# 发展与管理

## 2008发展与管理论坛

尤建新 邵鲁宁 王 曼 郑海鳌 主编

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# 前　言

第六届“发展与管理”论坛马上要开始，我们学术梯队又将有一次大规模的面对面的学术讨论。这一年中发生了许多变化，首先是我在经济与管理学院院长行政岗位上度过了第八个年头，正式完成使命，于2008年2月起回管理科学与工程系继续当教授，由研究生院的副院长霍佳震博士接任经济与管理学院院长。同时，由于学科发展和建设的需要，按照学校领导的安排，开始担任中国科技管理研究院副院长，协助院长徐冠华院士推动研究院的发展和建设。也因此，我们的学术梯队中增加了一些在这个领域开展科研工作的青年学者，他们的研究成果在本次论坛中有了初步的体现。在管理理论与工业工程、城市发展与管理两个领域继续着梯队的研究，成果也不少。以前论坛一直沿用“管理发展与工业工程”，由于现在的研究领域已经有了很大的扩展，同时也为了与书名保持一致，建议今年论坛的名称就直接采用“发展与管理”。

开创这个论坛的主要目的之一，是为青年学者们建立一个广泛的展示学术思想、增进学术交流的平台。学术思想和交流需要一个自由、活跃的空间，特别是对于青年人，有一个快乐的、平等的和能够不断激发他们灵感的学术氛围是非常重要的。今天，我们欣喜地看到，我们的学术梯队中已经有了很好的收获，周文泳博士、陈强博士、马国丰博士、杨瑾博士等相继获得了国家社科基金和国家自然科学基金，而承担省部级课题和企业课题的就更多。我想，这就是论坛所要起到的效果。

2007年的论坛得到了我的同学、上海市政协委员程东先生的大力资助，非常感谢好友们对我们学术研究的关怀和帮助。作为论坛的发起者，我感谢这几年来为论坛作出许多贡献的博士生们和博士后们，正是你们的努力，才使得论坛能够持续，并且越办越好。陈宝胜博士、杜学美博士、陈强博士、杜波博士、濮津博士、杨瑾博士、武小军博士、邵鲁宁博士、朱岩梅博士、蔡依平博士、李巽博士、王曼博士，以及博士生郑海鳌等等，他们给予了论坛许多的贡献。本次论坛由邵鲁宁博士、王曼博士和博士生郑海鳌和我共同组织，

同时也得到了许多同学和朋友的帮助以及他们的智慧贡献，在此我一并表示衷心的感谢！

同时，作为论坛的发起者，我希望以下几点可以与大家共勉：

1. 论坛是一个学术平台，这是举办论坛的目的。一年一年的持续，目的不是为了持续一个简单的论坛，而是要把一个有意义的学术平台持续下去。不仅仅是简单地为了持续而持续，而是希望论坛越办越好。这就需要大家群策群力、集思广益。认清目的很重要，这样的话，论坛才会越办越有意义。

2. 要坚持学术自由，充分展示自己的思想。虽然发表论文有一定的规范要求，有时候某一个火花难以形成一篇完整的文章。但是在论坛上，应该要有一个空间让这种火花有个冒出的机会。学术需要交流和碰撞，这样才会进步。

3. 要有集中的议题，提高论坛的绩效。由于论坛集中的时间较短，议题过于分散会影响大家的讨论，而且也难以深入。论坛集中前可以在网上交流，要充分利用网络工具创造的资源。在形成几个主要议题的前提下，集中在论坛上研讨。形式应该多样化，可以有主题报告，也可以问答互动，甚至可以请嘉宾客串。



总之，这是大家的舞台，要依靠大家来创新和发展。现在陈强博士等一批同学已经成长起来，这个论坛今后将主要依靠他们来推动。

本书中汇集的是论坛发表的学术论文，有许多是正在研究和探讨的问题，还不能马上定论。错误之处，欢迎各位读者和专家提出批评指正。

尤建新

2008 年 9 月 25 日于同济

# 目 录

# · 管理理论与工业工程

# A Research on the Developing path of China's Textile and apparel Industry: Based on Value Chain Perspective

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**Abstract**: This article uses value chain perspective to analyze the developing paths of China's textile and apparel industry in the global commodity chain. Some elements are deeply explored in this article: features of export roles in commodity chain; value creating mechanism based on value-added activities; organizational type and enterprise's location; dynamic paths of export roles' upgrading activities; the particularity of China's textile and apparel industry in value chain. Then, some constructed suggestions are proposed for the development of China's textile enterprises.

**Keywords**: Value Chain　Textile and Apparel Industry　Commodity Chain

## Ⅰ. Intruduction

Textile and apparel is one of the oldest and largest export industries in the world. Most nations produce textile and apparel products to the international market as in[1]. At present, there are large amount of China's textile and apparel enterprises exported-oriented, which contribute significantly for the development of China's economic growth and make this nation the first largest exporter of textile and apparel products in the world.

