

Cambodia Garment Manufacturing Industry Overview, 2011-2020

<https://marketpublishers.com/r/CB0E86FB963EN.html>

Date: July 2016

Pages: 30

Price: US\$ 1,800.00 (Single User License)

ID: CB0E86FB963EN

Abstracts

Description

China is a world leading producer and exporter of garments. However, it is undeniable that the comprehensive cost of textile and garment industry continuously rises and its advantage weakens. Confronted with these difficulties, part of garment manufacturing enterprises transfer their production bases to countries with lower costs such as Vietnam, Cambodia and Philippines.

Cambodia, situated in the core area of south-east Asia, is one of the least developing countries in the world. It is experiencing a relatively rapid growth in recent years. From 2010, the economy remained an annual growth rate of over 6% in Cambodia. From 2013, the economic annual growth rate remained above 7%. The Cambodia government claimed to maintain an annual growth rate of above 7% by 2018 in the newly developed 2015-2025 Industry Development Plan.

Under the context of free economic system, Cambodia is one of the most open economies in Asia. Products manufactured by Cambodia can be exported with generalized system of preference (GSP) and most favored nations (MFN) treatment in many countries such as the U.S.A., Europe and Japan. Particularly, with regards to textile and garment products imported by Cambodia, the U.S.A. gives looser quotas and cuts raised import tariffs, the European Nations have no barriers and Canada provides preferential measures such as granting the exemption of import duties.

Garment manufacturing industry is one of the mainstay industries in Cambodia. By the end of 2015, garment manufacturing enterprises registered in Cambodia reached over 1,400. According to CRI, about 1,100 enterprises among them are in normal operation.

Garment manufacturing enterprises in Cambodia mainly operate with foreign capital from areas such as China, Hong Kong, Taiwan and South Korea. They mainly concentrate in Phnom Penh and Sihanoukville with convenient traffic. Most raw materials of garments and foot-wears in Cambodia are mainly imported from Asian countries, especially from China, Japan and South Korea. At present, Cambodia garment factories can manufacture garments with technics of washing, tie-dyeing and embroidering, but still lack dyeing and finishing skills.

In 2015, the minimum wage of garment manufacturing industry is USD 140 per month, increased by USD 12 per month, but is still at a relatively low level in the world. Garment manufacturing industry provides over 700 thousand jobs for Cambodia, and creates plentiful indirect job offers as the primary pillar industry of Cambodia. In Cambodia, there are many newly established garment manufacturing enterprises as well as dozens of bankrupting ones each year mainly for weak competitiveness, strike issues and rising costs.

In 2015, the product export value of garment in Cambodia reaches USD 6 billion, accounting for approximately 70% in the total export value. The major export markets of Cambodia textile garments and foot-wears include Europe, the U.S.A. and Canada. Cambodia is ready to join TPP in the future. It is estimated that the Cambodia garment manufacturing industry will be confronted with more development plans in the next few years.

Through this report, the readers can acquire the following information:

Definition and Classification of Garment

Research Methods, Parameters and Assumptions

Analysis on Competition in Cambodia Garment Industry

Analysis on Leading Enterprises of Cambodia Garment Industry

Development Opportunities and Driving Forces Faced by Cambodia Garment Industry

Risks and Challenges in the Development of Cambodia Garment Industry

Analysis on Prices of Raw Materials and Products of Cambodia Garment

Contents

1 RELEVANT CONCEPTS OF GARMENT MANUFACTURING INDUSTRY

- 1.1 Definition and Classification of Garment
 - 1.1.1 Definition of Garment
 - 1.1.2 Classification of Garment
- 1.2 Parameters and Assumptions of the Report
 - 1.2.1 Assumption Base
 - 1.2.2 Data Sources
- 1.3 OEM of Garment
- 1.4 Global Garment Trade
- 1.5 About CRI

