

# TEXTILE & GARMENT REPORT

**AUGUST 2020**

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*Prepared by British Chamber of  
Commerce Vietnam*



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Chambers of  
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# OUR TEAM



## what we do ?

The British Chamber of Commerce Vietnam (BritCham) was officially established in Ho Chi Minh in 1998 with its Ha Noi branch founded in 2007. BBGV aims to support and develop Vietnam-UK business links while raising the profile of Vietnam in the British business community and vice versa. As an accredited British Chamber, BBGV in association with the Department for International Trade (DIT), is committed to promote strong business links between Vietnam and the UK.



### BUSINESS MATCHING:

Partner search and one-to-one meetings with potential clients, agents/distributors or outsourcing partners



### BUSINESS DEVELOPMENT REPRESENTATIVE:

Provide a professional business development representative to act locally on your behalf, strengthen existing engagements with the Vietnam market on a long term basis and develop further business relationships within the market.



### INWARD INVESTMENT FACILITATION:

Business Registration, Site Selection, Factory/Office Set-up & Operations Support, HR & Financial Management



### BUSINESS SERVICES EVENTS:

Organise trade missions, product launches and seminars/workshops



### MARKET STUDIES:

Sector reports, competitor analysis and local prospect background research



### EXPORT OPPORTUNITIES:

Explore your export opportunities to Vietnam through DIT's portal [opportunities.export.great.gov.uk](https://opportunities.export.great.gov.uk)



### WEBINARS:

Online dialogues with experts within industries to forestall new trends in doing business in Vietnam



### BACK-OFFICE SUPPORTS

Due Diligence, Marketing Materials & Company Documents Translation, Vietnam Entry Services



# OUR ADVOCACY WORKS



The BRITISH ADVOCACY COMMITTEE, comprising of the Heads of some of the largest British companies operating in Vietnam, continue to provide support to BBGV in its engagement of key business issues and was instrumental in the support to gain the full VBF membership.



**BRITISH EDUCATION BUSINESS GROUP**  
– BEBG is a proposed working group of BBGV and its British Advocacy Committee, to work alongside the British Embassy, Department for International Trade and British Council.

## Members

**DIAGEO**



## Founding Members



# ECONOMY OVERVIEW



GDP per capita (USD)



Average growth



## World Bank (2019)'s Ease of Doing Business

Vietnam ranked **70th** amongst 190 countries (**4th in ASEAN**), with best performance in "Getting credits" and "Paying taxes", ranking 25 amongst all the economies.

The size of middle class in 2020 is expected to reach



Population

**96.5**  
million (2019)

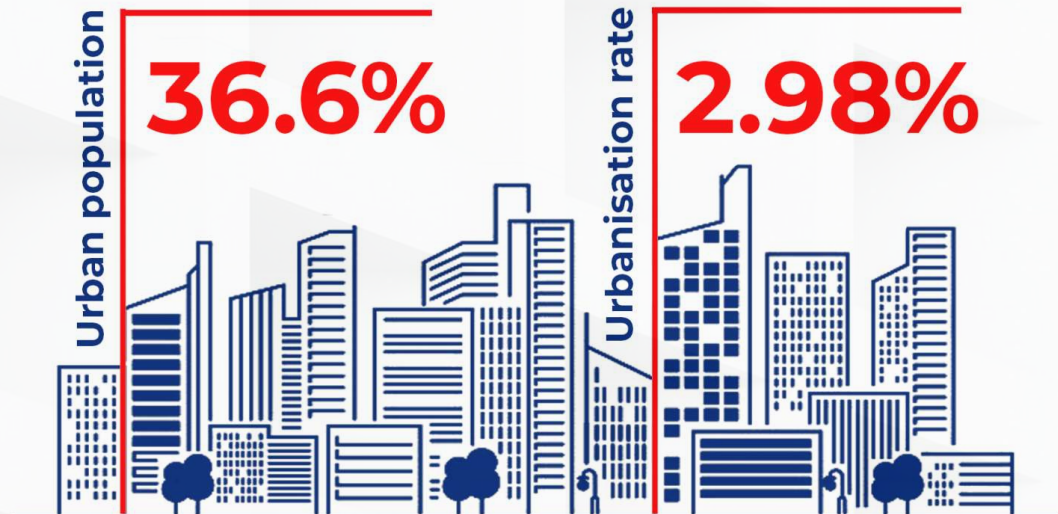


**33m**



Unemployment rate

**2.15%**



Quantity of Labour force

**57.4m**



Level of expertise

**22m**

people have higher than vocational degree



Asia Development Bank predicts that Vietnam growth rate will fall to 4.8% in 2020, but will bounce back to 6.8% in 2021.

