

The Cambodia's Garment Industry in 2005 and Beyond: A Quantitative Analysis of the Critical Challenges

The future of Cambodia's garment industry will depend on the government to effectively implement critical reforms to improve governance

Since 1997, Cambodia's garment industry has played a very important role in contributing to the country's economic growth, and alleviating poverty pressure, especially in rural areas. About one million lives of the total population of thirteen million benefit directly or indirectly from this fast growing industry. Like in some other developing countries, the Cambodia's garment industry has greatly benefited from the worldwide quota system for garment exports that will be removed in January 2005. How will the industry look like in 2005 and beyond? What will be impacts on the population livelihood, especially in rural areas? How should policy makers deal with this new situation?

The main objective of this article is to answer some of these questions. To better understand the analysis, a presentation of global garment market, and current state of the Cambodian garment industry will be first examined.

Global Market in Garments

The global textile and garment industry has grown continuously to meet the demands of an increasing world population and standards of living. The world consumption of fibre by textile mills was 7 million tons in 1950; it has since increased to more than 50 million tons in early 2000's. The changing demand and supply patterns has resulted in a sharp increase in foreign trade in garments, from US\$ 108 billion in 1990 to US\$ 201 billion in 2002. In the medium term, the growth value of the foreign trade will depend on economic conditions to be prevailing in the world over the next few years.

Supplier and consumer countries have also been changing (table 1). Data released by the World Trade Organisation (WTO) show that the EU is no longer expected to be a major exporter or importers of garment products in the next few years. The US is anticipated to overtake the EU as the

top consumer by 2010. About 85% of garment imports over the years have been bought consistently by the EU, USA, and Japan. There is every expectation that these same countries will continue to be the major markets. These data also suggest that garment exports from high and medium cost countries such as USA, Canada, Hong Kong, South Korea and Taiwan have been in a declining trend.

It seems they have been replaced by China. It has ambitious plans for its textile and garment exports, which is based largely on huge foreign direct investment and attractive local costs. Its world market share increased to 20.5 percent in 2002, from a low 9 percent in 1990. It is forecast that this rapid growth will continue well into the future. Vietnam is also expected to become a stronger exporter once it meets requirements for WTO membership.

The garment industry has developed to be a major activity in many countries that previously had little or no manufacturing basis. This is most definitely the case with Cambodia. The Cambodian garment production, while critical to the economy of the country, remains relatively small in global terms, with about 0.3% of garment production world-wide and 0.6% of global foreign trade in 2002.

The cost competitiveness of garment supply countries in the two major market areas will change considerably with the ending of quotas. Until now, several countries have sold quotas to their manufacturing companies. The cost of these quota premiums has been recovered from the eventual garment buyers. Without quotas, vendors will be able to reduce prices accordingly. It can be seen that Cambodia in particular will lose some of its cost competitive advantage as quotas end, and competing countries are able to adjust their prices, especially China.

It is also expected that employment and social compliance issues will become the norm with all supply countries meeting buyers'

demands in this respect. Protection of the environment will also become a greater factor in non-tariff barrier considerations than hitherto, especially with regard to pollution caused by the discharge of dye house waste liquid directly into the natural water courses. Most textile producing countries have environmental protection regulations but not too many implement them as yet as the effluent treatment plants are not in place.

The Cambodia's Garment Industry

The garment industry has been the largest in Cambodia's manufacturing sector. Number of garment factories has grown from almost nil in 1995 to about 200 factories in 2004; most of them operate around Phnom Penh and other provinces surrounding the city. They have operated with about 80 percent of its capacity during the past recent years. But this capacity is basically full in 2004 because of sharp increase in demand and limited new investment.

Table 1: Global Trade in Garments and the Top 3

	1990	1995	2002	2010p
Global Trade (Billion US\$)	108	158	201	310
<i>Exported To</i>				
EU 15	52.6%	47.0%	42.2%	37.1%
USA	24.9%	26.2%	33.2%	38.7%
Japan	8.1%	11.9%	8.8%	10.0%
Sub-Total	85.6%	85.1%	84.2%	85.8%
<i>Imported From</i>				
EU 15	37.8%	30.7%	25.1%	12.9%
China	9.0%	15.3%	20.5%	35.5%
Hong Kong	8.6%	6.0%	4.1%	1.9%
Sub-Total	55.4%	52.0%	49.8%	50.3%
Thailand	2.6%	3.2%	1.7%	0.8%
Vietnam	0.3%	0.3%	0.5%	1.3%
Cambodia	0.0%	0.3%	0.6%	0.8%

Source: WTO for 1990-2002, EIC for 2010, compiled from various international Outlook

Box 1: Quotas and Beyond: a Look Ahead

(Extracts from Rohit Kuthiala, http://www.sweatshopwatch.org/global/articles/jsquotas_oct03.html)

Under the Multi Fibre Agreement (MFA) which lasted until 1994, importing countries negotiated quotas bilaterally with the exporting country. Negotiations centred on particular products which caused or threatened to cause serious damage to the industry of the importing country. This was a major departure from GATT rules and particularly the principle of non-discrimination.

