

IMPACT OF AGOA

ON THE

SWAZILAND CLOTHING & TEXTILE SECTORS

COMPILED BY JACK KIPLING & ASSOCIATES

FOR ACTIF

AUGUST 2010

IMPACT OF AGOA ON THE SWAZILAND CLOTHING & TEXTILE SECTORS

INTRODUCTION

The objective of this report is to provide ACTIF with an analysis of the impact and relevance of AGOA to the clothing & textile sectors in Swaziland in preparation for the AGOA Review scheduled for August in Washington.

Statistical data is provided on the current size & composition of the apparel & textile sectors in Swaziland as well as the pattern of exports to the U.S. since the introduction of AGOA.

(Appendix 1)

IMPACT AND RELEVANCE OF AGOA FOR THE CLOTHING & TEXTILE SECTORS IN SWAZILAND

Swaziland owes the very existence of its apparel and textile industries to the MFA and AGOA and exports to the U.S. With one exception, all apparel manufacturers in Swaziland were established post 2000 following the enactment of AGOA.

Even the South African investors who have established apparel manufacturing facilities in Swaziland to supply the South African market were to some extent influenced by the success achieved by Taiwanese investors in establishing globally competitive apparel manufacturers in Swaziland.

Between 2000 and 2004, the Swaziland apparel sector grew phenomenally mainly as a result of investment by Taiwanese companies to take advantage of the duty free quota free access to the U.S. market under AGOA. At its peak in 2004, the clothing & textile sectors employed an estimated 30,000 employees in 27 establishments.

Like garment manufacturers located in many countries around the world, Swaziland's clothing industry experienced a major decline following the demise of the MFA in 2005. Employment declined significantly to reach a low of 11,500 by December 2005.

The demise of the MFA was not the sole reason for the decline. A significant strengthening of the local currency against the dollar coincided with the demise of the MFA seriously impacting global competitiveness.

The Lilengeni is linked to the South African rand at parity. The SA Government's monetary policy favours a floating currency with the Reserve Bank's role focused on inflation targeting. An unfortunate result has been an extremely volatile exchange rate. At its weakest the rand traded at R13.85 / US\$1 in 2001 and at its strongest traded at R5.92 / US\$1 in 2005. Throughout 2005 & 2006 the rand averaged R6.00–R6.50 / US\$1.

The volatile currency has created challenges for Swaziland manufacturers outside of their control.

Since 2005, the Swaziland apparel sector has experienced some employment growth due to South African investors establishing apparel manufacturing facilities in Swaziland to take advantage of the infrastructure and trained labour available as a result of the decline in exports. Employment at July 2010 is 16,950.

Despite favourable market access to the EU via the recently signed EPA, exports of apparel to the EU have been negligible. This is primarily as a result of the Taiwanese owned companies having their established customer bases in the U.S. and no market presence in the EU, whilst the South African and Swazi owned companies are focused on the South African market.

WHAT WOULD THE IMPACT BE ON THE SWAZILAND CLOTHING & TEXTILE SECTORS IF AGOA WAS NOT EXTENDED BEYOND 2015 WITH CONTINUED ACCESS TO 3RD COUNTRY FABRIC

Following the demise of MFA in January 2005, 9 foreign owned manufacturers closed down virtually halving employment in a single year, with employment declining from 30,000 employees in mid-2004 to 15,000 in mid-2005.

Swazi exporters are already facing a number of challenges in 2010. The continuing strength of the currency against the U.S.\$ as a result of the Lilengeni being linked to the South African Rand at parity, is adversely impacting on their competitiveness.

The demise of the export incentive scheme, the Duty Credit Certificate Scheme, in March 2010 will have a major impact on profitability from 2011 onwards.

Current exports are almost exclusively focused on the U.S. market. The predominant business model of the Taiwanese owned companies is for the Swaziland subsidiaries to be purely production facilities with product development, marketing and sales being conducted out of Taiwan. The product range appears to be very narrow being principally long run basic knits.

