

Vietnam Textile and Garment Report Q2/2016

<https://marketpublishers.com/r/VD53CE75112EN.html>

Date: May 2016

Pages: 136

Price: US\$ 2,495.00 (Single User License)

ID: VD53CE75112EN

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.

Industry's Potentials and challenges of Vietnam based on particular strategy

models.

Contents

Executive Summary
Global textile and apparel industry
Vietnam textile and apparel industry

1. BUSINESS ENVIRONMENT

1.1 Macroeconomic situation

Figure 1. Vietnam GDP and GDP growth rate
Figure 2. GDP per capital and GDP per capital growth rate
Figure 3. Vietnam total import value
Figure 4. Vietnam total export value
Figure 5. VND/CNY exchange rate
Figure 6. Main export products to China in 2014
Figure 7. Main import products from China in 2014
Figure 8. USD/VND exchange rate
Table 1. Oil refine projects currently built in VN
Figure 9. Vietnam retail sales
Figure 10. Share of modern retail in total retail

1.2 Government Policies Relating to the industry

Table 2. Vietnam's import tariff before and after WTO

1.3 Foreign Trade Agreement

1.4 Trans-Pacific Partnership Agreement

1.4.1 Importance of TPP countries

Figure 11. Textile imports and exports among 12 TPP countries
Figure 12. Vietnam's imports and exports with other 11 TPP countries in 2014
Figure 13. Main T&G import markets of the US in 2014

1.4.2 Impacts of tariff reduction

Figure 14. Average textile import tax of TPP countries
Table 3. Estimated effects of TPP on Vietnam's T&G industry in 2020

1.4.3 Impacts of origin regulation

Figure 15. Vietnam's yarn import by countries in 2014
Figure 16. Vietnam's fabric import by countries in 2014

Table 4. Estimated effects of TPP on Vietnam's T&G industry (with and without ROO)
in 2020

Figure 17. Forecast of Vietnam's textile import after TPP

1.4.4 Impacts of standard labor regulations

1.4.5 Impacts on attracting FDI to Vietnam's textile

- Figure 18. FDI structure in textile industry in 2014 – May 2015
Table 5. FDI in textile industry in 2014 and first 5 months of 2015
Figure 19. FDI structure in textile industry in 2014 – May 2015
Table 6. Noticeable FDI projects in 2015.
- 1.4.6 Opportunities
Figure 20. Impacts of TPP on textile export to the US
- 1.4.7 Challenges
1.4.8 Seizing opportunities
Figure 21. VINATEX's investment structure in 2015
- 1.4.9 Conclusion

2. INDUSTRY OVERVIEW

- 2.1 Global Textile and Garment Industry
- 2.1.1 Global Textile and Garment Value Chain
- 2.1.2 Raw materials
Figure 22. World's cotton price Oct 2009-Oct/2015
Figure 23. World cotton production 11/12-14/15
Figure 24. World cotton consumption 11/12-14/15
Figure 25. Cotton yield by countries
Figure 26. Impact of China's policies on cotton price
Figure 27. World's cotton export 11/12-14/15
Figure 28. World's cotton import 11/12-14/15
- 2.1.3 Spinning
Figure 29. Global yarn production and consumption
Figure 30. Cotton, cotton yarn and polyester filament indices
Table 5. Fiber application of the world in 2014
Figure 31. Fiber applications of the world in 2014
Figure 32. World fiber trade 2010-2014
Figure 33. World fiber export structure in 2014
- 2.1.4 Weaving, dyeing and finishing
Figure 34. World fabric production in 2014
Figure 35. World fabric trade in 2010-2014
- 2.1.5 Sewing
Figure 36. Global textile and apparel market size
Figure 37. Global Textile and Apparel trade
Figure 38. Top 10 T&A exporters
Figure 39. Top 10 T&A importers
Figure 40. Global T&A trade breakdown

