



DRESS FOR MODESTY IS
ON NOW !



WHAT'S INSIDE

The export destination for modest wear's export in Indonesia has not been fully directed to the main importers. It shows that Indonesia still have a chance to increase its export performance by maximizing its export potential to the markets.



editor's desk

Dear valuable readers,

Welcome to the fourth edition of Export News. In this edition, we will update you with the latest trend and information from fashion industry, specifically for modest wear items.

Modest and Fashionable. These words might not go together in the same sentence previously. However, these days, more and more customers wanted to be seen as fashionable as they could when they choose to put on modest clothes. This trend was quickly captured by retailer from high-end to street-style brand. The modest fashion that was previously identified for people from certain religious background became less exclusive. Both men and women would dress for themselves and refrain from standard given by society. This translates to some people dress modestly not because they have to, but because they want to.

In this Export News Edition, we will review the opportunities of Indonesian modest wear items in fulfilling the need of global market. We would also introduce you with some types of Indonesian modest wear. We hope all the readers will find the information in this edition useful and beneficial especially for their business.

Lastly, if you do have interest in importing modest wear items from Indonesia, please contact our trade representative in your country or directly contact the exporters for further information.

Thank You

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contents

04

Hot Issue

DRESS FOR MODESTY IS ON NOW !

Now You Can Put the Word Fashionable
and Modest in the Same Sentence



02

Editor's
Desk

06

Market Review
World Market of
Modest Wear

10

List of
Exporters

11

Commercial
Attaches

12

Indonesian Trade
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HOT ISSUE

DRESS FOR MODESTY IS ON NOW !

Now You Can Put the Word Fashionable and Modest in the Same Sentence

Kaftan, Abaya, Scarf, as the Modest Fashion begin to rise. These fashion items are no longer exclusive for women from certain religious background. Modest Fashion previously known within the Abrahamic faiths such as Islam, Christianity and Judaism. However, lately there are younger generation started dressing demurely even though they are not identified themselves as a religious.

Before getting in the latest trend of modest wear, let's first define the definition of Modest Wear or Modest Fashion. Modest Fashion is defined to a fashion trend specifically for women who wear less skin-revealing clothes. It used to be wear to fulfil the requirement of faith or even their own preferences. Another explanation for modern wear are an appropriate clothing in line with someone's religious beliefs. However, please keep it in mind that every person has their own definition when it comes to dress modestly.

However, as the world grew into more open place, the fashion industry certainly moves to more diverse and opens to more ideas and concepts. We saw these modest wears emerge not only for those coming from certain religious background, but also for people who embrace themselves in wearing clothes that satisfy their personal belief, be it related to faith, comfort or other personal reasons.

According to Thomson Reuters's State of the Global Islamic Economy report 2018/19, the social media engagement has brought positive impact on Modest Fashion industry. That being said, the highest Millennial's interaction captures in social media for Modest Fashion surprisingly happened mainly outside in the Islamic densely-populated countries. The United states became the key country to interact the most with modest fashion, followed by India, Nigeria and Indonesia.

According to the same report, these Millennials were supporting modest wear as it is gaining momentum among them. However, it should be noted that this interaction mainly focused on Hijab Fashion as the main topic. It implied that the Modest Fashion industry needs to develop more product and increase awareness among the millennials that Modest Fashion is not only limited to hijab. Dress and sportswear could be part of these Modest fashion industry. We might recall in year of 2007 when the first collection of Burkini was released by Australian Designer, Aheda Zanetti. Yes. Burqa and Bikini. Who will ever think this combination work and attract such attention? This piece is originally intended for women lifeguards who want to have full coverage of their body while wearing swimwear.

Modest Fashion gain even higher momentum when high end brand such as Dolce and Gabbana started to show them in runway. It presented at a fashion show with Hijabi Model on it, making its fashion items more relatable for those who dress modestly. This untapped market attracted attention from all over the world when New York Fashion Week and London Fashion Week started to give place for the modest wear's designer to present their collection during the most important Fashion Week. Not only that, responding to the gap, well-known sportswear brand released a series of hijab sport line to provide the hijabi – a niche market which almost never been touched before.

Nevertheless, as women are not the only gender who would wear modest clothing, we should not leave men in the discussion of modest wear. Both women and men want to dress modestly, but they certainly do not want to give up the style. This need was captured nicely by the retailer who not only release a series of collection for women, but also

for men. However, the collection of modest wear for men is slightly limited compared to women's collection. The retailer, designer offer them more loose-fitting pants and t-shirt.

