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THE PHILIPPINE GARMENTS AND TEXTILE INDUSTRIES: RIDING OUT THE CRISIS

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ABSTRACT

As the global economic crisis unfurls, it is becoming apparent that no country could remain immune. While the Philippines had relatively less exposure to the crisis through the financial system, the country is vulnerable to the global economic slowdown through export earnings with the attendant effects, not only in export-oriented, value-added industries themselves, but in industries across the entire value chain.

In particular, there is little doubt the Philippine garments and textile industry, with roughly 87% of total industry exports bound to recession-hit developed countries such as the US, EU, Japan and Canada, will be severely affected. The Congressional Planning and Budget Department (CPBD) estimates that garments and textile exports would continue its decline by 15.7% and 1.5% in 2009 and 2010, respectively. This would be further reflected in the sector's gross value added that is expected to contract by 25.3% in 2009 and by 36.5% in 2010. Consequently, this is expected to result in losses in employment.

In the absence of any serious commitment to reforms to enhance competitiveness in the sector (i.e. poor logistics, slow turnaround time, inefficient supply chain, declining productivity, high transaction costs like water, electricity and telecom), the garments and textile industry will most likely continue its downward spiral and become a less significant contributor to the country's export revenues.

The views, opinions, and interpretations in this report do not necessarily reflect the views of the House of Representatives as an institution or its individual members.

THE PHILIPPINE GARMENTS AND TEXTILE INDUSTRIES: RIDING OUT THE CRISIS*

by Elsie C. Gutierrez

BACKGROUND: A TALE OF TWO INDUSTRIES

Garments Industry. The current structure and performance of the garments industry has been shaped by past industrial policies. From a cottage-based industry in the late 1950s, small enterprises emerged to replace the traditional home sewing, custom tailoring and dressmaking shops. The industry currently includes all items of clothing, such as men's, women's, children's and infant's wear, and the manufacture of other wearing apparel accessories, such as hats, gloves, handkerchiefs, neckwear, apparel belts, brassieres, stocking and socks, and other related apparel.

The industry started to grow rapidly in the 1960's through the Embroidery Act (RA 3137) of 1961. Garment firms enjoyed privilege duty-free importation of textiles under the Act. Moreover, the Basic Industries Act (RA 3127) and the Investment Incentives Act (RA 5186) extended tax exemptions, credit and deductions to critical industries.

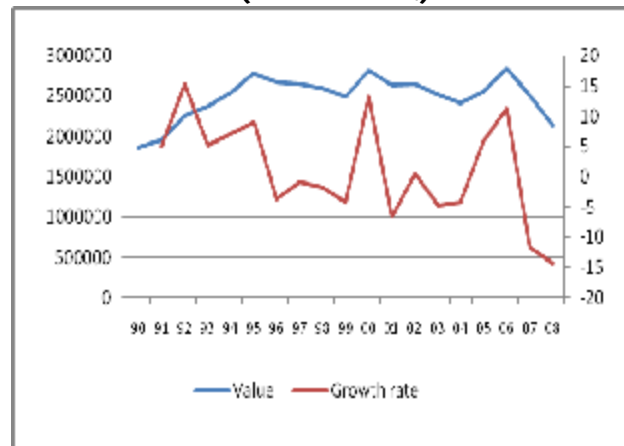
In the 1970s, restructuring was deemed necessary because of the foreign exchange crisis, the weak domestic consumption, and the general industry glut. From an inward-looking strategy, the government adopted an export-

*This paper benefited from the discussions with Director General Rodolfo V. Vicerra, Executive Director Romulo E. M. Miral, Jr. Ph.D., and Director Manuel P. Aquino.

oriented industrialization strategy. It was at this time when the MultiFibre Agreement (MFA)¹ took effect and opened windows of opportunity for Philippine firms to access the growing US market for clothing and textiles. The quota allocations under the MFA enabled the garments industry to become export-oriented and the second largest exporter, next to electronics in the '80s. Revenues from garments exports grew by 41% in the late '70s and 13% in the '80s, overtaking revenues from traditional exports such as coconut oil and sugar.

Note, however, that even during the MFA regime in the early 90s, export revenues from garments have been declining (Figure 1). The intense competition in the mid 90s (i.e. emergence of low cost suppliers and preferential trading arrangements), and the lack of competitiveness of the industry contributed to the decline in export revenues and shares of garments exports to total earnings.