Should the U.S. market be threatened in any manner or the risk factor raised to any extent, it is quite likely that a scenario similar to the one that followed the demise of the MFA would unfold, namely at least half of the existing factories would close down and approximately 9,000 jobs be lost as the business models would not allow for the focus to shift to the EU and the South African market would not be large enough to absorb the surplus capacity. Even if it was possible for the South African market to be to a certain extent a viable alternative to the U.S. market for some Swaziland manufacturers, this would negatively impact on South African producers and destabilize the SACU region as a whole.

The apparel & textile sectors are significant employers in Swaziland and have a positive impact on other sectors such as transport operators, freight forwarders, commuter transport providers & street vendors. Therefore any decline in the apparel & textile sector will be felt in the broader community.

ACTION REQUIRED

With Swaziland having only one vertically integrated knitting mill and little prospect of the establishment of new textile mills in the foreseeable future, continued access to 3rd country fabric beyond 2012 is critical. An extension of AGOA beyond 2015 with continued access to 3rd country fabric and no further preference erosion is critical to the survival of the apparel & textile sector in Swaziland.

The absence of formal employer institutional structures in Swaziland meant that the Swazi government authorities were not in possession of any formal submission from industry as regards input to the AGOA Forum in August 2010.

A copy of the ACTIF position paper prepared for the AGOA Forum was handed to the Director-Investment Facilitation, Mr Mandla Nkambule of the Swaziland Investment Promotion Authority, who was scheduled to attend the AGOA Forum in Washington as part of the Swazi delegation.

The Swazi authorities recognise the threat to its clothing and textile industries should AGOA not be extended with access to 3rd country fabric guaranteed, as well as the threat posed by the DFQF offer to other non-African LDC'S, and undertook to support ACTIF's position in Washington.

APPENDIX 1

AGOA EXPORTS

2001	2002	2003	2004	2005	2006	2007	2008	2009	2010 (Jan-Mrt)
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
8,195,167	73,888,701	126,368,078	175,646,601	159,346,287	134,405,182	134,635,341	124,171,746	94,163,854	24,097,565

(Source: U.S. International Trade Commission)

NO. OF COMPANIES

2001	2002	2003	2004	2005	2006	2007	2008	2009	2010 (Jan-Mrt)
NA	NA	NA	27	18	17	17	17	18	18

(Source: SIPA / Technoserve)

EMPLOYMENT

2001	2002	2003	2004	2005	2006	2007	2008	2009	2010 (Jan-Mrt)
NA	NA	NA	30000	11500	NA	NA	NA	16950	16950

(Source: SIPA / Technoserve)

SITUATIONAL ANALYSIS

OF THE

COTTON, TEXTILE & APPAREL VALUE CHAIN

IN

SWAZILAND

COMPILED BY JACK KIPLING & ASSOCIATES

FOR ACTIF PROJECT

AUGUST 2010

FOREWORD

ACTIF commissioned Jack Kipling & Associates to produce a report with the objective of developing an inventory of Swaziland's cotton, textile & apparel sectors that would include a directory listing of firms engaged in the sectors, identify the national employer associations, government ministries, higher education & training institutions, and research and development facilities, with the purpose of creating a base of sector specific information that could assist in increasing interregional & global trade, raise regional competitiveness and encourage the optimum use of existing R & D and training facilities in the region.

An overview of the recent trajectory of the sector in terms of output, capacity, employment, trade statistics and government support interventions was required to provide an understanding of the current situation of the sectors and assist in identifying opportunities.

This country level analysis of the cotton, textile & apparel sectors in Swaziland aims to provide the above information.

Every effort has been made to ensure that the situational analysis is as current as possible based on the latest available data.

Jack Kipling & Associates wishes to specifically acknowledge the contribution made by Ms Amanda Short of Technoserve and Mr Mandla Nkambule of the Swaziland Investment & Promotion Authority (SIPA) in arranging interviews with key stakeholders.

INTRODUCTION

All sectors of the cotton, textile & apparel value chain are to be found in Swaziland with a high degree of value chain integration. The apparel sector is the main employer whilst Swaziland has a long tradition of cotton farming.

YKK, the world's leading manufacturer of zips, established a factory in Swaziland from which it supplies the apparel industries throughout Sub-Sahara Africa.

