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Editorial: Pretenders to China's throne in the EU apparel import market

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Abstracts

China suffered further losses in share in the EU apparel market in 2016. Six years earlier, in 2010, over half of EU apparel imports in volume terms came from China. But in 2016 barely a third did so, reflecting moves by EU buyers to seek alternative sourcing locations. In a bid to hold on to their market share, Chinese exporters are cutting prices. In 2016 alone, the average price of EU apparel imports from China fell by over 8%. However, holding on to market share by cutting prices is not sustainable for a country in which labour costs are rising significantly and shortages of labour are a growing problem. China still dominates global apparel exports with a share of almost 40% while Bangladesh ranks second. But Bangladesh's share, at just 6%, is only a fraction of China's and China therefore has a commanding position on the world stage. In the EU market, however, China's position is under threat by Bangladesh and a number of other fast growing suppliers. In 2016 Bangladesh increased its share for the ninth year in succession and, at present growth rates, the country could overtake China to become the EU's largest apparel supplier by 2020. Bangladesh is not the only "pretender to China's throne", however. EU apparel imports from Cambodia and Vietnam are also growing rapidly, and many buyers see Myanmar as offering huge potential. Some of the more forward thinking retailers have already established a presence in Myanmar in order to gain first mover advantage. In this report Robin Anson analyses the factors which are causing China to lose share and highlights the competitive advantages which are helping Bangladesh, Cambodia, Myanmar and Vietnam to make gains. Also, he examines the strengths and weaknesses of these countries, and identifies the products which they supply in significant quantities and those which they supply at the most competitive prices.

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