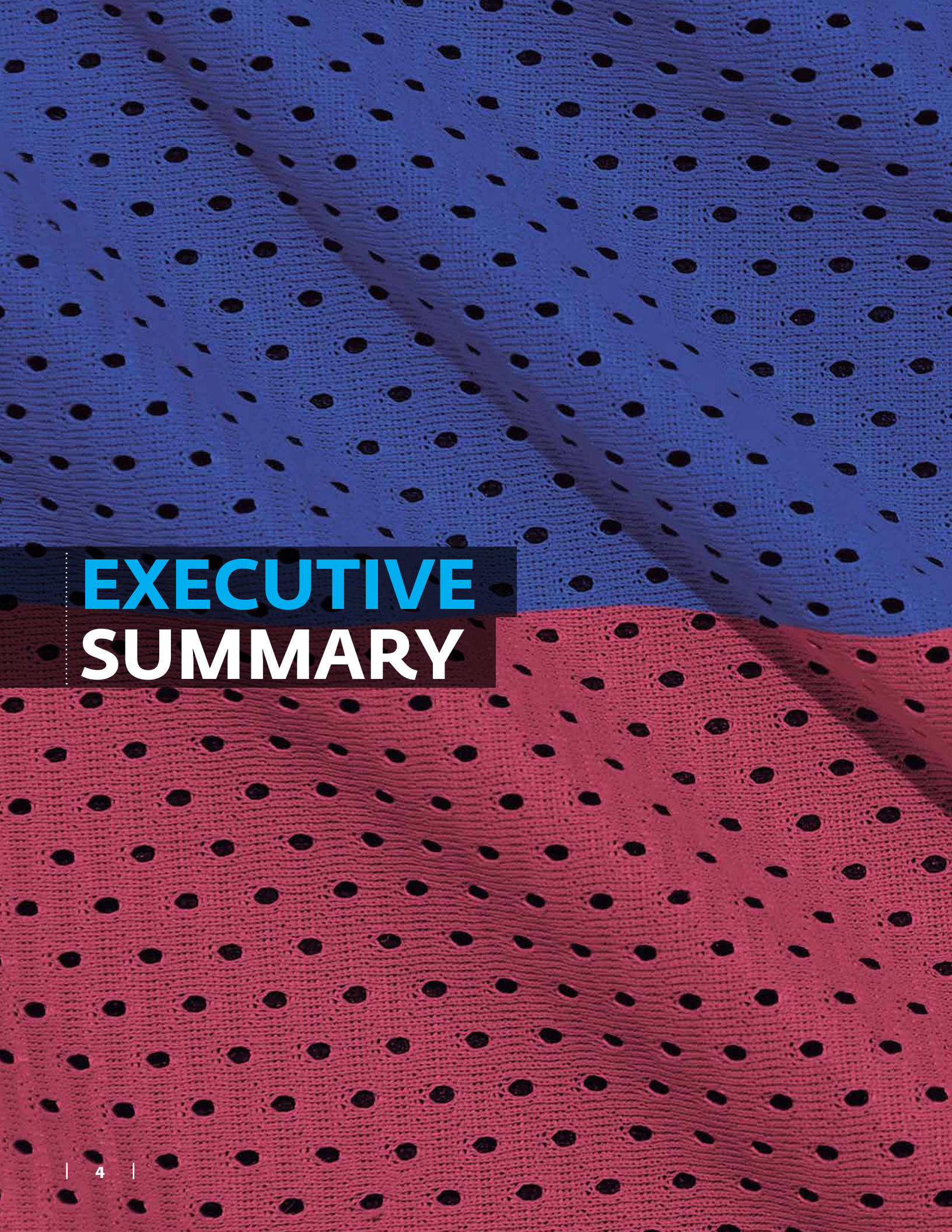
Firms are navigating structural shifts in the sector caused by COVID-19. A key factor is what types of apparel products from Haiti will be in demand moving forward. With supply chain disruptions and increased lead times, especially from China, executives are increasingly looking closer to home for their sourcing needs, as the crisis reinforces a near-shoring trend that began before the pandemic. Firms producing apparel can easily shift to washable personal protective equipment (PPE) to help meet the increasing global demand for masks, coveralls, surgical gowns, aprons, surgical caps, blouses, scrubs, and plastic PPE.

We are grateful to the 33 members of the ADIH who took the time to answer the survey questionnaire. We would also like to thank Anouk Pechevy, Claudine François, Finn Holm-Olsen, Jennifer Fievre, Maria Soledad Requejo, and Mariana Vijil for comments on the questionnaire and an earlier version of the report. We appreciate comments by the report reviewers of the ADIH Textile Committee who participated in the validation meeting on July 14, 2020: Clifford Apaid, Fernando Capellan, Joseph Blumberg, Carine Felix, Dayana A. Villedrouin, Gina Coles, Mario Giovanni Jules, Nathalie Hermantin, Christian Aimé, Tammy Moon, Jason Lee, Minchul Hwang, Rachelle Jean, Lulu Yu, Hans-Josemy Fonrose and Tessa Jacques Antoine from CFI.

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EXECUTIVE SUMMARY

In May and June 2020, the Industrial Association of Haitian (l'Association des Industries d'Haïti [ADIH]), in collaboration with the International Finance Corporation (IFC), conducted a survey to collect information on the impact on, challenges facing, and opportunities for the export-oriented garment sector in Haiti arising from the COVID-19 pandemic. Thirty-three firms from the West and the North of the country that produce apparel products responded to the survey. Haitian apparel manufacturers surveyed included both foreign-born and domestic companies. The participating firms collectively employed more than 50,000 workers in March 2020, 94 percent of all workers employed by ADIH members. Eighty-two percent of respondents operated in a public industrial park or private free trade zone, and 70 percent were established with foreign capital. Before the pandemic, these firms produced an average of 1.6 million pieces of garment a month, 83 percent of all pieces made with knit-only materials. According to the ADIH, seven firms produced personal protective equipment (PPE), including gowns, scrubs, and coveralls with hoods.

The most pressing challenges respondents identified included uncertainty about global demand, government restrictions (which prevented factories from working at full capacity until July 28), lack of working capital, and difficulty accessing raw materials (figure ES.1). Only 10 firms identified export restrictions as a key challenge. Among them, eight had had more than 20 percent of their orders cancelled.

