Vietnam and the End of the Multi-fibre Arrangement: A Preliminary View

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Textiles and clothing (T&C) have been the archetypal 'starter' industries in industrialization. Following the examples of Britain in the 18th century and Japan in the 20th, many developing countries have stimulated their economic growth by becoming exporters of T&C. World trade in T&C was tightly controlled for the thirty years from 1974 under a series of international Multi-fibre Arrangements ('MFA's). Access to major markets–principally the US and the European Union–was restricted by annual quotas imposed on exporting countries, under which total exports in a series of tightly defined categories were limited to volumes specified by country. In 1994 as part of the 'Uruguay round' trade negotiations under GATT,[1] a gradual phase-out of the MFA over a ten-year period was agreed. This was the Agreement on Textiles and Clothing ('ATC'), under which all quotas were to be abolished by the end of December 2004, with textiles and clothing being 'integrated' into the normal WTO rules governing trade.

By restricting the exports of major garment and textile producers, particularly China, not only did the MFA seek to protect domestic producers in Western markets, but it also served to encourage producers in other developing countries to become new exporters. Now that the MFA/ATC is no more, a number of developing countries have become vulnerable to competition from China and other large producers such as India. This paper looks at the experience of Vietnam[2] as a relatively new entrant to the global market. Vietnam is not as vulnerable (dependent on T&C exports) as some countries, since it has a relatively diversified export portfolio, but T&C exports are its largest manufacturing export. By considering the case of Vietnam, this paper hopes to provide partial answers to the question of how vulnerable countries can stay in the game,

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post-MFA[3], and–indirectly–whether T&C can continue to be drivers of export-oriented industrialization for new entrants to the global economy.

Section 1 now looks at the issue of vulnerability and further justifies the choice of Vietnam as a case study. Section 2 introduces key characteristics of world T&C trade, including the role of global buyers and the pressures facing all producers. Section 3 discusses the predictions about the impact of the end of the MFA and compares these to the initial outcomes. Section 4 concludes.

1. Vulnerability and the Choice of Vietnam as a Case Study

1.1 Vulnerability: Textiles vs Clothing

Although the textiles and clothing sectors are often referred to as if they were a single composite industry, textiles are more capital intensive than clothing, and have become increasingly so (OECD 2004 : 21). Vulnerability to competition usually refers primarily to clothing exporting, although a few developing countries, such as Pakistan, are significant exporters of textiles and face Chinese competition in their export markets. Historically textiles have been more of a driver of industrialization in low income countries than clothing, since garments can be produced in households or by small-scale tailoring using purchased fabrics. Textiles, though more capital intensive than clothing, are typically less capital intensive than the manufacturing average.[4] Often built up under tariff protection as part of import substituting industrialization policies, textiles in developing countries may lack the ability to produce at international standards of quality. And as an import-competing industry, they have been vulnerable to competition in their domestic market as countries reform and liberalise their trade regimes.[5] As a result of this competition, textile production in the world economy has become more concentrated geographically (Brenton and Hoppe 2006 : 151).

Countries that have entered the world market in recent years as garment exporters often have not done so on the basis of clothing using domestic textiles. Indeed, garment exporting to take advantage of unused MFA quotas may not even have been the result of domestic firms expanding into global markets, but of inward direct foreign investment (‘DFI’). In Cambodia, for example, the industry is almost entirely in the hands of foreign firms, although in Bangladesh it is predominantly locally owned (UNCTAD 2005 : 12) ; but in both cases the export of clothing depends on imported fabrics. Section 2 will show the key role that global buyers have played in such developments. In this paper we focus on vulnerability with regard to garment exporting, taking textile production into account where it affects export competitiveness in clothing. Textiles themselves, however, are important in world trade, accounting for 42 per cent of total world T&C exports in 2005 (WTO 2006). This partly reflects trade in non-clothing items such as industrial and home textiles,[6] but it is also the result of the trade-intensive nature of clothing production. Even China, the world's largest garment exporter and textile exporter,[7] is also the world's second largest textile importing country after the US (WTO 2006).

