

Strong export and job growth in Asia's garment and footwear sector

Developing Asia-Pacific's garment and footwear industry continued to perform well in 2014. Exports grew by 5.1 per cent in the past year and reached an astounding \$601 billion, or three-fifths of the global total. The sector now employs more than 40 million workers. Despite some progress, however, productivity and wages remain low overall. In order to sustain growth, new drivers of competitiveness based on improved working conditions are needed.¹

1. Introduction

Asia's garment and footwear industry has entered a pivotal juncture. Economic and demographic transition in China and the rise of an affluent consumer class in emerging markets are shifting the competitiveness landscape. Recent industry tragedies, such as the collapse of Rana Plaza in April 2013, have again highlighted social responsibility and legal compliance as fundamental considerations in apparel sourcing decisions.

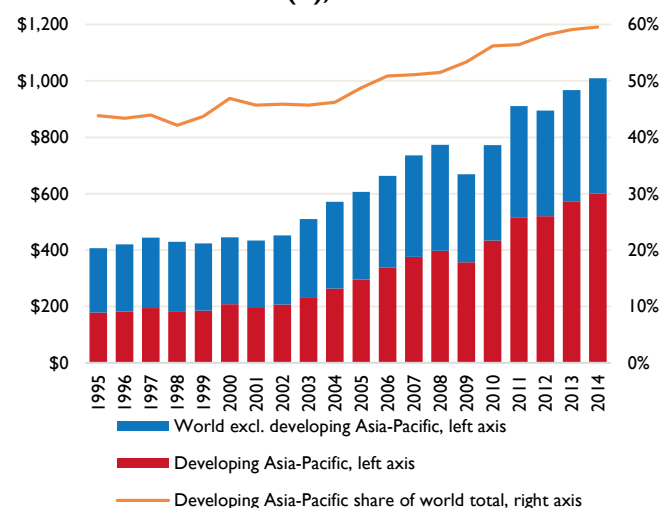
In that dynamic context, this note presents economic trends for the region's apparel industry and examines the factors that will heavily shape the medium-term outlook for its growth. Based on analysis of recent industry developments in terms of employment, wages, productivity, and working time, this note contends that promoting better working conditions can help countries drive competitiveness by attracting a better qualified workforce and enhancing workplace productivity.

2. Robust growth in garment and footwear exports

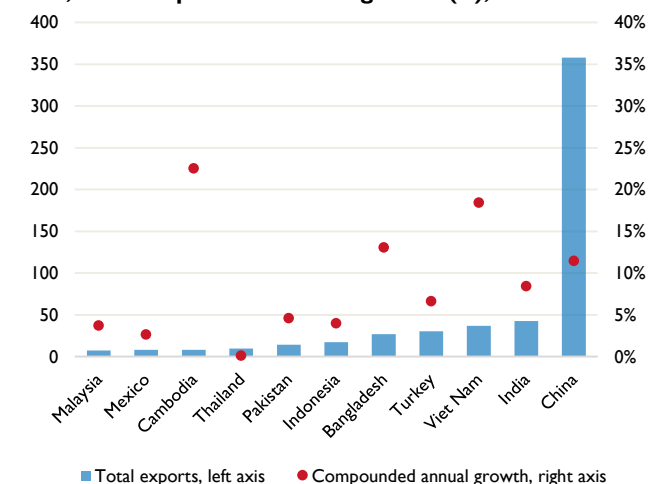
Asia has become the garment factory for the world. In 2014, the developing Asia-Pacific region accounted for \$601.1 billion (59.5 per cent) of global exports of garments, textiles and footwear (figure 1, panel A). This marks an astounding rise from \$178.3 billion (43.8 per cent) in 1995. Asian economies encompass three of the world's top five garment exporters, and 10 of the top 20. Annual compounded growth in apparel exports from the developing Asia-Pacific region averaged 6.6 per cent from 1995 to 2014, while the global average (excluding developing Asia and the Pacific) was only 3.1 per cent. The region's long-term growth achievements

are even more remarkable, given the slowdown in clothing exports immediately following both the 1997–98 Asian financial crisis and the 2008 global economic crisis.

Figure 1. Global exports of garments, textiles & footwear
Panel A. Exports from developing Asia-Pacific (\$ billion) and share of world total (%), 1995–2014



Panel B. Exports from selected economies (\$ billion), 2014, and compounded annual growth (%), 1995–2014



Source: Estimates from UNCTAD: UNCTADstat Database.

Within the region, several economies are shaping the global landscape (figure 1, panel B). China has been the international leader in garment exports for decades. In 2014, it exported \$358 billion in textiles, apparel and footwear and dominated

¹ This research note is based on P. Huynh: *Employment, wages and working conditions in Asia's garment sector: Finding new drivers of competitiveness*, ILO Asia-Pacific Working Paper Series (Bangkok, ILO, forthcoming).

52 per cent of the export market share among all developing economies. India and Viet Nam also ranked among the highest in clothing exports globally, totalling \$42.7 billion and \$37 billion, respectively. Annual export growth from 1995 to 2014 was robust and exceeded double-digits in Cambodia (22.5 per cent), Viet Nam (18.4 per cent), Bangladesh (13.1 per cent) and China (11.5 per cent). Clearly, these trends provide strong indication that Asia's global dominance in garment, textile and footwear production will not soon diminish.

