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## **Textile and clothing production and trading- the way to industrial economy development**

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### **ABSTRACT**

The expansion of the textile and clothing industries is inextricably linked to the socioeconomic advancement of all nations in the world that are struggling to come out of poverty and backwardness. The fact that the textile and clothing industries have successfully transitioned from an agricultural to a manufacturing-based economy justifies the continued use of this strategy by all emerging nations worldwide. From Europe to North America, then to Asia, South America, and other nations on other continents, the textile and clothing sector has been successfully used for socio-economic transformation. In every country it traversed, the textile and clothing guaranteed socioeconomic progress. Ethiopia started the implementation of agricultural development led industrialization (ADLI) plan in 1995 after realizing the significance of textile and clothing for its socioeconomic development. Unfortunately, despite the potential the country has for the development of the textile and apparel industries, the plan has not been implemented effectively, and as a result, the growth of the industry and the economic and social outcomes from the sector have not been as substantial. Thus, the Ethiopian textile and garment clothing sector industries are facing multiple challenges such as backward linkage, delivery and demand side linkage, employee-related problems, poor utilities and facilities, and weak control and coordination. The production and trade of textiles and clothing is the only industrial sector that contributes to industrial economic development for the least developing nations. Therefore, policy revision and problem-solving are essential to maintain this sector's industrial development in Ethiopia in order to realize a large industrial economy in the country.

**Keywords:** Textile; Clothing; Socioeconomic; Manufacturing and Challenges.

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### **INTRODUCTION**

The so-called "industrial revolution" started in England in the middle of the 1700s. Science and capital were for the first time combined by the means of the industrial revolution to address production-related issues (Dickerson, 1995). Prior to 1750, the majority of English households lived on farms or in small villages,

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and poverty was widespread in England at the time, just like it is now in Ethiopia. In England, the Industrial Revolution led to the establishment of the first textile factories and mills, which gave rise to a factory system. In the early to middle decades of the 19<sup>th</sup> century, New England underwent a major social transformation that transformed it from a rural, agrarian society to an urban, industrial society, drawing young men and women to the textile factories. Ethiopia needs this type of socioeconomic development badly since around 80% of its people are involved in substandard small-scale farming.

The first clothing factory was built in Philadelphia, United States of America (USA), to create uniforms for the War of 1812, following the development pattern of the textile factories in England (Kidwell and Christman, 1974). The key characteristics of the apparel sector are its labor-intensive, ease of entry with little start-up investment and technical know-how, minimal worker training, and ease of mastery of the industry's manufacturing tools. The growth of the textile and garment industries in England and the USA led to the first cross-border migration of labor and capital. Over 62 million individuals, largely from Europe, traveled between 1820 and 1930, with roughly 35% settling in the United States. Ethiopia has been involved in this area of industry since 1995 with its Agricultural Development Led Industrialization (ADLI) program, having learned the significance of textile and clothing manufacturing and commerce from foreign experience. To shift Ethiopia's economy from one that was centered on agriculture to one that was manufacturing-based, this strategy prioritized the production and marketing of textiles and clothing. As a result, this review's discussion of the relevance of global textile and apparel production and trade in Ethiopia's context is presented succinctly.

## **THE GLOBAL SCENARIO FOR TEXTILE AND CLOTHING MANUFACTURING**

Due to its low fixed costs and concentration on labor-intensive manufacturing, the production of textiles and clothing serves as a foundation for national growth and is frequently the traditional starting industry for nations engaged in export-oriented industrialization (Gereffi, 1999; Adhikari and Weeratunge, 2006). Because most countries manufacture for the global market, this is one of the most international sectors. By the 1960s, rising imports from low-wage developing nations had an influence on both the textile and clothing sectors in the majority of developed nations.

### **Textile and clothing manufacturing as sensitive and complex industrial sector**

Particularly responsible for the decline in the production of industrialized nations as a share of global manufacturing was Japan, the then-developing country with

expanded production capacity. During the 1920s through the 1950s, Japan's economic expansion followed the earlier trend in the USA and certain European nations by mainly depending on the textile and clothing industries to drive the industrialization process. Japan became the world's top exporter of cotton textile goods in 1933 (Dickerson, 1995). Other less developed countries started to produce and export cotton goods after Japan. Hong Kong, Taiwan, South Korea, India, China, and Pakistan soon joined Japan in exporting increasing volumes to the industrialized nations (Figure 1). Several emerging nations and a few countries in Eastern Europe started to model their economic development plans after those of industrialized nations in the 1950s and 1960s. The industrialized world has higher labor costs than developing nations, which reduces its competitiveness and forces merchants to outsource portions of the production process. Following the example of Japan and other industrialized nations, China put a lot of focus on labor-intensive manufacturing as part of its 1979 economic reform in an effort to expand exports.