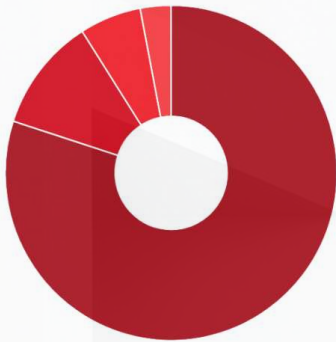


According to PWC, Vietnam is one of the few countries in the world that is expected to still grow, while others go into recession.



# SECTOR OVERVIEW

## 1. GDP contribution

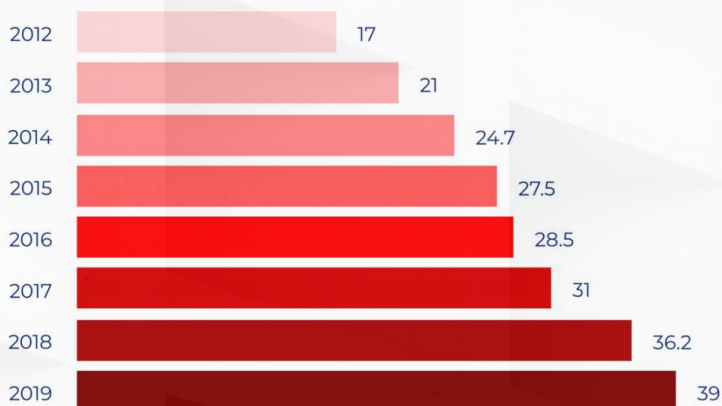


● Apparel ● Fiber ● Textile ● Others

**Chart 2 - 2019 Textile & Garment sector's GDP by products**

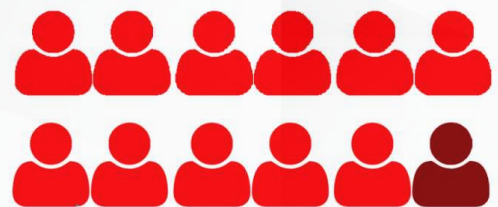
According to Vietnam Statistics Office, the textiles and garments industry in 2019 recorded a revenue of 39 billion USD (+16.6% YoY), in which apparel exports account for the majority of 80%, following by fiber exports (11%) and textile exports (6%).

## 2. Export turnover



**Chart 3 - T&G sector's export turnovers from 2012-2019 (billion USD) - GSO**

## 3. Workforce



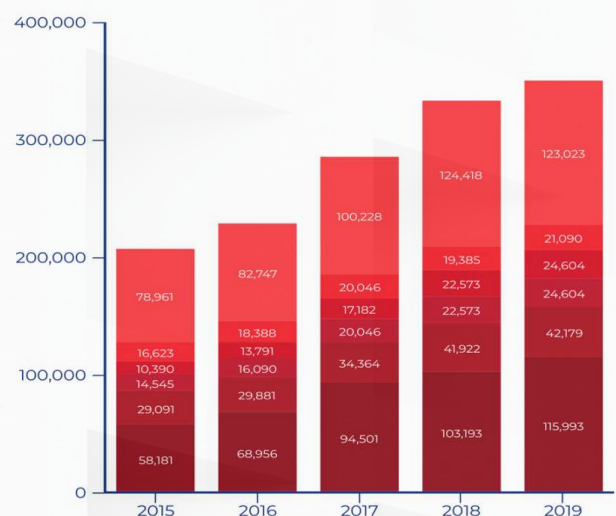
The T&G industry accounts for **12.5%** of total workforce (GSO)

## 4. Export contribution

Textile and garments are Vietnam second most exported products, after consumer electronics with CAGR from 2015-2019 being 9.6%

● Others  
● Agricultures  
● Machineries  
● Footwear  
● Textiles/Garment  
● Consumer electronics