1.2 The Choice of Vietnam

Table 1 illustrates a number of countries that are heavily dependent for their export earnings on garment exporting, including Cambodia and Bangladesh, already mentioned. While Vietnam is by no means as heavily dependent on garment exporting as the other countries listed, it is interesting for a number of other reasons too. As Table 2 shows, it experienced an exceptionally rapid increase in its T&C exports in the 1990s, as part of its entry into the global economy under its *doi moi* economic reform programme, started in the mid-1980s and following the collapse of its export markets in the former Soviet Union and Eastern Bloc at the start of the 1990s. Whilst its high

Table 1 Dependence on clothing exporting (Shares of total merchandise exports, 2003)

Cambodia	84%
Bangladesh	76%
Lesotho	65%
Mauritius	53%
Sri Lanka	52%
Laos	42%
Vietnam (share of exports)	18% (incl textiles)
Vietnam (share of manufacturing employment)	23% (incl textiles)

Sources : (UNCTAD 2005 : 4), except for Vietnam. For Vietnam sources see Nadvi and Thoburn (2004a and 2004b) export growth rate was from a low base, a comparison with South Africa–another new global entrant in the 1990s following years of economic seclusion under *apartheid*–is instructive.[8] While Vietnam's T&C exports were less than South Africa's in 1990, by 2001 they were almost five times greater.

Vietnam's performance as a T&C exporter was also remarkable in that until 2001 it was effectively cut off from the US market. Although the trade embargo imposed by the United States following the ending of the Vietnam-American war had been lifted in 1994, the US imposed substantially higher–and in T&C effectively prohibitive–tariffs on Vietnam as Vietnam was then not a member of the WTO. The conclusion of a bilateral trade agreement between the US and Vietnam in 2001 (the 'USBTA') opened the US market to explosive growth in Vietnamese T&C exports. Until 2001, about 80per cent of Vietnam's exports were divided almost equally between the European Union and Japan, a bilateral agreement having been concluded with the EU in 1992, while Ja-

Table 2 Exports of Textiles and Clothing, 1990−2001: Vietnam and Comparators before the US Bilateral Trade Agreement

			Average annual growth rate
	1990	**2001**	**1990−2001**
Exports (US $million)			
CHINA			
Clothing	9,669	36,650	13%
Textiles	7,219	16,830	8%
VIETNAM			
Clothing and Textiles	20	2,000	34%
[in1998C/(T&C)=88%]			
SOUTH AFRICA			
Clothing	81	222	5%
Textiles (narrow definition)	131	232	5%
WORLD			
Clothing		195,000	6%
Textiles		147,000	3%

Sources: see Nadvi and Thoburn (2004a and b) for Vietnam;
rest from WTO (2002)

pan did not impose MFA quotas or prohibitive tariffs. Following the start of the US-BTA, Vietnam's exports of T&C to the US rose from a negligible amount to almost 2.9 billion in 2005[9], more than Vietnam's total to all destinations in 2001. Of the Vietnamese T&C exports to the US in 2005, 95 per cent were of clothing, reducing the already low proportion of textiles in the T&C total in the late 1990s (see Table 2).

Vietnam, then, appears a rather formidable new entrant to world markets. After an initial grace period, the US imposed MFA quotas on Vietnam in May 2003 (Nadvi and Thoburn 2004b : 255). Following the end of the MFA with effect from 1 January 2005, the US continued to impose MFA quotas on Vietnam as it was not a WTO member, while virtually all other major exporters, including China (at least initially–see later), had unrestricted access. As of the beginning of 2007, Vietnam has been admitted to WTO membership, but it is too early to say what will be the impact on its T&C exports to the US.