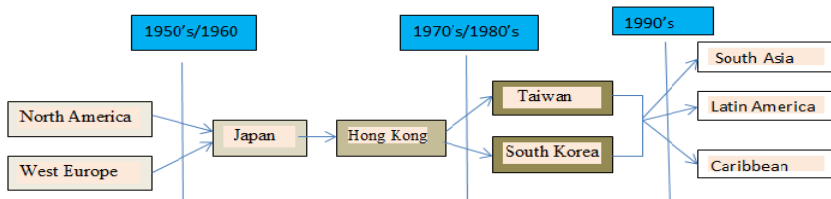


Figure 1. The historical perspective of textile and clothing industries global travelling

The comparative advantage in manufacturing is lost as economies become wealthier and salaries rise, and the emphasis instead switches to high-value-added goods or other produced goods with lower labor intensity (Adhikari and Weeratunge, 2006). Suppliers must be able to offer full package options that expand their capabilities to other parts of the value chain, including design, inventory management, and transportation of goods, and adopt the right technologies to facilitate this transition in order to operate effectively in the current textile and apparel global trading environment (Technopak, 2007). On the other hand, the need for supply chain openness has grown in both the US and the EU due to the rising consumer demand for greater social and environmental standards. The leading companies want to learn more about their suppliers and make sure they maintain the brand guidelines (Sauls, 2008).

### The top international manufacturers and exporters of textiles and clothing

With ongoing growth of their positions in the sector, China, Bangladesh, India, Vietnam, and Germany have been the main winners of the competition in textile and clothing production and export to the worldwide market (Gereffi and Frederick, 2010). China, Bangladesh, Vietnam, and India are the top exporters of

traditional textiles and clothing worldwide, whereas Germany is the top exporter of technical textiles. Since the early 1970s, the global clothing sector has been growing quickly and employing tens of millions of people in some of the least developed nations on the globe. Table 1 displays the annual export revenue and employment generated in the main exporting nations. In terms of yarn, fabric, dyeing, printing, finishing, and accessories, China completely meets its local demand (Wazir Advisor, 2021). Moreover, China exports machineries for spinning, weaving, knitting, dyeing, printing, finishing, and testing, as well as equipment and sewing machines for clothing manufacture. China's textile industry has a production capacity that exceeds more than half of the whole world market (Alam *et al.*, 2020). One of the key sectors in India that significantly contributes to the GDP of the country is the textile and garment sector (Giri and Rai, 2013).

The industry sector provides around 14% of industrial production, 4% of GDP, and 17% of India's export revenue (Chandra, 2005; CUTS International, 2020). Three decades ago, Bangladesh began participating in the global textile and clothing export market without having enough backward links (Houkokusho, 2012). According to Masum and Inaba (2015), Bangladesh's textile and clothing industry generates 82% of the nation's export revenue and contributes 23% of the nation's gross domestic product (GDP).

Table 1. Global textile and apparel leading exporter - \$USD, 2019

Country	Exports			Market share (%)	Direct employment (millions)
	Textile	Apparel	Total		
China	134.6	149.9	284.5	34	30
Vietnam	10.2	33.7	43.9	5	1.6
Bangladesh	1.8	40.9	42.7	5	5.1
Germany	15.5	23.8	39.3	5	-
India	20.2	16.2	36.4	4	35

In Vietnam, textile and clothing exports increased at a spectacular average annual growth rate of 29% from 1991 to 2000, outpacing the nation's overall export development (Berger and Lester, 2001). Similar to Bangladesh, Vietnam's exports of textiles and clothing increased from \$1.96 billion to \$2.7 billion during 2001 and 2002. With a global market share of almost 45% in the technical textiles sector, German enterprises are world leaders (Heymann, 2011).

