

# Taiwan Sweater Industry Business Strategies in a Changing Environment

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## ABSTRACT

This study is based, firstly, upon the annual total export quantities, value, unit prices, and membership in the Taiwan Sweater Industry Association from 1968 to 1996, as recorded in the Annual Exports and Rate of Growth of the Taiwan Sweater Knitting Association. These statistics are supported by in-depth interviews in a systematic analysis of the development and adjustments of the Taiwan Sweater industry at different stages. In other words, we will see how the Taiwan sweater industry planned and set business strategies as it developed in a changing environment. In the earliest stage, the government and the Association cooperatively framed business strategies and long-term plans. Once manufacturers had operating experience, they developed their own strategies. The important findings of this study are given below. The firm of Artur D. Little Consultants invented a method, known as Life Cycle Patterns, which is helpful to planning business strategies. Applying a life cycle analysis, the development of the Taiwan sweater industry can be divided into five stages, and the different business strategies at each stage, as the environment changed, can be described as follows: I. Beginning: 1963-1968 Strategies: export-oriented, OEM processing, few styles but in large quantities. II. Boom: 1969-1973 Strategies: price-cutting to achieve sales, multiplying production in order to be assigned larger quotas, total cost leading III. Maturity: 1974-1986 Strategies: marking up unit prices, increasing emphasis on design and development, focusing on differentiation and concentration IV. Recession: 1987-1994 Strategies: organization reshuffling and retrenchment, reduction in employees and production, withdrawal for real victory V. Regeneration: since 1995 Strategies: group strategies, withdrawal of factories from Taiwan and reestablishment abroad, international division of labor

This thesis applies Life Cycle Patterns to clarify for manufacturers the development of the Taiwan sweater industry and the changes in the environment and business strategies over time. Before the Recession stage began, the sweater industry was hard hit by the devaluation of the NT dollar under pressure from the U.S. (from 1:40 to 1:25, a rate of increase of approximately 60%), and by the upholding of the American Knitwear Guild's lawsuit for the dumping of the synthetic fiber sweaters (a dump duty of 23.1% was imposed). At that time, Taiwan exported 10 million sweaters, including 4 million dozen synthetic fiber sweaters, or 40% of the sweaters exported. These two incidents were severe blows to the sweater industry. However, manufacturers did not give in to these negative changes in the environment, and by changing their strategies in search for a breakthrough, have managed to bring about a second period of prosperity, which I call the Regeneration stage. During the transition from Recession to Regeneration, each company made different adjustments and employed different business strategies, with different results. This experience is a valuable lesson in business management and administration. Therefore, this study especially looks into, classifies, and further analyzes individual companies' business strategies in the transition. It is hoped that this record and analysis of adaptation to changing conditions will prove to be a valuable reference to the sweater industry, and to other industries as well, as they internationalize. To sum up, environmental changes leading to new opportunities and new threats for an industry are unavoidable. The old environment upon which successful business strategies depended will gradually disappear, and new strategies will have to be developed. The only thing in a changing environment which does not change is change itself, and survival depends entirely upon the ability to adapt.

Keywords : 台灣毛衣產業 ; 環境變遷 ; 經營策略

## Table of Contents

目錄 封面內頁 簽名頁 授權書.....	iii	論文摘要.....	v	英文摘要.....	v
要.....	viii	誌謝.....	xi	目錄.....	xii
錄.....	xiv	表目錄.....	xv	第一章 緒論.....	1
機.....	1	第二節 研究的目的.....	2	第三節 研究的問題.....	3
第二章 文獻探討.....	5	第一節 臺灣毛衣產業之定義.....	5	第二節 環境變遷.....	6
第一節 研究對象.....	32	第二節 資料收集.....	32	第三節 資料分析.....	35
第二節 經營策略.....	17	第三章 研究方法.....	30	第一節 研究對象.....	32
第三節 經營策略.....	17	第四節 研究流程.....	37	第二節 資料收集.....	32
第四章 臺灣毛衣產業分析與經營策略探討.....	40	第一節 臺灣毛衣產業與紡織業之關聯性.....	40	第三節 資料分析.....	35
		第二節 臺灣毛衣產業		第四節 研究流程.....	37

的發展.....	42	第三節 臺灣毛衣產業的演進 - 經營環境的變遷.....	50	第四節 經營策略.....	63
議.....	100	第一節 研究結論.....	100	第二節 研究建議.....	102
議.....	102	第三節 對後續研究之建議.....	105	參考文獻.....	106

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