

# Vietnam Textile and Garment Standard Report

## Q2/2016

<https://marketpublishers.com/r/V7BDD7CE455EN.html>

Date: May 2016

Pages: 86

Price: US\$ 995.00 (Single User License)

ID: V7BDD7CE455EN

### 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

List of abbreviations  
Executive Summary  
I. Business environment

### **1. MACROECONOMIC SITUATION**

Figure 1. Vietnam GDP and GDP growth rate  
Figure 2. GDP per capita and GDP per capita growth rate  
Figure 3. Vietnam total import value  
Figure 4. Vietnam total export value  
Figure 5. VND/CNY exchange rate  
Figure 6. Main import products from China in 2015  
Figure 7. Main import products from China in 2015  
Table 1. Oil refine projects currently built in VN  
Figure 8. Vietnam retail sales  
Figure 9. Share of modern retail in total retail  
Table 2. Top retailers in Vietnam market

### **2. GOVERNMENT POLICIES RELATING TO THE INDUSTRY**

Table 3. Vietnam's import tariff before and after WTO  
II. Industry Overviews

#### **1. GLOBAL TEXTILE AND GARMENT INDUSTRY**

1.1. Global Textile and Garment Value Chain  
1.2. Spinning  
Figure 10. Global yarn production and consumption  
Figure 11. Cotton, cotton yarn and polyester filament indices  
Figure 12. Fiber application of the world in 2014  
Figure 13. World fiber trade 2010-2014  
Figure 14. World fiber export structure in 2014  
1.3. Weaving, dyeing and finishing  
Figure 15. World fabric production in 2014  
Figure 16. World fabric trade in 2010-2014  
1.4. Sewing  
Figure 17. Global textile and apparel market size

- Figure 18. Global Textile and Apparel trade
- Figure 19. Top 10 T&A exporters
- Figure 20. Top 10 T&A importers
- Figure 21. Global T&A trade breakdown
- Figure 22. Global apparel trade
- Figure 23. Apparel market size by countries
- Figure 24. Spending on apparel per capita
- Figure 25. Average wage in textile sector 2014
- Figure 26. Minimum wage 2016

## **2. VIETNAM'S TEXTILE AND GARMENT INDUSTRY**

### 2.1. Overview

- Table 3. General Information of Vietnam's T&G industry
- Table 4. Textile and Garment enterprises of Vietnam
- Figure 27. Geographical distribution of textile businesses

### 2.2. Spinning

- Figure 28. Fiber production in 2010-2014
- Figure 29. Fiber consumption volume and value in 2010-2014
- Figure 30. Vietnam fiber and yarn exports
- Figure 31. Yarn and fiber export by countries
- Figure 32. Yarn and fiber import by countries
- Figure 33. Number of spindles, rotors of Vietnam
- Table 5. Vietnam's synthetic fibers companies

### 2.3. Weaving, dyeing and finishing

- Figure 34. Vietnam's fabric production during 2010-7M/2015
- Figure 35. Vietnam fabric consumption
- Figure 36. Vietnam fabric production by inputs
- Figure 37. Fabric import by countries/regions
- Figure 38. Vietnam fabric export and import
- Table 6. Selected Textile Dyeing Wastewater indicators

### 2.4. Sewing

- Figure 39. Apparel production 2010-6M/2015
- Figure 40. Domestic apparel market share
- Figure 41. Vietnam apparel export
- Figure 42. Apparel exports of FDI and domestic businesses
- Figure 43. Apparel export structure in 2014
- Table 7. Shipment/delivery periods of selected countries
- Figure 44. Inventory indexes of textile and apparel industry

### III. Industry's potential and risk analysis

#### 1.1. Industry's development plan

Table 8. Some criteria of T&G industry's development plan

#### 1.2. Forecast and potential assessment

Figure 45. Vietnam T&G export turnover forecast

### VI. Industry's key players

## 1. KEY PLAYERS IN GARMENT INDUSTRY

Table 9. Top 09 enterprises with the highest Total asset value of Vietnamese textile industry

Figure 46. Net revenue 2014 – 2014

Figure 47. Gross profit 2013 – 2014

Figure 48. Net profit 2013 – 2014

Figure 49. Financial cost 2013 – 2014

Figure 50. Cost of sales 2013 – 2014

Figure 51. General and administrative expenses 2013 – 2014

Figure 52. Asset structure 2013 – 2014

Figure 53. Debt structure 2013 – 2014

Figure 54. Account Receivables 2013 – 2014

Figure 55. Inventory 2013 – 2014

Table 10. Liquidity and Profitability of nine selected garment enterprises

Table 11. Cash flow of 9 enterprises in 2013 – 2014

Table 12. Cash conversion cycle of 9 enterprises in 2014

## 2. KEY PLAYERS IN TEXTILE INDUSTRY

Table 13. Top 05 textile enterprises of Vietnam with largest net revenue (VND billion)

Figure 56. Net revenue 2014 – 2014

Figure 57. Gross profit 2013 – 2014

Figure 58. After tax profit 2013-2014

Figure 59. Financial cost 2013 – 2014

Figure 60. Cost of goods 2013-2014

Figure 61. General and administrative expense 2013 – 2014

Figure 62. Asset structure 2013 – 2014

Figure 63. Liabilities structure 2013 – 2014

Figure 64. 2013-2014 Accounts receivable

Figure 65. 2013-2014 Inventory

Table 14. Some financial indicators

Table 15. Cash flow

Table 16. Cash conversion cycle

V. Conclusion

Reference

Appendix

## I would like to order

Product name: Vietnam Textile and Garment Standard Report Q2/2016

Product link: <https://marketpublishers.com/r/V7BDD7CE455EN.html>

Price: US\$ 995.00 (Single User License / Electronic Delivery)

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

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/V7BDD7CE455EN.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