How #MeToo Movement affects Modest Fashion Industry

Who are the driving forces behind the rise of Modest Fashion industry today? Well, it can be easily said that the existence of social media like Instagram, YouTube, Pinterest, making it easier for any trends to catch up especially if it is targeting a right demographic. Moslem women act as customers and designer at the same time bring the Modest Fashion Industry into the light. Many influencers with Islamic background started to promote living a modest life translates into the way they talk and the way they present themselves to the world. This affected not only their followers, but also their acquaintances and at the end it helps the modest clothing to be heard by many people. The modest wear movement also supported by the emergence of designer and label who started to promote covered-up fashion. It started dominantly in the countries with high Moslem's population such as Turkey, Pakistan and Egypt.

Modest Fashion movement blossomed in the last few years, as people started to discuss about it, many bloggers wrote about it, many designers released collection to fulfill the need about it. However, was this Movement supported or have any relations to the #MeToo Movement?

When MeToo Movement went viral in 2017, it inevitably played an important part of the rise of Modest Fashion. Movement which started to counter sexual harassment and sexual assault has made the women start to dress for themselves instead of for fulfilling the standard given by society. The demand for more covered-up and maxi dresses in the United States has been steady over the year 2017. However, when #MeToo Movement was echoed in social media, the demand for these products escalated and kept increasing, responding to this viral hashtag.

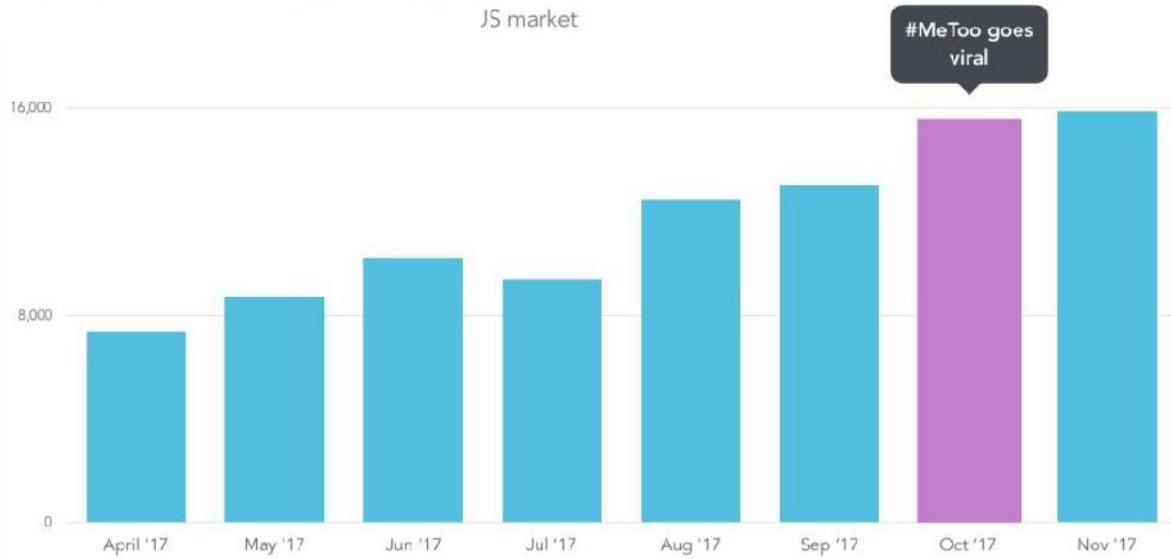
Nevertheless, please do note that the way women present themselves is just one way to guard themselves from the assault and harassment. There are many other ways this movement could be supported. At the end, even though we cannot state it confidently, the #MeToo movement has surely helped the covered-up clothing with high-neck or long-sleeve feature to be the center of attention for some time. From this moment forward, the term of modest fashion became more mainstream that everyone in fashion industry do not want to miss this trend.



Growth of Modest Fashion in the US Market

JS market

#MeToo goes viral



Source: <https://edited.com/blog/2019/03/modest-fashion/>

EDITED



MARKET REVIEW

World Market of Modest Wear

Modest fashion is one of the fastest growing sub-sectors in fashion industry. It really is impressive as in 2017 Muslim's spend on fashion was US\$ 270 billion and it estimated to escalate to US\$ 361 billion in 2023 . Not to mention the other buyers for modest wear outside the Moslem's community.

The same report wrote that the M-generation who represent 29% of younger generation is driving the Modest Muslim consumption.