Vietnam is interesting as a case study also for two further reasons. First, like China, its trade liberalization programme has followed an 'East Asian' pattern, where exports have been developed rapidly while the domestic market has remained protected (Jenkins and Thoburn 2003 : 1). Now Vietnam's entry into the WTO and its commitments under the USBTA are driving import liberalization.[10] Secondly, and again like China, its T&C sector has a more complex industrial structure than those of other new entrants to the global market like Cambodia or Lesotho. State owned enterprises ('SOEs') comprised 25 per cent of Vietnam's garment output in 2004, while the domestic private sector comprised 35 per cent and the foreign-owned sector 40 per cent,[11] although the domestic private sector was underrepresented in its share of exports. Vietnam's T&C SOEs have undertaken great restructuring as part of the country's moves into the global economy, as also have China's (Eberhardt and Thoburn, 2007).

2. Global Textile and Clothing Trade

Global T&C trade is tightly organized within global value chains ('GVC's). This form of institutional structure controls which countries, and which producers within those countries, can enter into global production, and whether their position is sustainable.

2.1 Global Value Chains[12]

To export clothing, producers need to gain access to global value chains. Analysis of GVCs looks at the process of selling a product from the supply of raw materials through to the final distribution and marketing of the product (and even recycling). But a GVC is more than a series of input-output relations. Economic actors at certain stages of the chain exercise control over entry and over upgrading (of products and processes, and functions) by producers: that is, they exercise *governance* and they can earn *'rents'* (surplus profits). Garments are *buyer-driven* GVCs, where barriers to entry –and rents–are concentrated at the retail end. Production in clothing GVCs is organised by many economic actors without their own factories, though some (sometimes former) manufacturing firms outsource too (eg Levy Strauss, Sara Lee). Buyers include department stores (such as JC Penney), speciality stores with their own brand (such as The Gap), brands largely without stores (such as Liz Claiborne), supermarkets (such as Tesco), discounters (such as Walmart), and mail order firms. Note though that the US market is more homogenous than the markets in Europe, which exhibit many characteristics of organization and demand that are somewhat country-specific (Palpaceur *et al* 2004). In consequence, US orders tend to be much larger and often for lower quality products; this has implications for the kinds of producers who enter the chain.

Another important feature of GVCs in garments is what Gereffi (1999) has called 'triangular manufacturing'. That is, production is often organized not directly with producers in developing countries but via garment manufacturing companies based in Hong Kong, Taiwan or Korea. These manufacturing companies may themselves set up factories in countries from which buyers wish to source, organize fabric supply (sometimes from textile factories of their own), or subcontract from domestic suppliers. This arrangement adds further to barriers to entry for domestic producers in developing countries, in that global buyers often prefer to source from existing vendors (such as Hong Kong manufacturers) setting up in new locations than from domestic producers in those locations.[13]

What then drives global buyers' pattern of world sourcing, and how is this affected by the end of the MFA? There are three key factors

- Distance and lead times
- Costs, particularly labour costs (wages relative to productivity)
- Trade distortions: the MFA in the past, but also tariffs and preferences

For high and fast fashion items, particularly in womenswear, proximity to the final market is required. Items must be available quickly on the shops' shelves if they are to sell before the current fashion changes. This leads to sourcing from adjacent countries such as Turkey in the case of the European Union and Mexico in the case of the US. There is some conflict between lead times and costs, since, for buyers to access lower labour costs, they generally have to source from further away. So the further away the supplying country, the more likely the buyer is to source either for very standard items, like T-shirts or jeans from countries like Lesotho, or items where there is little fashion change, such as men's suits from South Africa.

The 'fundamental' determinants of buyers' patterns of sourcing–lead times and costs–must be considered within a framework of complex trade distortions. The availability of unused MFA quotas in the past has been a major stimulus for buyers to move to new countries of supply and for the foreign investors working for those suppliers to undertake 'quota-hopping' DFI. Now, without the MFA, trade preferences and trade barriers fulfill a similar role. Clothing exporters still face highly differentiated trade barriers in different markets, and the average level of tariffs on T&C is high relative to that of manufactured goods as a whole (OECD 2004 : 57). For example, Bangladesh's clothing exports can enter the EU market free of import duty since Bangladesh is a least developed country, whereas Vietnam has to pay around 10 to 12 per duty since it is not. Vietnam (as a developing but not least developed country) qualifies for a 20 per cent reduction in the duty under the EU's *Generalised System of Preferences* if it meets the EU's stringent rules of origin, but where its clothing is made from imported fabrics it must pay the full duty. In contrast, clothing from South Africa–a richer country than Vietnam–can enter the US market duty free under AGOA (the US Africa Growth and Opportunity Act), although only if they use African (or US) fabrics and yarns.