**Chart 4 - Vietnam top export products**  
Source: GSO, PwC; Unit: USD million



# SECTOR OVERVIEW

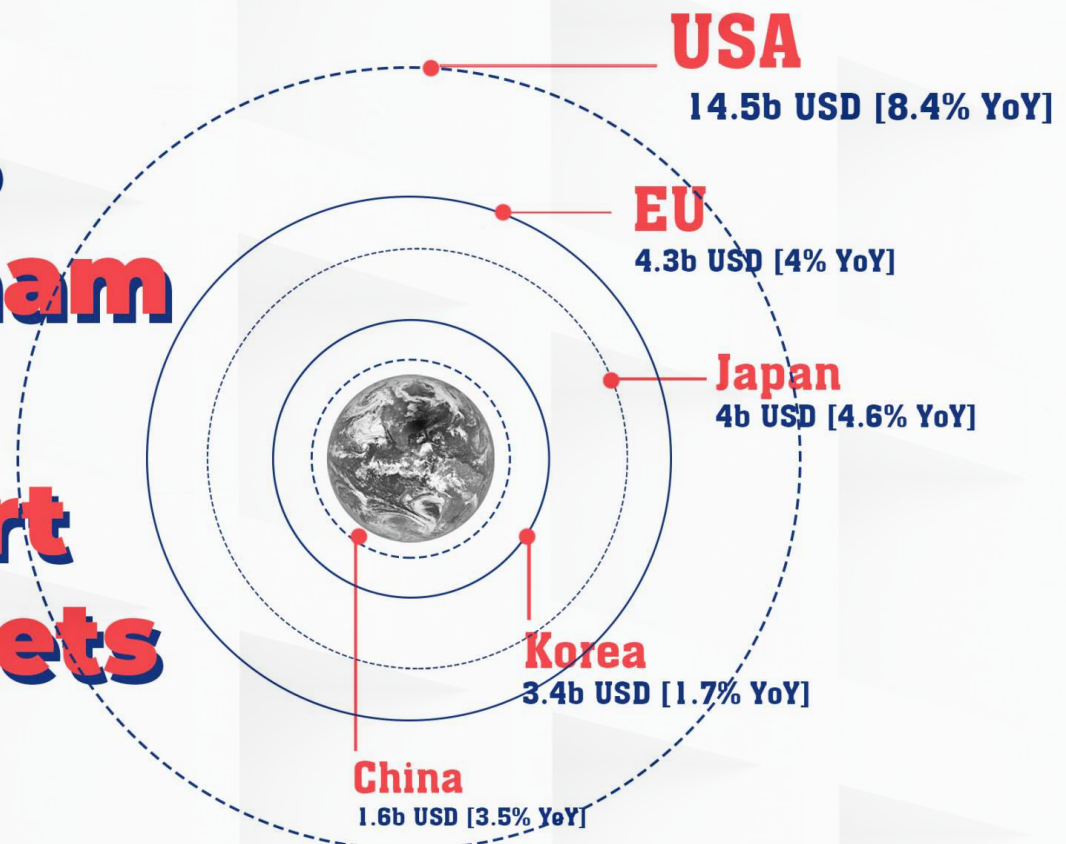
**TOP 10** WORLD TEXTILE EXPORTERS IN 2019  
(Source: Trademap; Currency: \$mn)

China	1		7,969	-0.9%
Germany	2		2,607	-10%
USA	3		2,149	-8.1%
South Korea	4		1,282	-3%
Italy	5		1,097	-5.4%
Japan	6		970.2	-1.7%
Netherlands	7		717.4	+0.8%
Vietnam	8		653.9	+4%
Belgium	9		494.5	-3.9%
Hong Kong	10		454.5	+1.7%

**TOP 10** WORLD GARMENT EXPORTERS IN 2019  
(Source: Trademap; Currency: \$mn)

China	1		71,440	-2.8%
Bangladesh	2		20,343	+1.1%
Vietnam	3		16,115	+16.3%
Germany	4		11,344	+2.2%
Italy	5		10,183	+5.7%
Turkey	6		9,089	+0.5%
Cambodia	7		8,817	+33.8%
India	8		7,908	+4.3%
Netherlands	9		6,717	+5.8%
Hong Kong	10		6,163	-11.5%

## Top 5 Vietnam T&G export markets





# VIETNAM PRODUCTION CHAIN VALUE

## 1. Cotton and Polyester



**Produced:** 500 tons of cotton (2018)



**Imported:**  
1034 thousands tons of cotton  
300 thousands tons of Polyester (2018)



Local production can only accommodate 1% of demand, thus enterprises rely mainly on imported materials.

## 2. Fiber



**Cotton yarn and short fiber**  
**Produced:** 1200 thousand tons  
**Imported:** 180 thousand tons  
**Exported:** 1100 thousand tons  
**Local consumption:** 280 thousand tons (2018)



**Long fiber**  
**Produced:** 200 thousand tons  
**Imported:** 380 thousand tons  
**Exported:** 70 thousand tons  
**Local consumption:** 510 thousand tons (2018)



Fast growing, however products are of low and average quality, which fails to meet the requirements of more demanding clients.

## 4. Sewing



**Exported:** 23.8 billion USD (2018)



Vietnam is the manufacturer for many famous brands around the world



However, the majority of factories follows the Cut-Make-Trim (CMT) method of production, which generate low profit.