Uruguay Round negotiations heralded a new era from 1995 to 2004 under the Agreement on Textiles and Clothing (ATC). A liberalisation process was initiated to enlarge existing quotas and increase textile and clothing exports from developing to developed countries away from the MFA and under normal GATT rules. Four stages for gradually easing-out quotas were agreed over a 10-year period, setting the stage for a quota-free world on 1 January 2005.

Years of restrictions under the MFA have deeply impacted global sourcing patterns and the development of the infrastructure to support textile and clothing manufacturing. The whole concept of global apparel sourcing was dictated by legislation and restriction instead of individual competitive strengths.

A major fall-out of the quota regime has been that it helped spread the textile and clothing business globally, giving many countries the opportunity to move into international export markets, for example Bangladesh, Cambodia, and many countries in the Middle East.

It is estimated that over 630,000 US jobs will be lost and more than 1,300 US textile plants will be closed over a three-year period due to a huge trade shift in favour of China after quotas are eliminated.

A similar impact will be felt across the globe as many factories will be forced to close down. Millions and millions of workers in some of the poorest economies of the world - in some cases textiles and clothing are the only export sectors - will also lose their jobs.

The dependence of a substantial portion of the US textile industry on preferential agreements is the main reason why the textile outlook for US producers is so grim. Mexico, the Caribbean and Central America account for nearly \$10 billion worth of US textile exports and none of these countries appears capable of meeting the enormous challenge the Chinese export machine presents.

How strong is the Chinese challenge? Could one country really dominate the global textile scenario so completely, as is predicted from China?

It is not clear how sourcing patterns will shift in the post quota era, but one thing is certain: there will be no sudden shift; changes, if any, will be gradual. Sourcing relationships take time to develop, and evolve and change, while associations between suppliers and buyers take seasons of positive performance and reliability to back and strengthen them.

Will it herald an expansion drive on capacities in China? Will countries like India, Pakistan, Turkey, Honduras, and Mexico hold their ground or lose market share or improve it?

There is no question that China with its huge resources, cheap and abundant manpower, export subsidies in the form of Chinese currency manipulation, state subsidisation and the use of export tax rebates, has an unassailable edge in the textile and apparel trade.

The advantages of cheap and abundant labour, a productive workforce, strong yarn and fabric base are not unique to China. Indeed, wages in Vietnam, India, and Bangladesh are even lower than in China. But what really makes China "so cheap" is its currency advantage... According to various estimates, this is approximately 40 to 50 per cent undervalued.

To really get a feel for how deeply China could penetrate the developed world's textile and apparel markets once quotas are completely phased out we can take the example of Japan and Australia, the two developed countries which have no quota structure in place. China has cornered a market share of 70 per cent or above in these markets.

However, price competitiveness is not the only factor determining and ensuring a big shift of business from one source to another. Retailers are always looking at quick lead times, lower inventory levels, quick replenishment etc to bolster their own margins and profitability. A cheap source on the other side of the world is definitely an advantage but has its limitations too.

Instead of having one single international market for apparel and textiles, the post quota era may result in three different regionally based models for the US, EU and Japan. Each of which will have a group of suppliers most suited to its needs in terms of lead times, prices, inventories, etc.

Looking at the domination of international trade by China, developed countries do have some safeguards built within the WTO to protect their domestic textile industries from the Chinese onslaught.

But whatever the outcome of global trade in apparel and textiles post 2005, one thing is certain: the global sourcing and trade scenario in this business as we know it today will cease to exist and a new order will come into being.

There is no denying the fact, that despite the currency and subsidy advantage that Chinese products offer, China still remains the world's single largest producer of apparel and textiles, offering a wide range of products unmatched by any other country. Sourcing managers will always find one road leading to China whatever product they wish to source.