In their respective national context, the garment and footwear industry is a crucial contributor to total exports for a number of Asian countries. In Bangladesh, the sector accounted for 89.2 per cent of total merchandise exports in 2014, an increase of 12.6 percentage points since 1995.² The growth of the sector has been even more remarkable in Cambodia, with its share of merchandise exports spiking rapidly from 20.6 per cent in 1995 to 77.4 per cent in 2014.

By comparison, in Pakistan the sector's contribution to merchandise exports waned by 16.9 percentage points since 1995 but still stood at 58.7 per cent in 2014. This overall sector trend is attributed to the marked decline in textiles while garment and footwear exports remained steady. In Viet Nam, the garment, textile and footwear industry has accounted for around one-fourth of total merchandise exports since 1995, despite a gradual diversification away from labour-intensive exports overall.

Conversely, several Asian economies have become significantly less reliant on the apparel industry and have shifted into other higher-skilled manufacturing sectors over the past couple decades. In China, for example, garment exports as a percentage of total merchandise exports decreased around 15 percentage points to 15.3 per cent from 1995 to 2014. In Indonesia, dependence on apparel production also declined considerably during that same period, but the sector still contributed 9.8 per cent of merchandise exports in 2014.

3. Changes in the competitiveness landscape

In China, which remains the dominant global garment supplier, tremendous changes are shaping the future of the industry for the whole region. First, the country's process of economic transformation has been rapid, with industrialization increasingly focused on higher value-added production. From 1995 to 2014, garment exports as a share of total merchandise exports fell from 30.5 per cent to 15.3 per cent. During that same period, the share of total

manufacturing exports of labour- and resource-intensive products decreased by 20.1 percentage points to 23.7 per cent, with a concomitant rise of 15.8 percentage points in the share of medium- and high-skill and technology-intensive manufacturing exports.

Second, the country's historical advantage of massive labour surpluses is diminishing due to an ageing population. China's labour force is projected to grow by merely 6 million, or 0.7 per cent from 2015 to 2025.³ Moreover, jobseekers are increasingly turning to more prestigious industries with higher earnings and better career prospects, further constraining the garment sector's ability to recruit a high-quality workforce.

Finally, wages in the garment and textile industry have risen in the past decade, in line with broader economic policies to re-balance growth towards domestic consumption. Although productivity has also increased (and thus unit labour cost remains competitive), this process has weakened the country's comparative cost advantage for very low-end garment production. In sum, these economic and demographic dynamics are influencing the strategy of international apparel buyers to locate new suppliers outside of China and diversify their production source.

Another important regional development is the expanding consumer classes in not only China but also India and Indonesia. Collectively, these three emerging economies will account for an estimated middle class workforce of 727 million in 2018, a substantial increase of 33.5 per cent from 2013.⁴ As garment production in these middle-income countries gradually declines, consumer demand will be increasingly met by a greater influx of imported clothing. From 1995 to 2014, total imports of garments and footwear (excluding textiles) to China, India and Indonesia combined grew on average by 11 per cent annually.⁵ With formidable growth in domestic consumption and purchasing power in these emerging markets, the opportunities for apparel suppliers within the region appear massive.

4. Emerging opportunities to create jobs

These regional dynamics point to booming prospects for a number of Asian economies to expand their garment and footwear export markets. This process, in turn, could contribute hugely to both economic growth and new jobs, given the relatively labour-intensive nature of the industry. Across a sample of ten developing Asian economies, employment in the industry totalled more than 40 million (figure 2, panel A). China (6.7 million) and India (16.8 million)

² All estimates of merchandise trade including of garment, textile and footwear are based on UNCTAD: UNCTADstat Database.

³ ILO: ILOSTAT Database.

⁴ These estimates are based on a middle class definition of daily per capita expenditure of US\$4 or more in 2005 purchasing power parity US dollars.

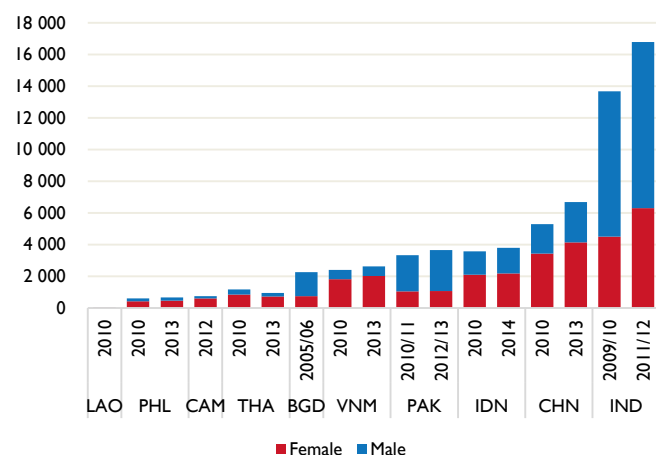
For further discussion, see: S. Kapsos and E. Bourmpoula: *Employment and economic class in the developing world*, ILO Research Paper No. 6 (Geneva, ILO, 2013).

⁵ Based on compounded annual growth rate.