Source: Thomson Reuters's State of the Global Islamic Economy report 2018/19

Hannah Almasi wrote on her website in the article titled "What Does Modest Fashion Really Look Like?" that the searches for Modest Fashion in Pinterest UK has increased by 500% since 2017 (check the fact). This shows how many potentials the modest fashion has and how many more it will boost in the future.



Source: Thomson Reuters's State of the Global Islamic Economy report 2018/19

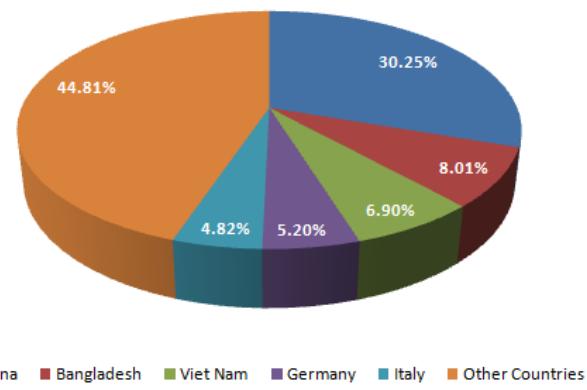
World's Export and Import for Modest Wear

For the last five years, the modest wear trade – both export and import – shows only a slight increase. This trend was not accordance to the emergence of modest fashion industries in the world. This probably caused by the economic downturn a couple years back. However, its trade value was started to recover last year as the world's economy improved.

In 2014, world's export of modest wear was accounted for US\$ 254.6 billion. In the period of 2014-2018, its export value rose slightly by average 0.3% per year. Started in 2015, the slowdown of modest wear's export was experienced by almost all main exporting countries. Modest Wear's export dropped to its lowest point in 2016 in which its export recorded about US\$ 233 billion. However, after two years of declining trend, the world export started to recover as its value back to level at US\$ 255.5 billion in 2018.

The main exporter for modest wear in 2018 was China with market share about a third of world export (30.3%). Even though its share tends to decline, China has remained as the number one modest wear's exporters for more than 15 years (Source: Trademap.org). As showed from the graph below, the second and third largest exporters for Modest Wear were Bangladesh and Viet Nam. It is not surprising as these two countries lately joining the global value chain of textile industry by producing for large retailer company around the world. Their increasing performance in the textile industry has slowly driven down China's domination in this industry. Offering lower labor price, they produced on more competitive production cost, making their textile products in general are cheaper and able compete with China's mass production. Together, these two countries shared 15% of modest wear market in 2018 or equivalent to half of China's share on the world market.

Major Exporters of Modest Wear in 2018



Source: trademap.org, prepared by DGNED

From the import side, the world import for modest also experience only a moderate increase the period of 2014 – 2018. For the last five years, world import of modest wear has increased just by average 1.7% per year due to significant decline in the period 2014-2016 in which its value dropped to its lowest point (US\$ 201.7 billion in 2016). Compared from its value in 2014 which recorded US\$ 213.2 billion, modest wear import value has increased to US\$ 228.9 billion in 2018.

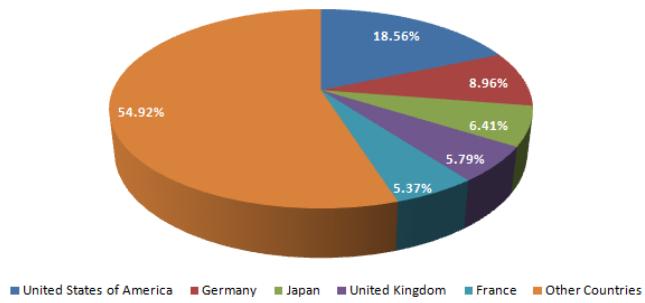
In 2018 the United States was the largest importer of modest wear with 18.6% market share. It was in line with the trend of modest wear that has the highest social media interaction in the United States as discussed before. The second and third largest exporter for modest wear was Germany and Japan with market share 8.96% and 6.41% respectively.

The interesting fact from the modest wear's market structure lies on the composition of main modest wear's importers in the world. Even

MARKET REVIEW

though United Arab Emirates, India, Nigeria, and Indonesia are the countries with high engagement with modest fashion trends, none of them was the major importing country for modest clothing. These statistics showed us that modest clothing can be accepted by all customers around the world.

Major Importers of Modest Wear in 2018



Source: trademap.org, prepared by DGNED

However, the dress can be worn in many events included vacations, party, graduation, or other informal events. The material used for the dress depends on the activities in which this dress is put on.