Investment and Employment

Based on an EIC estimate, stocks of fixed assets of the 200 garment factories currently operating in Cambodia reach about US\$260 million. Including operating cashflows, the industry's FDI accumulated between 1995 and 2003 amounts more than US\$600 million. Most of garment investors in Cambodia are from Hong Kong, Taiwan, and China. These three top investor groups control more than 70 percent of total garment factory owners.

The garment industry plays a significant role in providing low-skilled labour force employment in Cambodia. It comprises of about 65 percent of total employment in the manufacturing sector. However, as Cambodia is still largely an agriculture country, number of work force in the garment industry is relatively minute, representing only about 4 percent of total labour force. From 1997 to 2001, the garment industry created almost 40,000 new jobs per year on average. However, this trend has significantly slowed down since 2002 to only about 15,000 new jobs, due to sharp decline in new investments. In 2003, it is estimated that the garment sectors employed 230,000 people.

Like in other countries, Cambodian women make up the largest part of the garment and footwear factory workers, accounting for about 85 percent. About 90 percent of them come from rural areas. Including overtime works, garment workers could earn on average about US\$60 per month, and about half of this amount is to pay for the minimum subsistence covering foods, room renting, and transportation between home and factory.

Most of the garment workers send a proportion of their earning to support poor families who are struggling in rural areas. To make that sharing possible with their little wages, they have to minimize their personal spending and engage in prolonged overtime works. Consequently, many have become weak, pale, and are prone to frequent sickness.

Production and Market

In principle, all garment production is for export. In 2003, the total

value of US\$1.6 billion has been exported; the US markets take 70 percent, and the EU markets 25 percent of the export. The reason that the US and EU markets absorbed largest proportion of the Cambodian apparel products is that Cambodia has received a Normal Trade Relations (NTR) with those countries after years of isolation. Cambodia is now enjoying duty-free and quota free access to the EU and Canadian apparel markets.

The garment export has rose dramatically since 1997 in spite of the political tension that brought about some fears to foreign investors at the time. Even though the quotas imposed by the US authority on some categories of products in 1999, the annual Cambodian garment exports rose 46 percent in 1999 and 78 percent in 2000, before slowing down to around 15 percent increase in 2001-2003. Despite the fear of huge international competition facing this industry next year, the export remained unexpectedly very strong, and it could reach the level of US\$2 billion in 2004.

The Cambodia's Quota System

As mentioned earlier, the US and European markets are the two most lucrative destinations for Cambodia textiles and garments exports. Exports of garments and textiles rapidly expanded, reaching almost US\$1 billion in 2000, and of this amount, the US markets represent 76 percent. The pace of great influx of Cambodian garment exports to the U.S. has brought about restrictions from the US government through an introduction of quotas on 12 categories of textiles and

apparel products. The quota has been effective from the period of 1 January 1999 through 31 December 2004.

With this limitation agreement, the US government planned to increase quotas by an additional bonus percentage, on the top of 6 percent annual automatic increase, if Cambodia would substantially comply with internationally recognised core labour standards. That encompasses assurance that labour laws and regulation would provide for high quality and productive workplaces, and seek to foster transparency in the administration of labour law, promote compliance with, and effective enforcement of existing labour law, and promote general labour rights embodied in the Cambodian labour code. In contrast, if the Cambodian government has failed to take major action resulting in a significant change in worker's working conditions, the United States may withdraw such an increase.

Since 1999, the quota utilisation mostly reached its limits, except for some non-important categories of products. Fortunately, the quotas do not seem to have shown any significant effects on Cambodian garment exports to the US markets. The very significant increase in the garment export to the US in 2000-2004 was mainly fuelled by rapid expansion of categories of garment not imposed by the quota, which is estimated to reach about 60 percent of total garment exports to the US in 2003, up from only 20 percent in 1999. Export to the non-US markets also played a great role in the garment industry development. For these reasons, the Cambo-

Table 2: Cambodia's Garment Exports (Million Pieces)

	1999	2000	2001	2002	2003
US Market Under Quota	118	115	126	137	139
US Market Without Quota	30	91	140	173	202
US Market - Total	148	206	266	310	341
EU and Other Markets	38	64	86	97	126
Total Markets	186	270	353	407	467
Quota/US Market (%)	80%	56%	47%	44%	41%
Quota/Total Market (%)	63%	43%	36%	34%	30%

Source: Ministry of Commerce

dia's garment industry can be well developed, if political and social environment remain good, and especially, if governance issues are resolved.