Figure 1
Garments and Textile Exports of the Philippines, 1990-2008
 (In thousand US\$)



Source: NSO (*i-stats*), various years.

¹ The MFA is a quota system that govern the trade in textile and clothing with the United States, European Union and Canada from 1974-1994.

Textile Industry. The textile industry began in the 1950s as one of the industries established under the rationale of import substitution. The industry covers fiber production and yarn, fabric, and made-up textile manufacture. It is classified into two sectors: (1) the primary processing sector, which basically include spinning, weaving/knitting and finishing; and (2) the secondary processing sector, which covers made-up textile goods manufacture (e.g., rope, carpets, rugs, etc.). Production is geared principally towards the domestic market.

Before the end of the 70's, the industry was adjudged not competitive. Studies revealed severe operating and structural problems due to obsolete machines and equipment, lack of specialization, poor technical processes and high cost of production. The Textile Rehabilitation Program of the late 70s was aimed to rehabilitate the industry using World Bank funds for implementation in the early 80's.

Production of textile was geared principally towards the domestic market because of high production costs relative to world prices. Protection and incentive packages had been accorded to the industry (import and foreign exchange controls, liberal access to dollar allocations for the importation of machinery and raw materials, and easy access to loans and tax concessions) resulting to seemingly high profit against imported textiles up to the 80s. As a result, the textile producers operated below "best practices" standards (Austria, 1996) thereby leading to technical inefficiency. Over time, the industry suffered from domestic market saturation and rampant smuggling.

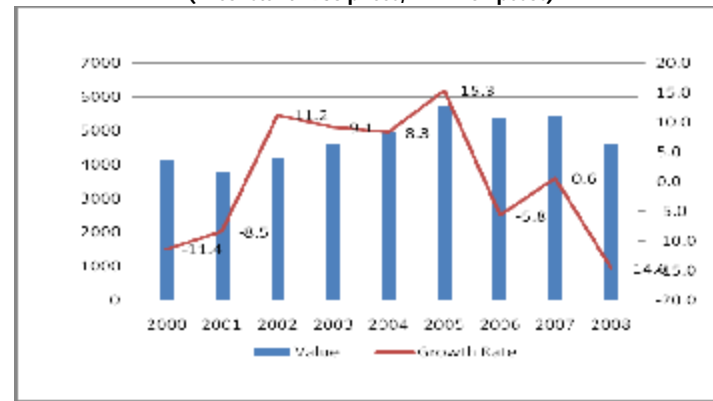
Textile exports only began to improve after the implementation of the advanced tax credit scheme in 1985 whereby local millers can offer tax and duty-free textile to garment exporters with bonded manufacturing warehouses. Indirectly, therefore, textile producers were able to export through garment exporters.

The Import Liberalization Program of the 80's effectively reduced tariff rates making it even tougher for the textile industry, which was then undergoing rehabilitation, making the reforms inutile. The textile industry accelerated its decline in the latter 80's and the early 90's as the domestic market shifted to imports.

The Uruguay Round under the World Trade Organization came into effect in 1995 and integrated textiles and apparel into the mainstream by removing all quotas over a ten-year phase-out. The Agreement on Textiles and Clothing (ATC) was signed and covered the modality of phasing-out of quotas over a 10-year period and under four phases.

2000 onward, export revenues from garments and textiles have been volatile, although peaking at \$2.84 billion in 2006 (Figure 2). Moreover, significant declines in export revenues have been observed beginning 2007 and up to December 2008 of around 19.5%. This volatility has been transmitted to the sector's overall performance with gross value added peaking at the end of the MFA in 2005 but declining as the financial crisis started to become evident.

Figure 2.
Gross Value Added in Textile Manufacture, 2000-2008
(In constant 1985 prices, in million pesos)