The situational analysis reflects the position of each of the sectors as at June 2010.

COTTON GROWING & GINNING

Chapter 1:

1 Situation Analysis of the Cotton Growing & Ginning Sector in Swaziland

Overview

There are 4 cotton growing regions in Swaziland, namely Lubombo, Shiselweni, Manzini and Hhohho, of which the first two are the major producing regions.

Cotton growing in Swaziland is exclusively dry-land cultivation undertaken by 2,500 to 3,000 small scale farmers with the largest having approximately 40 hectare under cultivation.

There is only one ginner currently in operation, Sikhulile Ginnery in Big Bend that gins the entire output of the Swaziland cotton farmers.

Sikhulile Ginnery is owned by the Swaziland Cotton Board and the C.E.O. is Mr Jecomiah Msibi.

Cotton Lint Production

Cotton lint production in 2009 totalled 1556 metric tons, the estimate for 2010 being 2450 metric tons.

The entire current cotton lint output of Sikhulile Ginnery is sold locally to Spintex in Matsapha. The seed is currently sold to South Africa for use as feedstock. There is an oil seed establishment, Swaziland Oil Industries located in Matsapha, but the ginning production would need to increase to 10,000 metric tons before it became viable to supply the local oil seed facility. The capacity of the Sikhulile Ginnery is 25,000 metric tons.

Institutional Structures

The key institutional structure is the Swaziland Cotton Board chaired by Mr Tom Jele. The board consists of 4 Regional Cotton Farmers Associations representatives, a Ginners representative, a Spinners representative and representatives from the Department of Agriculture and the Department of Finance.

The Cotton Board is highly effective providing excellent support to farmers. In Swaziland, cotton farming is a cash crop with Sikhulile Ginnery, owned by the Cotton Board, paying the farmers direct on delivery. Farmers are also provided with suitable bags to eliminate contamination.

The Cotton Board has well-established education & training programmes that are decentralized, with principal trainers training over 100 selected lead farmers who in turn train & educate the other small scale farmers in every district.

The country is mapped out and every farm location identified. Every farmer has a registration number and cotton bales can be traced to their source.

The Cotton Board is funded by a levy of E0.7,5c per kilo.

Research & Development

Apart from its own facilities, the Swaziland Cotton Board works closely with Cotton S.A. to maximise the expertise & facilities available in the SACU region. All grading is currently done by Cotton S.A.

Organic Cotton and GM Seed

Although organic cotton and the use of GM seed have been discussed by the Cotton Board, a cautious approach is being taken and currently there is no organic cotton being grown nor is GM seed being used.

Average Seed Cotton Prices

The seed cotton price to farmers in 2009 was E4.30/kg and the estimate for 2010 was E4.40/kg.

Future Potential for Cotton Growing & Ginning

Spintex's demand estimated to be 4100 metric tons exceeds Sikhulile's current output of 2450 metric tons. Spintex has expressed interest to take up any increased output from Sikhulile Ginnery.

Texray also has a knitting mill with demand for cotton lint.

With a ginning capacity of 25,000 metric tons the key lies in encouraging farmers to grow more cotton. A fall back position for Sikhulile Ginnery is to gin cotton from Mozambique or South Africa in order to meet the needs of Spintex & possibly Texray.

A key aim of ACTIF is to encourage the growth of the entire cotton value chain through increased interregional trade, local beneficiation and the optimum use of existing research & education facilities. The cotton, textile & apparel value chain in Swaziland is setting an admirable example of vertical integration.

APPAREL SECTOR

Chapter 2:

2. Situational Analysis of the Apparel Sector in Swaziland

2.1.1 Overview

It is no exaggeration to say that Swaziland owes the existence of its clothing industry to the MFA and AGOA. With one exception, all existing apparel manufacturers were established in 2000 and onwards.

Following the enactment of AGOA in 2000, (Swaziland became eligible for apparel exports on 23 April 2001) a number of international investors, mainly Taiwanese, were attracted by the duty-free quota free market access into the U.S.A. With strong support from the Swazi government (Swazi Investment Promotion Agency) in the form of low rental custom-built factory premises, favourable tax rates coupled with an abundant supply of highly trainable staff at globally competitive wages, led to the rapid growth of the apparel sector which peaked in 2004 at an estimated 30,000 employees.

