



INTERNATIONAL TEXTILE MANUFACTURERS FEDERATION  
FÉDÉRATION INTERNATIONALE DES INDUSTRIES TEXTILES  
INTERNATIONALE VEREINIGUNG DER TEXTILINDUSTRIE



国 际 纺 织 制 造 商 联 盟

年会 Conference

*November 4-6, 2012, Hanoi, Vietnam*

越南河内, 2012年11月4-6日

12

*ITMF Director General  
Christian Schindler, Ph.D., says:  
“Welcome to Hanoi. We are looking  
forward to many attendees at the  
annual ITMF conference.”*

国际纺织制造商联盟总干事  
Christian Schindler博士说：  
“欢迎来到河内。我们希望  
有更多代表参与ITMF会议。”

撰文：翟立甫，执行编辑  
Jürg Rupp, Executive Editor



Christian Schindler

## ITMF In Vietnam

## 国际纺织制造商联盟在越南

The ITMF 2012 Annual Conference will take place November 4-6 in Hanoi, Vietnam. It is co-organized by the Switzerland-based International Textile Manufacturers Federation (ITMF) and VINATEX, the Vietnam National Textile and Garment Group. The theme of the conference is “Challenges for the Textile Industry — Present and Future.”

“Volatile raw material markets, sovereign debt crises, currency disputes, political instability in some regions, a blocked Doha-Trade-Round, looming protectionism ... these are just a few of the short- and long-term risks that the world economy is confronted with and which have far reaching implications for the global textile value

chain.” With those words, ITMF is introducing the conference.

As ITMF states on its website, the conference delegates “will benefit from a wide range of presentations, meetings and workshops in order to:

- learn more about the ongoing changes affecting the global textile industry;
- exchange views and experiences regarding the challenges and opportunities of today and tomorrow; and
- meet colleagues from the textile and affiliated industries from around the world.”

**Textile World Asia** spoke to ITMF Director General Christian Schindler, Ph.D., about the reasons why Vietnam was chosen to be the host of this year’s conference.

**TWAsia:** *Why is this year’s annual ITMF conference taking place in Vietnam?*

**Schindler:** Vietnam has been opening up in the past two decades and has gradually integrated its economy into the global economy. Its proximity to many rapidly developing and emerging economies in Asia and the regional integration of its economy helped to spur investments and economic growth. Along with Vietnam’s economy as a whole, also its textile and apparel industry grew rapidly. Between 2000 and 2010, Vietnam’s textile and apparel exports surged from US\$2.1 billion to US\$13.5 billion — an average annual increase of 54.3 percent. While apparel exports still represent approximately 80 percent of the

## 国际纺织制造商联盟年会2012

2012国际纺织品制造商联盟年会将于11月4日-6日在越南河内召开。年会由总部位于瑞士的国际纺织品制造商联盟(ITMF)和越南国家纺织服装集团VINATEX联合主办。本届年会的主题是“纺织行业的挑战—当前和未来”。

“波动的原材料市场，政府债务危机，货币争议，一些地区的政治不稳定，悬而未决的多哈贸易回合谈判，隐约出现的保护主义...世界经济目前面临的一些短期及长期的风险，它们已经对全球纺织产业链产生了相当的影响。”ITMF通过这一开场白开始介绍本次年会。

正如ITMF在它的网站上所宣传的一样，本次年会的代表“将会从一系列的演讲、会议和研讨会中获益，能够：

- 更多的了解这些即将到来的变化对全球纺织行业的影响；
- 就今天和未来所面临的挑战和机遇交换意见和经验；
- 会见来自全球的纺织行业以及相关行业的同行。”