## 3. Weaving and dyeing



**Produced:** 2.85 billion metres  
**Exported:** 0.39 billion metres  
**Imported:** 6.4 billion metres (2018)



This sector is severely underdeveloped. Finished products are of low quality, creating a paradox in which local enterprises have to import 70-80% of fabric while 2/3 of domestic cloth is exported every year.

## 5. Marketing and Distribution



Because of the focus on CMT manufacturing, most products are distributed through a third or contracted party. Thus, Vietnam has yet to establish a brand of its own and bring the garment & textile products known to the international market

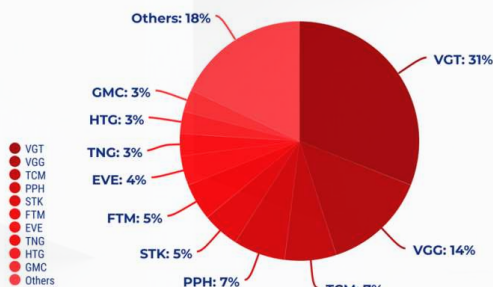
# MARKET SHARE AND NOTABLE T&G COMPANIES

## 1. Market share

In 2015, Vietnam had a registered number of 5000 companies operating in the T&G sector, 21 of which are publicly listed companies.

Chart 5: Stock Capitalisation of T&G companies

(Source: VIS)



## 2. Vietnam National Textile and Garment (Vinatex - VGG)



**VINATEX**

- The largest T&G company in Vietnam with 45 members.
- Main products: Fiber, textiles, apparel
- Revenue (2019): 815.64 million USD
- Gross profit (2019): 65 million USD
- Capacity: Threads: 147,486 ne30 tons/year; Textile: 18,000 tons of knitted fabric/year, 124 million metres of woven fabric/year; Apparel: 320 million products/year.

## 3. Viet Tien Garment Corp.



- Viet Tien is the subsidiary company of Vinatex and it's the second largest T&G company in Vietnam.
- Main products: Garment, apparel (mostly exports)
- Revenue (2019): 388 million USD
- Gross profit (2019): 48.4 million USD

## 4. Soi The Ky (STK)



- Main products: POY, DTY, FDY threads
- Market: Domestic (37%) – Export (63%)
- Revenue (2019): 95.7 million USD
- Gross profit (2019): 15 million USD
- Capacity: 63,000 tons DTY & FDY
- Technology: Chips spinning

## 5. Thanh Cong Group (TCM)



- Thanh Cong is one of the few companies in Vietnam to possess the complete Fiber – Textile – Dye – Sew manufacture chain.
- Main export markets: Korea, Japan, China
- Main products: Textile & Garment, Fashion retail, Real estate
- Revenue (2019): 156 million USD
- Gross profit (2019): 24.8 million USD

## 6. TNG



- TNG is the contracted manufacturer for renowned international brands such as ZARA, MANGO, GAP, etc. and also manage their own fashion brand – TNG Fashion.
- Main export markets: EU – US (account for 67% of order value)
- Main products: Apparel
- Revenue (2019): 198 million USD
- Gross profit (2019): 33.8 million USD
- Capacity: 11 sewing divisions, 2 apparel factories with 228 sewing chains.

## 7. Song Hong Garment (MSH)



- Main products: Garment & Cushion, pillow
- Production type: FOB 70% - CMT 30%
- Main export markets: EU, USA (for FOB products); Japan, Korea, Canada (for CMT products)
- Revenue (2019): 189 million USD
- Gross profit (2019): 39.8 million USD



# FOREIGN DIRECT INVESTMENT

## 1. Total investment value

The number of FDI companies in T&G sector though only accounts for 25% but they contribute 75% to total turnovers, this is because not only do FDI companies hold advantage over domestic companies in machine and technology but they also receive stable orders from their parent companies.