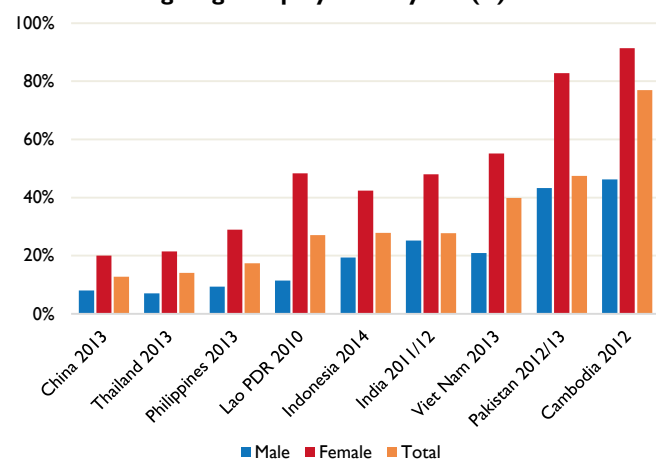
accounted for almost three-fifths of that total.⁶ Employment in the sector also exceeded 3 million in Indonesia (3.8 million) and Pakistan (3.6 million).

Figure 2. Employment in garments, textiles and footwear, various years

Panel A. Total employment by sex (thousands)



Panel B. Wage employment as share of total manufacturing wage employment by sex (%)



Note: BGD = Bangladesh, CAM = Cambodia, CHN = China, IDN = Indonesia, IND = India, LAO = Lao People's Democratic Republic, PAK = Pakistan, PHL = Philippines, THA = Thailand, and VNM = Viet Nam; aged 15+; China figures include total employment in public urban units only.

Source: Estimates from official national labour force surveys (various years) and China National Bureau of Statistics and Ministry of Human Resources and Social Security: *China Labour Statistical Yearbook* (Beijing, various years).

Moreover, where comparable data are available, trends indicate that jobs in the garment and textile industry have continued to expand, with the exception of Thailand. Job growth was robust in India, increasing by 10.7 per cent on a compounded yearly basis from 2009/10 to 2011/12. In China, sector employment expanded by 8.1 per cent from 2010 to 2013. By comparison, annual employment increases during the same three-year period averaged 4.6 per cent in Pakistan,

3.4 per cent in the Philippines and 3.1 per cent in Viet Nam. In Indonesia, however, industry expansion in terms of employment was only 1.4 per cent per annum between 2010 and 2014, with women accounting for less than 45 per cent of that growth.

Overall, jobs in apparel production are predominantly occupied by women. The share of women workers in the garment, textile and footwear industry ranged from nearly three-fifths in Indonesia to around four-fifths in Cambodia. By contrast, in India and Pakistan the industry was driven by considerably more men than women workers, mirroring the wider challenge of low female participation in the overall economy.⁷ The industry workforce is also young. On average, wage workers in the industry were as young as 24.5 years in Cambodia, 27.8 years in the Lao People's Democratic Republic and 28.4 years in Bangladesh (see Annex table 1).

The garment, textile and footwear industry in developing Asia is also important given the large extent that jobs in the sector provide workers with regular wages. With a few exceptions, the bulk of employment in the industry was comprised of wage earners. For example, salaried employees accounted for around four in five industry jobs in Cambodia, Indonesia and Viet Nam. Likewise, in Pakistan, Philippines and Thailand, the comparable ratio was more than three in five. By contrast, garment, textile and footwear production in India and Lao People's Democratic Republic is dominated by own-account and contributing family workers. Relative to other countries, the small share of wage employment (around one in three) reflects the predominantly informal nature of the industry in both countries where a majority of workers are home-based subcontractors who are typically paid on a piece-rate basis.

The share of wage employment in garments, textiles and footwear relative to all manufacturing sectors further reveals the industry's importance for job creation. In Cambodia, where the manufacturing base is considerably less diversified, the share was the largest, at 77 per cent overall and 91.4 per cent for female employees (figure 2, panel B). In Viet Nam and Pakistan, the comparable percentages were 38.8 per cent (54.9 per cent for women) and 46.7 per cent (80.7 per cent for women), respectively. On the other hand, the contribution to manufacturing wage employment in both India and Indonesia was less than 30 per cent, echoing their longer-term aim to shift towards higher-end manufacturing. Similarly, the industry contributed around 17 per cent or less in China, Philippines and Thailand.

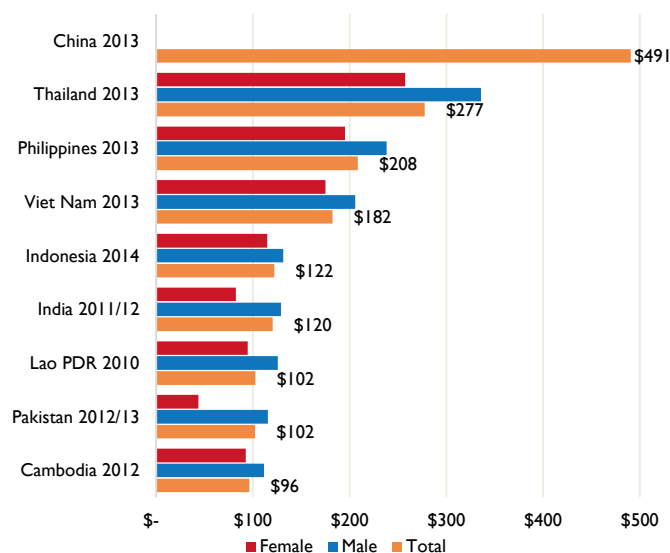
⁶ Regional figure of more than 40 million includes a recent estimate of 4.2 million workers in Bangladesh's ready-made garment sector. See: ILO: *Towards a safer ready made garment sector for Bangladesh: Progress made and way ahead* (Dhaka, 2014). China figure includes only public urban units and therefore should be considered an underestimate.