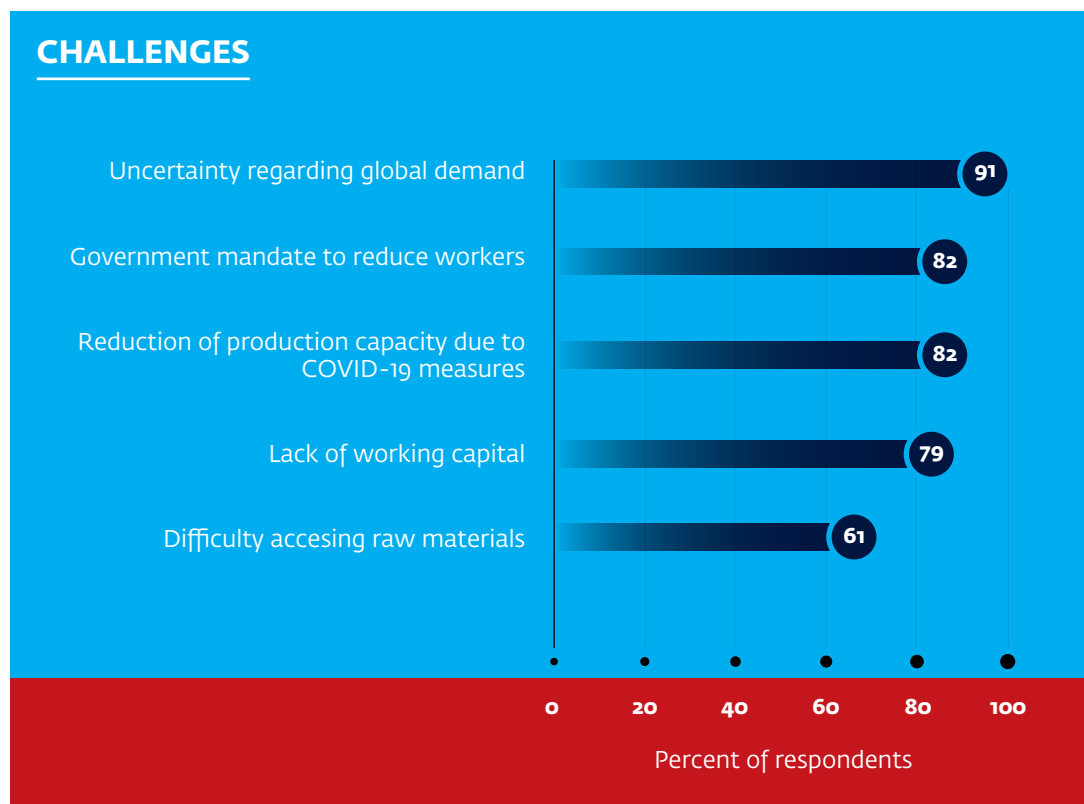
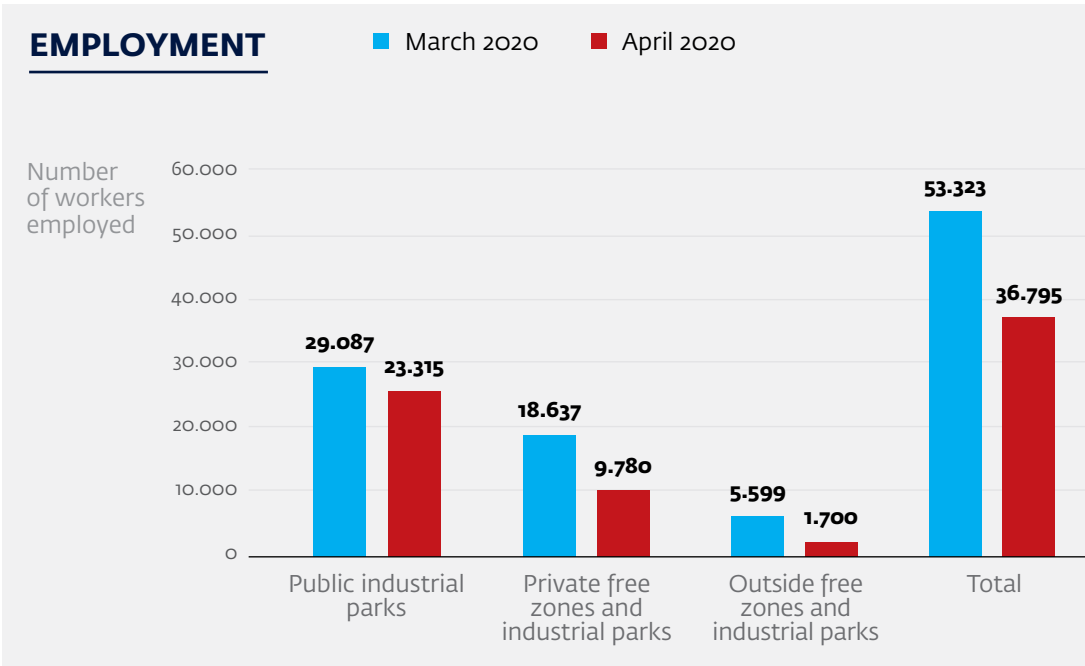


Figure ES.1
Top five challenges
identified by
Haitian apparel
manufacturers

Employment by ADIH members plummeted between March and April 2020, falling by almost a third (figure ES.2).

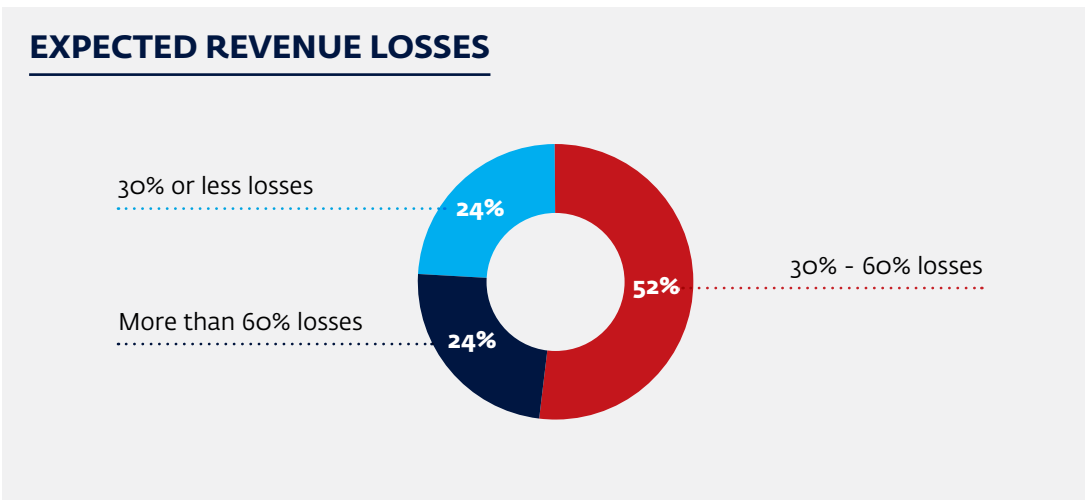
Figure ES.2
Employment in Haiti's apparel sector in March and April 2020, by type of location



Source: Data for March 2020 were collected from firms that receive government subsidies. Data for April 2020 were collected by ADIH from its members.

Seventy-six percent of respondents expected at least a 30 percent loss in revenues in 2020 as result of the pandemic (figure ES.3). Twenty-eight respondents (84 percent) reported a total of 723 production days lost between March 20 and April 20.

Figure ES.3
Revenue losses projected by Haitian apparel manufacturers for 2020 (percent of firms)



At the time of the survey, in May–June 2020, only 22 percent of respondents were producing at least 60 percent of their previous capacity. All but one firm reported reductions in and cancellations of orders; and 52 percent of all firms saw reductions or cancellations of more than 50 percent.

Twenty-eight firms (85 percent of respondents) reported that they could produce PPE, although only 20 had received orders for this type of products. Twenty-four firms reported being able to produce masks; 5 could produce gowns, 10 scrubs, and 2 coveralls with hoods. PPE production capacity appears to be underutilized, with only 67 percent and 39 percent of capacity used to produce masks and gowns, respectively. According to respondents, orders for masks and other PPE could help save these companies; exports should therefore not be subject to any restrictions.