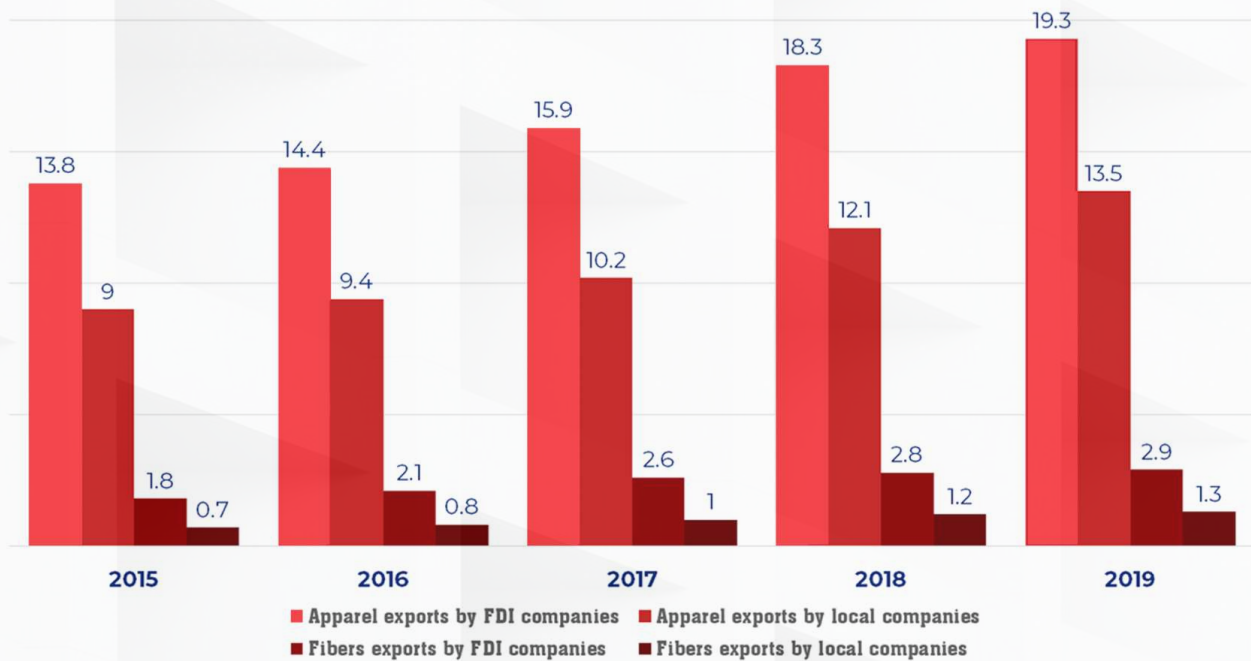


Chart 6 - Textile & Garment Sector's export turnovers from FDI and local companies (Billion USD)