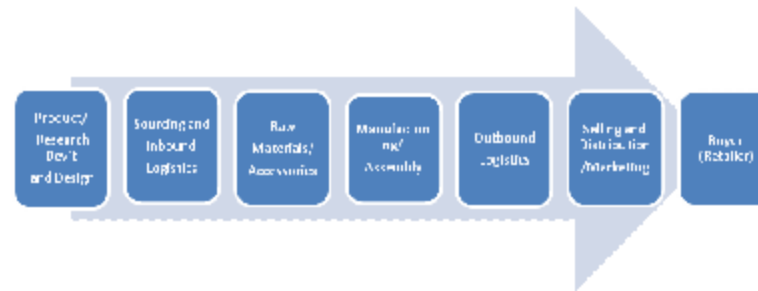


Source: NSCB (i-stats), various years

STRUCTURE OF THE PHILIPPINE GARMENTS AND TEXTILE INDUSTRIES

For the past decades, the Philippines has concentrated in the assembly portion of the production system of the garments industry with a relatively few firms providing full package supply or original equipment manufacturing (OEM) (Figure 3). Presently, the Philippine garments industry is made up of exporters (around 39%) and subcontractors (69%) which include homeworkers and small contractors to garment exporters (Austria, 1996).

Figure 3.
Value Chain of the Philippine Garments Industry



The global apparel commodity chain (Figure 4) is said to be a buyer-driven commodity chain. There are three major types of lead firms in the chain: retailers, marketers, and branded manufactures (Box1). The Philippine garment industry is basically part of what is called the triangle manufacturing (Gereffi, 2002), where a foreign buyer deals with an agent in a newly industrialized economy which then outsources production in the Philippines. The triangle is completed when the Philippine supplier ships the products to the buyer. However, in recent years, mass retailers have shifted from the Philippines to low cost exporters in Asia.

Figure 4.
The Global Apparel Commodity Chain



Source: Antonio, E. (2006)

According to a US International Textile Council Report (2003), some considerations by US buyers or importers in their sourcing decisions include cost competitiveness, proximity to markets, and efficient logistics. Location decisions for branded manufacturers, on the other hand, would include costs of doing business, political and investment climate, and logistics.

Specifically, buyers' perceptions of the Philippines as a supplier, include the following:

- a) On Labor – Highly flexible labour with the ability to produce fashion-oriented products and have good communication and interpersonal skills.
- b) On Delivery – High reliability for high-end products but relatively low reliability in some basic items. Delivery time can be longer due to bureaucratic procedures.
- c) On Concerns – There is need to improve reliability on an industry-wide basis. There is high cost of labour relative to Vietnam, Indonesia and China. Moreover, there is a need to engage in information technology.

BOX 1.
THE GLOBAL APPAREL COMMODITY CHAIN

There are three types of lead firms in the apparel commodity chain: retailers, marketers, and branded manufacturers (Gereffi, 1999) that have evolved as a result of the policy environment on quotas. As apparel production has become globally dispersed and the competition between these type of firms intensified, each has developed extensive global sourcing capabilities. The lead firms in the global apparel chain are:

Retailers. In the past, they were the manufacturer's major markets but now they have direct competitors and have resorted to imports due to growing consumer demands. Examples are Walmart, K-mart and JC Penny.

Marketers. These are manufacturers without factories and include companies such as Liz Claiborne, Donna Karan, Ralph Lauren, Tommy Hilfiger, Nautica and Nike. To deal with competition, marketers have adopted several strategic responses –they are shrinking their supply chains using fewer but more capable contractors and instructing them where to obtain needed components thus reducing their own purchase and redistribution activities; discounting certain support functions; adopting more stringent vendor certification systems to improve performance and shifting geographic sourcing from Asia to the Western Hemisphere.

Branded manufacturers. These firms supply intermediate inputs to their extensive suppliers. It is called the 807/9802 program in the US where the sourcing networks of the US are predominantly located in Mexico and Central America and the Caribbean including Sara Lee, Levis and Avon which also run their own facilities in other countries.

Source: Antonio, E. (2006)

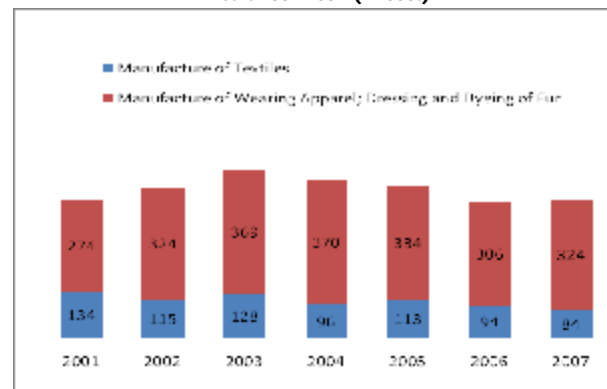
EMPLOYMENT AND WAGES IN THE PHILIPPINE GARMENTS AND TEXTILE SECTOR

According to The International Textile, Garment and Leather Workers' Federation (ITGWLF), there were an estimated 900,000 formal textile and garment workers registered in 1994 (Duvillier, 2005). Thirteen years later, however, only about 45% or around 408,000 remained in the sector.