Firms reported the need for several types of assistance. In terms of financial assistance, they need working capital financing (11 respondents) and both short-term (8) and long-term credit (7). Other requests include support for market intelligence and assistance marketing and selling PPE, regular meetings with ADIH and increased support to operations, including authorization to export masks, assistance in shipping products abroad, and help attracting more international investors. Firms also identified their desire for assistance in building the capacity of workers to repair equipment and in training supervisors, sewing operators, quality controllers, and auditors.

PURPOSE OF THE SURVEY

.....
*On March 19, 2020,
the government of
Haiti ordered the
mandatory closure of
all factories, in order to
contain the spread of
COVID-19.*
.....



Photo: Santo du Jour Free Zone

On March 19, 2020, the government of Haiti ordered the mandatory closure of all factories, in order to contain the spread of COVID-19. The next day, factories closed. On March 25, the government closed the border with the Dominican Republic for the transit of people (merchandise traffic was permitted throughout the shutdown). On July 1, it reopened the border and resumed international air traffic. Between March 31 and April 20, the authorities progressively allowed factory operations to reopen, but they imposed restrictions to slow the spread of COVID 19, limiting the number of workers in a factory to less than 30 percent of capacity, for example. On July 28, the government lifted the state of emergency, allowing production but retaining some safety requirements.

The survey aimed to measure the impacts of the COVID 19 pandemic on Haiti's export-oriented garment sector, including the impact of cancellations and reductions of orders and the challenges facing firms when reopening. It also sought to identify (a) opportunities based on firms' capacity to produce personal protective equipment (PPE) and (b) areas of needed support for the sector, including technical and financial assistance, worker training, and better services.

PROFILE OF HAITIAN APPAREL MANUFACTURERS BEFORE THE COVID-19 PANDEMIC

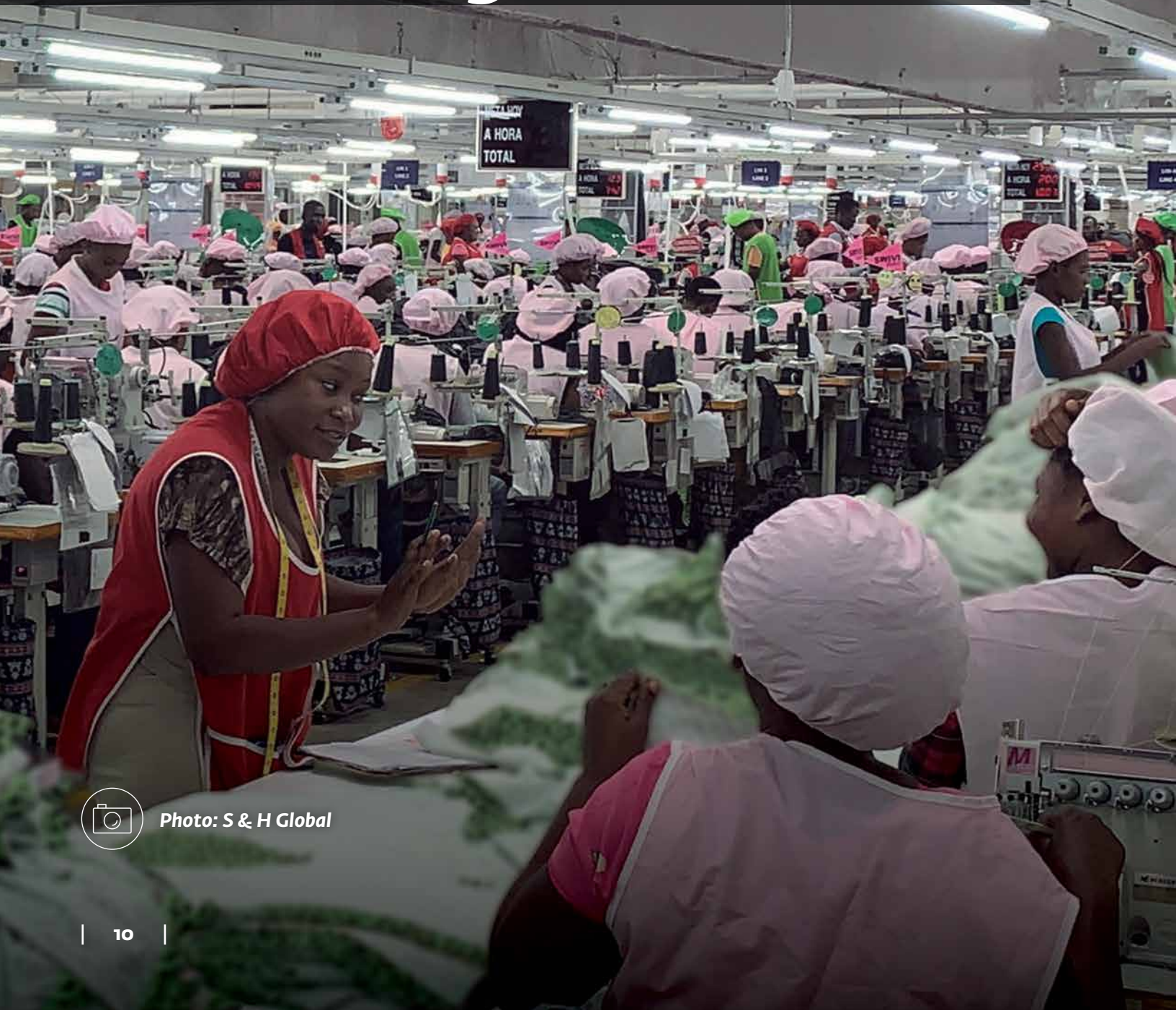


Photo: S & H Global

Eighty-two percent of the firms surveyed are located inside industrial parks or free trade zones, which are physical areas benefiting from tax exemptions (table 1). Seventy percent were funded by foreign capital (table 2). Haitian apparel manufacturers include both, foreign-born and domestic companies.

LOCATION

Location	Number of firms	Percent of total
Public industrial park	12	36
Private free zone or industrial park	15	45
Outside free zone or industrial park	6	18
Total	33	100



Table 1

Type of location of Haitian apparel manufacturers surveyed

SOURCE OF CAPITAL

Location of firm	Domestic		Foreigner	
	Number of firms	Percent of total	Number of firms	Percent of total
Public industrial park	2	16.7	10	83.3
Private free zone or industrial park	2	13.3	13	86.7
Outside free zone or industrial park	6	100	0	0
Total	10	30.3	23	69.7



Table 2

Source of capital of Haitian apparel manufacturers surveyed, by type of location

Source: World Bank Group Country Private Sector Diagnostic Mission, January 2020.

The 33 firms surveyed represent 87 percent of ADIH membership and employed 94 percent of all formal sector workers in the sector declared to ADIH. The sample included 6 large firms (2,000 employees or more), 20 medium-size firms (500–2,000 employees), and 7 small firms (less than 500 employees). The largest firms are located mostly in public industrial parks (table 3).



Table 3

Jobs in Haiti's apparel sector, by firm size and type of location

JOBS

Item	Firm size			
	Less than 500	500 - 2,000	More than 2,000	Total
Public industrial parks	0	10,632	16,957	27,589
Private free zones and industrial parks	1,308	11,945	3,936	17,189
Outside free zones and industrial parks	943	4,656	0	5,599
Total	2,251	27,233	20,893	50,377
Percent of ADIH membership	97	90	100	94



Photo: Digner
Manufacturing S.A.