## 2. Top investors



## 3. FDI structure

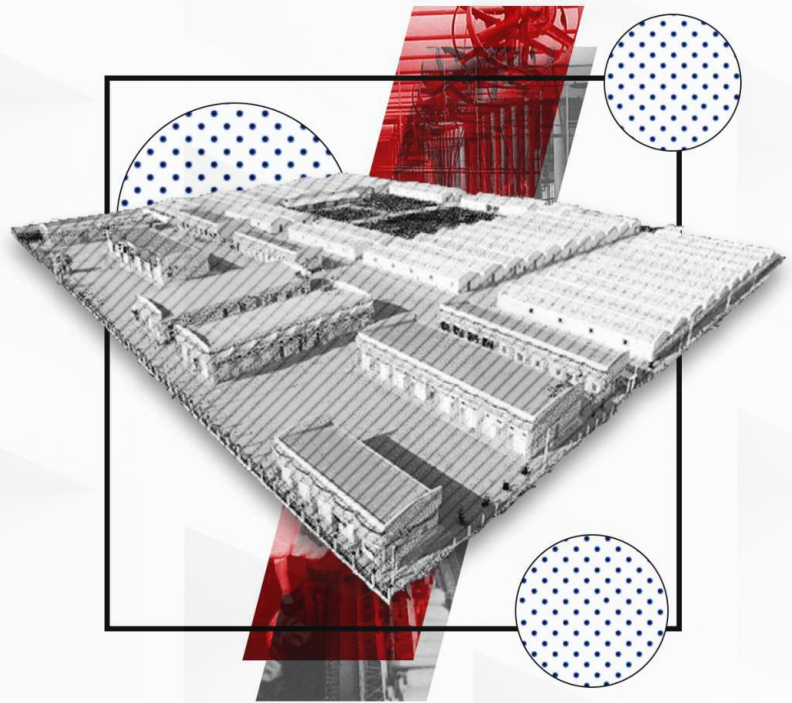


Chart 7 - Vietnam's 2019 FDI structure  
Source: VITAS

# NOTABLE & G FDI PROJECTS IN 2019

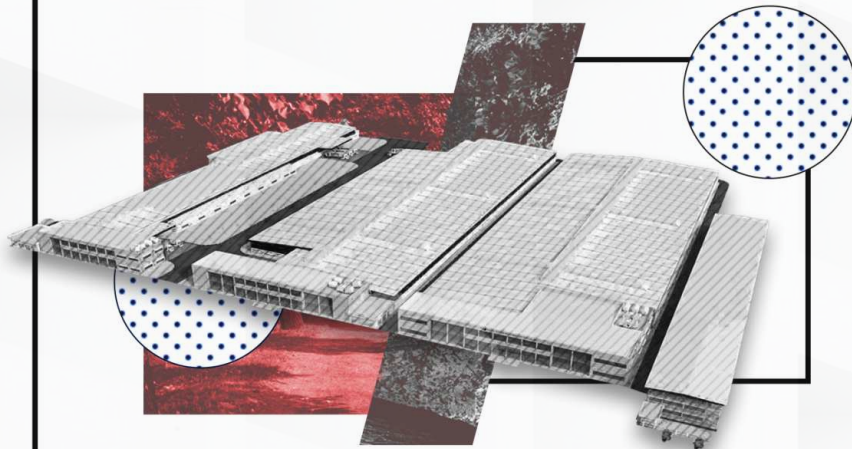
## **Vinhtex factory – Royal Pagoda Private Limited (Singapore)**

- Location: Nghe An Province
- Registered investment capital: 200 million USD
- Purpose: Produce fabric and dyeing knitting fabric in Nghe An
- Start date: April 2019



## **Whitex–Dung Quat factory – Whitex Corporation (Malaysia)**

- This is the second factory of Whitex in Vietnam after the construction of their factory in Da Nang in 2015
- Location: VSIP Quang Ngai
- Registered investment capital: 39.4 million USD
- Purpose: Textile and apparel production
- Start date: November 2019
- Due date (estimate): August 2019



## **Xindadong Textiles – Dung Quat factory - Xindadong Textiles Vietnam (China)**

- Location: VSIP Quang Ngai
- Registered investment capital: 20 million USD
- Purpose: Jean production
- Start date: April 2019



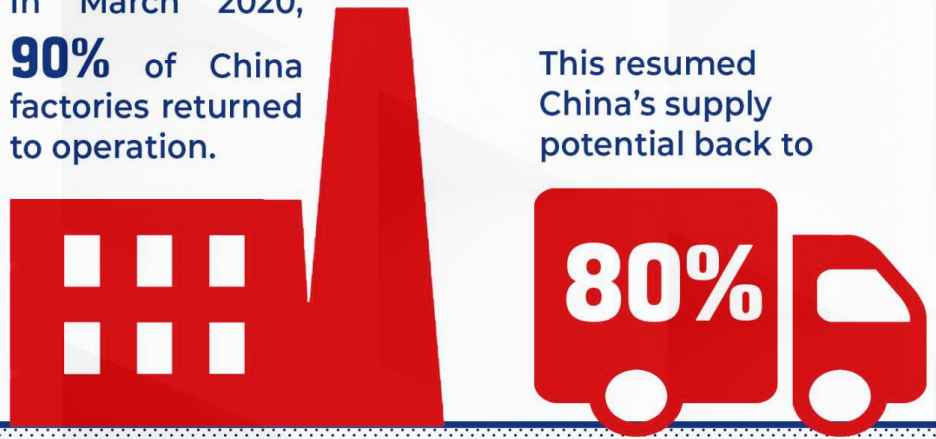


# T&G SECTOR DURING COVID-19

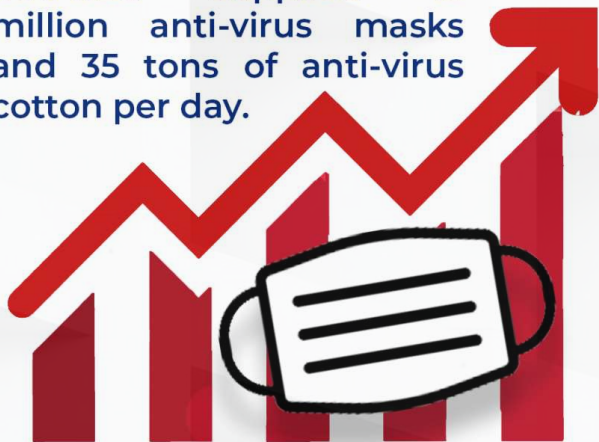
The effect of COVID on the T&G sector wasn't prominent at this stage. In this period, the biggest threat was the supply cut from China, however, this problem was soon contained.

In March 2020, **90%** of China factories returned to operation.

This resumed China's supply potential back to



In March 2020, the demand for masks boomed, VINATEX supplied 15 million anti-virus masks and 35 tons of anti-virus cotton per day.



