

Garment Industry Development in South East Asia and Competitiveness

Authors : P. Nayak, Shakeel Shaikh

Abstract : In this paper, we analyse the apparel export performance of Southeast Asian Nations (ASEAN) in the world market. The study covers the 2003-2012 period at the sector as well as product levels (6 digit HS) and analysis is based HS 2002 nomenclature. We measure export similarity among Southeast Asian nations for the apparel sector (two digit HS-61 & 62), besides analysing the products performance in the world through Revealed Comparative Advantage (RCA) technique. Coupled with RCA, the price as a factor of competitiveness was examined from the available Unit Value Realizations (UVR). Further to this, the resource availability or outsourced from the region was considered as an extension to the analysis of competitiveness between the nations. With the help of these methodologies, we examine the degree of competition between the exports of southeast nations in the world market. Our results show that Cambodia, Indonesia, Thailand, and Vietnam are well performing states within ASEAN. The paper further delves into sustainability of the export performing countries within ASEAN.

Keywords : export competitiveness, export similarity index, revealed comparative advantage, unit value realisation

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