Productivity and Price Competitiveness

Productivity of the Cambodia's garment industry significantly increased. On average, the productivity of worker in US dollar rose by 14 percent per year during 1995-2003. Productivity of capital increased even more rapidly at an annual average rate of 20 percent during the same period (Figure 1). Nevertheless, the level of productivity in the Cambodia's garment industry remains lower than that of China, according to a World Bank report.

On the demand-side competitiveness, landed prices of Cambodia's garment products in the US markets are higher than those from Vietnam, Bangladesh, and Pakistan. However, China and India perform better than Cambodia on the same markets, according to the World Trade Atlas.

Critical Constraints

Same as in other sectors of the economy, Cambodia's garment industry faces many operational problems, starting from corruption and bureaucracy to high input costs.

Corruption and Bureaucracy

According to a World Bank survey, surveyed firms in all activities reported that corruption and bribery result in large additional payments, accounting for up to seven percent of the total value of export sales. Companies operating in Cambodia are conditioned to having to pay something under the table, and the amounts demanded by the public sector organizations are reported to be on the increase.

In addition to the unofficial payments relating to import-export procedures, surveyed firms confirmed that the bureaucracy associated with importing raw materials and exporting final products are onerous, and often result in significant time wasting and

unacceptable delays. The amount of time that senior management needs to spend on government-related matters represents a serious misallocation of resources.

These regulatory practices and corruption serve as deterrents to buyers and investors alike, as both groups know that the demanded payments situation can get out of hand. Especially, they will be at the mercy of those in influential positions whose "contributions to exports are limited, but whose costs are high."

Trades Unions

A number of problems with the trades unions that are active in the garment industry are reported by the firms in the World Bank survey. In many cases, differences in the interpretation of the labor law result in serious conflicts arising within the companies. In large part, the business sector ascribes these problems largely to vagueness in the phrasing of articles in the Labor Law. While industrial disputes are now fewer in number, any dispute is disruptive to the flow of export orders, costly to workers and the companies alike, and thus hurts the supply reputation of the companies in the eyes of the buyers.

Input Costs

In addition to the problems already mentioned, there are also issues related to other input costs which account for around 18 percent of total costs. The main issue here, especially for the more machine driven

processes, is the cost of power, which is about 2.5 times higher than that of the international average.

A Quantitative Analysis of the Critical Challenges

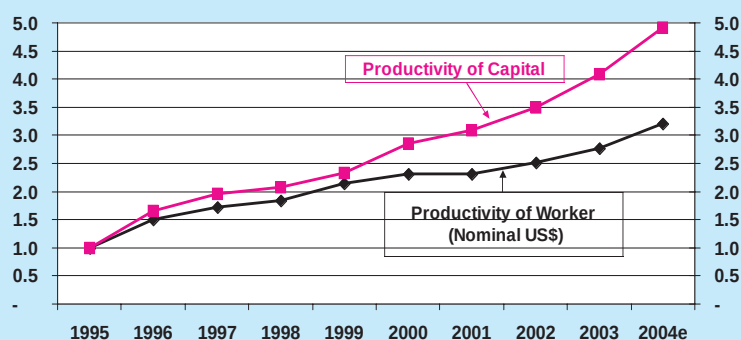
In order to examine the likely impacts of various development scenarios of Cambodia's garment industry over the next 5 years or so following the ending of the global garment quota system, EIC employed a simple but rich macroeconomic model to generate consistent estimates of the impacts on key macroeconomic variables.

The Model and the Scenarios

Since it is not possible to develop a model of the global garment industry itself, it is decided to examine two "scenarios" that draw on expert opinions on likely developments in the areas of competitiveness, and the market access for the Cambodian garment industry and that of the major competitors. For each scenario, detailed assumptions are made on the export quantities of the Cambodian garment industry, and product prices that the country can secure. Given the differences in types and prices of products exported to the US under quota and non-quota regimes, the distinction between these two categories is maintained even though the quota system will not be in place. And, given that Cambodia is a small player in global markets, it is assumed that changes in Cambodia's production will have no impact on global prices.

The final Cambodian garment

Figure 1: Productivity of Capital and Worker in the Cambodia's Garment Industry (1995=1)



Source: EIC, compiled from GMAC and Ministry of Commerce data

export values were then fed into the EIC macroeconomic model to generate expected impacts of the various scenarios on a range of socio-economic variables in the overall economy and in the garment sector, namely GDP, government revenues, labour costs, employment, and more. Details of the two scenarios are as follows.