Unfortunately since 2004, the apparel industry has experienced a dramatic decline primarily as a result of the demise of the MFA and uncertainty regarding continued access to 3rd country fabric, resulting in a number of foreign-owned apparel manufacturers that were supplying the U.S. market closing down. Employment declined to a low of 11,493 in December 2005.

Exports to the U.S. declined considerably from US\$175,6m in 2004 to US\$94,2m in 2009.

As a result of the success of Taiwanese manufacturers in establishing globally competitive apparel manufacturers in Swaziland, a number of South African apparel manufacturers were persuaded to establish manufacturing facilities in Swaziland.

Therefore partly compensating for the decline in exports has been the rise in the interest of some apparel manufacturers to service the local South African market.

As at July 2010, there are 16 apparel manufacturers employing a total of 16,950, well below the peak of 30,000 in 2004 but up from 2005. There is consequently a fair amount of underutilized factory premises highly suitable for apparel manufacturing and an abundant supply of highly trainable prospective employees.

2.2 Structure of the Swaziland Apparel Sector

2.2.1 Size of Industry

Companies & Location

There are 16 apparel manufacturers in Swaziland of which 8 are in Matsapha, 4 are in Nhlanguana, 3 are in Mbabane and 1 in Ezulwini. Appendix 1 is a list of manufacturers and contact details.

Employment

As at June 2010, employment stood at 16,950, considerably down from the peak of 30,000 in 2004, but up from the low of 11,493 at December 2005. Appendix 1 reflects company employment.

2.3 Regulatory Framework

Legislation exists to cover conditions of employment, health & safety and environmental protection and are in line with global best practice.

The Regulation of Wages in the Textile & Apparel Industry, which came into effect on 1st September 2004, is a sector specific extension of the Wages Act of 1964 to regulate minimum wages. Wages & conditions of service are negotiated bi-annually and the current agreement expires in December 2010. Based on evidence at the factories visited, it is evident that the legislation is effectively implemented and monitored to ensure compliance, with some export oriented companies displaying certification from leading U.S. retailers known for setting high standards for ethical sourcing.

Cost of Production

Wage Rates

The current minimum wage for a qualified machinist up to December 2010 is E266 per week for a 47 hour week. For global comparisons this equates to US\$0,78 per hour.

There are 11 public holidays and an annual leave entitlement of 13,5 days. Employees are entitled to 14 days sick leave per annum at full pay and 14 days at half-pay.

There is also a statutory contribution to a National Provident Fund of E50 per month.

Some progressive manufacturers have established in-house clinics staffed by medical professionals for the benefit of their staff. The cost of providing clinic services is estimated to be approximately 2,5% of wages although the companies benefit from a lower absentee rate than the average (3,5% versus 8%).

The total labour costs, including benefits, equates to approximately US\$0,97 per hour.

Electricity

Swaziland draws its electricity supply from the South African grid. The normal cost is E0,97 per kilowatt hour and the peak rate is E1,33 per kilowatt hour.

The cost of electricity is expected to rise quite considerably over the next 4 years at approximately 28% per annum.

Water

The water cost is E12.32 per kilo litre.

Rentals

The Swaziland Investment and Promotion Authority has invested heavily in developing industrial premises which it rents at an average of E8,00 per sq.m to apparel manufacturers establishing factories in the industrial areas.

(Exchange rate E7.40 / US\$1)

Trade Statistics

The apparel sector in Swaziland is largely export oriented. The export market profile, namely almost exclusively the U.S. market, is a reflection of the foreign ownership of the majority of exporters with an established customer base in the U.S.

Despite duty free quota free access to the E.U. based also on a single transformation rule of origin, exports of apparel to the E.U. are negligible although Spintex is exporting yarn to the E.U.

However it must be recognised that the advantage of duty free access to the U.S., an average of 17%, is significantly more than the average advantage in the E.U. market of approximately 8%.