## THE GLOBAL TEXTILE AND CLOTHING TRADE

The textile and clothing industry has long been a significant sector of the worldwide economy, ranking second only to agricultural products in terms of value in 2018 (IFPRI, 2020). Figure 2 depicts the worldwide commerce in textiles and clothing items, which reached \$839 billion in 2019 and is projected to reach

\$1 trillion by 2025 (Wazir Advisors, 2021). According to the WTO (2017), the EU, USA, and Japan account for 76.2% of all textile clothing imports worldwide, making them the top three garment importers globally. Other nations, such as the Russian Federation, Canada, Switzerland, the United Arab Emirates, Australia, South Korea, Norway, Mexico, China, and others, import the remaining 24.8% of the textile and clothing items (Gereffi and Frederick, 2010). Global customers or importers place demands on manufacturers and exporters, including those for less expensive goods, better quality, quicker lead times, and labor standards (employment terms, pay from employment, and working conditions) (Keane and Velde, 2008).

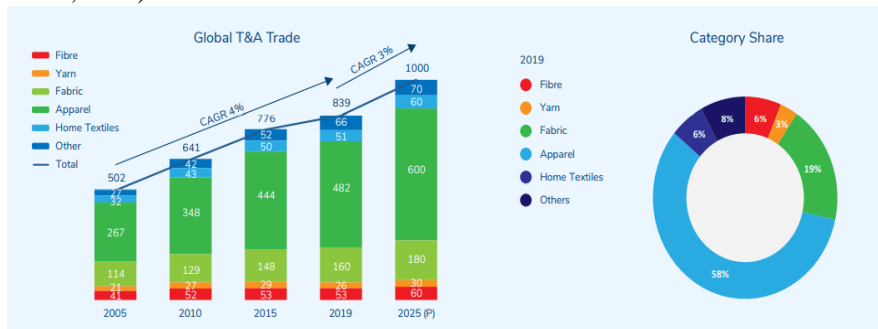


Figure 2. The global textile and clothing trade trend with category-wise share (\$ Billion) (Source: Wazir Analysis, 2021)

## ETHIOPIAN TEXTILE AND APPAREL PRODUCTION AND TRADING SCENARIO

The fourth industrial revolution is now taking shape globally using modern technology. The first industrial revolution began in England with the industrialization of textile production, and other industries later adopted this model. As a result, Ethiopia is currently implementing all technological vicissitudes resulting from the first through fourth industrial revolutions. On the other hand, Ethiopia's current socioeconomic state is comparable to how English people lived before the first industrial revolution in the 1750s. Similar to how the majority of English people lived before the industrial revolution, around 80% of Ethiopia's population today lives in rural farming communities where poverty is rife.

The first industrial revolution movement was sparked by the then-worst socioeconomic situation in England, and as a result, New England arose with improved social status and economic progress. The industrial revolution has inspired other countries to model their socioeconomic growth after that of New England's textile manufacturing sector. The production and trade of textiles and clothing was utilized by all industrialized nations to support the growth of their manufacturing industries. Thus, Ethiopia's expanding textile and clothing sector

is a necessity step if it hopes to rescue the nation from its current economic predicament. Production in the textile and clothing sector helps Ethiopia transition from a resource-based economy to an industrial manufacturing one. Because of their labor-intensive nature, ease of entry, low capital requirements, and ability to be learned quickly, textile and clothing manufacturing and commerce are suitable for the current socio-economic scenario in Ethiopia. By the creation of mills or industrial villages, the bulk of the rural people will progressively transition from being rural to urban residents in terms of socialization (Cooper, 2013).

### **Ethiopian potential for the rapid expansion of the textile and clothing industry**

The availability of plentiful labor at a low price, which is Ethiopia's key comparative advantage, makes it the most suited country for the manufacture and trading of textiles and clothing. Ethiopia is a fortunate country in this aspect since, out of an estimated 115 million people, 70% are young and trainable. The capacity of the nation to produce cotton might be seen as a second comparative advantage, especially for the expanding cotton-based textile and garment industry. With a total land area of 1,127,127 km<sup>2</sup>, Ethiopia is the 27<sup>th</sup> largest nation in the world (Mohajan, 2013). Nearly 3 million hectares of the nation's land area are potentially suitable for cotton production, but only 3% of that area is currently under cultivation for cotton (European Commission, 2021; Tiliksew *et al.*, 2021). This figure illustrated the enormous potential for widespread cotton cultivation in the country. The third comparative advantage Ethiopia has for a thriving textile and clothing industry is arguably its geographical location between Europe and Asia. The majority of customers of textile and clothing products are European nations, whereas the majority of suppliers of raw materials for textile and clothing manufacture are Asian nations. Due to Ethiopia's existing production situation, in which its backward links to the manufacturing of textiles and clothing are quite weak, the proximity to Asia is an opportunity.