《亚洲纺织世界》专访了ITMF总干事Christian Schindler博士，获悉为什么选择越南作为今年会议的主办地的原因。

《亚洲纺织世界》：为什么今年的ITMF年会在越南召开？

**Schindler**：越南在过去20年里进行了改革开放，已经逐渐将自己的经济融入了全球经济当中。它临近亚洲很

多快速发展的新兴经济体，它的经济区域一体化有助于促进投资和经济增长。越南的总体经济，以及它的纺织服装产业都快速发展。在2000年到2010年之间，越南的纺织服装出口从21亿美元跃升到135亿美元——年平均增长率是54.3%。它的服装出口仍然占据了该产业出口的80%，但纺织品的出口也在快速增长。根据ITMF的国际纺织机械运输统计，越南的基础纺织领域投资非常强劲。特别是纺纱机械具有突出的增长。从2000年以来，越南纺织行业每年平均新增约21万锭的短纤纱锭。单在2011年，行业就新增短纤纺锭33万锭。

《亚洲纺织世界》：越南纺织行业通过主办本次会议将有什么收获？

**Schindler**：将ITMF年会带到越南是展示越南纺织服装产业的一次机会，可以促进对该行业的投资，并与来自全球的纺织业代表建立起纽带并讨论共同利益相关的话题。换句话说，主办ITMF年会提供了一个推动越南纺织服装产业发展的可能性。

《亚洲纺织世界》：你对参与这次会议的越南纺织行业具有什么期望？

**Schindler**：作为ITMF年会的共同主办方，我们希望参与者能够在各阶段的全体会议以及会议室以外的社交活动中讨论本行业面临的挑战和机遇。ITMF年会是一个真正的国际平台，让所有的参与者能更好的了解发展状况和全球纺织产业链即将到来

industry's exports, textile exports have increased significantly. According to ITMF's International Textile Machinery Shipments Statistics, investments in Vietnam's primary textile industry picked up strongly. Especially the segment of spinning machinery saw a strong increase. Since the year 2000, the Vietnamese textile industry has on average invested in approximately 210,000 new short-staple spindles every year. In 2011 alone, the industry installed 330,000 new short-staple spindles.

**TWAsia**: What are the benefits for the Vietnamese textile industry to organize this conference?

**Schindler**: Bringing the ITMF Annual Conference to Vietnam is an opportunity to showcase the Vietnamese textile and apparel industry, to promote investments in the industry, to build ties and networks with textile representatives from around the world and to discuss topics of mutual interest. In other words, hosting an ITMF Annual Conference provides the possibility to promote the Vietnamese textile and apparel industry.

**TWAsia**: What do you expect from this conference for the Vietnamese textile industry?

**Schindler**: As the co-organizer of the ITMF Annual Conference, we hope that the participants will discuss the challenges and opportunities of the industry in the various General Sessions as well as during the social activities outside the conference room. The ITMF Annual Conference with a truly

international platform enables all participants to better understand the developments and ongoing changes in the global textile value chain — from fibers to retail — that the industry needs to understand to overcome the challenges and to prosper in the future. Of course, we hope that the links between the Vietnamese and the international textile industry can be intensified and strengthened.

**TWAsia:** *What are your hopes for the ITMF attendees for the conference?*

**Schindler:** I hope that the participants will listen to informative presentations, will be able to participate in interesting discussions, will meet old and new colleagues and friends, will learn more about the Vietnamese textile industry, and will better understand the short- and long-term challenges and opportunities of the global textile industry.

**TWAsia:** *What should not be missed while visiting Vietnam and the conference?*

**Schindler:** Attending the ITMF Annual Conference in Hanoi enables every participant to experience first-hand this fascinating country with a vibrant and dynamic society and economy. If time allows, one should also consider participating in the ITMF post-conference tour to central Vietnam. The cultural and natural treasures of Vietnam are numerous and definitely worth visiting and seeing. We are looking forward to welcoming a lot of guests to Hanoi in November. **TWAsia**