The table below reflects the growth and subsequent decline post 2005 of AGOA exports from Swaziland.

2001	2002	2003	2004	2005	2006	2007	2008	2009	2010 (Jan-Mrt)
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
8,195,167	73,888,701	126,368,078	175,646,601	159,346,287	134,405,182	134,635,341	124,171,746	94,163,854	24,097,565

(Source: U.S. International Trade Commission)

Exports to the EU over the past 5 years were as follows:

2005	2006	2007	2008	(2009)
E10,1m	E20,9m	E26,8m	E 9,1m	(Not available)
US\$1,4m	US\$2,8m	US\$3,6m	US\$1,2m	-

(Source: SIPA)

Product Range

The majority of exports are knits (T-shirts, sweaters & polo shirts). However the South African owned companies are producing a wide range of products for the South African market, e.g. ladies blouses, skirts, pants, jackets & dresses, both knits & wovens, displaying high levels of operator skill & flexibility.

Industry Institutional Structures

Employer Associations

At present there are no formal industry institutional structures in place for the apparel & textile sectors. However efforts are being made to establish an industry association to deal specifically with trade related issues.

Whilst communication channels exist between individual manufacturers and government agencies, there is no formal collective apparel sector communication channel with government as evidenced by the dangerous lack of collective industry input to government on issues as important as the AGOA Forum Review and the discontinuation of the TCIDP (DCCS) export incentive scheme.

Key Government Ministries / Departments

There are two key government agencies actively engaging with the apparel & textile sectors.

The Swaziland Investment Promotion Authority (SIPA) is responsible for attracting new investment as well as servicing existing companies, most of whom rent premises from SIPA. Contact details for SIPA are as follows:

Physical Address: 7th Floor, Mbandzeni House,
Libandla Street,
Mbabane

Postal Address: P.O. Box 4194,
Mbabane H100,
Swaziland

The Director-Investment Facilitation & Aftercare is Mr Mandla Nkambule.

The Ministry of Labour & Social Security is the authority that oversees the bi-annual wage negotiations and is responsible for ensuring compliance to the national wage agreement.

The absence of a structured employer representative body has added a burden on the government agencies as regards effective communication and interaction with the sector collectively.

Government Support for the Sector

Priority Status

The apparel & textile sectors enjoy support from the Swaziland authorities. It is very evident that the Swazi government has invested heavily in terms of infrastructure in the industrial centres.

Between 2000 & 2005 the average share of transport & communication infrastructure accounted for 36,8% of the government budget.

Swaziland is a land-locked country by definition only. Its membership of SACU and geographic position provide it with ready access to three of Southern Africa's principal sea ports in close proximity, namely Durban, Richards Bay & Maputo as well as relatively close proximity to the largest cargo airport at O.R. Tambo in Johannesburg. Road works on the main transport corridors are well maintained.

Support Measures

Competitively priced custom built factory premises provided by the Ministry of Enterprise & Employment via SIPA is the main attraction coupled with favourable negotiable corporate tax rates and exemption from tax on dividends for 10 years.

The Textile & Clothing Industry Development Programme (TCIDP – DCCS), an export incentive programme under which exporters could earn tradable duty credit certificates equal to 25% of the value of their exports, was terminated on 31 March 2010. There are no other sector specific incentives in place.

Tariff Protection

Swaziland is a member of the South African Customs Union (SACU) which comprises South Africa, Namibia, Botswana, Lesotho & Swaziland. Goods move freely between these countries which share a common external tariff regime.

SACU applies comparatively high tariff protection on textile product imports with fibre ranging from 0 – 10%, yarn at 15%, fabric at 22% and apparel at 40% with a number of primarily cotton based apparel at 45%. The SACU bound rate on apparel is 45% and on textiles 25%.

Preferential Market Access Arrangements

Swaziland is AGOA eligible and has duty-free access into the U.S. based on a single transformation rule of origin.

Swaziland has signed the Interim EPA and has duty-free access into the EU based on a single transformation rule of origin.

As a member of SACU, Swaziland also has duty-free access into the EFTA States (Norway, Switzerland) based on a 35% added value rule of origin.