### **The present production and trading scenario of Ethiopia's textile and clothing industry**

According to data from Ethiopia, the textile and clothing sector has expanded at an average rate of 51% during the past ten years. Throughout this time, licenses have been issued for more than 65 foreign international textile and clothing investment projects (Kohan Textile Report, 2022). There are now 176 clothing and 52 textile industries in the sector (ETIDI, 2018). Ethiopia's textile and clothing industry's output and trade are inconsistent, according to Beatrice *et al.* (ND). The Gross Value of Production (GVP), which started at \$2 million in 1995/1996 and climbed progressively to \$35.5 million in 2006/07 before abruptly dropping to \$2.3 million in the years that followed, surged dramatically once

again to \$78.1 million in 2009/10. According to New Business Ethiopia, the country's export value for textiles and clothing reached \$126 million in 2021.

The share of exporting textile and clothing products by FDI firms accounted for 80% of total exports in 2017 (Staritz and Whitfield, 2019). There are currently 13 industrial parks around the nation where textiles and clothing are produced with a focus on export. The present employment level in Ethiopia's textile and clothing industry is anticipated to reach 80,000 in 2017 (Clasmann and Anne-Batrice, 2017). According to Beatrice *et al.* (ND), the products of Ethiopia's textile and clothing sector range from carpets and towels to clothing and uniforms. The export of textile and clothing products includes items like t-shirts, sportswear, trousers, work clothing and safety clothing, undergarments, jackets, home textiles, bags, and scarves with ethnic motifs.

### The competitive challenges of Ethiopia's textile and apparel industry

Ethiopia's textile and clothing industry is struggling with production and marketing difficulties. The supply of cotton, fabrics, accessories, dyes, and auxiliary materials constitutes backward linkage production challenges. The workforce's skill level is low, and as a result, their effectiveness is inadequate. Additionally, import/export regulations are complicated, which affects lead times, product quality, and production costs (Beatrice *et al.*, ND). According to Beatrice *et al.* (ND), the constraints facing the Ethiopian textile and apparel industry sector are backward linkage, delivery and demand-side linkage, employee related, utility and facility-related, and managing and coordination limitations. Figure 2 illustrates these constraints and how they relate to one another.

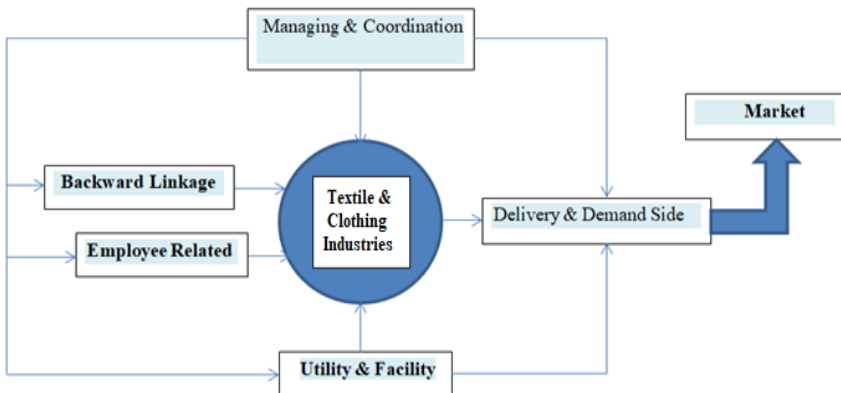


Figure 2. The difficulties that Ethiopia's textile and clothing industry is currently confronting

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## **Backward linkage challenge**

Ethiopia has a shortage of locally produced fabrics, trims, and usable cotton goods; thus, these materials must be imported from countries like China, India, Turkey, and Pakistan. Local cotton production meets only 60% of the textile and clothing industry's needs and is expensive and of subpar quality. Most of the textile sector uses old or obsolete machinery, and the fabric production is devoted to domestic garment production (bed sheets, working cloth, etc.). The domestic input-producing sector offers a small selection of low-quality accessories. As the majority of the clothing accessories are imported, they may be more expensive than most of their rivals, especially those in Asia, who profit from a developed industrial sector and technological expertise. The flexibility of Ethiopian producers to adapt to customer needs is hampered by such limitations.

## **Employee related challenges**

The majority of textile and clothing industry employees do not have an industrial work culture. Finding qualified workers who will stay is a big problem in the clothing manufacturing sector, where worker efficiency is quite low at 25% and absenteeism is high, accounting for 23% in some clothing manufacturing companies. Technical and soft skills are generally lacking among textile and clothing industry employees. The average monthly employee turnover rate for the textile and clothing sector is 8%, or 100% annually (Mihretu and Lilobet, 2017). Throughout the value chain of manufacturers, importers, and retailers, the stability of the workforce in the textile and clothing sectors is crucial.