Buyers are also influenced by whether potential producers of their garments can meet environmental and social compliance standards, such as no excessive overtime, no use of child labour and the avoidance of pollution, although such compliance is a necessary rather than a sufficient condition for sourcing. Some countries have been able to enhance their appeal to buyers by stressing their adherence to social standards: Cambodia is a case in point (ILO 2005: 36−41). Large buyers, especially those from the US regularly audit their suppliers for compliance, although compliance requirements are less strict in cases where traders–usually from East Asia–source from smaller firms (Nadvi and Thoburn, 2004a: 115−8).

2.2 Increasing Pressures on Suppliers

At the time of the abolition of the MFA, a number of long term challenges were facing clothing exporters. These remain important and include

- Demands by global buyers for cheaper products, higher quality, and shorter lead times
- Pressures to meet environmental and labour standards, as noted in the previous subsection
- Buyers wishing to reduce number of suppliers–both in terms of countries, and of vendors in each country, in order to reduce transactions costs
- Competition from China, with predictions that China would sweep the board once MFA quotas had gone

These pressures reflect pressure on buyers as a result of increased competition at the retail end (OECD 2004: chs 1 and 2; UNCTAD 2005: 7−12). The end of the MFA has offered buyers a chance greatly to reduce their transactions costs by limiting their numbers of suppliers and supplier countries.

3. The End of the MFA and Its Consequences

The end of the MFA from 1 January 2005 saw a situation where pressures on clothing suppliers had been increasing, and where producers in countries with previously underutilized MFA quotas were vulnerable to buyers switching their purchases elsewhere and to foreign investors moving out. In clothing production, a factory–whose capital equipment mostly consists of sewing machines–can be moved out in a matter of weeks. Textile production, especially the production of yarns, has heavier and more expensive capital equipment and is therefore less footloose. Now that the MFA is over, trade preferences exert a greater influence on sourcing–for instance pushing buyers towards a country like Bangladesh–than hitherto.

3.1 Predictions about the End of the MFA

One of the most influential set of predictions was that made by Nordås (2004) for the WTO, arguing that China was likely greatly to increase its share of the US and EU market (see Table 3). China's strengthening position was more pronounced in the US than the EU, and more pronounced in clothing than in textiles.

Table 3 Estimated percentage market shares in the US and EU before and after elimination of quotas

EU clothing	*Before*	*After*	US/Canada clothing	*Before*	*After*
China	18	29	China	16	50
India	6	9	India	4	15
Turkey	9	6	Mexico	10	3
Other 'top ten' exporters	37	32	Other 'top ten' exporters	46	22
Rest of world (incl Vietnam)	30	24	Rest of world (incl Vietnam)	24	10

EU textiles	*Before*	*After*	US/Canada textiles	*Before*	*After*
China	10	12	China	11	18
India	9	11	India	5	5
Turkey	13	12	Mexico	13	11
US and Canada	8	7	EU	16	14
Other 'top ten' exporters	24	24	Other 'top ten' exporters	35	31
Rest of world (incl Vietnam)	36	34	Rest of world (incl Vietnam)	20	21

Source: adapted from Nordås (2004)

3.2 The Initial Events in 2005[14]

Initially there was rapid expansion of exports from China to the EU and the US after MFA quota removal on 1st January. Some buyers rushed in, though others not. In July and August 2005 garments from China were held in EU ports, and from May to August 2005 Chinese clothing exports to the EU and US more or less stopped. In September 2005, the EU released Chinese products from the warehouses in time for Christmas. New trade restrictions on China were introduced, however: the EU established quotas for imports from China for the period 2006－7, pre-set but with some growth. After the EU had decided on quotas, the US followed, imposing quotas on China for the period 2006－8. Compared to the EU, the new US quotas had less generous growth provisions than the EU's and covered wider range of products than the EU (eg the US included woven shirts and the EU did not). Quotas on China under these two new systems were set in value terms, not volumes as in the old MFA.