Swaziland is a member of SADC. The rule of origin for SADC currently is a double transformation rule. SADC member states are Angola, Botswana, D.R. Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, South Africa, Swaziland, Tanzania, Zambia & Zimbabwe. Madagascar's membership of SADC has been suspended but the market access remains in place.

Swaziland is also a member of Comesa with preferential market access based on a 35% added value rule of origin to 19 Central & East African countries.

Monetary Policy

The Elengeni is linked to the South African rand at parity. The SA Government's monetary policy favours a floating currency with the Reserve Bank's role focused on inflation targeting. An unfortunate result has been an extremely volatile exchange rate. At its weakest the rand traded at R13.85 / US\$1 in 2001 and at its strongest traded at R5.92 / US\$1 in 2005. Through 2005 & 2006 the rand averaged R6.00-R6.50 / US\$1.

The volatile currency has created challenges for Swaziland exporters outside of their control.

Customs Regulations

SACU Customs regulations allow for the duty-free import of raw materials for re-export under the 470-03 regulations as well as allowing for a draw-back of duty on all raw materials imported, benefited and exported.

Future of Apparel & Textiles

Given the overwhelming importance of exports to the U.S., of some concern going forward is the future of AGOA, with access to 3rd country fabric scheduled to expire in 2012 and AGOA, itself, scheduled to expire in 2015 which could put at risk a number of the foreign-owned export-oriented apparel manufacturers. However the Swazi authorities have realised the threat and are fully supportive of the ACTIF submission to the AGOA Forum in August 2010.

An additional concern is the discontinuation in March 2010 of the Interim Textile & Clothing Industry Development Programme (DCCS), an export incentive scheme that was compensating for an unusually strong currency. The impact of this development on the viability of exporters remains to be seen.

South African retailers are showing a greater interest in sourcing apparel from Swazi apparel manufacturers which could offer an alternative to exports but certainly not to the extent of total replacement for a potential loss of global markets.

Failure to secure an extension to AGOA with continued access to 3rd country fabric could result in the closure of a number of foreign-owned companies with a potential loss of 9,000 jobs. Given the importance of the apparel & textile sector in Swaziland's industrial economy this would be catastrophic.

TEXTILE SECTOR

Situational Analysis of the Swaziland Textile Sector

Overview

The textile industry in Swaziland consists of one operational spinner (Spintex), one knitting mill (Texray), and the YKK zip manufacturing plant.

It is unlikely that there will be any significant increase in textile capacity in the near future.

Spintex

Spintex is the only spinner currently operational in Swaziland, producing a diverse range of cotton and poly yarns primarily for the SACU market with approximately 10% of output exported to the EU. The product range includes:

- 100% Cotton Carded and Combed Ringspun yarns
- Poly/cotton Carded and Combed Ringspun yarns
- 100% polyester Ringspun yarns for sewing thread and knitting/weaving
- Core yarns both Poly/Poly and Poly/Cotton
- 100% Cotton Open End yarns for the Knitting and Weaving industries – Spun on Rieter R40
- Open End waste yarns

Currently the spinning capacity of 380 ton per month is fully utilized. Future expansion would be dependent on investment incentives in the form of capital availability at favourable interest rates to upgrade technology and expand production.

Spintex takes up the total current cotton lint production output of Sikhulile Ginnery and sources the balance from within SADC.

Texray

Texray is Swaziland's largest apparel & textile group employing 5,000 staff in a number of factories in Matsapha. Whilst knit apparel manufacture is the main activity, Texray does have a vertically intergrated spinning and knit fabric capability in excess of its own needs. Texray is managed from Taiwan.

(Awaiting capacity details from Texray Taiwan)

Future of the Apparel & Textile Sectors in Swaziland

A SWOT analysis of the apparel and textile sectors in Swaziland would indicate the following:

STRENGTHS	Government support for the sector to attract investment is business friendly Good industrial infrastructure Existing premises at competitive rentals Favourable market access arrangements to U.S., EU & Africa and proximity to South African market Plentiful supply of suitable trainable labour at globally competitive rates
WEAKNESSES	Absence of industry institutional structures to address macro challenges collectively High level of labour turnover
OPPORTUNITIES	Existing demand and production capacity available for an increase in cotton lint production and therefore cotton growing South African retailer interest in sourcing from Swaziland
THREATS	High level of foreign ownership entirely reliant on AGOA extension Currency strength / volatility against US\$

Conclusion

Potential exists to grow the apparel & textile sectors (particularly the apparel sector) in Swaziland.