The Laissez-faire Scenario

This scenario basically reflects a status quo situation, which is perhaps considered to be a likely one. The overall growth of the global garment market is assumed to be 5%. It is also assumed that the competition in the US market will be very fierce after the elimination of the quota system, and that levels of productivity in the Cambodian garment industry will remain the same, and that the Cambodian government takes no concrete measures to improve the business environment for the garment industry. As a result, Cambodia garment producers lose competitiveness in the world market, especially in the US.

Based on expert and professional opinions, Cambodia garment exports to the US market will thus decline by 5% per annum, on average, from 2005 to 2010, while the price of garment products under quota in that market also declines by 5% per year. However, it is assumed that conditions in the EU and other markets, including Canada, remain relatively favourable for Cambodian garment producers. Cambodian garments exports to these markets continue to grow at 5% per year, with a price increase of 2% per year.

The Growth Scenario

This scenario represents a more optimistic one for Cambodia. It is also assumed that the world market for garment products continues to grow by 5% per annum. While competition in the US market after the elimination of the quota system will be strong, with the implementation of sound economic and legal reforms, Cambodia garment producers will remain competitive, and maintain their market share in the world market.

Specifically, there will be concerted efforts undertaken by both government and industry to: (a) improve productivity of the workforce; (b) work to maintain and gain greater market access; (c) reduce lead times and develop backward linkages in the industry; (d) reduce the unnecessary transaction costs; and, (e) address other impediments to investment.

The Cambodian garment exports will, therefore, continue to grow by 5% per year in line with the expected growth in the global garment market.

It should be emphasized that modelling the impact of the ending of quotas at the end of 2004 on Cambodia and on international trade will be a highly fluid one. Undoubtedly, there will be significant changes in the global market environment that can affect the projections in the analysis. Buyers around the world will have a choice to source at will after 30 years of restrictions and quota allocations.

The number of variables that will influence the performance of Cambodia's garment industry are numerous and extremely difficult to predict. They range from factors that are more or less under the control of Cambodia - such as the policy reforms and productivity improvements - to those which are not - such as the performance of China in the garment industry, the performance of other major competitors, the decisions of major markets on issues of market access, and the overall growth of the global garment industry.

In terms of the immediate changes in 2005, there has been much discussion of a dramatic turndown in exports by Cambodian garment factories. It is our

belief that such major changes are unlikely to happen. A recent World Bank survey with 15 companies from the US and EU responsible for buying

Table 3: Main Assumptions and Results

	2003	2007p	2010p
Main Assumptions			
Price Levels (US\$/pieces)			
Growth	3.4	3.7	4.0
Laissez-faire	3.4	3.3	3.2
<i>Growth – Laissez faire</i>	-	0.4	0.7
Quantities (million pieces)			
Growth	466	567	656
Laissez-faire	466	451	407
<i>Growth – Laissez faire</i>	-	116	249
Impact on the Garment Industry			
Exports (million US\$)			
Growth	1,608	2,114	2,598
Laissez-faire	1,608	1,498	1,311
<i>Growth – Laissez faire</i>	-	616	1,287
Value Added (million US\$)			
Growth	482	635	780
Laissez-faire	482	450	393
<i>Growth – Laissez faire</i>	-	185	387
Labour Cost (million US\$)			
Growth	235	311	377
Laissez-faire	235	224	202
<i>Growth – Laissez faire</i>	-	87	175
Gross Profit (million US\$)			
Growth	115	147	187
Laissez-faire	115	101	86
<i>Growth – Laissez faire</i>	-	46	101
Employment (000's)			
Growth	230	265	294
Laissez-faire	230	219	198
<i>Growth – Laissez faire</i>	-	46	96
Impact on the Economy			
Nominal GDP (million US\$)			
Growth	4,000	5,020	6,350
Laissez-faire	4,000	4,680	5,350
<i>Growth – Laissez faire</i>	-	340	1,000
Real GDP Growth (%)			
Growth	5.0%	5.0%	5.0%
Laissez-faire	5.0%	4.0%	3.5%
<i>Growth – Laissez faire</i>	-	1.0%	1.5%
Gov. Revenue (million US\$)			
Growth	430	590	784
Laissez-faire	430	540	610
<i>Growth – Laissez faire</i>	-	50	174
Total Employment (million US\$)			
Growth	5,480	5,787	6,039
Laissez-faire	5,480	5,686	5,787
<i>Growth – Laissez faire</i>	-	101	252

Source: EIC Projection

about half of all garments produced in Cambodia has confirmed this belief. All changes are most likely to be gradual as both buyers and suppliers will need to find their feet in the as yet unknown market situations. Buyers will not suddenly switch orders from proven suppliers to ones that are less known to them as they cannot afford to fail in their established 'just in time' supply channels. However, in the longer term some countries and some suppliers will begin to benefit from the more open market whilst weaker companies will begin to lose out.