⁷ For further discussion on low female labour force participation in South Asia, see: R. Chaudhary and S. Verick: *Female labour force participation in India and beyond*, ILO Asia-Pacific Working Paper Series (Bangkok, ILO, 2014).

5. Garment sector wages are low but rising

Competition across the region for global garment buyers therefore is motivated by not only expanding export market share and economic growth but also the potential to create jobs. The key, however, is to ensure that the dynamism in the industry leads to new jobs for women and men as well as better-quality jobs with decent working conditions and adequate wages. Despite some progress, industry wages remain low across the region. Average earnings were less than \$200 a month in the majority of nine countries with available data (figure 3). The exceptions were China, Thailand and the Philippines where monthly wages were \$491, \$277 and \$208, respectively. On the low end, wages were merely around \$100 in Cambodia, Lao People's Democratic Republic and Pakistan. Notably, wages for men were consistently higher than that for women, although the gap varied between countries.

Figure 3. Average nominal monthly wages in garments, textiles and footwear by sex (\$), latest available year



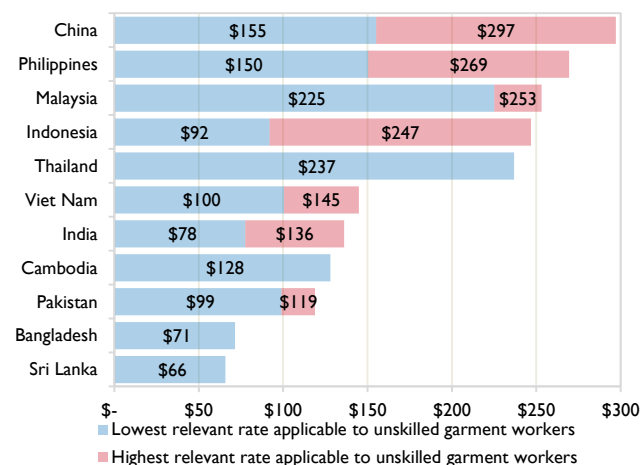
Note: Aged 15+; includes gross remuneration in cash and kind, except Lao People's Democratic Republic (excludes non-cash payments) and Thailand (excludes bonuses, overtime and non-cash payments); China figure is applicable only to public urban units (excludes private urban units and individual employment).

Source: Estimates from official national labour force surveys (various years), China National Bureau of Statistics and Ministry of Human Resources and Social Security, op. cit., and World Bank: World Development Indicators (2014).

In this context, minimum wage policies are critical to ensure that earnings are sufficient and fairly reflect the contribution of workers to the growth of the industry. Minimum wages often serve as an indicator for the prevailing wage in Asia's garment industry, given the overall low-skill composition of the workforce and existing weaknesses in the collective bargaining and merit-based wage systems. If properly

formulated and implemented, they can help reduce working poverty and provide a minimum level of social protection for the most vulnerable wage workers.

Figure 4. Monthly minimum wages in the garment industry (\$), as of 1 January 2015



Note: All rates presented are effective as on 1 January 2015 and refer to the lowest skill grade for new entrants. For countries with decentralized minimum wage systems, figures reflect relevant rates in the main garment-producing locations.

Source: ILO compilation from official national sources.

Among the top apparel-exporting Asian economies, monthly minimum wages are generally low throughout the region (figure 4). By far the lowest levels are in Bangladesh and Sri Lanka, where the respective statutory minimum wages of \$71 and \$66 are less than one-quarter of the highest applicable rate in China. In other competitor markets, such as Cambodia, India, Pakistan and Viet Nam, the highest applicable minimum wage varied from \$119 to \$145, or a range of two-fifths to one-half of China's highest level. By contrast, minimum wages at the highest relevant rate for the industry are significantly higher in Indonesia, Malaysia, Philippines and Thailand, ranging from \$237 to \$269. Notably, minimum wage levels in Cambodia were less than one-half their current levels as recently as March 2012, but have spiked after a series of increases in the past few years. This trend consequently has had a positive impact on boosting average wages.⁸

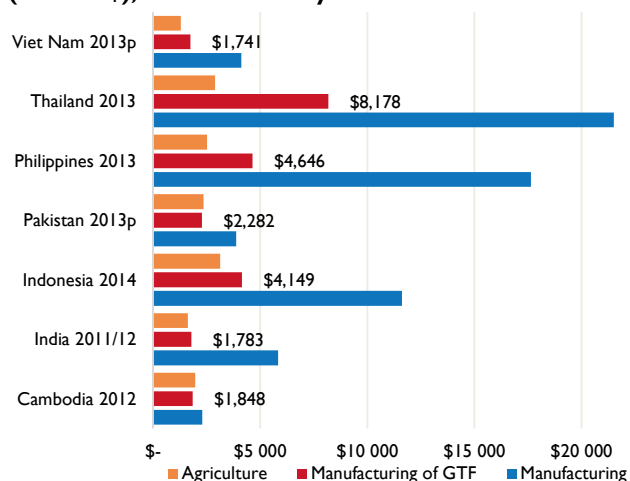
6. Boosting productivity through better working conditions