3.3 Performances of Suppliers

Tables 4 and 5 show purchases from the US and the EU, respectively. The US data shown include textiles. These are of minimal importance for Vietnam (or Cambodia, Bangladesh or Lesotho) but the inclusion of textiles allows us to see how Pakistan and India have been able to increase their exports to the US substantially. The table makes

Table 4　US imports of T&C ('total MFA categories')

(US $ billion)	2004	2005	Change for year ending August 2006
World	83.3	89.2	2.9%
China	14.6	22.4	13.5%
Vietnam	2.7	2.8	24.5%
Cambodia	1.4	1.7	27.2%
Bangladesh	2.1	2.5	21.4%
India	3.6	4.6	17.6%
Pakistan	2.5	2.9	18.0%
Mexico	7.8	7.2	−11.3%
Sub-Saharan Africa	1.8	1.5	−19.5%
Lesotho	0.46	0.39	−14.4%
SouthAfrica	0.16	0.086	−46.2%

Source:http://otexa.ita.doc.gov/

Table 5 Imports of garments into EU−15

(*million Euros*)	2004	2005	% change
China	**11037.9**	**16398**	**48.6**
Vietnam	609.6	662.9	8.7
Cambodia	517	474.4	−8.2
India	2433.8	3196.8	31.3
Pakistan	905.8	770.2	−15.0
Bangladesh	3689	3500.9	−5.1
Lesotho	0.843	0.632	−25.0
South Africa	56.7	39.2	−30.9
Mauritius	512.7	441	−14.0
Turkey	7519.9	7868.4	4.6

Source: Eurostat

it clear that there have been losers too, most noticeably in Africa, but Mexico has seen its exports fall too.

3.4 Vietnam

Vietnam at the moment seems to be staying in the game, and is seen by buyers as an alternative to China, particularly now that China is restricted in the US market until 2008. Vietnam has skilled workers and low wages, although the country has issues of corruption, which affect the movement of goods. However, it has various problems. First, its textile industry has proved inadequate to meet the needs of garment exporting, and some three-quarters of fabrics used for export garments are imported. Fabrics are often supplied by buyers, and the Vietnamese garment manufacturers are paid a processing fee. Some textile SOEs have integrated forwards into garment production using their own fabrics (Thoburn *et al* 2003), but this makes them inflexible, and they often do not know how to source fabrics from elsewhere. As one buyer in Hong Kong explained, buyers want vertical production not vertical integration. That is, they want all stages of production in one country or area, but not necessarily in vertically integrated and inflexible firms.

Second, Vietnam T&C production is largely confined to manufacturing, and does not include product development. Even Hong Kong foreign investors in Vietnam do their product development with buyers in the manufacturer's Hong Kong office and just use Vietnam for manufacturing.

Thus Vietnam's garment exporting seems to generate less value-added in the country than might be first supposed. To increase its gains, Vietnam requires development of its textile industry, particularly through foreign investment to generate international standards of quality. It requires more skill in textile sourcing, even if these are not produced domestically, to gain the control to move towards 'full package' production.

3.5 China

Although China is a formidable competitor, in the longer run it faces some problems. Its wage levels are rising, especially in the southern province of Guangdong, one of the hearts of the export garment industry. Wages have been rising too in central coastal China, the greater Shanghai region, an historic centre of textile production. Although moves to the interior of China to access lower wages are possible in principle, interior provinces suffer from poor infrastructure, long distances to market and it is difficult for firms to persuade managers to go. Also, people from the interior are becoming less willing to migrate and live in dormitories, which has been a way in the past that the coastal regions have ensured a labour supply. More fundamentally, there will be a future labour shortage as China's one-child policy affects first population growth and reduces the size of the working population. Some regions are trying to get out of T&C (like Shanghai), and buyers say that China is keen for 'diplomatic reasons' to leave lower value-added products to less developed countries.

