

Selecting an Optimal Overseas Manufacturing Location: A Case Study of Relocation Decision-Making in the Global Textile Industry

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ABSTRACT

Many textile producers are looking at reviving their production sites because of high production expenses, fast delivery deadlines and better competition. This paper describes a case study of an important textile enterprise, SuperFiber, which get over 80 % of their revenue from one particular customer, LondonFabric. By applying a mixed method, a qualitative comparison of location factors and a simple quantitative cost model analysis, six candidate regions (Southeast Asia, Eastern Europe, Latin America, China, Japan and Morocco) are analyzed. Five criteria are compared between each region: market potential, labour availability, infrastructure and logistics, government policy and regulatory and financial risk. Then a SWOT and a PESTLE analysis are used to analyse the region that has performed best on these criteria. The analysis reveals that Southeast Asia is the most favorable mix of expanding consumer markets, plentiful and low-cost labor, developing infrastructure, and pro-business policies, but that Eastern Europe and Latin America are viable alternatives, each with its own set of risk and cost considerations. According to a basic cost calculation, the firm could save nearly four million dollars annually by moving 100 employees to Southeast Asia, in addition to its labor, rental, food and transportation expenses. The paper ends by stating that Southeast Asia makes the most balanced choice for SuperFiber and suggests a simple checklist for other small and medium-sized textile manufacturers to consider when making other location decisions.

Keywords: Manufacturing relocation; facility location decision; textile industry; SWOT analysis; PESTLE analysis; Southeast Asia; supply chain management

INTRODUCTION

There is an increasing pressure for textile manufacturers around the world due to higher prices, restricted delivery times and increased competition (Mendling, Pentland and Recker, 2020). Companies that rely heavily on a single client are particularly at risk from this kind of pressure as the client can impose strict conditions on both price and quality along with their time of delivery. The study in this paper is a manufacturer of cotton and synthetic fiber textiles called SuperFiber. The company's top single customer, LondonFabric, a global garment-outsourcing firm with North American, European and Asian clients, contributes more than 80 per cent of SuperFiber's revenue. This dependency provides SuperFiber with a reliable income but, at the same time, changes in the needs of LondonFabric have a significant influence on the business of SuperFiber.

Over the last few years, SuperFiber has suffered from five related issues. Cost of raw materials, wages and energy has also increased at a rate higher than can be charged by SuperFiber, thereby diminishing profit margins (Samad et al., 2022). Secondly, customers now demand for higher and more consistent product quality, which increases the production cost and complexity (Atik et al., 2022). Third, contracts are frequently handed in late and need to be finished on tight, predetermined deadlines, making production planning more difficult and error-prone (Dallasega, Marengo and Revolti, 2020; Ali, 2023). Fourth, the payment is taken after 30 days or more, which affects the cash flow of SuperFiber and makes it difficult for them to invest in new equipment (Ahmad et al.,

2020; Wang, Akbar and Akbar, 2020). Fifth, there has been a rise in competition within the textile industry, along with fluctuating order quantities and volumes, making it increasingly challenging to plan staffing and capacity (Kim and Chung, 2023).

These issues, combined, have caused a drop in SuperFiber's revenue and profit, and thus the leadership of the company will have to make a decision on what to do. An idea being considered is the shift of part of its production to a less expensive nation with better long-term prospects. One response to this type of pressure is relocation. It can reduce labour and overhead expenses (Ahlseil et al., 2022), enable to approach new customers with a firm (Diamandis and Kotler, 2020), access to a larger workforce (Duval et al., 2022), and production flexibility when demand changes (Butollo, 2020). However, there is a real danger when relocating: A company may fall victim to different regulatory environments, currency issues and cultural differences which are difficult to manage remotely. This paper is intended to determine which of the six possible regions would provide SuperFiber the greatest benefit and the least risk to move its manufacturing operations. Southeast Asia, Eastern Europe, Latin America, China, Japan and Morocco are the candidate regions.