More and more, non-wage factors are driving the purchasing and sourcing decisions by European and United States apparel companies. These determinants include capacity, product quality, workforce competency, production efficiency and labour compliance, among others. In addition, industrial tragedies – such as the collapse of Rana Plaza in April 2013 and two fatal apparel factory fires in Pakistan in September 2012 – have heightened pressure on multi-

⁸ ILO: *Growth continues for Cambodia's garment and footwear sector*, Cambodia Garment and Footwear Sector Bulletin Issue 1 (Phnom Penh, 2015).

national clothing retailers to rethink their sourcing strategies. Global consumers are strongly calling for social responsibility, ensuring workplace safety and labour compliance in the factories that supply the world's apparel. Suppliers throughout the region must address public concerns for decent working conditions while increasing productivity and remaining competitive.

Figure 5. Labour productivity in selected industries (current \$), latest available year



Note: Labour productivity defined as gross value added in current prices per employed persons, with official nominal exchange rates applied; 'p' = projections; GTF = garments, textiles and footwear.

Source: Estimates based on official data from national accounts and national labour force surveys (various years); World Bank, op. cit.

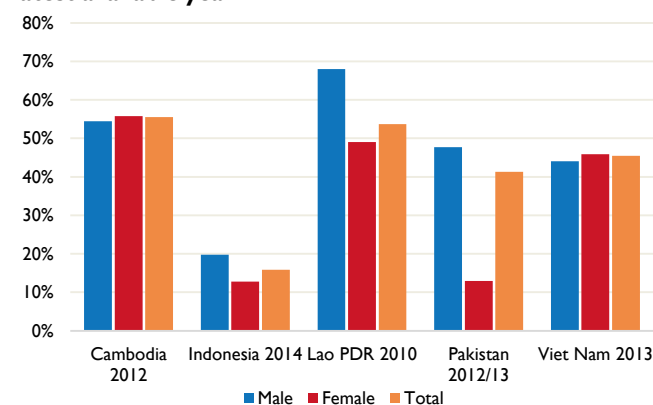
To attract buyers diversifying away from production in China and to tap the potential of emerging markets in the region, improved productivity is needed. Across the region, productivity gaps remain considerable reflecting the generally low-value nature of the industry (figure 5). In Cambodia, India, Pakistan and Viet Nam, productivity levels in garments, textiles and footwear ranged from \$1,700 to \$2,300. By contrast, in Thailand labour productivity exceeded \$8,000, and it was more than \$4,000 in Indonesia and the Philippines.⁹

Inter-industry differences in labour productivity further underscore the productivity challenge in garment production. In all seven countries, productivity in the garment industry was a fraction of that in manufacturing overall, ranging from around one-quarter in the Philippines to four-fifths in Cambodia. The higher ratio in Cambodia reflects its narrow manufacturing base in terms of product diversification and limited overall value addition. Furthermore, in cases such as Cambodia and Pakistan, labour productivity in garments was marginally lower than that in agriculture. In India, it was only around 10 per cent higher.

⁹ There are considerable challenges associated with cross-country productivity comparisons. These figures represent one methodological approach. A forthcoming ILO research note will examine labour productivity in the garment sector in greater depth.

Improving productivity in the industry is paramount for competitiveness, but productivity gains should be driven by greater efficiency – not work intensity. Greater production volume, based on long hours and excessive overtime, can both compromise workplace safety and health and create disincentives to adopt such measures as technological and process innovations that can propel viable productivity improvements. Across the region, however, excessive working hours in the garment industry are common (figure 6).¹⁰ In Cambodia and Lao People's Democratic Republic, more than one in two garment employees worked more than 48 hours per week. In Pakistan and Viet Nam, the comparable shares were slightly more than two in five, and in Indonesia the proportion was around one in six.

Figure 6. Share of wage employees in garments, textiles and footwear working more than 48 hours per week (%), latest available year



Note: Aged 15+; based on actual hours of work in the main occupation.

Source: Estimates from official national labour force surveys (various years).

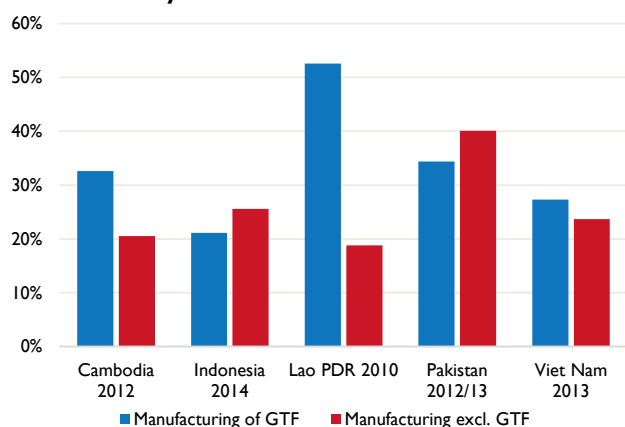
Boosting productivity driven by efficiency instead of intensity is critical to offset wage increases, ensure unit labour cost remains competitive and keep overall price levels attractive. To increase productivity while maintaining high-quality standards, suppliers should focus on innovative business processes, invest in firm-level training and attract and retain a skilled workforce, particularly for middle and higher management positions. Over the medium- and long-term, this approach would allow suppliers to effectively move up the value chain within the garment industry, supply more sophisticated apparel products and offer higher value-added services, such as research and product design.