Vietnam's Textile and Garment sector's two largest markets:



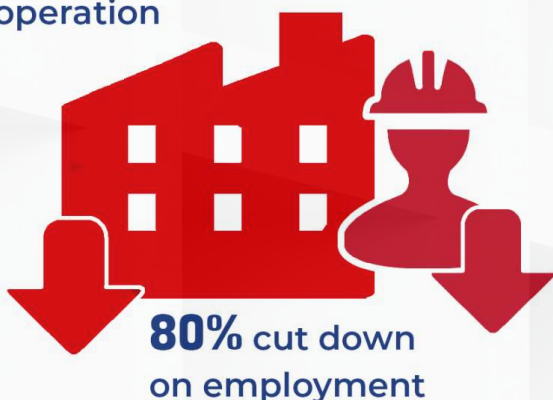
**50%** of exports



**13%** of exports

closed their border and practiced isolation measures, resulting in many cancelled orders.

**70%** of Vietnam T&G SMEs cut down on operation



**80%** cut down on employment

The total textile and garment export value in the first four months of 2020 dropped by 6.6% YoY to USD 10.64 billion, however, this is still lower than other exporting countries, with a decrease of 14-15%.



T&G industry's export value by the end of 2020 is estimated to reach **33.5b USD**

# T&G SECTOR REGULATIONS AND LEGAL UPDATES

## 1. Important legal documents

### **TCVN 6054: 1995 Common clothing**

This standard applies to common clothing such as trousers, shirts, skirts, suits, multi-layered garments made of woven, knitted and other fabrics. The clothing shape must conform to the design style and express proper aesthetics. The production of these apparels must be in accordance with the style and size specified in regulated standards or contracts.

### **TCVN 4737: 1989 Textile materials – Apparel fabrics – Quality standards**

This standard applies to woven and knitted fabrics used to make common apparel products. It also presents a list of quality criteria which serve as a basis for the establishment of future clothing standards and technical documents. These criteria does not apply to fabrics used to make protective clothing and special-purpose wear.

### **TCVN 2109: 1977 Apparel – Methods of sampling**

This standard applies to apparel products and disclose their sampling procedures. The quality of a shipment is determined by the average sampling taken from each lot. A shipment refers to the number of products that belongs to the same manufacturing unit, has the same shipping mark, and is packed in the same type of packaging, delivered concurrently and has the same Certificate of quality. Before sampling, the packaging, and marking must be check to ensure their consistency with current regulations.

### **QCVN 13-MT: 2015/BTNMT: National technical regulation on the effluent of textile industry**

This regulation stipulates the maximum permissible value of parameter of pollutants in the textile industrial effluent discharged into the receiving waters. This regulation applies exclusively to the textile dyeing industry, all organizations and individuals involved must comply with the provisions of this regulation.

### **Circular 23/2016/TT-BCT Abolition of Circular No.37/2015/TT-BCT**

This circular serves to abolish the Circular No. 37/2015/TT-BCT dated October 30, 2015 that regulates the limits and inspection of content of formaldehyde and aromatic amines derived from azo colorants in textile products.

### **Circular 21/2017/TT-BTC**

Issued on October 23, 2017 by the Ministry of Industry and Trade regulating the national limits of formaldehyde content and aromatic amines derived from azo dyes in textile products.

## 2. Legal updates

**Decree 05/2019/ND-CP** on Internal Audit (IA) in Vietnam which came into effect on April 1, 2019 making organizations have to adopt IA practices.

**Decision No.15/2020/QĐ-TTg** on 24 April, guiding the implementation of Resolution 42, to protect the workers.



# OPPORTUNITIES

## 1. Free Trade Agreements

At present, Vietnam is signatory to 19 free trade agreements, which poses as its greatest strength in attracting investment & exports. The recently most notable FTAs are CPTPP and EVFTA.

### CPTTP

The Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), ratified on 12th November 2018, is a free trade agreement between Vietnam and 10 other countries in the Asia-Pacific region: Australia, Brunei, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore and Canada. Once fully implemented, the 11 countries will form a **trading bloc representing 495 million consumers and 13.5% of global GDP**, providing Vietnam with preferential access to key markets in Asia and Latin America.

### EVFTA

Vietnam's National Assembly on 8th June 2020 ratified the EU-Vietnam Free Trade Agreement (EVFTA) and the EU-Vietnam Investment Protection Agreement (EVIPA) agreements between Vietnam and the EU. Based on this agreement, **100% T&G product will benefit a tax reduce to 0% within a maximum of 7 years** since the agreement came into power. Specifically, according to the Foreign Trade Department, EU will remove export tariffs on 77.3% of Vietnam export turnovers in the first 5 years and 22.7% of turnover in the next 2 years.