A significant portion or 18% of total paid employment in manufacturing was still found in the textile and garment sectors in 2007 (compared with the 22% of paid employment accounted for by the electronics and machinery sectors).

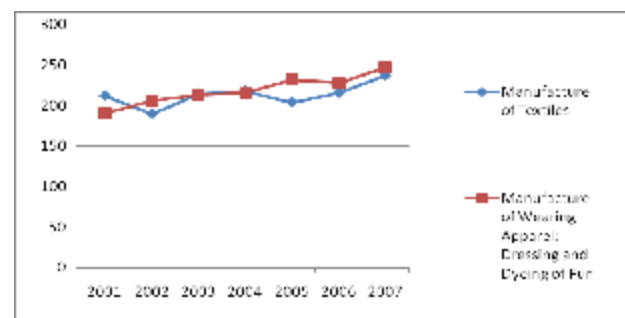
Wages in both the textile and wearing apparel manufacturing sub-sectors have remained stagnant in the 2001-2007 period. Compared to wages paid in the electronics sector, the wages of garment workers are 30% lower as of 2007.

Figure 5.
Employment in the Garments and Textile Industries
Years 2001-2007 (In '000s)



Source: <http://laborsta.ilo.org/STP/do>

Figure 6.
Wages in the Garments and Textile Industries, 2001-2007.



Source: <http://laborsta.ilo.org/STP/do>

EXPORT MARKETS

The major markets for garments and textiles are the former MFA quota countries. The United States, European Union and Canada accounted for approximately 87.27% of total garment exports. The United States was the biggest market with a share of around 74% of all apparel exports in 2006.

Table 2
PERCENTAGE SHARE OF EXPORT MARKETS OF PHILIPPINE GARMENTS
(In percent)

	1995	2000	2006
US	61.59	73.21	73.97
EU	14.22	12.17	10.71
JAPAN	5.04	3.87	2.57
CANADA	2.15	2.29	2.59
OTHERS	16.99	8.47	10.16
TOTAL	100.00	100.00	100.00

Source: http://tradelinephil.dti.gov.ph/betp/trade_stat.main

Table 3
US Apparel Imports in 2001, 2004 and 2007 (Value Shares)

	2001	2004	2007
WORLD	100.00	100.00	100.00
China	8.15	17.47	33.53
Mexico	13.83	9.35	5.83
Honduras	4.15	3.21	2.61
Bangladesh	3.72	2.48	3.21
El Salvador	2.85	2.11	1.56
Indonesia	3.92	3.15	4.36
Dominican Republic	3.99	2.50	1.10
Vietnam	0.08	3.26	4.73
Hong Kong	7.46	4.75	2.20
India	3.04	4.36	5.29
Cambodia	1.66	1.73	2.53
S. Korea	3.86	3.10	1.37
Guatemala	2.84	2.35	1.52
Taiwan	3.21	2.52	1.42
Philippines	3.35	2.32	1.86
Pakistan	1.65	3.06	3.29
Thailand	3.22	2.64	2.14
Macau	2.00	1.72	1.07
Sri Lanka	2.67	1.90	1.65

Source: US Department of Commerce, Office of Textiles and Apparel

Focusing on the US market, the Philippines have been quickly losing its competitive edge against leading Asian exporters such as China, India, Vietnam and Indonesia. After ranking number 12 on the top 30 clothing exporters list in the US market in 2001, the Philippines slipped to 17th in 2004 but regained 14th place in 2007. For the past ten years, its share of the US clothing market shrunk from 3.35% in 2001 to only 1.86% in 2007, while China's share increased from 8.15% to 33.53% in the same period.

LINKAGE WITH THE REST OF THE ECONOMY

According to the study by Villamil and Reyes (2007), the garments industry has a low total linkage index of 5.3 (compared with the electronics industry with 57.1) which means that it is relatively less important in terms of investments and that growth in this sector will not stimulate much production in other sectors of the economy. Furthermore, the garments industry has a greater link with its backward industries in terms of the number of dependent sectors. The study showed that it required 64 other sectors' output within the economy for its production including the textile, spinning, weaving, texturizing and finishing, fabric-knitting mills, and wholesale and retail trade industries. On the other hand, its forward linkage included the public administration and defense sectors as well as public health services sector.