To implement this type of strategy, compliance with minimum wage and overtime regulations should be viewed as only a first step. In addition, competitive wage schemes and decent working conditions can provide convincing incentives for the recruitment and retainment of top managers and technical specialists in the industry. Across a

¹⁰ For further discussion on the concept and international standards for measuring excessive working hours, see ILO: *Decent work indicators: Concepts and definitions* (Geneva, 2012).

selection of five garment-producing economies, the wage premium for garment sector employees in high-skill occupations relative to low- and medium-skill occupations varied considerably, even after controlling for differences in demographics, education, geography and economic sector (figure 7). In Indonesia, for example, the high-skill wage premium for managers and technical professionals was only 21.1 per cent. By comparison, in Viet Nam the earnings of high-skilled employees in garment production was around 27 per cent higher than for less skilled employees. Conversely, on the opposite end, the wage premium for managers and technical professionals in garment manufacturing was the highest in the Lao People's Democratic Republic (52.6 per cent), followed by Pakistan (34.4 per cent).

Figure 7. Estimated wage premium for high-skilled employees in manufacturing of garments, textiles and footwear (GTF) and all manufacturing excluding GTF (%), latest available year



Note: Indicates the hourly wage premium for employees (aged 15+) in high-skill occupations relative to those in low- and medium-skill occupations while controlling for differences in sex, age, marital status, education, geographic location and economic sector. High-skill occupations are defined as ISCO-08 major group 1 (legislators, senior officials and managers), major group 2 (professionals) and major group 3 (technicians and associate professionals). Low- and medium-skill occupations are defined as the remaining ISCO-08 major groups 4 to 9.

Source: Estimates from official national labour force surveys (various years).

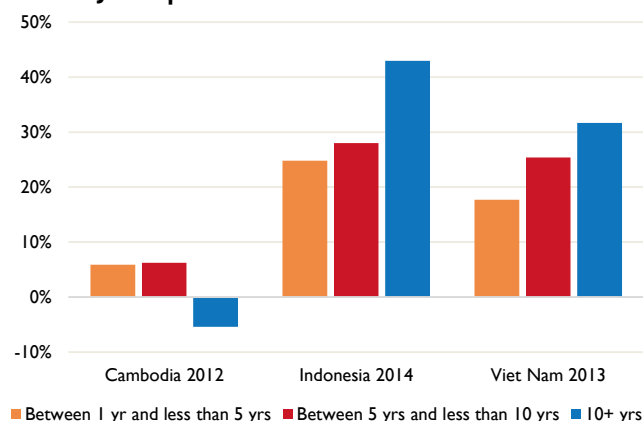
Moreover, in some countries the high-skill wage premium in garment production lagged behind that in the other manufacturing sectors. In Pakistan, for instance, the earnings premium for high-skilled employees in non-garment manufacturing was about 6 percentage points higher than in the garment sector. Likewise, in Indonesia the inter-industry gap was about 5 percentage points lower for managers and technical professionals in apparel production vis-à-vis their counterparts in other manufacturing sectors.

These findings underline the increased difficulty in drawing the most skilled workers to the garment sector as economic structures develop and manufacturing industries upgrade. Attracting and keeping a highly qualified workforce necessitates wage systems that reward workers' educational achievements and on-the-job performance in addition to

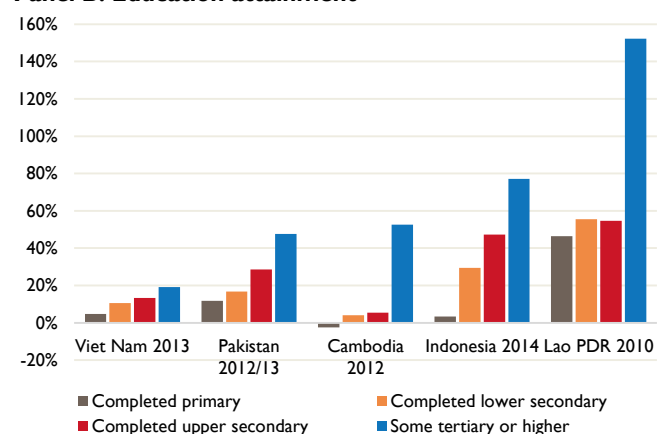
relevant experience. In this regard, survey data from Cambodia, Indonesia and Viet Nam provides some insights to assess the wage premium for having more job experience (figure 8, panel A).