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However, in the resent years, the growth of the textile and apparel industry's export is becoming gradually slow down. According to the resent published data of the first two month in 2008 from General Administration of Customs, the export of China's textile and apparel industry only increased 5.7 percent, receding 15 percent comparing to the whole year of 2007. And, the average profit margin of the domestic textile and apparel industry stands at merely 3 per cent in 2006 and still gradually decreases since then.

Many small and medium-sized enterprises (SMEs) in China have closed down because of the export decline. And, the existing enterprises are struggling to survive and look for the way of development. This article aims to find solution of current difficulties facing by China's textile and apparel industry and propose constructed suggestions for the development of companies. To achieve these purposes, there are two questions should be firstly answered. One is what are the fundamental reasons for the recession of the trade enterprises in China's textile and apparel industry? The other is how to operate this industry's upgrading?

This paper utilized value chain perspective to deeply discover causes of above questions in the scope of the whole commodity chain scope. The structure of the paper is as follows. Firstly, a literature background is presented, including value chain and commodity chain perspective. Second, it employs SWOT analysis to study economic environment facing by textile and apparel industry in China. Third, value chain perspective is utilized to discover value creating mechanism in the whole industrial commodity chain. An explanation about the reason of China's export companies' decline is made in this section. This paper does not only explore the industrial positions in value chain enterprises' locations and business types, but also summarizes the internal mechanism for the development of textile and apparel industry. Finally, some constructed suggestions are proposed for the development of China's textile enterprises.



## Ⅱ. Literature Review

*Value Chain perspective*

In the literature, two main expressions are used: "value chain", and "commodity chain", as in[2]. The value chain concept was first developed by Porter. The value chains refer to all the value-added activities to produce end-used products and services within and among enterprises as in[3]. With the fast development of international outsourcing activities, Porter breaks through the traditional perspective of vertical enterprises integration, and extends his view to the interactions among different companies. He suggests that each organization's value chain "is embedded in a larger stream of activities" that he calls the "value system" as in[4].

Later researchers further extend the scope of value chain; explore value creating mechanism in whole industrial chain. Galbraith and Kazanjian propose that, within an industry, value is added through a natural sequence of operations or stages in a chain of supply as in[5]. While an individual business may function along a number of these phases, it will tend to favor one or the other as it's primary stage. And, Sturgeon defines a value chain as "the sequence of productive(i. e. value-added) activities leading to and supporting end-use" as in[6]. Gereffi[7] introduces the alternative expression "commodity chain", which explores value creating process in the whole industry. He also addressed distinction between buyer-driven and producer-driven commodity chains, where value creating processes may differ with each other.

As all indicated, one of the key advantages stemming from the value chain perspective is the opportunity to expose potential shifts in the value creating processes of the company. It offers insights into balancing the needs of key constituencies across the company's competitive landscape.



*The textile and apparel value chain*

The textile and apparel industry similar as footwear, toys, consumer electronics and housewares is a typical buyer-driven commodity chain, as defined by Gereffi[7]. In buyer-driven commodity chain, large retailers, brand-name merchandisers and trading companies play the pivotal role in controlling production and trade networks as in[8], [2], [9]. The application of information technology and ease of transportation provide advantaged environment for textile enterprises to product for international market and outsource production and other function worldwide. Textile and clothing is clearly globalized industry as in[10], [11], [12].

China's textile and apparel industry is inevitably involved in international trade network and competition. In the course of last decades, oversea capitals flow into China setting up textile production plants and favor of China's products, because of the advantage of labor-intensive and low wage rate. Whereas, it is becoming more and more difficult for China's textile and apparel companies facing increasingly intensive pressure competition from domestic and international market. This paper will firstly analysis China's textile and apparel industrial situation, and then use value chain perspective to explore value creating process in the whole industrial commodity chain.

## Ⅲ. Industrial Analysis

In this paper, SWOT analysis is used to assess the internal and external environment of textile and apparel industry. Based on four dimensions: strength, weakness, opportunity and threats, the wholly situation of China's textile and apparel industry has been deeply explored. The findings are summarized in Table I.

| Strength | Weakness | Opportunity | Threat |
|---|---|---|---|
| • Mutual industrial chain<br>• Favorable domestic environment<br>• Low production cost | • Design ability<br>• Brand recognition<br>• Quality of product | • Expanding of home market<br>• High quality requirement<br>• Quota abolition | • Rising production cost<br>• Adjustment of exported tax rebates<br>• Low labor cost in Southeast Asia<br>• Trade barrier |



**Table I SWOT Analysis**

*Strength*

**Mutual industrial production line**:

In China, the industrial match rate could reach 100% within the range of 50 kilometer radius of the main industrial cluster. Because of the mutual industrial chain, the textile and apparel industry has good self-adjust ability to counteract external market risk and makes further development.

Favorable domestic environment:

At present, China has a stable domestic environment from every aspect: politic, society, economy etc. Gross domestic product (GDP) keeps a high growth speed for plenty of years, predicted 10.5% and 9.6% of GDP in 2008 and 2009 respectively. This is an essential impetus for the improvement of China's textile and apparel industry.