Before the pandemic, almost half of the firms surveyed were using knit fabrics, 21 percent were using woven fabric, and 30 percent were using both. According to the ADIH, seven firms were active in the production of PPE and 6 specialized in large-scale production of t-shirts. Eighty-three percent of all units were produced by firms using only knit fabric. The average number of units per month per firm was about 1.6 million (table 4).

PRODUCTION

Item	Number of firms producing	Number of units produced per month		
		Number of pieces produced	Percent of total production	Total
Knit	16	40,742,400	83	2,546,400
Woven ^a	6	1,719,000	4	286,500
Both knit and woven ^a	9	6,473,000	13	719,222
Total	31	48,934,400	100	1,578,529

^a. Two firms did not specify the quantities produced per month. They are excluded from the table.

Respondents collectively identified 44 buyers. About half of respondents had only one buyer; almost a third had four or more buyers (table 5).

BUYERS

Number of buyers per firm	Number of firms
1	14
2	5
3	4
4 or more	9

Note: One firm did not respond and one provided invalid information.



Table 4

Production by Haitian apparel manufacturers surveyed between May and June 2020, by type of product



Table 5

Reported number of Haitian apparel manufacturers' buyers, per firm

EFFECTS OF COVID-19 ON HAITIAN APPAREL MANUFACTURERS



Photo: S & H Global

Surveyed firms reported five main challenges (figure 1):

- uncertainty about global demand
- government restrictions on the number of workers in factories
- reduction of production capacity because of COVID-19 measures
- lack of working capital
- difficult accessing raw materials.

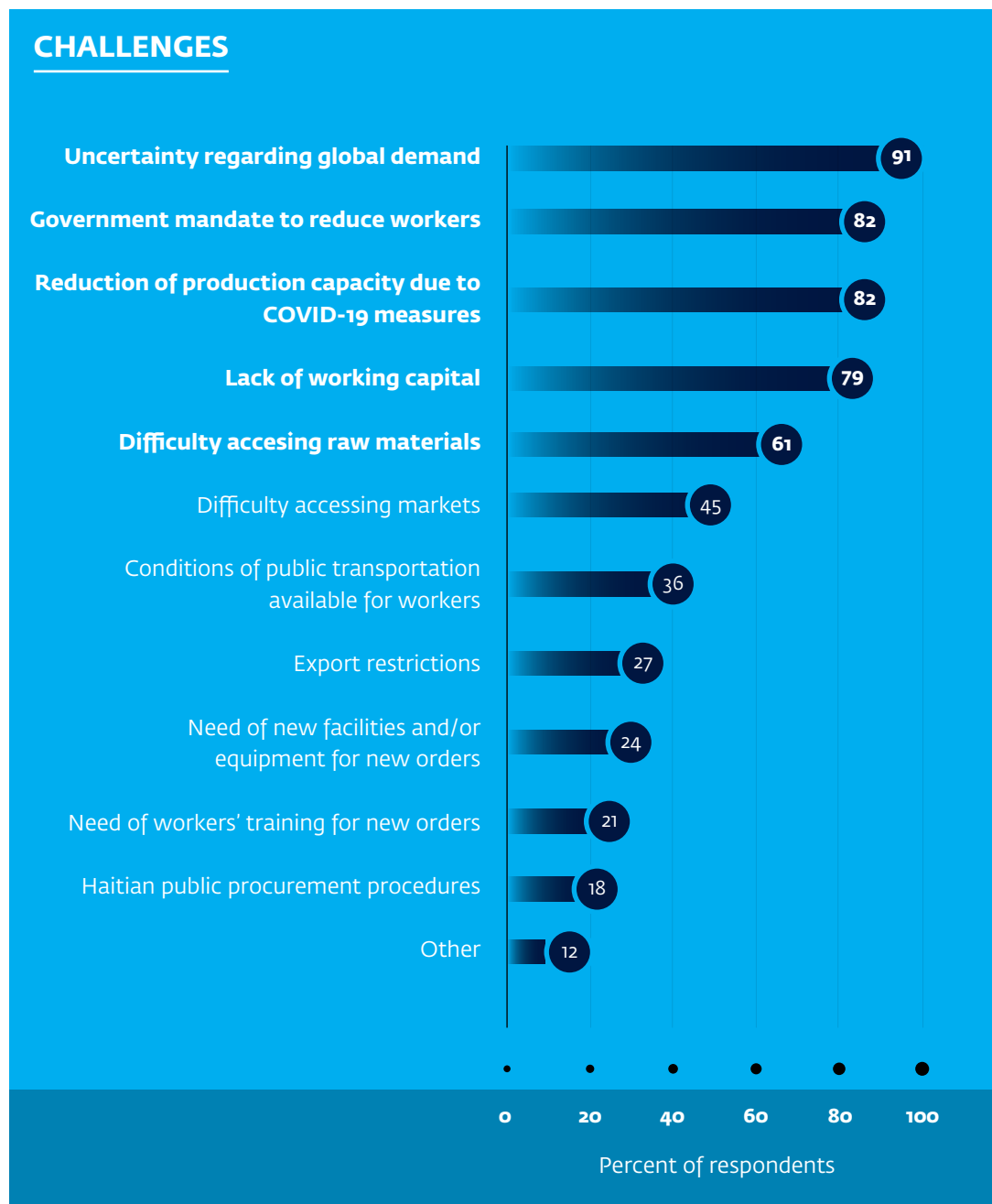


Figure 1
Main challenges
identified by
Haitian apparel
manufacturers

Other key challenges included difficulty accessing markets and the poor condition of public transportation. Ten firms highlighted export restrictions as a priority challenge. Among these firms, 8 had had more than 20 percent of their orders cancelled. Export authorizations and procedures have become difficult to manage since the ban on the export of masks, announced by the Customs Department on April 22, and the closure of the border with the Dominican Republic on March 25.

Eighty-five percent of respondents planned to continue operations over the next six months. Among these firms, 22 (79 percent) planned to employ more than 60 percent of the workers they employed in early March; 3 (11 percent) planned to employ less than 30 percent. If conditions remain unchanged, 42 percent of surveyed firms did not exclude the possibility of temporarily closing their plants.

Lost Production Days

Twenty-eight of the surveyed firms (85 percent) reported reopening after closing. Together, they reported losing 723 production days (table 6).



Table 6

Production days lost
by Haitian apparel
manufacturers
surveyed as a result
of factory closures

DAYS LOST

Date firm was permitted to resume operations	Number of firms				Numbers of days lost
	Total	Opened	Closed	Did not respond	
March 31	13	13	1	0	161
April 3	4	4	0	0	108
April 10	5	4	0	1	85
April 20	11	9	1	0	369
Total	33	30	2	1	723

Note: Authorities allowed factories to reopen in phases, on the dates shown in the table. Two firms did not specify the date of resumption of operations.

Cancelled or Reduced Orders

All but one firm reported having had orders cancelled or reduced. Among these firms, 52 percent experienced reductions or cancellations of more than 50 percent (figure 2).