While the desegregation of manufacturing cost, the optimization of supply chain and market accessibility are analyzed in previous studies, not many studies have covered both qualitative strategic tools (SWOT and PESTLE) and quantitative cost assessment in a single decision-making process for SMEs in textile manufacturing industry. Moreover, most of the current research is conducted on multinational companies instead of SMEs with a strong focus on a specific customer. This study aims to fill this gap by offering a structured and practical approach to integrate strategic and financial analysis in the relocation decision-making process. The paper has four objectives to achieve this purpose:

1. To scan literature to find out the reasons given by manufacturing companies for relocation and what they generally considered for their relocation.
2. To make a comparison between the 6 candidate regions in respect of 5 criteria: market potential, labour availability, infrastructure and logistics, government policy, regulatory and financial risk.
3. To carry out a SWOT analysis and a PESTLE analysis on the region that excels when judged on these measures.
4. To provide a reasonable cost saving estimate of the relocation and to provide a clear and evidence-based recommendation.

The paper is structured such that Section 2 discusses the literature on manufacturing relocation and the factors which firms consider when making the choice of location. The research design and data collection and analysis methods are discussed in section 3. Section 4 offers the results, which also involve a comparison of the six regions, a SWOT analysis, a PESTLE analysis and a cost estimate. The implications of the results for SuperFiber are discussed in Section 5. The paper is ended with section 6 setting out recommendations.

LITERATURE REVIEW

Why Manufactures Relocate

Manufacturing relocation is a phenomenon which is extensively studied as a strategy to deal with cost pressures and market shifts. Reducing costs is typically the main reason: shifting production to an area with lower labour, land, and energy expenses can be a significant advantage for profit margins (Ahlseil et al., 2022). In addition to cost, companies move to be closer to expanding markets because when they are physically closer to customers, they can respond faster and can spend less time to transport goods and services (Diamandis and Kotler, 2020). A third driver is access to labour: a region's size and the presence of a skilled labour force lower the difficulty in recruiting labour and also reduces wage inflation (Duval et al., 2022). Last but not least, relocation can provide businesses with greater operational flexibility, which can lead to redesigned processes, new technology, and the ability to adjust to changes in demand quicker (Butollo, 2020). This is changing with digitalization and automation, however, as some production tasks become less labor-intensive, and more skills and connectivity intensive, some industries may in the future be better suited for reshoring than for offshoring (Özüdoğru et al., 2018; Yang and Gu, 2021).

Criteria for Location Selection

Five common manufacturing site selection criteria have been identified in the literature, which include market potential, labour availability, infrastructure and logistics, government policy, and regulatory and/or financial risk. Market potential is the size of the population, income growth, and the demand for the product category (Booth, 2019). Labour availability refers to both quantity and quality of the local labour force—most of the textile work still needs manual and semi-skilled labour (Majumdar et al., 2020). The quality of infrastructure and logistics (ports, roads, digital connectivity) affects goods transportation to market (Nguyen and Woo, 2021, China Power Team, 2017). The cost of doing business can be reduced significantly because of the government policy such as tax incentives and trade agreements (Majumdar and Sinha, 2019; Lai et al., 2019). Last, the location may not compensate for such a low cost if regulatory and financial risk (such as currency volatility and complexity of compliance) are not mitigated (Marwah and Ramanayake, 2021; Tran and Nguyen, 2020).

Regional Perspective

With its growing middle class and improving trade infrastructure, Southeast Asia has been gaining more academic and industry interest for its potential as a region. Due to the presence of Southeast Asia's expanding middle class and improving trade infrastructure, the region has been gaining more academic and industrial interest for its potential as a destination region (Lechner et al., 2020; Aggarwal, 2022). Vietnam, Thailand, Indonesia and Malaysia, among others, have relatively low labour costs and are developing their ports and transport infrastructure (Khan et al., 2020; Khan et al., 2021). Eastern Europe is appreciated for its close location to the large consumer markets in Europe, and its long manufacturing history, but wages are also higher (Zia, 2023; Domenico Mario Nuti, 2023; Sabatini et al., 2019). Although there are significant numbers of consumers in Latin America who are increasingly fashion-conscious, the region faces issues with uneven infrastructure and political and economic uncertainty (O'Neil, 2022; Van Loon et al., 2020). While still highly appealing for its size, infrastructure and available labor, many factors, such as increasing wages and IP issues, are increasingly seen as a constraint (Magazzino and Mele, 2020; Morrison, 2019). While Japan has a high level of production quality and advanced logistics, foreign companies are faced with high costs, ageing workforce and cultural and language barriers (Chopra, Sodhi and Lücker, 2021; SME Japan, 2023). Morocco enjoys a favorable geographical location as a gateway to the European markets and the government is encouraging foreign investment, despite its infrastructure still lagging behind other manufacturing locations (Amraoui et al., 2019; Karim and Abdulaziz, 2023). No single area performs best on each of these metrics in this literature; each has trade-offs between cost, market access and risk. This reinforces the need to use a structured, multi-criteria comparison (as done in this paper) as opposed to a cost decision. The literature suggests that in general manufacturing location is a strategic decision that goes beyond labour costs. There are multiple factors—economic, operational, regulatory and market—that must be considered simultaneously to achieve a successful relocation. Thus, using a single financial measure to determine manufacturing location is less appropriate and a multi-criteria evaluation is more suitable.