### Implication

- Vietnam's garment products will increasingly decrease the price gap with Bangladesh's (currently enjoying 0% import tax) and gain advantages over China (import tax 12%) while the preferential tax for Cambodia (0%) is currently discontinued due to recent labour rights violations (BVSC).
- EVFTA requirement "from garment onward" combine with CPTPP requirement "from thread onward" though may restrict the benefit enjoyed by local enterprises in the short term, it will, in the future, encourage the autonomy of material in businesses, increase production chain's value and reduce reliance on imported materials from overseas.
- Assuming the import tax rate decreases by 1%, the export turnover increases by 2% (excluding the annual export growth), it is forecasted that the export turnover to the EU in the period of 2020 - 2025 will increase as shown in the following chart



## 2. Global diversification of supply chain

After COVID-19, companies are shifting their supply chain from China to South East Asia, and Vietnam is emerging as the optimal choice for investors and manufacturers alike due to:

- **Abundant supply of workers**
- **Low minimum wage**
- **Strategic location**
- **Free trade agreements**

## 3. Facemask export

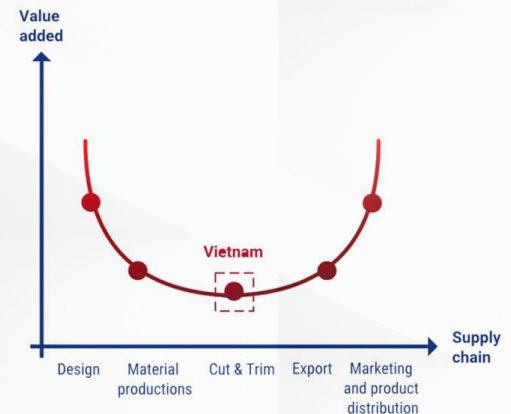
With the Government promulgating Resolution 60/NQ-CP of April 29, 2020, masks of all kinds, including cloth masks and medical masks, were allowed to be exported. From the start of 2020 to April 19, the total number of masks exported was **415.7 million pieces**, value estimated at **63.2 million USD**. The main export markets are Japan, Korea, Germany, USA, Hong Kong, Singapore.



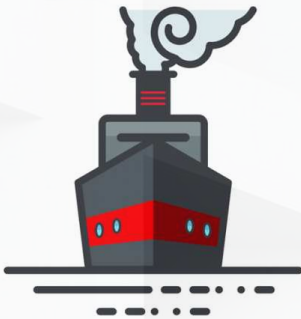
# CHALLENGES

## 1. Low production value

70% of T&G export products are manufactured under the Cut Make Trim (CMT) method, which results in low profit, most local enterprises hesitate to follow the more advanced practices such as OEM/FOB, ODM or OBM because they require modern equipment and technologies as well as large capital resource which few companies can fulfill. However, many researches and published papers have all agreed that in order for Vietnam T&G sector to develop and raise its production value, enterprises must go out of their way to invest and establish their own material supply chain as well as slowly shifting to ODM and OBM production method.



## 2. Reliance on import materials



While Vietnam export 2/3 of its fiber production, fabric supply mainly comes from import (accounting for 66% of consumption). The biggest challenge for the textile and garment sector comes from underdeveloped dyeing sector that lacks machinery, technology and requires high environmental cost. With the EVFTA and CPTPP's material requirements, if companies want to enjoy the benefit of these agreements, they must seek out local supply partners or develop their own complete production chain. For this, there is an urgent call for supporting industries promotion such as preferential policies for material businesses, solution to the issue of wastewater treatment in dyeing and other environmental-related issues.

## 3. Rules of origin

The lack of local suppliers for input materials is proving to be a major challenge for Vietnam's textile and garment industry to enjoy preferential treatment from the EVFTA and CPTPP, as it fails to comply with the rules of origin. As of present, nearly 90% of the input materials for the industry is currently being imported from countries which are not members of the EU or those which the bloc has signed trade deals with. Thus, a number of garment and textile producers are skeptical of opportunities from this market and expressed intentions to focus on their traditional markets due to the low cost of materials from China.

## 4. US-China trade war

Due to China – USA trade war, Vietnam textile industry has been experiencing a decrease in both exports and production. In 2019, Vietnam export to China, traditionally a major market that accounts up to 60% of turnovers, plummeted as China cut back on import. The majority of orders were of small volume and short-term as customers were constantly on the look-out for new development of the trade war. In addition, more and more Chinese orders have been shipped to countries with better tax incentives such as Cambodia and Bangladesh.

## 5. COVID-19

With two of its main export markets – USA & EU closing down, amongst all the industrial sectors in Vietnam, the textile and garment sector took the hardest hit. More specifically, the sudden order cancellation without any amends from foreign clients has left enterprises in dire state, especially since they had previously purchased materials for production. The total damage taken was estimated by VINATEX to be 515 million USD. Without immediate and adequate support from the government, many T&G enterprises could face bankruptcy (especially SMEs).



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