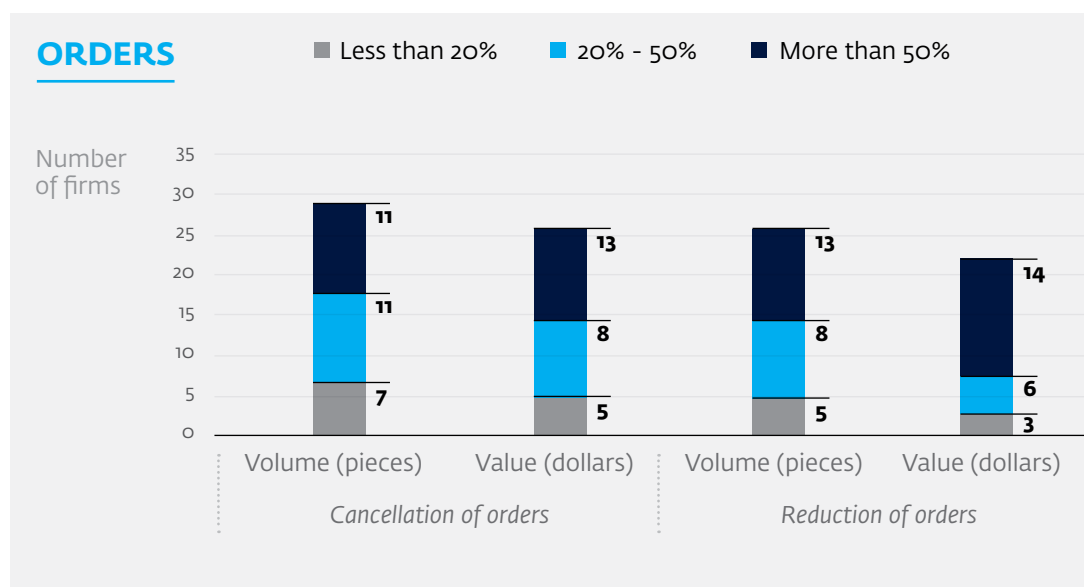


Figure 2
Share and value of Haitian apparel producers' orders cancelled or reduced by mid-June

Lost Revenues

Seventy-six percent of respondents forecast that they would lose more than 30 percent of their revenues in 2020; eight firms (24 percent) expected revenue losses of more than 60 percent (figure 3).

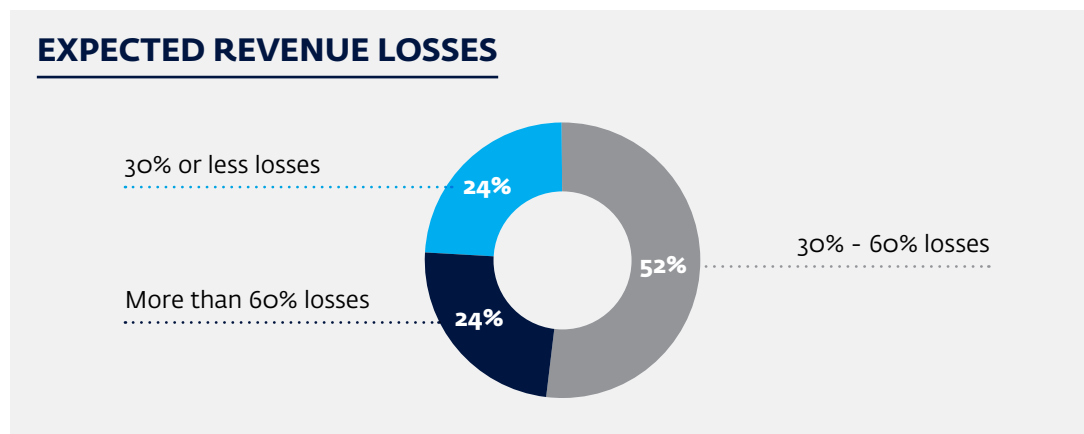
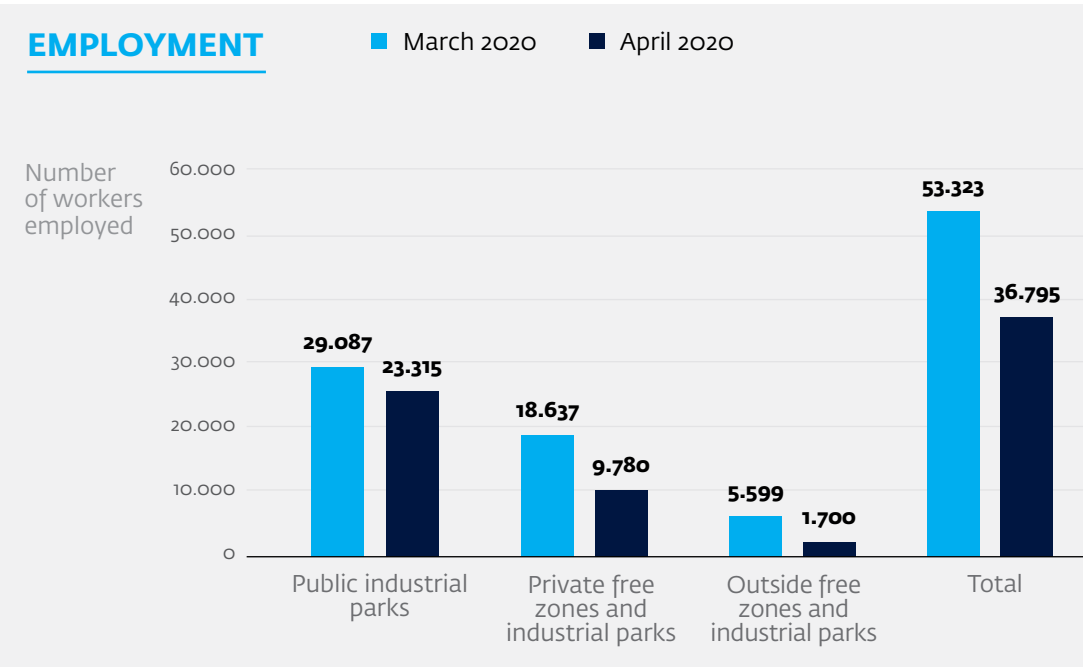


Figure 3
Revenue losses projected by Haitian apparel manufacturers for 2020 (percent of firms)

Lost Jobs

Employment at the 38 ADIH members declined by 31 percent between March and April 2020, according to ADIH reports (figure 4). Small firms and private facilities outside public parks and private free zones were the most affected, with declines in employment of 59 percent and 70 percent, respectively.

Figure 4
Employment in Haiti's apparel sector in March and April 2020, by type of location



Source: Data for March 2020 were collected from firms that receive government subsidies. Data for April 2020 were collected by ADIH from its members.



Photo: Palm Apparel



PROFILE OF FIRMS AFTER REOPENING



Photo: The Will Bes Haitian S.A.

Production Capacity

At the time of the survey, one firm remained closed. The remaining 32 firms were fulfilling existing orders, new orders, or both (figure 5).