- Figure 41. Global apparel trade
- Figure 42. Apparel market size by countries
- Figure 43. Spending on apparel per capita
- Figure 44. Average wage in textile sector 2014
- Figure 45. Minimum wage 2016
- 2.1.6 Distribution and export
 - Figure 46. World's apparel retail revenue 2014-2019
- 2.1.7 Textile Machine Industry
 - Figure 47. 10 biggest textile machinery exporters
 - Figure 48. 10 biggest textile machinery importers
 - Table 6. World's largest textile machinery manufacturers
- 2.2 Vietnam's Textile and Garment Industry
 - 2.2.1 Overview
 - Table 7. General Information of Vietnam's T&G industry
 - Table 8. Textile and Garment enterprises of Vietnam
 - Figure 49. Geographical distribution of textile businesses
 - 2.2.2 Raw materials
 - Figure 50. Vietnam cotton production and crop area
 - Table 9. Vietnam's cotton area
 - Figure 51. Vietnam's cotton consumption 10/11-14/15
 - Figure 52. Vietnam's cotton import 2010-7M/2015
 - Figure 53. Average imported cotton price
 - Figure 54. Vietnam cotton import by countries
 - 2.2.3 Spinning
 - Figure 55. Fiber production in 2010-2014
 - Figure 56. Fiber consumption volume and value in 2010-2014
 - Figure 57. Vietnam fiber and yarn exports
 - Figure 58. Yarn and fiber export by countries
 - Figure 59. Yarn and fiber import by countries
 - Figure 60. Number of spindles, rotors of Vietnam
 - Table 10. Vietnam's synthetic fibers companies
 - 2.2.4 Weaving, dyeing and finishing
 - Figure 61. Vietnam's fabric production during 2010-7M/2015
 - Figure 62. Vietnam fabric consumption
 - Figure 63. Vietnam fabric production by inputs
 - Figure 64. Fabric import by countries/regions
 - Figure 65. Vietnam fabric export and import
 - Table 11. Selected Textile Dyeing Wastewater indicators
 - 2.2.5 Sewing

- Figure 66. Apparel production 2010-6M/2015
 - Figure 67. Domestic apparel market share
 - Figure 68. Vietnam apparel export
 - Figure 69. Apparel exports of FDI and domestic businesses
 - Figure 70. Apparel export structure in 2014
 - Table 12. Shipment/delivery periods of selected countries
 - Figure 71. Inventory indexes of textile and apparel industry
- ### 2.2.6 Distribution and export

3. INDUSTRY'S POTENTIAL AND RISK ANALYSIS

3.1 Risk analysis

3.1.1 Five Forces Analysis

Table 13. Five forces analysis

3.1.2 SWOT Analysis

Table 14. SWOT analysis

3.1.3 Risk Assessment

3.2 Potential analysis

3.2.1 Industry's development plan

Table 14. Some criteria of T&G industry's development plan

3.2.2 Forecast and potential assessment

Figure 72. Vietnam T&G export turnover forecast

4. INDUSTRY'S KEY PLAYERS

4.1 Key players in Garment Industry

Table 15. Top 09 enterprises with the highest Total asset value of Vietnamese textile industry

Figure 73. Net revenue 2014 – 2014

Figure 74. Gross profit 2013 – 2014

Figure 75. Net profit 2013 – 2014

Figure 76. Financial cost 2013 – 2014

Figure 77. Cost of sales 2013 – 2014

Figure 78. General and administrative expenses 2013 – 2014

Figure 79. Asset structure 2013 – 2014

Figure 80. Debt structure 2013 – 2014

Figure 81. Account Receivables 2013 – 2014

Figure 82. Inventory 2013 – 2014

Table 16. Liquidity and Profitability of nine selected garment enterprises

Table 17. Cash flow of 9 enterprises in 2013 – 2014

Table 18. Cash conversion cycle of 9 enterprises in 2014

4.2 Key players in Textile Industry

Table 19. Top 05 textile enterprises of Vietnam with largest net revenue (VND billion)

Figure 83. Net revenue 2014 – 2014

Figure 84. Gross profit 2013 – 2014

Figure 85. After tax profit 2013-2014

Figure 86. Financial cost 2013 – 2014

Figure 87. Cost of goods 2013-2014

Figure 88. General and administrative expense 2013 – 2014

Figure 89. Asset structure 2013 – 2014

Figure 90. Liabilities structure 2013 – 2014

Figure 91. 2013-2014 Accounts receivable

Figure 92. 2013-2014 Inventory

Table 19. Some financial indicators

Table 20. Cash flow

Table 21. Cash conversion cycle

5. CONCLUSION

Reference

Appendix

I would like to order

Product name: Vietnam Textile and Garment Report Q2/2016

Product link: <https://marketpublishers.com/r/VD53CE75112EN.html>

Price: US\$ 2,495.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/VD53CE75112EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970