Because of the sector's weak linkage with the rest of the economy, the said study indicated that the output multiplier (the value of production in all sectors spurred by a unit's worth of final demand for the sector's output) of the garments sector has fallen from 1994 to 2000. From an output multiplier of P2.30 in 1994, it has dropped to P2.04 in 2000 which means that a peso of new final demand of garments in 2000 only induced a P2.04 additional output from the economy.

ISSUES OF THE SECTOR

Aside from being increasingly unable to compete on the basis of low wages, the Philippines is often perceived to have failed in developing a full-service garment industry. The lack of locally produced raw materials and poor vertical integration bring about longer lead time for Philippine products (compared to Thailand). By focusing mainly on the assembly operation at the expense of its design capabilities and logistics efficiency, the industry seems to have neglected to move its supply chain into higher value-added areas and more profitable products. Only a few garment manufacturers have entered the more differentiated branded markets. Rodolfo (2006) attributed this to the fact that most manufacturers failed to provide the necessary infrastructure for training and product development to their designers. This is because it became relatively easier for most firms to simply concentrate on assembly given that they only needed the quotas during the MFA regime.

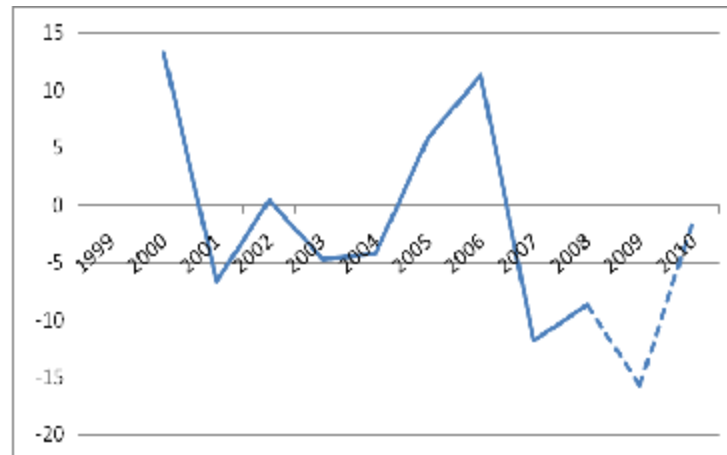
Moreover, the Philippines also suffers from poor logistics, slow turnaround time, inefficient supply chain, declining productivity, high transaction costs, and high reliance on one single market (Antonio and Rodolfo, 2006). According to a Manila-based company selling to the American brand Gap, producing the same garment item can cost 50% less in China mainly because of relatively high labour and non-labour costs such as water, electricity and communication rates in the Philippines (Duvillier, 2005). This somewhat improved to 15% in 2008 according to the Confederation of Garments Exporters of the Philippines, (Manila Times, 28 April 2008). Nevertheless, such factors made the industry prone to undue competition from smuggled goods and “ukay-ukay.”

THE CURRENT GLOBAL FINANCIAL CRISIS AND ITS IMPACT ON THE SECTOR

In light of the ongoing global financial crisis, there is little doubt the Philippine textile and garment industry whose roughly 87% of total industry exports were bound to recession-hit developed countries,

will be severely hit. Although the Philippines has gradually shifted to high-end garment products, the luxury goods market especially in the US is not immune to the current financial crisis (National Jeweler Independents, 2008). Because of the financial crisis, the Department of Labor and Employment reported factories were forced to close or retrench workers. As a result, the number of locally displaced workers in the garments sector stood at 4,041 from October 2008 to February 2, 2009.

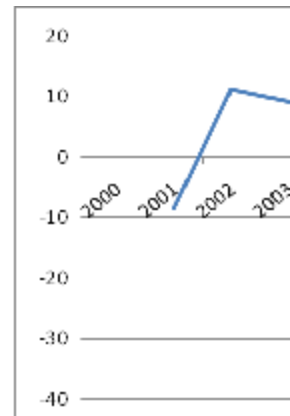
Figure 5
Estimated Growth Rate of Garments and Textiles Exports
Years 2009-2010



Source: National Statistics Office, various years
a/ CPBD staff estimates (2009).