In both Indonesia and Viet Nam, the wage premium for more experience, even after controlling for differences in sex, age, marital status, education, geographic location and economic sector, exhibits an expected pattern. That is, employees are well compensated for their increasing levels of job experience and tenure. In Indonesia, an employee with between one year and less than five years of experience receives a 25 per cent wage premium over her counterpart with less than one year of experience. For more than ten years of experience, the return to hourly wages climbs to 43 per cent. Similarly, Vietnamese employees are paid incrementally more given their job experience, ranging from 18 per cent (one year to less than five years) to 32 per cent (ten years or more).

Figure 8. Estimated wage premium in garments, textiles and footwear (%), latest available year
Panel A. Job experience



Panel B. Education attainment



Note: Indicates the hourly wage premium (or penalty) for employees (aged 15+) relative to the base scenarios of having less than one year of job experience (panel A) and having no education or less than a primary degree (panel B), while controlling for differences in sex, age, marital status, education, geographic location, economic sector and occupation. Job experience captures the years of experience the employee has worked in that occupation for that employer.

Source: Estimates from official national labour force surveys (various years).

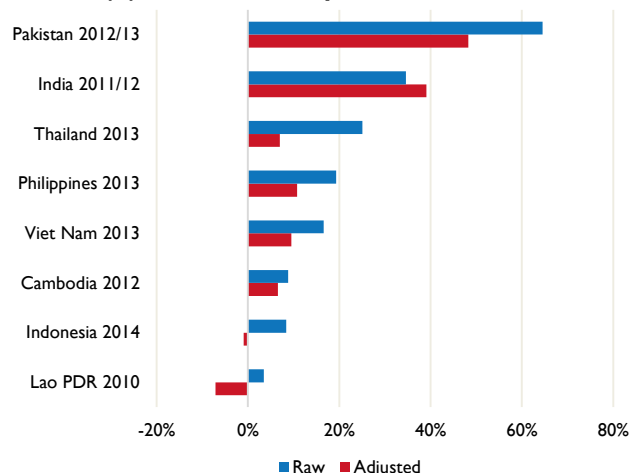
Conversely, the experience-based wage premium in Cambodia is vastly different. Having between one year and less than ten years of experience boosts the expected hourly pay by around 5–6 per cent, compared to a newer employee with less than one year of experience. However, workers with ten or more years of experience tend to be penalized for their experience with that employer, earning approximately 5 per cent less than recruits with less than one year of experience. These results could reflect the high attrition rates in the garment industry where more experienced workers find little monetary incentive to stay with the same employer while new recruits are joining firms at more competitive wages. However, skilled labour shortages are reportedly prevalent in Cambodia, particularly at the management, supervisory, technical and design levels, and better compensation schemes that account for job tenure and experience could be an effective counter-measure.

With regard to education, employees in the garment, textile and footwear industry tend to be justifiably rewarded for their educational credentials (figure 8, panel B). In a five-country sample of wage earners in the industry, the return on higher education relative to having less than a primary degree is lowest overall in Viet Nam where the wage premium increases from 5 per cent for a primary diploma to 19 per cent for having some tertiary studies. By contrast, the wage premium for increased education is highest in the Lao People's Democratic Republic and this is consistent with the sizeable wage premium for high-skilled employees discussed earlier. Given the generally low-value nature of garment production in Asia, it is unsurprising that the wage differential for employees with a primary degree vis-à-vis those with incomplete primary studies is less than 5 per cent in three of the five countries. At the other end, however, the sizeable gains for tertiary schooling exceeds 40 per cent in all cases except Viet Nam. This common pattern could signal the high demand for (and relative scarcity of) qualified workers to fill managerial and technical positions that are better paid.

Another important strategy to increase productivity and competitiveness is promoting workplace equality. Asia's garment industry is primarily dominated by women, yet their earnings commonly lag behind that of men (figure 9). The male-female difference in garment sector earnings was the highest in Pakistan (64.5 per cent) and India (34.6 per cent). In comparison, the pay gap ranged from around 17–25 per cent in the Philippines, Thailand and Viet Nam. When adjusting for demographic, educational, geographical, subindustry and occupational variances between women and men, a wage disparity in favour of men still exists in six of the eight countries. In sum, closing the gender wage gap in Asia's garment industry could drive competitiveness by attracting female jobseekers with higher skills and competencies needed to increase firm-level efficiency. It

would also signal to international buyers and consumers worldwide a commitment to core labour standards and gender equality in the workplace.

Figure 9. Gender pay gap in garments, textiles and footwear (%), latest available year



Note: The raw pay gap indicates the difference in estimated natural log of hourly wages of employees (aged 15+) while controlling for only sex, and the adjusted pay gap controls for differences in sex, age, marital status, education, geographic location, economic sector and occupation. A positive pay gap value indicates higher earnings for men relative to women. India figures are based on the natural log of estimated daily earnings.

Source: Estimates from official national labour force surveys (various years).

7. Conclusions

Developing Asia's garment production is unrivalled in the world. Its \$601 billion in exports of garments, textiles and footwear account for three-fifths of the global total. The industry employs more than 40 million workers. But major industrial tragedies have heightened global awareness about factory conditions. Asia's apparel and footwear industry can sustain its progress, but boosting competitiveness and productivity is paramount.