**Low production cost.**

Although the price of labor and raw material keeps on increasing for decade years, production cost of textile and apparel industry in China is still comparable lower than USA and most of European countries.

*Weakness*:

**Design ability**:

Although textile and apparel companies in China take effort to promote their design abilities, there is a large gap between China and the developed countries. The mainly weaknesses embody shortness of creativities, individual design and cultural dimensions etc.

**Brand recognition**

China's textile merchandises are good at mass production and low-cost control strategies without brand recognition. Their products have low brand awareness both in domestic and oversea market.

**Quality of product**

It is the lower price not the quality of products that makes China's textile products popular in international trade. Once China's products did not the advantage of low cost any longer, they would be replaced by merchandises from other places in the world.



*Opportunity*:

**Expanding of home market**:

For the fast development of China's economy, there is a growing domestic market in China. Many factors inspire the demand for textile and apparel products: the growth of real estate, development of tourist, more international activities held in China etc.

**High quality requirement**:

Nowadays, more Chinese people especially the young generation care about not only the price of products, but pay more attention to the products' quality as in[13]. Textile and apparel products with high quality, novel design and cultural dimensions become popular and widely accepted by Chinese people.

**Quota abolition**:

WTO members have abolished trade quotas of textile and apparels and clothing on 1 January, 2005. And from 1 January 2008, the European Union would not set quota to China's textile and apparel products. This change provides a good opportunity for China's exporting trade and make China the leading world's supplier as in[14].

*Threats*:

**Rising production cost**:

China's textile and apparel industry is facing a hard pressure of the rising production cost. A new labor law has been implemented since 1 January, 2008, which leads to an increase of the labor wage expense. The appreciation of the Renminbi against the US dollar is another main challenge for exporters. On January 17th 2008 the exchange rate strengthened to a new high of Rmb7.22: US $ 1. And, a worldwide price rise of oil and raw material also influence China's textile and apparel industry. All of these dimensions largely squeeze the slender profit of China's textile and apparel industry.

Adjustment of exported tax rebates:

In recent years, the Chinese government has lowered the textile and apparel industry in the amount of export tax rebates. In 2006, the exported tax rebates have been adjusted from 13 per cent to 11 per cent, and is predicted to be 7 per cent in year of 2008. The sharp decline may quickly close down many Small and medium-sized enterprises(SMEs) which hardly depend on the rate of exported tax rebates.



Low labor cost in Southeast Asia:

Since the late of 20th century, labor price in most of China's industries has kept a sustainable growth. Cheap labor is not the advantage of China's textile and apparel industry any more, compared with many countries of Southeast Asia such as Thailand and Malaysia where many foreign buyers go for a lower price.

Trade barrier:

Although quota system has been abolished worldwide since January 1st 2005, China textile and apparel industry is continuing to confront with many different kinds of trade barrier: anti-dumping, technical trade barrier, special protective measures as in[15].

# Ⅲ. Framework Discussion

Since textile and apparel trade has become a worldwide activity, it is necessary to expend the research to the global commodity chain. Three main exported roles are involved in the network: manufacturers(including OEM, ODM and OBM), large retailers and branded marketers. All of them interact with each other and follow dynamic development paths.

A. **Introduction of exported roles in commodity chain *Manufacturers***

The elementary manufacturer—original equipment manufacturer(OEM) refers to some producers who produce merchandises entirely based on the requirements of other companies. All the merchandises will be sold at other's brand name. Original brand manufacturer(OBM) could join their production expertise with design and sell it's own branded merchandises. And, there is another form of manufacture between them called original design manufacture(ODM), which has the ability to produces and design products without their own brand names as in[14]. The differences among the three manufacturers are summarized at Table II.

| Business Type | Main Business Activities | Features of Manufacture | | |
|---|---|---|---|---|
| | | Scale | Time Span | Complexity |
| OEM | Simple Production | Large | Short | Simple |
| ODM | R&D, Design, Production | — | — | — |
| OBM | R&D, Design, Distribution, Brand, Marketing, After-sale service | Small | Long | Sophisticate |

**Table II A Comparison of Various Features: OEM, ODM and OBM**

OEM or ODM commonly used in the sub-sourcing business among cooperated enterprises. The former one only takes charge of the most simple part of outsourcing business—production. And the later mainly engages in research and development, and all the other business related to product. Compared with the two types above, OBM is the full autonomy brand manufacturer integrating all consumer-oriented business: from product development, design and manufacturing to marketing, distribution and after-sales services. At the same time, there are a lot of differences among the three types, especially in manufacture. The scale of OEM's business is relatively large with less number of customers and transactions, and short-term transactions taking only one year or a few years. The production process of OBM is much more complex than OEM, and situations are also the same in marketing and after-sales service sectors. With larger number of consumers, smaller scale of single transactions and longer time-span of business, the management in OBM is corresponding more difficult than OEM style.