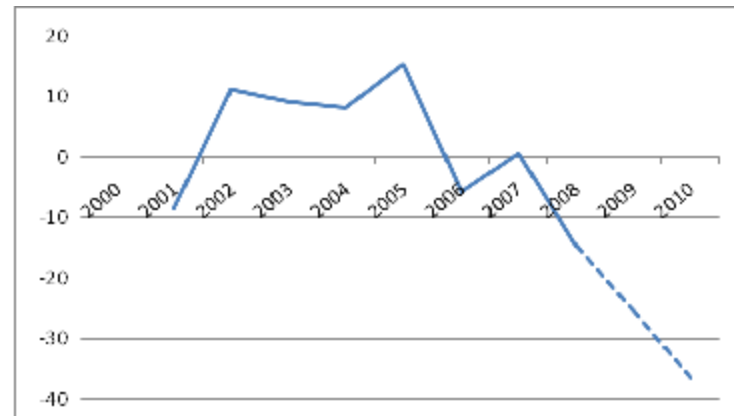
Based on CPBD estimates, exports of garments and textiles would continue its decline by 15.7% in 2009 but would slightly recover—although still at -1.5%—in 2010 due to the persistent recession in advanced countries. This downbeat sentiment will be reflected in the sector’s overall growth as gross value added in the textile manufactures is expected to contract by 25.3% in 2009 and would continue its downward spiral by 36.5% in 2010. Consequently, this is expected to result in losses in employment in the garments and textile sector.

Estimated Growth



Source of Basic Data:
a/ CBPD staff estimat

Figure 6
Estimated Growth Rate of GVA in Textile Manufactures
Years 2009 -2010.

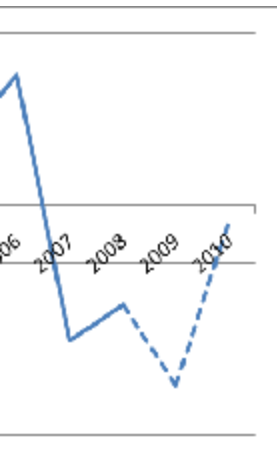


Source of Basic Data: National Statistics Office, various years.
 a/ CBPD staff estimates (2009)

With an unemployment rate of 6.8% and an underemployment rate of 17.5% (January 2008), the Philippine economy may not be able to absorb the majority of possible displaced workers in the garments and textile sector. Add to that is the fact that most terminated workers are usually of the age where it will be difficult for them to get rehired elsewhere.

Other possible scenarios for the sector would be that working conditions for the remaining jobs may deteriorate as labour standards may tend to be disregarded. Precarious forms of labour such as factory-based contracting or home-based sub-contracting for minor sewing operations may be more preferred at the expense of more stable, better-paid, and protected job opportunities. Currently, garment companies are favouring job contract schemes that are renewable every 3 to 5 months as a disguised but common strategy to keep workers from getting access to regular employment and to discourage them from joining unions (Duvillier, 2005).

d Textiles Exports



Another negative implication is the possible increase in “overnight” closures of factories owned or managed by foreigners leaving Filipino subcontractors bankrupt and workers with unpaid salaries.

MEASURES TO COMBAT THE CRISIS

The effects of the global financial crisis have been far and wide. While the Philippines has relatively less exposure to the crisis through adverse effects on capital flows, the country is vulnerable to the global economic slowdown through export earnings with the attendant effects, not only in export-oriented, value-added industries themselves, but in industries across the entire value chain.

Among major garments exporting countries such as China, India, Pakistan, Vietnam, Cambodia and Bangladesh, only China, India and Pakistan have temporarily introduced incentive packages which were part of their respective stimulus plans to address the decline in global demand for their exports.

China has raised the export tax rebate rate for textiles three times since last August 2008 from 13% to the present 15% (as of February 2009). In a medium term national plan to invigorate the textile industry, the Chinese government would allocate funds for companies that produce textiles or fibers, or operate in the textile printing and dyeing sector, to upgrade technology and develop domestic brands. Government departments were also ordered to provide financial support and insurance services to small and medium-sized textile plants. It also intended to phase-out obsolete capacity, eliminate energy-intensive, polluting equipment and technology, and encourage textile and garment makers to relocate from southeastern parts of China to central and western areas. Mergers and acquisition between backbone enterprises were also encouraged (China View, 2009). India had an allocation of Rs 1,400 Crore (or roughly \$277 million) for textile upgrading fund, a 2% interest subvention (credit subsidy) for exporters up to September 2009, and a custom's duty cut from 5% to 3%. On the other hand, Pakistan has announced a R&D rebate of 6% besides a 2.5% cut in interest rates (Apparel Bulletin of Bangladesh, 2009).