的变化 — 从纤维到零售 — 这个行业需要通过了解去战胜挑战并迎来美好的未来。当然，我们也希望越南纺织产业与国际同行的联系能够得到加深和加强。

**《亚洲纺织世界》:** 你对ITMF与会代表参加会议有什么期望？

**Schindler:** 我希望代表们能倾听有价值的演讲，能够参与到有趣的讨论中，能够遇见老同事并结交新朋友，能够对越南纺织行业有更多的了解，以及能够更好的了

解全球纺织行业短期和长期面临的挑战和机遇。

**《亚洲纺织世界》:** 到越南访问并参加会议，什么是不能错过的？

**Schindler:** 到河内参加ITMF的年会可以让每一位参与者亲密接触这个充满活力和欣欣向荣的国度和它的经济。如果时间允许，代表可以考虑参加ITMF在会后组织的参观越南中部地区的游览活动。越南有数不尽文化和自然景观，一定值得参观和访问。我们希望能于11月的河内迎来大量的宾客。 **TWAsia**

## VINATEX

### 越南国家纺织服装集团

VINATEX属于其母公司越南国家纺织服装集团所有；包括了研究和培训中心；下属大约120家子公司，包括一些涉足不同领域的股份合作企业，例如纺织服装生产和商业服务。该机构主席是Vu Duc Giang。

VINATEX制定了2015年越南纺织服装行业发展战略，并将目标指向2020年，包括集中发展专业化和现代化，提高纺织服装产品的附加值。该组织的行动纲领有两大任务：

- 通过完成三大决定性项目来实现该国纺织服装行业的可持续性、稳定以及长期的发展，包括棉花种植，优质纺纱和人力资源的培训；
- 完成所有国有纺织服装企业以及VINATEX的资本化。

VINATEX is owned by mother company Vietnam National Textile and Garment Group; research and training centers; and nearly 120 sub-companies, which include joint stock companies doing business in various fields, such as textile apparel manufacturing and commercial services. The organization's chairman is Vu Duc Giang.

VINATEX's strategy for developing the Vietnamese textile apparel industry until 2015, with orientation toward 2020, includes a focus on specialization and modernization to offer added value in textile apparel products. The organization's approach comprises two initiatives:

- to achieve sustainable, stable and long-term development of the country's textile apparel industry by implementing three decisive programs — cotton planting, high-quality spinning and human resources training; and
- to complete capitalization of all state-owned textile apparel enterprises and VINATEX.

# 越南 Vietnam:

## A Small Tiger Is Growing Up 一只正在崛起的小老虎

经历了严峻的时期，越南付出了艰苦的努力成为东南亚地区纺织产业的一个主要竞争者。

*After severe times, Vietnam has made tremendous efforts to become a serious player in the textile industry in Southeast Asia.*

《亚洲纺织世界》特别报告  
Textile World Asia Special Report



**自** 北方和南方统一以来，从很低的水平开始发展，现在越南已经成为全球纺织产业中的有力竞争者。纺织服装行业对整个国家的日益繁荣发挥着重要作用。越南纺织行业现有超过3800家企业，在国家出口当

中具有相当分量。国有企业仅占了越南商业中的0.5%；但是有75%的是合资或者有限责任公司。在全球纺织品服装出口中越南位居第五位，该行业目前相关从业人员超过了200万人，其中130万人直接为该行业工作。

### 越南国家纺织服装集团

越南国家纺织服装集团(VINATEX)是一家在亚洲颇具实力的纺织服装集团公司，它与65个国家超过400家组织有业务联系。它于1995年国有纺织服装企业的兼并重组中成立。在它的120个组成机构中，95%已经完成股份化改造。VINATEX下属企业雇佣了越南纺织服装行业约9%的劳动力，出口量占全国的18%。