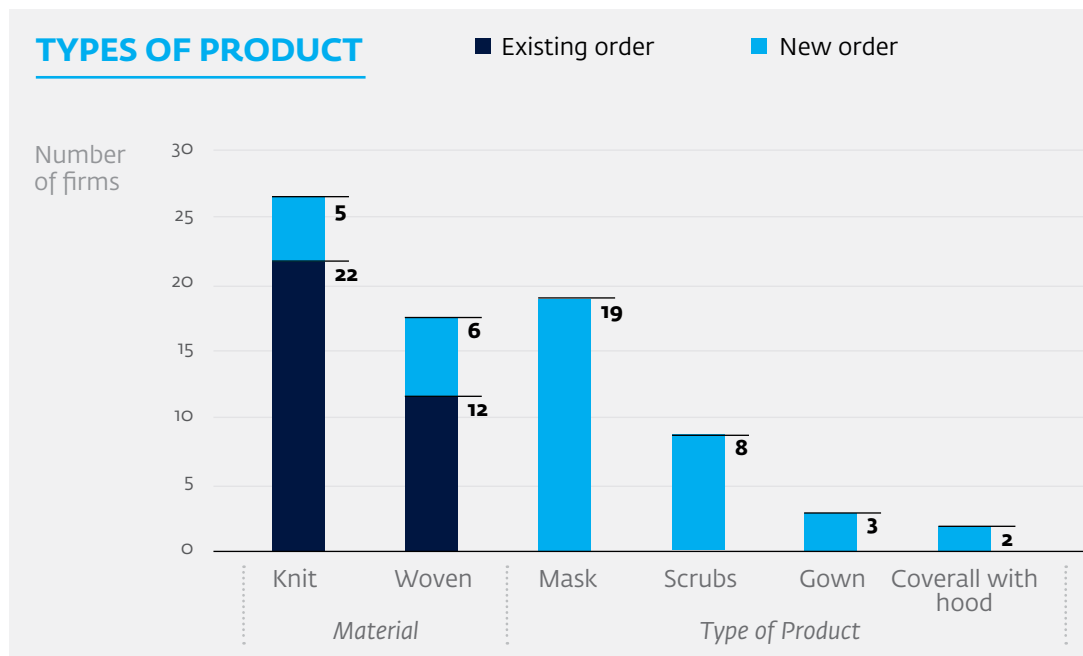


Figure 5
Types of products produced and orders received by Haitian apparel manufacturers after reopening following closure caused by COVID-19

More than half of firms (56 percent [18 firms]) were producing at less than 30 percent of their capacity after resuming operations (figure 6).

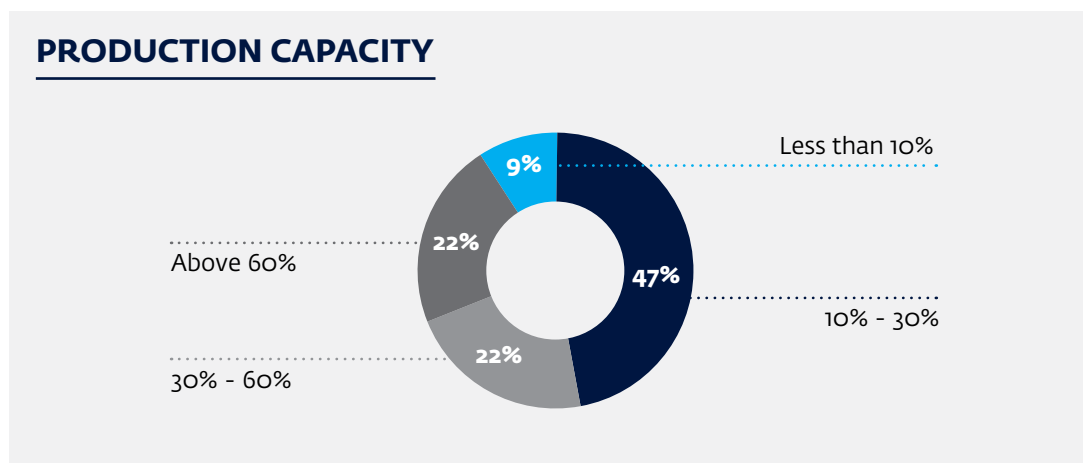


Figure 6
Reduction in production capacity reported by Haitian apparel manufacturers in May-June 2020

The data collected from the 31 firms that responded suggest that potential production capacity is 37.8 million units a month—59 percent PPE and 41 percent other garments (table 7).



Table 7

Capacity of Haitian apparel manufacturers surveyed to produce personal protective equipment and other products

APPAREL PRODUCTION CAPACITY

Type of capacity	Number of firms	Monthly production capacity (thousands of units)						
		Personal protective equipment					Other products	Total
		Masks	Coverall	Gown	Scrubs	Total		
Current production of personal protective equipment (PPE)	19	12,648	50	658	1,424	14,779	800	15,579
Producing PPE but cannot give capacity	1	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Has capacity to produce PPE but is not producing it	7	6,290	2	1,050	65	7,407	600	8,007
Has capacity to produce PPE but cannot specify how much and is not producing it	1	0	0	0	0	0	0	0
Not interested in producing PPE	3	n.a.	n.a.	n.a.	n.a.	n.a.	14,256	14,256
Total	31	18,938	52	1,708	1,489	22,186	15,656	37,842

Note: n.a. Not applicable.

At the time of the survey, the producers who declared that they had capacity to produce PPE were using two-thirds of their capacity (table 8). Of the 26 firms that specified the types of PPE they could produce, 23 reported being able to produce masks, 5 could produce gowns, 10 scrubs, and 2 coveralls with hoods.

MONTHLY CAPACITY

Type of capacity	Masks	Scrub	Gown	Coverall	Total
Current production	12,648	1,424	658	50	14,779
Capacity to produce additional units	6,290	65	1,050	2	7,407
Total potential capacity	18,938	1,489	1,708	52	22,186
Current production as percent of total potential capacity	67	96	39	96	67



Table 8

Monthly capacity of Haitian apparel manufacturers surveyed to produce personal protective equipment products, by type of product (thousands of units, except where otherwise indicated)

Only 20 firms reported producing PPE (table 9). Respondents did not provide information on production of surgical caps, shoe covers, and plastic face shields. A plastics manufacturer in Haiti (not part of the survey) has reportedly begun producing face shields, disposable boot covers, head caps, and gowns.

PPE PRODUCERS

Type of product (PPE)	Number of producers
Masks only	11
Masks and scrubs	4
Masks, gowns, and scrubs	1
Masks and gowns	1
Masks, coveralls, gowns and scrubs	1
Scrubs only	2
Total number of firms producing PPE	20



Table 9

Number of Haitian apparel manufacturers producing personal protective equipment, by type of product

Note: All of these firms were also producing other garments.

All respondents reported having enough resources and materials to comply with the obligations established by the authorities. These requirements include PPE for workers, handwashing stations, a chlorine carpet to disinfect shoes soles at the factory entrance, 1.5 meters between workers, and regular maintenance of facilities. Some respondents also reported taking additional measures, including the following:

- temperature screening at the entrance
- safe entry management
- sanitization of equipment and hands (with disinfectant, paper, alcohol-based sanitizer gel, soap)
- medical assistance and regular checking for respiratory symptoms
- plan to evacuate confirmed cases.

Efforts by Buyers to Assist Producers

Some respondents reported that buyers had offered them alternatives to simply cancelling their orders:

- 10 firms reported that buyers replaced their existing orders with different ones.
- 3 firms were asked to complete their orders, 2 of them obtained extensions of their delivery deadlines.
- 2 firms reported that buyers had authorized them to use the raw materials they had purchased to meet the buyers' orders for other uses.
- 1 firm reported that its buyers temporarily suspended their orders.
- 1 firm reported having been given permission from a buyer to purchase fabric from other suppliers.

One firm reported that it did not require mitigation measures, as its business did not suffer significant losses from the crisis.

All respondents reported having enough resources and materials to comply with the obligations established by the authorities.