METHODOLOGY

Research Design

A single case study design was chosen because this type of study design is appropriate for the research question which seeks an in-depth understanding of a specific one organisation's decision-making process (Aguinis et al., 2020). The case discussed is the location of SuperFiber's factory. Both qualitative analysis of location factors and a basic quantitative cost model are included in the design, enabling both verbal and quantitative arguments to be used to support the final recommendation.

Data Sources

Three kinds of data were utilized. Firstly, the internal information regarding SuperFiber's operations, its ties with LondonFabric and its recent financial woes. Second, publicly available secondary information on labour costs, cost of living and logistics performance in the candidate regions from sources like Numbeo (www.numbeo.com),

n.d., and Trading Economics (www.tradingeconomics.com), n.d. Third, peer-reviewed academic literature and industry market reports from each candidate region, that were used to support and cross-check the secondary data.

Analytical Tools

Three analytical tools were used. First, the six candidate regions were compared with the five criteria found in the literature review using a comparative review. Secondly, a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) and a PESTLE (Political, Economic, Social, Technological, Legal, Environmental) analysis were conducted for each of the three regions which were identified as the highest scoring region in the comparative analysis, to provide further insight into the region. Third, for estimating potential savings, a simple cost model was employed, which uses the formula:

$$\text{Total cost saving} = \text{Labour cost saving} + \text{Cost of living saving},$$

where each term equals the number of employees multiplied by the difference between the home-country cost and the destination-country cost. The analytical tools were used one after another. At first, all the candidate areas were assessed on the basis of five selection criteria which had been indicated in the literature. The top region was then analyzed using SWOT and PESTLE analysis to gain a deeper understanding of the strategies that could be adopted. Lastly, a streamlined cost model was used to identify the potential monetary gains of relocation. This was a sequential process that guaranteed that the strategic evaluation was consistent with the financial evaluation.

Limitations

There are some limitations in the present study. It focused on one company, and so may not be directly applicable to other companies with other products, client structures or size. It is based on average values rather than site specific values collected directly in each country; therefore, it is less precise. The cost model does not include relocation costs (such as equipment, staff training, disruption of business processes etc.) and should not therefore be considered as a complete feasibility study. Last but not least, primary interviews with management and in-country partner of SuperFiber were not included, which would further support future research on this subject.

RESULTS

Comparative Overview of Candidate Regions

The comparative assessment shows that there is no region that is best in all the assessment areas. Southeast Asia offers the best combination of cost competitiveness and market growth, while Eastern Europe has the benefit of being geographically close to European customers, and China and Japan boast excellent infrastructure, but with much higher operating costs. Thus, the overall balance of strategic and economic factors rather than a single criterion is the basis for the final recommendation. Table 1 summarizes how the six candidate regions compare on the five selection criteria described in Section 2.2.

Table 1. Comparative overview of six candidate manufacturing regions

Region	Market Potential	Labour	Infrastructure	Policy & Regulation	Key Risk
Southeast Asia	Large, fast-growing middle class	Large, low-cost, trained workforce	Improving ports and transport links	Business-friendly, tax incentives	Currency swings; rules differ by country
Eastern Europe	Close to major EU markets	Skilled but costlier than Asia	Well-developed, improving further	Investment incentives	Higher wages; complex compliance
Latin America	Growing demand for fashion goods	Available but wage levels vary widely	Improving but uneven by country	Some incentives, mixed enforcement	Political and economic instability

China	Very large, mature market	Skilled, but wages rising fast	Highly developed	Increasingly strict compliance rules	IP protection; rising labour costs
Japan	High-value, quality-focused market	Highly skilled but expensive; ageing population	Excellent, technologically advanced	Stable but administratively demanding	High costs; language and cultural barriers
Morocco	Gateway to European markets	Growing skilled base	Developing, still behind regional leaders	Incentives for foreign investment	Uneven infrastructure; political risk

The two best overall performers are Southeast Asia followed by Eastern Europe. Southeast Asia has the biggest growth opportunity and cost advantage, and Eastern Europe has a higher cost with better proximity to Europe. Each country has its own strength and weakness (scale, quality, and market growth; rising costs, high costs, and market instability, respectively) and China, Japan, and Latin America are the ones that fall under these three categories. Morocco is competitive on site but is still lagging behind the other regions in terms of maturity of infrastructure. Comprising of Southeast Asia, the region had scored good on most of the criteria and was chosen for a more detailed analysis through SWOT and PESTLE.