### 经济

越南的国民生产总值(GDP) 2011年的增长率是5.9%，比

2010年的6.8%有所下滑。但是，考虑到该国在努力控制通货膨胀，2011年的GDP保持了相对高速增长。

越南在2011年纺织品服装出口总值达到了158亿美元，同2010年比增长24.4%。它的主要出口市场是美国，在它的所有出口中占到了69亿美元；其次是欧盟国家，25亿美元；第三是日本，17亿美元。从出口产品看，纱线出口17.9亿美元—比上年增长27.8%。中国市场约占其纱线出口的30.5%；韩国占16.1%；土耳其占15.4%。越南的面料出口达到了8.317亿美元。

## Main Products Produced By VINATEX Members VINATEX 集团企业的主要产品

| Product 产品                   | Unit 单位                        | 2005          | 2006          | 2007          | 2008          | 2009          | 2010          | 2011          | est<br>预计 |
|------------------------------|--------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------|
| Yarn • 纱线                    | 1,000 mt • 公吨                  | 109           | 123           | 121           | 116           | 115           | 117           | 112           | 112       |
| Fabrics • 面料                 | million m <sup>2</sup> • 百万平方米 | 196           | 222           | 203           | 209           | 224           | 222           | 235           | 235       |
| Apparel • 制衣                 | million pcs • 百万件              | 171           | 186           | 205           | 224           | 226           | 245           | 267           | 267       |
| <b>Total Revenues</b><br>总收入 | <b>billion VND</b><br>10亿越南盾   | <b>17,811</b> | <b>20,055</b> | <b>22,455</b> | <b>22,960</b> | <b>24,264</b> | <b>29,719</b> | <b>35,912</b> |           |

Source • 资料来源: VINATEX

Table 1 • 表1

在2012年上半年, 越南纺织品服装出口仍然继续保持增长, 达到77亿美元 — 跟2011年同一时期相比增长8.2%。

2011年, 不包括附件在内的纺织品进口为93亿美元 — 相比2010年的72亿美元增长了28.8%。棉花进口共计33.26万吨, 价值10.5亿美元。其它纤维和纱线的进口量为61.41万吨, 价值15.3亿美元。面料进口将近67亿美元。

### 产业结构

越南有70家纺纱厂, 其中31家在越南北部, 6家在中部, 33家在南部。

截止2011年底, 纺织行业雇佣了84万名员工 — 相比2010年增长了11.2%。纺织工人的平均小时工资换算成美元是60美分。

### 重要的零售行业

越南纺织行业的基础主要是零售业务。该国有71个纺织品/服装超市, 分布在25个城市和省份。计划到2015年超市和贸易中心的数量将增加到200个, 并在越南的北部和南部建立起纺织服装原材料及附件中心。另外还有计划推动和促进时装品牌以提升竞争力, 并建立在线的纺织品服装贸易网站。

From humble beginnings since the reunification of its northern and southern regions, Vietnam has become a strong player in the global textile market. The textile and apparel industry plays a major role in increasing the country's prosperity. The Vietnamese textile industry, with more than 3,800 companies, is the leading export sector.

State-owned enterprises make up just 0.5 percent of Vietnam's businesses; however, 75 percent are joint stock or limited companies. The country ranks fifth worldwide in textile and apparel exports and has a labor force in that sector of more than 2 million people, of whom 1.3 million are working directly in the industry.

### VINATEX

The Vietnam National Textile and Garment Group (VINATEX) is one of Asia's leading textile and apparel groups, and has a relationship with more than 400 organizations from 65 countries. It was established in 1995 as a result of merging textile and apparel state-owned enterprises. Of its 120 members, 95 percent already have been equitized. VINATEX member companies account for 9 percent of the Vietnamese textile and apparel industry's total labor force and 18 percent of total exports.