Baju Kurung

Baju Kurung is also a traditional clothing from Malay, including Indonesia. This piece of clothing is a pair of long and loose-fitting blouse and skirt. Baju kurung which could be worn by both men and women is mostly worn by people form the Island of Sumatera where the Malay culture is commonly found.



Indonesia Modest Wear

Being one of the largest Abrahamic-religions populated countries, there is nothing surprising if its people dress modestly on their daily basis. Even without its religious status, Indonesian people pride of their identity of eastern culture. The code of dressing in eastern culture was shaped by various factors including but not limited to religious beliefs, cultural obligations and tradition. All these has made dress modestly as a norm in the eastern culture.

Based on the report, Indonesia was the second rank for countries with highest interaction in social media for the modest wear conversation. It is inevitable as many retailers, sellers and SMEs running business in clothing not only offered the customer with loose-fitting dress and more covering dress but also sold and promoted these fashion items through their social media handle. Being one of the countries with largest social media users, the retailers, sellers and SMEs will use the engagement in social media as the way to market their products as the customers will buy and post the clothes.

Kebaya

Even though its characteristics are rarely connected to the modest fashion, Kebaya -Indonesian traditional dress- in its loose-fitting shape could be worn demurely by women. This dress originally came as early as Majapahit Kingdom and it was worn by the aristocrat women. As the time goes by, Kebaya is worn by female from all age in many different occasions. Kebaya itself has many different types such as Kebaya Encim and Kebaya Kutu Baru. Mostly women will wear it in combination with unstitched skirt or sarong.

Kaftan

This product originally came from the Middle East region. However, as diversity was one of the characteristics of Indonesia, it is easy to spotted some cultures from other regions in Indonesia. As for modest fashion, the more and more dresses from Middle Eastern culture adapted in Indonesia. It is common now to see people wearing kaftan especially during special occasions in Indonesia such as Eid Al Fitr.

Indonesia's Export Performance on Modest Wear

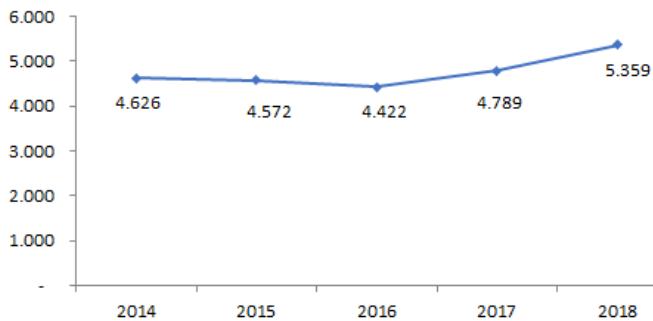
Indonesian export of Modest Wear has increased modestly over the last five years (2014-2018). It increased by average 3.47% every year. In 2014, Indonesia exported US\$ 4.63 billion worth of modest wear items. It rose to 5.36 billion in 2018, making it reached its peak last year.

The United States was Indonesia's largest export destination in 2018 for modest wear items with 54.15% share. The other main destination countries were Japan, Germany, and South Korea and China. These five countries shared around 76% of modest wear's export from Indonesia.

The attention should be directed to the fact that Indonesia was not yet supplied most of its products to other countries which have higher modest fashion trend these years. In the United States market -country with highest interaction for modest wear- Indonesia only supplied around 6.5% of its imported modest fashion items. Even in the world, Indonesia was only in the 13th position of modest wear's exporter, having only 2.1% market share for these products in 2018.

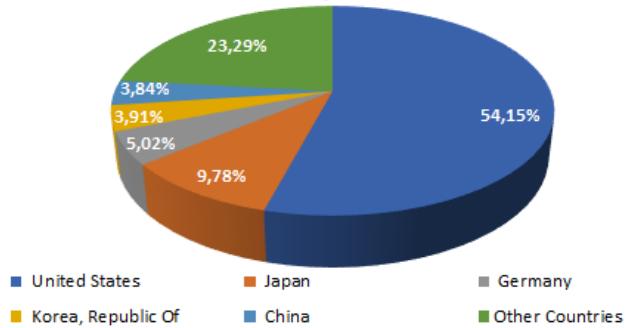
The one thing we all should notice is that the export destination for modest wear's export in Indonesia has not been fully directed to the main importers. It shows that Indonesia still have a chance to increase its export performance by maximizing its export potential to these markets.

**Indonesia Export of Modest Wear
2014 - 2018 (US\$ Million)**



Source: Statistics Indonesia, prepared by DGNED

Destination Countries for Indonesian Modest Wear's Export 2018



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