SWOT Analysis of Southeast Asia

The advantages are that SuperFiber is financially stable, thanks to a longstanding partnership with LondonFabric, and they have also chosen to relocate. SuperFiber's current quality control process can support the area's expanding manufacturing industry. Southeast Asia has a huge pool of relatively low-cost and growing skilled labour force for the manufacturing of textiles (Majumdar et al., 2020).

However, SuperFiber's profitability is currently hindered by a number of weaknesses, including increases in input costs and production inefficiencies, which would be difficult to overcome after relocating, but would need to be addressed during the relocation process. Quality consistency with new labour force and new suppliers has medium term risks. Late payments restrict the cash flow for the move.

Demands: Middle class population in countries like Indonesia, Thailand, Malaysia and Vietnam is growing and a new demand for textile products is emerging. Government incentives, such as tax incentives and streamlined trade requirements, make it less expensive to start new businesses (Majumdar and Sinha, 2019). The infrastructure investment in the region is still enhancing port and transport connections (Nguyen and Woo, 2021).

Threats: The textile industry in Southeast Asia is very competitive and may hinder SuperFiber's ability to stand out from the crowd. The complexity of compliance varies from country to country in the region due to differences in the regulatory requirements (Lai et al., 2019). Projected cost savings may be impacted by currency fluctuations and localized political or economic instability is possible in portions of the region (Menon and Fink, 2019). In general, the SWOT analysis shows that the opportunities of the market of moving to Southeast Asia are greater than the weaknesses and threats. Successful implementation of these benefits requires careful planning, supplier selection, training of the workforce and good risk management throughout the relocation.

PESTLE Analysis of Southeast Asia

Political: The governments in the area are actively promoting investment in manufacturing and provide a variety of incentives and streamlined procedures, but the situation differs among countries and should be evaluated on a case-by-case basis when selecting a manufacturing site.

These can be supported by long-term economic factors: rising incomes and number of consumers; and relatively low labour and living costs in the near term can provide cost-saving opportunities (Section 4.4).

Social: The population is young and growing, which helps to ensure a steady labour supply, and consumer demand for fashion products is growing, which helps to expand the market (Booth, 2019).

Technological: Regional infrastructure investment is enhancing logistics and connectivity, facilitating efficient supply chain operations (Nguyen and Woo, 2021); however, there remains a wide range of countries that have adopted technology.

Legal and Compliance: Each market in the region has different compliance requirements, and SuperFiber would have to undertake specific legal and compliance planning before entering each market (Lai et al., 2019).

Environmental: Implementing environmentally friendly production methods would boost SuperFiber's image and progression in the anticipated direction of customers, including LondonFabric (Yaro et al., 2023). Overall, the external business environment for manufacturing investment is fairly favorable in Southeast Asia, according to the PESTLE analysis. However, there are significant differences between individual countries in the region and hence important country-specific assessments of legal, economic and operational conditions are needed prior to final investment decisions.

Cost Analysis

As an example within Southeast Asia, wages and cost-of-living data from the city of Bangkok, Thailand, is used in Table 2 to estimate the amount of money that can be saved by relocating 100 staff members. The average monthly salary in Bangkok is about \$1800, whereas it is about \$4000 for a similar job in the UK, showing a saving of about \$2200 per employee per month. Likewise, the average monthly rent, food and local transportation cost is also lower than that of the United Kingdom, providing an additional monthly saving per employee. The annual savings amounts often indicate the potential monetary benefits of relocation but should be taken with a pinch of salt since they do not account for capital investment, facility construction/leasing expenses, machinery transportation costs, employee relocation costs, production downtime and other implementation costs. The figures presented therefore reflect the savings of the relocation process rather than the overall cost-benefit of the relocation.