### Economy

Vietnam's gross domestic product (GDP) grew by 5.9 percent in 2011, down from 6.8 percent in

## Vietnamese Textile Capacities And Imports In 2010 2010年越南纺织品产量及进口量

| Product 产品            | Unit 单位                        | Capacity 产量 | Import 进口量 |
|-----------------------|--------------------------------|-------------|------------|
| Yarn • 纱线             | 1,000 mt • 公吨                  | 514         | 582.2      |
| Wovens • 梭织           | million m <sup>2</sup> • 百万平方米 | 680         | 2180       |
| Circular knits • 圆针织物 | 1,000 mt • 公吨                  | 58          | 70         |
| Flat knits • 平针织物     | 1,000 mt • 公吨                  | 23          | 106.1      |
| Towels • 毛巾           | 1,000 mt • 公吨                  | 38          | —          |
| Tire cord • 轮胎帘子布     | 1,000 mt • 公吨                  | 8           | —          |
| Nonwovens • 非织造布      | million m <sup>2</sup> • 百万平方米 | 19          | —          |

Source • 资料来源: VINATEX

Table 2 • 表2

## Vietnamese Textile And Apparel Industry Development Plan 越南纺织服装行业发展计划

|                     |               | 2010                                   | 2015                                    | 2020                                    |
|---------------------|---------------|--|---|---|
| Export • 出口量        | US\$ • 美元     | 11.2 billion • 112 亿美元                 | 18 billion • 180 亿美元                    | 25 billion • 250 亿美元                    |
| Capacity/year • 年产量 | Spinning • 纺纱 | 550,000 mt<br>55 万吨                    | 880,000 mt<br>88 万吨                     | 1 million mt 吨<br>1 百万吨                 |
|                     | Weaving • 织造  | 680 million m <sup>2</sup><br>6.8 亿平方米 | 1,500 million m <sup>2</sup><br>15 亿平方米 | 2,000 million m <sup>2</sup><br>20 亿平方米 |
|                     | Apparel • 制衣  | 1.8 billion units<br>18 亿件             | 2.85 billion units<br>28.5 亿件           | 4 billion units<br>40 亿件                |
| Workforce • 从业人员    |               | 2 million • 200 万                      | 2.75 million • 275 万                    | 3 million • 300 万                       |

Source • 资料来源: VINATEX

Table 3 • 表3

2010. However, 2011 GDP growth was relatively high considering the country's efforts to control inflation.

Vietnam's textile and apparel exports in 2011 totaled US\$15.8 billion, up 24.4 percent compared to 2010. Its main export markets were the United States, which accounted for \$6.9 billion of those exports; the European Union, \$2.5 billion; and Japan, \$1.7 billion. Of the total textile and apparel exports, yarn exports accounted for \$1.79 billion — up 27.8 percent from the previous year. China accounted for 30.5 percent of yarn exports; Korea, 16.1 percent; and Turkey, 15.4 percent. Vietnam's fabric exports totaled \$831.7 million.

Vietnamese textile and apparel exports continued to record growth in the first six months of 2012, growing by US\$7.7 billion — an 8.2-percent increase over the same period in 2011.

In 2011, textile imports, not including accessories, netted US\$9.3 billion — a 28.8-percent increase over 2010 imports worth US\$7.2 billion. Cotton imports totaled 332,600 metric tons (mt) valued at US\$1.05

billion. Imports of other fibers and yarns totaled 614,100 mt and were worth US\$1.53 billion. Fabric imports totaled approximately US\$6.7 billion.

### Structure

There are 70 spinning companies in Vietnam, 31 of which are located in northern Vietnam, 6 in the middle region and 33 in the south.

At the end of 2011, the textile sector employed some 840,000 people — 11.2-percent more than in 2010. The average hourly wage for textile workers that year was 60 cents in U.S. currency terms.