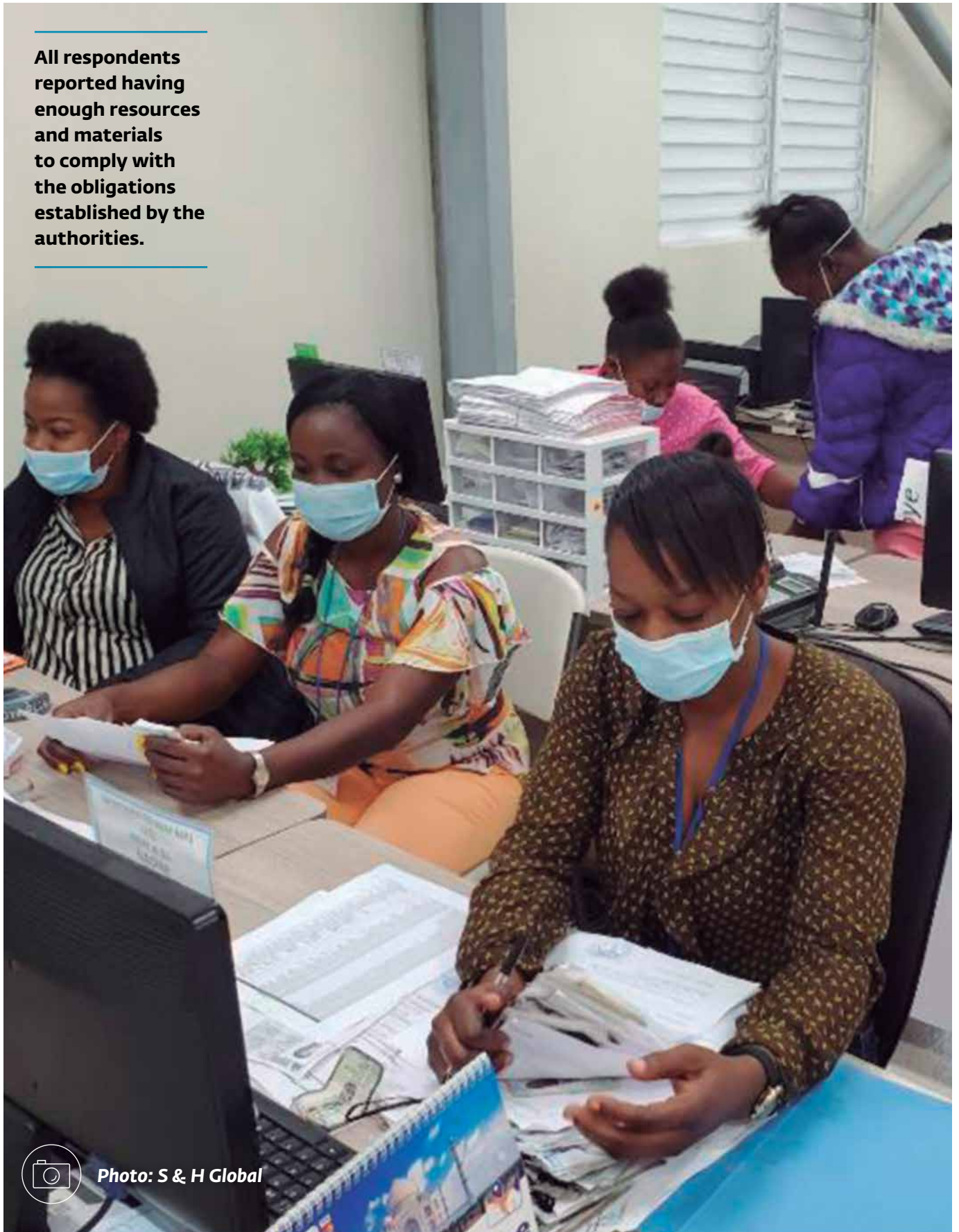


Photo: S & H Global

REQUESTS FOR ASSISTANCE



Photo: The Will Bes Haitian S.A.

The surveyed firms identified various needs for technical and financial assistance (table 10).

REQUESTS FOR ASSISTANCE

Type of assistance requested	Number of requests from producers of personal protective equipment (PPE)	Number of requests from other producers
Technical assistance		
PPE design	1	0
PPE manufacturing	1	0
PPE marketing and sale	3	2
Market intelligence	3	3
Financial assistance		
Working capital	8	3
Investment capital	2	1
Short-term credit	2	6
Long-term credit	4	3



Table 10

Requests by Haitian apparel manufacturers for assistance

Three firms requested assistance in obtaining PPE export permits and authorization, and one firm asked for support in implementing COVID-19 protocols in the communities of Ouanaminthe through education and social activities. Seventeen firms expressed interest in participating in a two-hour webinar that could include training and other relevant information.

The Dominican Republic is a major source of equipment and materials. The closure of the border between the two countries in March therefore affected the preventive and scheduled maintenance of equipment.

The surveyed firms requested assistance in training workers to repair equipment, especially air compressors, matter plotters, electronic motors, sewing machines, and embroidery machines (table 11).

With the Dominican Republic under shutdown, most of Haitian supply chain are under lock-down too. This also affects Haitian preventive maintenance, scheduled maintenance, and even dealing with breakdowns, as the Dominican Republic is the one of the main source of this type of service for the Haitian Industry.



Photo: S & H Global

REQUEST FOR TRAINING IN EQUIPMENT REPAIR

Type of machinery	Number of firms requesting assistance
Air compressor	8
Marker plotter	6
Sewing machines	5
Electronic motors	5
Embroidery machines	4
Specialized printing	3
Desk printer	1
Power generator (other)	1
Maintenance (other)	1



Table 11

Requests by Haitian apparel manufacturers for assistance in training workers to repair equipment, by type of machinery

The surveyed firms also requested assistance in training for different types of workers. There were 46 requests in total. Their top requests were training for supervisors, sewing machine operators, quality controllers, and auditors (table 12).

TRAINING REQUESTS BY PROFILE

Type of training	Number of firms requesting assistance
Training of trainers and supervisors	16
Training of sewing operators	9
Training of quality controllers and auditors	8
Training of special sewing operation	6
Training in mask production	4
Training in PPE production	2
Training of cutting-room controllers	1



Table 12

Requests by Haitian apparel manufacturers for assistance in training workers in order to increase productivity, by type of training

SURVEYED FIRMS' RECOMMENDATIONS TO THE ADIH TEXTILE COMMITTEE

Ten of the surveyed firms made specific suggestions for consideration by the ADIH Textile Committee:

1

Conduct regular meetings with apparel manufacturers, rather than only during a crisis. Meeting regularly would help firms act proactively and ensure that all firms are aligned with ADIH and the government in fighting COVID-19.

2

Support firms' operations. Firms are facing substantial losses as a result of closure, reduction or cancellation of orders, and lack of clarity on when business will get back on track. Suggestions include the following:

- Authorize all firms to export masks and other PPE so that they can respond to inquiries they are receiving.
- Recognize that mask production is not the only way for firms to surmount their difficulties. Mask production does not appear to be profitable for all firms, although it makes a valuable contribution to the survival of workers and firms. Alternatives need to be sought.
- Do not revise the minimum wage this year.
- Provide government grants to factories to maintain operations and jobs.

3

Meet human resource and training needs in English and/or Spanish speaking, reading, and writing; computer skills; import/export or accounting-related experience; and medicine (doctors and nurses).