Key requirements for growth are:

The extension of AGOA to 2025 with continued access to 3rd country fabric

No further preference erosion due to favourable market access being offered to non-African LDC's

Attracting additional foreign investors preferably with existing markets in U.S. and EU

Attracting South African, Swazi local & sub-Sahara African investors to encourage regional integration and the development of regional markets within the SADC & Comesa blocs

TEXTILE, GARMENTS AND APPARREL COMPANIES

NO.	NAME OF ORGANIZATION	DIRECTORS NAME	E-MAIL ADDRESS	ADDRESS	NO. OF EMPLOYEES
1	Matsapha Knitwear (Pty) Ltd	Managing Director, Mr. Simon Cheung	mkntswd@africaonline.co.sz	P. O. Box 1315, Matsapha	200
2	FTM Garments (Pty) Ltd	Managing Director, Mr. John Sheng-Neng Fan	ftmmotors@swazi.net	P. O. Box 714, Nhlangano	800
3	HO's Enterprise (Pty)Ltd	Managing Director, Mr. Joe Ho	hos@swazi.net	P. O. Box 1416, Nhlangano	800
4	Tuntex Textile Company (Pty) Ltd	Managing Director, Mr. Paul Weng	paul@tuntex.co.sz	P.O.Box 1892, Matsapha	1200
5	Leo Garments (Pty) Ltd	Managing Director, Mr. Leo Hsiao	leogmt@realnet.co.sz	P. O. Box 111, Matsapha	900
6	The Great Spring (Pty) Ltd	Managing Director, Mr. Chang Wan Li	Jerry@greatspring.co.sz	P. O. Box 453, Matsapha	600
7	Texray Group	Managing Director, Mr. Mason Ma	cindy_wu@texray.com mason@texray.com	P. O. Box 1864, Matsapha	5000
8	Fashion International (Pty) Ltd	Managing Director, Mr. Mike Destombes	roberta@fashion.co.sz miked@traiclo.co.za	P. O. Box 536, Ezulwini	1400

9	Far East (Pty) Ltd	Managing Director, Mrs. Tokky Hou	tokkysportz@realnet.co.sz	P. O. Box 629, Matsapha	
10	Carapparel Swaziland (Pty) Ltd	Managing Director, Ms. Cynthia Lu	cynthia@carapparel.net	P. O. Box 995, Matsapha	500
11	Zheng Yong (Pty)Ltd	Managing Director, Mr. Ping Kun Cheng	ada@zhengyong.co.sz	P. O. Box 337, Nhlungano	3000
12.	Clockwork Giant Clothing	Mr Jay Hall	jayhall@giant.sz robs@gfox.co.za	P O Box 4194, Mbabane	750
13.	New Life Garments	Mr David	mchin@telkomsa.net	P O Box 4194, Mbabane	200
14.	Juris Manufacturing		junte@junit.co.za juries@swazi.net	P O Box 1490 Nhlungano	600
15.	Ample Clothing and Apparel	Mr Ricky Huang		76346967	100
16	Kanfa Knitwear (Pty) limited	Mr Chang I-ming	Sunho51268@yahoo.com.tw zhaiyun@163.com	P O Box 1853 Matsapha Tel: 3436585	300