### Important Retail Business

The cornerstone of the Vietnamese textile industry is basically the retail business. The country has 71 textile/apparel supermarkets, with locations in 25 cities and provinces. Plans call for increasing that number to 200 supermarket and trade centers nationwide by 2015, and to establish textile and apparel material and accessories centers in northern and southern Vietnam. Plans are also in place to

越南纺织品服装行业的客户包括全球主要品牌。仅仅举其三大主要出口市场仅仅举其三大主要出口市场,美国的品牌及零售商包括 JCPenney、耐克、Gap、Philips Van Heusen、Liz Claiborne、Target 以及 Perry Ellis; 欧洲的品牌及零售商包括玛莎、C&A、Otto、骆驼、Seidensticker、皮尔卡丹以及 Jacques Britt; 日本的品牌及零售商包括伊藤洋、Nissho Iwai、Marubeni、Mitsui、Seikyo、Mitsukoshi 以及 Katakura。

### 产量

越南每年消耗的棉花大约是40万吨 — 其中35%从美国进口, 32%从印度进口, 19%来自南非。

2010年, 越南共有环锭纺365.6756万锭, 气流纺10.4348万锭。它每年的纱线产量是51.4万吨, 主要都是纯棉纱。国内市场消耗占了所生产纱线的34.7%。2010年梭织织物的产量是6.8亿平方米。上述产品及其它纺织品的现有产量和进口量见下面的表2。

## 国际纺织制造商联盟年会2012

### 投资机会

正值越南寻求加强它在全球服装市场上的竞争力之际，投资项目，以及政府对外来投资的鼓励政策，被认为是越南纺织服装行业提升的中心。其它的有利因素包括低廉的劳动力价格和稳定的政治环境。

今天的越南纺织行业包括了服装裁剪企业。计划中的投资将为上游纺织品生产建立制造能力。在2012-2014年VINATEX计划投资上游纺织生产有以下几种：

- 粘胶纤维工厂(第一阶段): 3万吨/年产量; Quang Ngai省
- 6万锭紧密纺工厂: 4500吨/年产量; Pho Noi B产业区(Hung yen省)
- 坯布面料工厂: 3000万平米/年产量; Pho Noi B产业区(Hung yen省)
- 染色工厂: 3000万平米/年产量; Pho Noi B产业区(Hung yen省)

promote and enhance fashion brands to increase competitive strengths, and to create an online textile/apparel trade website.

The Vietnamese textile and apparel industry's customers include the top labels worldwide. To name a few from the top three markets, U.S. brands and retailers include, among others, JCPenney, Nike, Gap, Philips Van Heusen, Liz Claiborne, Target and Perry Ellis; European brands and retailers include Marks & Spencer, C&A, Otto, Camel, Seidensticker, Pierre Cardin and Jacques Britt; and Japanese brands and retailers include Itochu, Nissho Iwai, Marubeni, Mitsui, Seikyo, Mitukoshi and Katakura.

### Capacities

Vietnam consumes some 400,000 mt of cotton annually — with 35 percent of that total imported from the United States, 32 percent from India and 19 percent from South Africa.

In 2010, 3,656,756 ring spindles

and 104,348 rotors were installed in Vietnam. Total yarn production capacity was 514,000 mt per year, primarily for 100-percent cotton yarn. Domestic consumption accounted for 34.7 percent of the yarn produced. Woven fabric capacity in 2010 was 680 million square meters (m<sup>2</sup>). The available production capacities and imports of these and other textile products are shown in Table 2.

### Investment Opportunities

Investment projects, along with government incentives for foreign investment, are deemed to be central to the improvement of the Vietnamese textile and apparel industry as Vietnam seeks to strengthen its competitive position in global apparel markets. Other contributing factors include low labor costs and a stable political environment.

The Vietnamese textile industry today comprises mainly apparel cut-and-sew enterprises. Investments are in the works to build manufacturing capacity for upstream textile