4

Make Haiti more business friendly and inviting to international investors and buyers, by improving infrastructure, security, transparency, and governance. Such efforts would help prevent buyers that used to source from Haiti from shifting to more stable manufacturing destinations and help Haiti attract investors who are leaving China.

5

Improve safety and government requirements:

- Optimize space. Decreasing the distance between operators to one meter if barriers are placed between them would allow factories to employ more workers.
- Extend the suspension period by another 60 days to prevent factories from operating and provide a direct subsistence subsidy to workers while factories are closed.
- Raise the restriction limiting the number of workers in a factory from less than 30 percent of capacity to at least 60 percent.
- Extend the validity of the Quitus (the compliance document firms must obtain before they can export) beyond the current one to three months. (In other countries, such a certification is usually valid for one full year.)

6

Help factories ship products abroad. Improve trade and logistics service provision and infrastructure for companies to export efficiently.

ANNEX A: THE QUESTIONNAIRE



ASSOCIATION DES INDUSTRIES D'HAÏTI



Textile and Apparel Survey
May 12, 2020

COVID-19 AND POST COVID-19

Losses, New challenges and Opportunities for the Apparel Industry in Haiti

The health prevention measures adopted against the spread of the COVID-19 virus have hit the Textile and Apparel Sector very hard. New opportunities are emerging, offering solutions to protect the Haitian industry and enabling it to get through the difficulties and uncertainties of this crisis. The purpose of this survey is to collect the necessary data so that the Textile and Clothing Committee of our association can establish a clear and precise roadmap to meet the new challenges we had already discussed during the past month. The treatment of your answers to this questionnaire will be confidential and will respect the principles of equity of ADIH. The final report will be presented and validated during a meeting to which all ADIH members will be invited. As a reminder, ADHI's last similar exercise took place in 2017 and the data do not reflect the current profile of our members. We are expecting your response by May 16, 2020. Thanks for your collaboration.

Name of the member: _____

Name of the contact person _____ Phone _____ E-mail _____

Before the CODIV-19 crisis

1. What was the production of your plant? ☐ Knit ☐ Woven ☐ Both

2. What was the capacity of your plant? _____ number of units per month

3. Who were your principal buyers?

Buyers name _____ Percentage of your total order _____ %

Buyers name _____ Percentage of your total order _____ %

Buyers name _____ Percentage of your total order _____ %

Buyers name _____ Percentage of your total order _____ %

After the March 19 Decision of GOH to shutdown factories and to reopen them

4. Did you reopen after March 19, 2020? ☐ Yes ☐ No ☐ If yes, when?

5. What production capacity are you working with today? (in percentage of your normal capacity)

Less than 10% ☐ Between 10% and 30% ☐ Between 30% and 60% ☐ Above 60% ☐

6. What are you producing now?

Existing orders: ☐ Knit ☐ Woven

New orders: ☐ Knit ☐ Woven ☐ Masks

☐ Coverall with hood ☐ Gown ☐ Scrubs (blouse and pants)

☐ Surgical cap ☐ Shoe cover ☐ Plastic face shield ☐ Other

7. What is your capacity to produce (number of units per month)?

☐ Masks ☐ Coverall with hood ☐ Gown ☐ Scrubs (blouse & pants)

☐ Surgical cap ☐ Shoe cover ☐ Plastic face shield

8. Will you register losses for this year because of the COVID-19 crisis?

a. Cancellation of orders:

In volume: Less than 20% ☐ Between 20% and 50% ☐ More than 50% ☐

In \$: Less than 20% ☐ Between 20% and 50% ☐ More than 50% ☐

How many brands cancel their order? _____ over a total of _____

b. Reduction of orders:

In volume: Less than 20% ☐ Between 20% and 50% ☐ More than 50% ☐

In \$: Less than 20% ☐ Between 20% and 50% ☐ More than 50% ☐

How many brands reduce their order? _____ over a total of _____

9. Do you receive new orders? From existing brands ☐ and/or from new brands ☐

a. Type of new orders: Garment ☐ Masks ☐ Gown ☐ Coverall with hood ☐
Scrubs (blouse& pants) ☐ Surgical cap ☐ Shoe cover ☐ Plastic face shield ☐

b. New orders for when:

Fall season 2020 ☐ Winter season 2020 ☐ Both seasons ☐

10. What measures have your buyers offered to mitigate the impact on your factory?

a. Replacement orders By existing brands ☐ By new brands ☐
Type of products: Masks ☐ PPEs ☐ Others ☐

b. Free use of their raw materials for other clients ☐

c. Other measures _____

11. What are the most important challenges you are facing?

Put a number in the square to show your priority: High Priority is 1; Low Priority is 2; No priority is 0.

- a. Difficulty accessing raw materials ☐
- b. Lack of working capital ☐
- c. Access to market ☐
- d. Uncertainty in global demand ☐
- e. Need of new facilities and/or equipment for new orders ☐
- f. Need of workers' training for new orders ☐
- g. Conditions of public transportation available for workers ☐
- h. Due to new government regulation:
- h.1 Workers and staff reduction
30% or Less ☐ Between 30% and 60% ☐ More than 60% ☐
- h.2 Economic performance in terms of reduction of your regular production:
30% or Less ☐ Between 30% and 60% ☐ More than 60% ☐
- h.3 Export restrictions ☐
- h.4 Haitian public procurement procedures
- i. Other challenges _____

12. Do you plan to ask the Ministry of Labor to temporary close your operation?

For 15 days ☐ For 30 days ☐ For 60 days ☐

13. Will you be able to continue your operation during the next 6 months? Yes ☐ No ☐

If yes, it will be with 100% of my employees ☐ 60% of them ☐ 30% or less ☐

14. What is the estimation of your revenues lost for this year?

30% ☐ Between 30% and 60% ☐ More than 60% ☐

15. Do you have enough resources and materials to comply with the guidelines for protection against CODIV-19?

Yes ☐ No ☐ If Yes, please check, boxes below:

PPEs for workers ☐ Hands washing stations ☐ Chlorine carpet at the entrance ☐
Industrial space to accommodate social distance (1.50 meters) ☐ Regular maintenance of facilities ☐
Other _____

16. Do you require any assistance?

16.1 Technical: PPEs design ☐ PPEs confection ☐ PPEs marketing and sale ☐
Market intelligence ☐ Other _____

16.2 Financial: Working capital ☐ Investment capital ☐
Short term credit ☐ Long term credit ☐ Other _____

16.3 Other type of assistance _____

Workers Training

17. Do you have equipment or machinery that you cannot find repair services for and that you think a service provider could potentially help with, in terms of training workers in equipment repair?

Sewing machines ☐ Electronic motors ☐ Air compressor ☐ Desk printer ☐
Marker plotter ☐ Embroidery machines ☐ Specialized printing ☐ Other _____

18. Which skills do you think are missing and could help you to produce more efficiently with better quality, lower your operating costs, and create a better work environment?

Training sewing operators ☐ Trainers, supervisors ☐ Quality controllers and auditors ☐
Special sewing operation training ☐ Cutting room controllers ☐ Producing masks ☐
Producing PPEs ☐ Other _____

19. Are you interesting in participating in a Webinar?

2 hours ☐ More than 2 hours ☐ Not interested ☐

20. Please give your recommendations to the Textile and Apparel Committee of ADIH



Photo: UTE/Ministry of Economy and Finance, Haiti



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December, 2020