However, these incentive packages may prove to be inutile as Dr. Andrew Michael Spence (2001 Nobel Prize Recipient) put it, “there is nothing that a developing country can do about the declining global demand”. Thus, the effort of the Philippines in pushing for a Free Trade Agreement with the US at this point would be useless since a quota and other preferential treatments can be redundant especially when demand is weak.

Moreover, given the fiscal bind that the government is in, the Philippines could not afford incentive packages of this magnitude such as tax rebates, credit subsidies and custom’s duty cuts.

In the current recessionary state of most developed countries, the Philippines’ garments and textile industry could cushion the downward spiral by implementing the following measures, in short term:

- Increase demand for local products by embarking on campaigns toward patronizing locally produced garments and similar products. Recently, progress has been made in local product branding with the emergence of saleable brands such as BENCH, BAYO, KAMISETA, etc. which is a signal that the domestic client base is expanding. Improving preferences could mean reduced demand for cheap, mass-based garments from China.
- Provide retooling of workers and technology-based training for self-employment at the community level. Based on Villamil’s study, the largest users of the garments industry are still the public administration and defense, as well as public health services sectors as shown by their high forward linkage indices. Thus, providing uniforms to civil servants, the military and the nurses is still the most viable option especially for small-and-medium enterprises.
- Instead of pushing for an FTA with the US, take advantage of and focus on China’s share of the US kids’ wear with the emerging issues on the safety of Chinese products. The

US Congress enacted the Consumer Product Safety Improvement Act of 2008 that requires to have goods certified by an accredited third-party tester and to add tracking information on labels for easier recall of defective goods by August 2009 . This law also cuts the allowable lead content in goods and gives the US government more power to pull out from stores products that violate laws on consumer safety.

Still, competitiveness is the key to long term growth in the sector. This can be achieved through:

- Managing the sector's value chain and its supply chain rather than push for building an integrated textile and garments industry. Value creation can start in the finishing and dyeing sectors and in the design and logistics portion of the garments value chain. Rodolfo (2006) pointed out that around 90% of industry players have not engaged in product development and attribute it to the lack of financing to invest in such programs and the absence of a common resource for R&D for the industry.

The industrial upgrading experience by East Asian economies such as Taiwan, S. Korea and Hong Kong revealed that they have become competitive suppliers based on design and manufacturing and logistics capabilities rather than labor cost. Thus, R&D as well as Information and Communications Technology (ICT) investments are mandatory, not just an option.

Re-equipping the industry with modern high-tech machinery in order to secure greater economies of scale, higher productivity and an improvement in its competitiveness is, therefore, needed. Investing in ICT for garment and textile firms is also necessary. However, they should be aided by the government by providing loan facilities or tax incentives for such endeavours. Portions of the P300 billion Economic Resiliency Plan should be channelled to provide credit to

the industry as well as to increase the budget of the Textile Research Institute of the DOST towards upgrading and expanding capability in product design of garments manufacturers.

- Investing in the research and development of indigenous fibres –such as abaca, pineapple and silk –in order to ease the country’s serious lack of locally sourced raw materials. Joint ventures between the private sector and LGUs that are major producers of indigenous fibers should be encouraged.
- Removing all unnecessary transactions costs, particularly inbound and outbound logistics concerns of the sector. Government should play a key role in addressing structural bottlenecks, high power cost and poor infrastructure. One way to address these problems is for government to be more aggressive in its effort to locate garment manufacturers in Clark Special Economic Zone from where goods will be transported to the Subic Bay Freeport for shipment. This means getting the goods shipped within 30 minutes instead of more than 3 hours if shipment is hauled all the way to the Port of Manila. Moreover, if Subic Port becomes the jump-off point for garments to the US, ships no longer have to pass through Hong Kong (Valdez, 2008). Providing training on dressmaking to as many people in the area through the TESDA is necessary as this specialized skill (especially for undergarments).

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