In sum, it is believed that the analysis presented below provides consistent indications of the likely impacts of two reasonable scenarios. If it is believed that the Cambodian garment industry will perform less well than modelled in the laissez-faire scenario, then the negative effects can easily be demonstrated.

Impacts on the Garment Industry

Impacts in the two scenarios on some key indicators of the garment industry are for the years 2007 and 2010. In terms of exports, the laissez-faire will see a decline of US\$ 110 million by 2007, and nearly US\$ 300 million by 2010. As mentioned earlier, this decline of exports by around 20% is not as dramatic as some have forecast, but we feel it serves well as a laissez-faire scenario. Similar declines are estimated for value added (from US\$ 33 million in 2007 to US\$ 89 million in 2010), labour costs (from US\$ 11 million to US\$ 33 million), and gross profit (from US\$ 14 million to US\$ 29 million). Employment losses increase to 32,000 jobs by 2010, accompanied by declines in payrolls of around US\$ 33 million.

In order to highlight the "opportunity cost" to the Cambodian garment industry for not making the improvements and reforms as indicated earlier, a comparison of the growth scenario with the laissez-faire scenario will produce dramatic results. By the year 2010, the difference in terms of export values is almost US\$ 1.3 billion, the number of additional jobs created is almost 100,000, and the additional payroll is US\$ 175 million.

Impacts on the Overall Economy

The effects of the two scenarios on some key indicators of the overall economy are for the same years 2007 and 2010. Looking immediately at the differences between the laissez-faire scenario and the growth scenario, it is striking that, in 2010, a full 1.5% of real GDP growth annually would be lost by not making improvements and reforms affecting the garment industry. This translates into losses of US\$ 1 billion of GDP annually and US\$ 174 million of government revenues. In terms of employment, the negative impact of the laissez-faire scenario as compared to the growth scenario would be a loss of 252,000 jobs per year, some 2.5 times the number of relatively high paying garment industry jobs alone that would be lost.

Poverty Impacts

While the poverty impacts of the employment generated by the garment sector have not been systematically quantified at the macro level, it is obvious that personal situations of the garment industry employees as well the rural households they support would be transformed if the laissez-faire scenario is realized. It is widely estimated that around 50% of monthly wages are sent home by the largely female workforce that has been originally from rural Cambodia. It is clear that the absolute declines in jobs, incomes, and therefore remittances, will translate directly into lower incomes for women and for poor rural households.

For example, the more than US\$ 30 million of labour cost declines by the year 2010 in the laissez-faire scenario would translate into reductions in remittances of around US\$ 15 million. It is likely that the social impact of the increasing joblessness (with a decline of more than 32,000 jobs in the laissez-faire scenario by 2010) would be great as large numbers of young women are thrown into an employment market with little opportunities for them. As they do not possess skills for alternate employment nor can they integrate back to

their villages easily, some NGOs working directly with garment employees fear that large numbers would be pushed into unsuitable or exploitative employment. And this analysis only takes into account the direct employment in the garment industry.

If the growth scenario is compared to the laissez-faire scenario, the opportunity costs of not undertaking the reforms required to improve the competitiveness of the garment industry are even more dramatic. If the growth scenario is achieved, it is estimated that around US\$ 90 million of the differential wage costs of around US\$ 175 million would be remitted to the rural areas. And almost 100,000 more jobs would be generated in the growth scenario.

Concluding remarks

The modelling exercise has confirmed what many have forecast. The negative impact on the Cambodian economy for not addressing the various impediments and inefficiencies in the garment industry is significant - amounting to a loss per year of 1.5% of GDP, and up to 250,000 jobs. It is likely that most of these adverse effects fall on women and the poor, thereby exacerbating the current social problems substantially. And perhaps more worrying is that these figures are based on a laissez-faire scenario that is somewhat more favourable than many have hoped for.

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Notes:

Parts of this article are inspired by a paper prepared for the Ministry of Commerce entitled "Cambodia's Garment Industry: Meeting the Challenges of the Post-Quota Environment".

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