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# Vietnam Textile and Garment Comprehensive Report Q2/2016

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## Abstracts

A severe decline of textile industry in 2009 caused by the global crisis has brought both advantages and disadvantages for Vietnam. Hence, this report comes up with in-depth analysis of Textile and Garment worldwide and Vietnam after the financial crisis. In the next five years, the emerging markets with large size of population such as China and India are expected to increase significantly in both demand and supply quantity, whereas the figures for developed countries are estimated to decelerate. The factory shift from China to Vietnam also accelerates thanks to political stability and cheap labor cost. This situation offers Vietnam a valuable opportunity to boost the textile and clothing export turnovers in the upcoming years.

VIRAC's researchers feature comprehensive outlook of Vietnam textile and garment industry in recent years by covering all contributing factors, including macroeconomics situation, related government policies, the projected effect of FTAs, and the nature of the industry. Among the recent foreign trade agreements, TPP, VKFTA and EVFTA are the most influential to the industry. Together with the attractive tax reduction from strategic partners, Vietnam has to deal with restricted rules of origin, labor standards, and technical trade barriers. In order to enjoy the tax incentives, Vietnam needs to enhance domestic production capacity, especially in some weak stages, to achieve sustainable growth.

The report uses a value chain approach to Vietnam's Textile and Apparel industry. Vietnam mainly has advantages in sewing and spinning stages which are relatively labor-intensive and bring low added-value. Moreover, in several years, it still faces shortage of raw materials and mostly depends on imported sources. Local production of cotton, fibers and fabrics fail to meet the demand of domestic clothing manufacturing companies in terms of both quality and varieties. Though being one of the biggest

apparel exporters in the world, the industry only contributes a small percentage to Vietnam's annual GDP. Domestic apparel market is small, estimated to be 3 billion US$, and dominated by foreign goods. Only a few local companies succeed in building their brands and distribution network since most enterprises are yet to pay sufficient attention to R&D.

Additionally, extensive analysis and forecasts are contained for the period 2016 until 2020. The report also points urgent goals of Vietnam and compares the financial performance of leading enterprises in domestic apparel market between 2013 and 2014.

This report covered key points:

- Root elements that affect deeply business environment.
- Detailed data on all fields of Vietnam textile industry and the global garment market, including but not limited to:
  - World T&G trade, Cotton, Fibers, Fabrics production and consumption;
  - Labor cost of some main processing countries (India, China, Vietnam, etc.);
  - T&G trade among TPP countries;
  - Average import/export tax of TPP's countries;
  - FDI structure in textile industry;
  - Vietnam's T&G export turnovers;
  - Domestic production and consumption of cotton, fibers/yarns, fabrics, apparel, etc.;
  - Total export/import value of Vietnam;
  - Financial statements of leading domestic players in the industry.
- Textile and Garment Value Chain.

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Industry’s Potentials and challenges of Vietnam based on particular strategy models.

COMPANIES METION

Viet Tien Corporation

Nha Be Garment Corporation

Hoa Tho Textile and Garment Corporation

Song Hong Garment JSC

May 10 Corporation

Duc Giang Corporation

TNG Investment and Trading JSC

Sai Gon Garment Trading Manufacturing JSC

Dong Nai Garment Corporation

Phong Phu Corporation

Thanh Cong Textile Garment - Investment - Trading JSC

Viet Thang Corporation

Century Synthetic Fiber Corporation

Hue Textile Garment JSC

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