4. Conclusions and Reflections

Barriers to entry into export garment production have become higher in recent years as a result of changes at the retail end of the global value chains for garments. There has been increasing concentration in the US retail sector : new entrants have been challenging existing firms, with a large fall in the share of department stores and a rise of discounters like Walmart. There are now shorter fashion seasons, causing buyers to search for lower prices for given quality, and for faster lead times. So firms need to keep prices low and to upgrade their products, processes, and functions. Buyers require producers to be able to work with them in developing new products, and prefer to source from countries with a strong textile industry in order to shorten lead times. In this sense the barriers to entry, and to the sustainability of the position of recent entrants, have grown larger, and T&C exporting has become a less easy route to industrialization than in the past.

At the same time, the continued existence of a distortionary[15] pattern of trade preferences increases the trade-intensity of the global T&C industry. For instance, Jordan has become an exporter of clothing to the US on the basis of a bilateral free trade agreement with the US, while importing its textiles from China. Vietnam has succeeded in becoming a major exporter of clothing without strong preferences, first to the EU[16] and Japan, and from 2001 to the US. Nevertheless, it remains vulnerable if the restrictions on Chinese T&C exports to the EU and the US are lifted after 2007-8, although it is also likely that buyers will wish to retain some degree of diversification in their sourcing, even though their range of suppliers is currently being reduced. However, Vietnam's lack of a globally competitive textile industry of sufficient capacity to service its export garments remains a significant weakness, and Vietnam has far to go before it becomes a partner in product development.

Notes

1. GATT is the General Agreement on Tariffs and Trade, the forerunner of WTO, the World Trade Organization.
2. For an introduction to Vietnam and its economy, see Thoburn (2007). An overview of globalisation issues in Vietnam, as they relate to poverty, can be found in Thoburn (2004). See also Van Arkadie and Mallon (2004) on the Vietnamese economy and reform programme.
3. Strictly speaking, the ATC *replaced* the MFA in 1994. However, virtually everyone has continued to refer to the arrangements as the MFA, and so do we.
4. This is true of Vietnam, measuring capital intensity in terms of non-wage value-added per worker (Thoburn *et al* 2003).
5. A classic case is South Africa, where a trade liberalisation programme in the 1990s resulted in much increased import penetration. South African companies adjusted, often developing exports in niche products to make up for their losses of domestic market share, but at the cost of large losses of employment as they restructured to improve labour productivity. See Roberts and Thoburn (2003).

6. Less than half of world textile production is for use in clothing (OECD 2004 : 36).
7. This comment refers to exporting countries, not counting the European Union collectively as a 'country'. In 2003, China as a textile exporter was second to the EU−15 (UNCTAD 2005 : 4).
8. South Africa was also used as a comparator country to Vietnam in the research on globalization on which Nadvi and Thoburn (2004a, 2004b) report.
9. See http://otexa.ita.doc.gov/msrcty/v5520. htm, accessed February 2007.
10. Import liberalization has also been driven by Vietnam's commitments under AFTA, the ASEAN Free Trade Area, although there is not space here to discuss them. See Thoburn *et al* (2003 : 10).
11. The corresponding figures for Vietnam's textile sector were 44 per cent for SOEs, 30 per cent for the domestic private sector and 27 per cent for the foreign sector (VNSY 2004).
12. On global value chains, see Nadvi (2004).
13. This comment is based on interviews by the author with buyers based in Hong Kong in 2001, 2002 and 2006. Hong Kong is a key base from which British and US buyers organize their world sourcing.
14. These comments are based on interviews in Hong Kong in spring 2006.
15. This is not to say that all preferences are undesirable. Clearly the EU's Anything but Arms preferences for least developed countries, under which Bangladesh benefits, or the US Africa Growth and Opportunity Act, which gives African countries duty free access, can be justified on the basis of special help for the poorest. Nevertheless, there is a strong suspicion that some preferences are more political than developmental.
16. Although Vietnam has GSP access to the EU, often its clothing exports do not qualify under EU rules of origin, because the fabrics are imported.

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