Table 2. Estimated cost savings from relocating 100 employees to Bangkok, Thailand

Cost Category	Estimated Monthly Saving (per employee)	Estimated Annual Saving (100 employees)
Labour cost	\$2,200	\$2,640,000
Rent	\$500	\$600,000
Food	\$300	\$360,000
Local transport	\$200	\$240,000
Total	\$3,200	\$3,840,000

Based on this, SuperFiber may save around \$3,840,000 (or 3.84 million baht) per year by relocating 100 employees to Bangkok. This figure is indicative as it represents the national and city level averages and will not incorporate one off costs of relocation including new facilities, equipment and training for staff which would need to be estimated separately before a final investment decision is made.

DISCUSSION

Based on the results, the Southeast Asia region appears to have the best mix of market growth, labour costs, infrastructure and government support for SuperFiber out of the six possible regions. This result aligns with the broader body of work on textile sector relocation, which also states that the Southeast Asian region is a lucrative destination due to its cost competitiveness along with the strengthening of the trading infrastructure (Tran and Beddewela, 2020; Khan et al., 2020). However, Eastern Europe is a fair option, especially when the proximity to European customers and shorter transport time to Europe are more important than the lower wage costs, as the higher wages are counterbalanced by lower transport times and costs to the EU markets (Fedorenko, 2019).

The principal dangers of relocation to Southeast Asia include currency fluctuation and regulation differences between the countries in the region. Financial hedging and inclusion of a currency buffer in project planning could be part of the solution to managing currency risk (Marwah and Ramanayake, 2021). SuperFiber should not use the term "Southeast Asia" as a market: a specific country, and preferably a specific city, should be determined only after a more exact and country-specific legal and compliance analysis. The cost model presented in Section 4.4 has to be used with care because it does not account for the costs of the relocation itself (such as risk of temporary disruption of the LondonFabric relationship during the move), and because it is based on national averages, not a particular site. The results also show that manufacturing move decisions need to be considered as strategic investments over the long term, not just as short-term cost-cutting moves. The challenges organisations must overcome to ensure sustainable competitive benefit after relocation are balancing finance, operational resiliency, supply chain continuity, customer satisfaction and regulatory compliance.

In general, this case highlights another important message for all small and medium sized manufacturers that have a limited range of customers – don't move because of labour costs alone. Cost comparison is not enough, a structured, multi-criteria comparison, plus a country-specific SWOT and PESTLE analysis and a conservative cost estimate provide a more balanced basis for decision making. The proposed framework provides some useful insights for the managers assessing relocation of manufacturing activities abroad. Managers need to consider market opportunities, labour availability, logistics infrastructure, regulatory conditions and financial risks, in addition to labour costs. A structured approach to comparative analysis, SWOT, PESTLE and cost estimation is useful for reducing uncertainty when making decisions in strategic planning.

CONCLUSION

This paper analyzed the problem: where should the textile company SuperFiber, where 75% of their products are supplied to a single customer, move their production facility? Six candidate regions are compared using a structured format, followed by a SWOT analysis, PESTLE analysis, and a simple cost analysis to show that Southeast Asia has the best overall mix of market growth, workforce, improving infrastructure, and government policy, with the potential savings being almost \$3,840,000 annually on a 100-person workforce.

The following three recommendations are a result of this analysis. SuperFiber should first conduct a feasibility study for the country involved, because, for Southeast Asian countries, there are meaningful differences between regulatory, wage and infrastructure conditions. Second, the firm must start to manage the currency and compliance risk from the beginning—from financial hedging to having specific legal support in the local jurisdictions. Thirdly, the move should be carried out in stages as SuperFiber is reliant on LondonFabric, to ensure there is no interruption to production during the shift.

The limitations of this study are that it is single case in nature and the average data used in the analysis were published data, which were not specific to the individual firm or site. Future research should further develop this analysis by collecting primary data including interviews with SuperFiber's management and visits to the shortlisted locations and should construct a more comprehensive financial model, with one-off relocation costs and with a sensitivity analysis of currency movements. Despite all these limitations, the structured procedure outlined in this paper, evaluating multiple criteria prior to SWOT, PESTLE and cost analysis of the most attractive candidate, can be used as a practical and repeatable process for other SMEs to consider when making decisions about moving. Environmental and sustainability considerations such as carbon emissions, ESG requirements, and green manufacturing policies should also be incorporated into future relocation decisions. Future research should use a formal Multi-Criteria Decision-Making (MCDM) approach such as AHP, TOPSIS, or PROMETHEE to assign objective weights to the evaluation criteria and improve the robustness of the regional ranking.

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