### VINATEX Target And Development Plan VINATEX 发展目标

|                     |               | 2010                                   | 2015                                   | 2020                                   |
|---------------------|---------------|--|--|--|
| Turnover • 营业额      | VND • 越南盾     | 29,719 billion                         | 53,858 billion                         | —                                      |
| Export • 出口量        | US\$ • 美元     | 1.9 billion • 19 亿美元                   | 3.9 billion • 39 亿美元                   | 5 billion • 50 亿美元                     |
| Capacity/year • 年产量 | Spinning • 纺纱 | 117,200 tons<br>11.72 万吨               | 231,000 tons<br>23.1 万吨                | 300,000 tons<br>30 万吨                  |
|                     | Weaving • 织造  | 222 million m <sup>2</sup><br>2.22 亿平米 | 506 million m <sup>2</sup><br>5.06 亿平米 | 675 million m <sup>2</sup><br>6.75 亿平米 |
|                     | Apparel • 制衣  | 245 million units<br>2.45 亿件           | 503 million units<br>5.03 亿件           | 706 million units<br>7.06 亿件           |
| Workforce • 从业人员    |               | 110,000 • 11万                          | 210,000 • 21万                          | 290,000 • 29万                          |

Source • 资料来源: VINATEX

Table 4 • 表4



production. Among 2012-2014 VINATEX planned investments in upstream textile production are the following:

- Viscose fiber plant (phase one): 30,000 mt/year capacity; Quang Ngai Province;
- Compact spinning mill with 60,000 spindles: 4,500 mt/year capacity; Pho Noi B Industrial Zone (Hung yen province);
- Greige fabrics plant: 30 million running meters/year capacity; Pho Noi B Industrial Zone (Hung yen province); and
- Dyeing plant: 30 million running meters/year capacity; Pho Noi B Industrial Zone (Hung yen province).

## Human Resources

VINATEX is focusing on R&D and training to foster competitiveness. There are plans for the long-term development of vocational schools and colleges. In this context, 20,000 workers should receive training to reach intermediate, college, or higher skill levels. Furthermore, there is a plan to provide the industry with some 60,000 educated and skilled workers every year. And finally, the textile industry wants to cooperate with international partners to provide high-quality training.

## Future Plans

The Vietnamese textile and apparel industry has an ambitious target plan, with investment capital estimated to total approximately US\$25 billion in 2020 (See Table 3). A complete infrastructure is planned for the industrial

## 人力资源

VINATEX 正致力于研发和培训以提高它的竞争力。计划修建职业学校和院校以适应长期发展。在这个项目中, 2 万名工人将得到培训, 达到中等、院校级和更高水平。此外, 还有一项计划每年为行业输送近 6 万名受过教育的熟练工人。最后, 纺织行业希望与国际伙伴合作提供优质培训。

## 未来的计划

越南纺织服装行业制定了一个野心勃勃的目标计划, 到 2020 年投资额预计将达到约 250 亿美元(见表 3)。一套完整的基础设施建设计划将在纺织行业聚集区实施, 包括交通系统、电力和水力供应, 排水和废水处理中心等。

目前纺织服装行业的总占地面积达到 510 公顷, 主要集中在两个区域: 北部, Pho Noi B 占据面积 121 公顷, Bao Minh 占据 165 公顷; 南部,

## 越南纺织行业自我评估 Vietnamese Textile Industry Self Evaluation

在 VINATEX 协助下, 越南的纺织行业对自身的优势和不足之处做了 SWOT 分析。SWOT 分析是一种对业务或项目进行优势、劣势/局限、机遇以及挑战进行战略分析的方法。

### 优势

- 占主导的出口量和极具潜力的国内市场;
- 工资低廉的熟练工人;
- 翻新及现代化的设备;
- 稳定的政治环境;
- 政府鼓励政策。

### 劣势

- 大部分企业是中小规模;
- 50% 的原材料需要进口;
- 生产管理仍然不足和低效;
- 对市场战略不重视。

### 机遇

- 从中国到东南亚联盟国家包括越南的产业转移趋势;
- 从潜在市场例如俄罗斯和韩国吸引投资者;

- 在美国、欧盟和日本市场份额正不断扩大;
- 人口众多: 8600 万人。

### 挑战

- 包括中国、印度和印度尼西亚在内的强劲竞争对手;
- 技术、卫生、社会责任等方面的问题。

### 竞争优势

然而, 相比它的邻近几个国家, VINATEX 例举了几项主要的竞争优势:

- 在熟练、快速学习及工资低廉的劳动力方面具有丰富资源;
- 现代化设施支持高质量的水处理系统;
- 在制造及出口上的地理位置具有价格竞争力;
- 与国际大买家/进口商具有良好的有力的纽带;
- 优质产品的信誉度得到承认;
- 与主要出口市场的自由贸易协议的支持。

## 国际纺织制造商联盟年会2012

Binh An 占据 76 公顷，VINATEX Tan Tao 占据 148 公顷。计划中纺织服装生产工业占地面积未来将极大拓展。

此次扩建包括以下项目，由土地总 1.080 公顷组成：

- 北部：Ha Nam；  
Nam Dinh；  
Nghe An。
- 中部：Da Nang；  
Khanh Hoa；  
Binh Thuan。
- 南部：Long An；

Ben Tre；  
Tra Vinh。

### 光明的未来

随着纺织企业不断升级它们的设备以提高竞争力，越南纺织行业的未来充满了希望。在过去 3 年里，该行业的产业结构发生了巨大的变化，特别是纺纱部门。 **TWAsia**

执行主编 Jürg Rupp 和助理编辑 Janet Bealer Rodie 对本文亦有贡献。

In collaboration with VINATEX, the Vietnamese textile industry evaluated its own strengths and weaknesses in a SWOT analysis. A SWOT analysis is a strategic planning method to evaluate the strengths, weaknesses/limitations, opportunities and threats involved in a business or project. Here is the outcome of the analysis:

### Strengths

- Dominant exporting capability and highly potential domestic market;
- Low costs, skillful labor force;
- Renovated/modernized equipment;
- Stable political environment; and
- Incentive policies.

### Weaknesses

- Most enterprises are medium and small size;
- 50 percent of raw materials are imported;
- Production management is still weak and inefficient; and
- Marketing strategy is not paid serious attention.

### Opportunities

- Shifting trend from China to Association of Southeast Asian Nations

- (ASEAN) countries, including Vietnam;
- Attracting investors from potential markets such as Russia and Korea;
- Expanding market share in United States, European Union and Japan market; and
- Large population: 86 million people.

### Threats

- Strong competition from rivals including China, India and Indonesia; and
- Bargains of technology, hygiene, social responsibilities.

### Competitive Advantages

However, VINATEX has defined some important competitive advantages over its neighboring states, such as:

- Abundant source of skillful, fast-learning and wage-competitive labor;
- Modern facilities backed with high-quality water treatment systems;
- Cost-competitive locations for manufacturing and exporting;
- Good and strong relationships with big international buyers/importers;
- Recognition of credibility for high-quality products; and
- Support from free trade agreements with major exporting markets.

Source • 资料来源：VINATEX

areas, including traffic systems, power and water supply, drainage and wastewater treatment centers.

The current textile and apparel industrial total area of 510 hectares (ha) is based in two regions: in the north, in Pho Noi B comprising 121 ha and Bao Minh comprising 165 ha; and in the south, in Binh An comprising 76 ha and VINATEX Tan Tao comprising 148 ha. There is an ambitious plan to further extend the industrial area for textiles and apparel production. The expansion includes the following projects, comprising a land total of 1,080 ha:

- North:  
Ha Nam;  
Nam Dinh; and  
Nghe An.
- Center:  
Da Nang;  
Khanh Hoa; and  
Binh Thuan.
- South:  
Long An;  
Ben Tre; and  
Tra Vinh.

### Bright Future

The future of the Vietnamese textile industry looks bright due to continuous efforts of textile companies to upgrade their equipment to enhance their competitiveness. Over the last three years, there has been a fundamental change in the industry's structure, especially in the spinning subsector. **TWAsia**

Executive Editor Jürg Rupp and Associate Editor Janet Bealer Rodie contributed to this report.