To this end, better working conditions and a more skilled workforce would help improve productivity. Efforts to adapt more efficient processes and technologies could reduce excessive working hours and help the industry upgrade functionally and eventually shift to higher value garment production. Compensation schemes that better reward skills, experience and education and are free of discrimination could help to attract and retain a workforce with the competencies and creativity to drive growth and boost competitiveness. In a context where skilled labour shortages are reportedly pervasive, a refocus on improved remuneration schemes and working conditions could be an effective strategy.

Annex Table I. Indicators of wage and salaried employment in the garment, textile and footwear industry by sex, selected Asia–Pacific countries, latest available year

	Cambodia (2012)			India (2011/12)			Indonesia (2014)		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Wage and salaried employment in GTF (000)	123.0	520.7	643.7	4 022.6	939.3	4 961.9	1 322.1	1 700.2	3 022.3
Textiles	6.7	22.7	29.4	2 019.3	379.7	2 399.1	562.9	520.3	1 083.1
Garments	101.0	456.1	557.1	1 456.8	423.5	1 880.3	462.9	848.4	1 311.3
Luggage, handbags, footwear, etc.	15.3	41.9	57.1	546.5	136.1	682.6	296.3	331.5	627.8
Share of total employment in GTF (%)	85.6	86.0	85.9	38.4	14.9	29.6	82.7	77.8	79.8
Share of total wage and salaried employment in manufacturing (%)	46.2	91.4	77.0	25.2	48.0	27.7	19.3	42.4	27.9
Average age (years)	24.8	24.5	24.5	32.4	28.5	31.6	32.7	31.0	31.7
Average weekly hours of work (hours)	52.9	52.6	52.6	n.a.	n.a.	n.a.	45.9	43.7	44.6
Average nominal monthly wages (000 LCU)	448.9	374.0	388.3	6.5	4.1	6.0	1 557.4	1 361.8	1 447.4
	Lao PDR (2010)			Pakistan (2012/13)			Philippines (2013)		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Wage and salaried employment in GTF (000)	3.7	11.5	15.2	1 902.0	429.2	2 331.2	132.6	289.6	422.1
Textiles	0.2	1.5	1.6	1 000.7	120.8	1 121.5	20.1	33.7	53.8
Garments	3.0	9.9	12.9	766.3	294.7	1 061.0	83.6	220.3	303.9
Luggage, handbags, footwear, etc.	0.6	0.1	0.7	135.0	13.7	148.7	28.9	35.6	64.4
Share of total employment in GTF (%)	62.2	30.4	34.8	74.0	39.9	63.9	70.1	61.4	63.9
Share of total wage and salaried employment in manufacturing (%)	11.4	48.3	27.0	43.3	82.8	47.4	9.3	28.9	17.4
Average age (years)	32.7	26.2	27.8	31.1	29.2	30.8	33.8	37.8	36.5
Average weekly hours of work (hours)	54.1	50.7	51.6	53.3	35.7	50.1	48.6	45.8	46.7
Average nominal monthly wages (000 LCU)	1 038.3	779.6	845.4	11.3	4.3	10.0	10.1	8.3	8.8
	Thailand (2013)			Viet Nam (2013)					
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Wage and salaried employment in GTF (000)	148.2	426.8	575.0	487.3	1 573.3	2 060.6			
Textiles	61.5	109.9	171.4	69.0	139.8	208.9			
Garments	60.7	250.5	311.2	230.1	878.3	1 108.5			
Luggage, handbags, footwear, etc.	26.0	66.4	92.4	188.1	555.2	743.2			
Share of total employment in GTF (%)	65.9	59.6	61.1	79.6	78.0	78.4			
Share of total wage and salaried employment in manufacturing (%)	7.0	21.4	14.0	20.9	55.2	39.8			
Average age (years)	35.0	37.3	36.7	30.5	30.4	30.4			
Average weekly hours of work (hours)	49.9	49.3	49.4	51.0	50.5	50.6			
Average nominal monthly wages (000 LCU)	10.3	7.9	8.5	4 306.3	3 660.4	3 813.2			

Note: Aged 15+; LCU = local currency unit; n.a. = not available.

Source: Estimates based on Cambodia Labour Force Survey (2012), India National Sample Survey (2011/12), Indonesia Labour Force Survey (Aug. 2014), Lao People's Democratic Republic Labour Force Survey (2010), Pakistan Labour Force Survey (2012/13), Philippines Labour Force Survey (Oct. 2013), Thailand Labour Force Survey (Quarter 3, 2013), Viet Nam Labour Force Survey (2013).

Contact Information

ILO Regional Office for Asia and the Pacific
 United Nations Building
 Rajdamnern Nok Avenue, Bangkok 10200, Thailand
 Tel.: +66 2 288 1234 | Fax: +66 2 288 3062
 Internet: www.ilo.org/asia
 Email: BANGKOK@ilo.org

Copyright © International Labour Organization 2015

This research note has been published within the framework of the programme financed by the GIZ on behalf of the Government of the Federal Republic of Germany. The programme was initiated as part of a renewed partnership between the German Ministry for Development Cooperation (BMZ) and the International Labour Organization (ILO). The responsibility for opinions expressed in this research note rests solely with its author(s), and publication does not constitute an endorsement by the ILO or the Government of the Federal Republic of Germany of the opinions expressed in it.