2 ANALYSIS ON GARMENT MANUFACTURING INDUSTRY IN CAMBODIA, 2011-2015

- 2.1 Development Environment of Garment Industry in Cambodia
 - 2.1.1 Economic Environment
 - 2.1.2 Policy Environment
 - 2.1.3 Social Environment
- 2.2 Analysis on Garment Supply in Cambodia, 2011-2015
 - 2.2.1 Analysis of Major Enterprises
 - 2.2.2 Analysis of Garment Production Volume
- 2.3 Analysis on Demand of Garment in Cambodia Market
 - 2.3.1 Major Consumer Group of Garment
 - 2.3.2 Market Scale of Domestic Garment in Cambodia
- 2.4 Analysis on Export of Garment in Cambodia
 - 2.4.1 Export Value of Garment in Cambodia
 - 2.4.2 Major Export Destinations of Cambodia Garment

3 COMPETITION STATUS OF GARMENT MANUFACTURING INDUSTRY IN CAMBODIA, 2013-2015

- 3.1 Barriers to Entry in Garment Industry in Cambodia
 - 3.1.1 Policy Barriers
 - 3.1.2 Barriers of Sales Channels
 - 3.1.3 Brand Barriers
 - 3.1.4 Technical Barriers

3.2 Competition Structure of Garment Manufacturing Industry in Cambodia

- 3.2.1 Bargaining Ability of Raw Material Suppliers of Garment
- 3.2.2 Bargaining Ability of Garment Consumers
- 3.2.3 Internal Competition of Cambodia Garment Industry
- 3.2.4 Potential Entrants of Cambodia Garment Industry
- 3.2.5 Substitutes

4 ANALYSIS ON TOP 5 GARMENT MANUFACTURERS IN CAMBODIA, 2013-2015

4.1 Tak Fook (Cambodia) Garment Ltd.

- 4.1.1 Enterprise Profile of Tak Fook (Cambodia) Garment Ltd.
- 4.1.2 Sales Revenue and Proportion of Tak Fook (Cambodia) Garment Ltd. in Cambodia Garment Manufacturing Industry

4.2 T Y Fashion (Cambodia) Plc.

4.3 M & V International Manufacturing Ltd.

4.4 Grand Twin International (Cambodia) Plc.

4.5 Shen Zhou (Cambodia) Co., Ltd.

5 ANALYSIS ON THE COST AND GARMENT PRICE IN GARMENT MANUFACTURING INDUSTRY IN CAMBODIA, 2013-2015

5.1 Analysis on Garment Manufacturing Costs, 2013-2015

- 5.1.1 Cost of Raw Materials
- 5.1.2 Manpower Cost of Garment Manufacturing Industry in Cambodia

5.2 Analysis on Garment Prices in Cambodia, 2013-2015

6 PREDICTION ON THE DEVELOPMENT OF GARMENT INDUSTRY IN CAMBODIA, 2016-2020

6.1 Factors Influencing the Development of Garment Manufacturing Industry in Cambodia

- 6.1.1 Major Driving Forces and Market Opportunities in Garment Manufacturing Industry in Cambodia
- 6.1.2 Risks and Challenges Faced by Garment Manufacturing Industry in Cambodia

6.2 Prediction on Supply in Cambodia Garment Industry

- 6.2.1 Prediction on Output Volume of Garment in Cambodia, 2016-2020
- 6.2.2 Forecast on Export of Garment in Cambodia, 2016-2020

6.3 Forecast on Demand in Cambodia Garment Market

Selected Charts

SELECTED CHARTS

Chart Cambodia's GDP and Its Growth Rate, 2011-2015

Chart Laws and Regulations of Garment Industry in Cambodia, 2013-2016

Chart Sales Revenue of Cambodia Garment Manufacturing Industry, 2011-2015

Chart Export Value of Garment Products in Cambodia, 2011-2015

Chart Top 5 Enterprises and Their Market Share in Garment Manufacturing Industry in Cambodia Market, 2013-2015

Chart Sales Revenue of Ltd. in Tak Fook (Cambodia) Garment, 2011-2015

Chart Proportion of Tak Fook (Cambodia) Garment Ltd. in Cambodia Garment Manufacturing Industry, 2013-2015

Chart Sales Revenue of T Y Fashion (Cambodia) Plc., 2011-2015

Chart Sales Revenue of M & V International Manufacturing Ltd., 2011-2015

Chart Sales Revenue of International (Cambodia) Plc., 2011-2015

Chart Sales Revenue of Shen Zhou (Cambodia) Co., Ltd., 2011-2015

Chart Prediction on Export Value of Garment in Cambodia, 2016-2020

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