August 6, 2010

SWAZLND

MAJOR SHIPPERS REPORT
By Country
Data through 6/2010 in Million \$

Ctrl, Cat, Product	Calendar Years		Year-to-Date			Year-Endings			YE 6/2010		
	2008	2009	6/2009	6/2010	% Change	6/2009	4/2010	5/2010	6/2010	% Change	% Share
Aggregations:											
0 Total	124.901	94.432	47.637	40.070	-15.88	116.630	88.575	87.991	86.865	-25.52	0.10
1 Apparel	124.869	94.409	47.625	40.064	-15.88	116.595	88.554	87.969	86.848	-25.51	0.13
2 Non-Apparel	0.033	0.023	0.011	0.005	-50.97	0.035	0.022	0.022	0.017	-51.03	0.00
11 Yarns	0.007	0.000	0.000	0.000	*	0.007	0.000	0.000	0.000	-100.00	0.00
12 Fabrics	0.005	0.003	0.003	0.004	49.83	0.004	0.006	0.006	0.004	12.88	0.00
14 Made Ups / Mis	0.020	0.020	0.008	0.001	-83.26	0.024	0.016	0.016	0.013	-45.48	0.00
30 Cotton Product	80.225	56.451	29.612	22.573	-23.77	73.112	52.558	50.826	49.411	-32.42	0.10
31 Cotton Apparel	80.219	56.438	29.612	22.570	-23.78	73.106	52.543	50.810	49.397	-32.43	0.12
32 Cot Non-Appare	0.005	0.012	0.001	0.003	257.99	0.006	0.016	0.016	0.015	143.54	0.00
40 Wool Products	0.015	0.008	0.008	0.001	-89.40	0.015	0.003	0.004	0.001	-94.58	0.00
41 Wool Apparel	0.000	0.000	0.000	0.001	*	0.000	0.000	0.001	0.001	*	0.00
42 Wool Non-Appar	0.015	0.008	0.008	0.000	-100.00	0.015	0.003	0.003	0.000	-100.00	0.00
60 MMF Products	44.657	37.973	18.016	17.496	-2.89	43.499	36.014	37.162	37.453	-13.90	0.12
61 MMF Apparel	44.647	37.971	18.014	17.494	-2.89	43.489	36.011	37.158	37.451	-13.88	0.18
62 MMF Non-Appare	0.009	0.002	0.002	0.002	30.34	0.010	0.003	0.003	0.002	-76.33	0.00
80 S and V Produc	0.005	0.001	0.001	0.000	-100.00	0.004	0.000	0.000	0.000	-100.00	0.00
81 S and V Appare	0.002	0.000	0.000	0.000	*	0.000	0.000	0.000	0.000	*	0.00
82 S and V Non-Ap	0.004	0.001	0.001	0.000	-100.00	0.004	0.000	0.000	0.000	-100.00	0.00
Cotton:											
335 W/G Cot. Coats	1.183	0.192	0.114	0.001	-98.84	1.078	0.079	0.079	0.079	-92.67	0.01
339 W/G Knit Blous	15.995	9.245	4.682	4.972	6.21	11.837	8.965	9.711	9.535	-19.45	0.13
340 N-Knt Shirts,M	5.838	4.183	0.773	1.354	75.29	4.121	5.238	4.898	4.764	15.61	0.21
347 Cot.M/B Trous	15.586	14.957	7.611	7.559	-0.67	15.970	15.500	14.827	14.906	-6.66	0.29
348 W/G Slacks, et	34.670	22.688	14.209	6.681	-52.98	35.083	17.645	15.915	15.160	-56.79	0.24
Man-Made Fiber:											
634 Other Coats, M	0.998	0.905	0.084	0.000	-100.00	1.065	0.821	0.821	0.821	-22.87	0.07
635 Coats, W/G	1.764	1.434	0.303	0.827	173.43	1.863	1.947	1.963	1.959	5.17	0.14
638 Knit Shirts, M	6.136	5.328	1.843	5.490	197.95	4.626	8.382	8.711	8.975	94.04	0.60
639 Knit Blouses,W	13.659	11.924	5.485	2.740	-50.04	12.837	8.917	9.141	9.180	-28.49	0.36
647 Trousers,etc M	1.228	2.496	1.315	1.880	42.92	1.730	2.479	2.901	3.060	76.95	0.20
648 Slacks,etc. WG	16.252	13.459	7.307	6.274	-14.14	16.922	11.973	12.605	12.426	-26.57	0.91
659 Oth. MMF App.	1.468	0.420	0.187	0.003	-98.44	1.566	0.266	0.235	0.235	-84.99	0.01

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