## **Utility and facility challenge**

The lead time of the customer agreement that governs the planned output of the clothing industry is impacted by often occurring electrical outages. Another difficulty is that internet connectivity is frequently erratic and severely constrained. Moreover, the absence of regional certification organizations makes it difficult for the local textile and clothing industries to sell their goods to international consumers. Further difficulties include the inability to get pre-shipment financing and the restricted availability of the foreign currency required for the import of the inputs (Beatrice *et al.*, ND).

## **Delivery and demand side challenges**

Transportation, port facilities, public services, and other after-production components are included in the forward or delivery connections. Transporting products for shipment requires a lot of time, is delayed by customs clearance and port authorities, and is somewhat expensive. Transport time from Ethiopia to the EU might take up to 40 or 45 days for all possible reasons (Beatrice *et al.*, ND).



Consumer expectations, prevailing trends, impending events, seasonal fluctuations, etc., which are connected to demand forecasting, and, as a result, the capacity to create the ideal product need to be understood (Houkokusho, 2012). The clothing product has an extremely wide range, a short-lived, rigid supply chain, a volatile, unpredictable demand, and a restricted life cycle (summer items, winter products, etc.). These initiatives are a result of the companies' research and development departments. This covers customer analysis, demand forecasts, product design, order confirmation, and bilateral relations.

### **Management and coordination**

The textile and clothing sectors need effective management. The industry won't be competitive on the worldwide market if the management doesn't know what they're doing. The management must continuously develop the workforce via training in both hard and soft skills. Basic skill development cannot make a workforce productive, disciplined, and responsible on their own. It is frequently the case that there is a lack of coordination between service providers (such as those who provide electricity, internet, customs clearance, transportation, and port facilities) and textile and clothing manufacturers, which can have an impact on industry production, productivity, and lead times. In consequence, this will reduce the industry's ability to compete in the worldwide trade and manufacture of textiles and clothing.

### **THE NECESSARY INTERVENTION**

No country in the world has achieved industrial development without first entering the textile and clothing manufacturing and trading sectors, as learned from the experience of all industrially developed nations. Therefore, the production and trade of textiles and clothing are essential to the socioeconomic development of Ethiopia because they generate significant employment opportunities, boost export revenues, and transform rural residents into city dwellers through the creation of mill or industry villages. The following contributing rudiments for the industrial sector's growth must be prioritized in order to reach the necessary developmental stage.

### **Enhancing education and training**

Ethiopia is only a marginal supplier to the global textile and clothing market, and an upgrade to the level of preferred supplier, full-service provider, or strategic supplier is necessary to benefit more from the global value chain. Investing in education and training to address skills gaps is essential for industrial upgrading. In this regard, Bahir Dar University has provided 5564 graduates with qualifications ranging from diploma to doctoral (PhD), making significant contributions to human resource development, research, and deployment in the

textile and clothing industrial sector. Ethiopian technical and vocational training institutions also provide instruction in industrial operations. However, both universities' and technical and vocational training institutions need to improve their quality of education and training to keep up with international competitiveness in textile and clothing manufacturing and trade. Therefore, it is required to further strengthen the sector's education and training with additional investment and focused follow up. In addition, due to the importance of textile and clothing production and trading for the socioeconomic growth of the nation and the reduction of poverty, the sector's education and training need to be handled with the utmost care.

### **Promote foreign direct investment or joint ventures to develop vertical capabilities**

Ethiopian companies that manufacture clothing and textiles are able to engage in global supply chains. Skills, expertise, and technology will be transmitted through FDI in addition to capital. They are all viewed as crucial elements for increasing productivity and driving growth (UNIDO, 2004). FDI is a useful way for late-coming Ethiopia to take advantage of technology breakthroughs in textile and clothing manufacturing and commerce far from the technological frontier in order to access new technologies. As a result of commerce with both developed and developing nations, as well as involvement in global value chains due to knowledge spillovers from outside, Ethiopian textile and clothing companies "learn by doing" (Jodie Keane and Dirk Willem Van Velde, 2008). Governments in developing nations have a part to play in crafting industrial policies to make sure that the potential gains from exporting the textile and clothing industries are attached in a way that fosters beneficial learning effects for the larger economy.

### **The government's involvement in the manufacturing and trade of textiles and accessories**

The challenges with backward linking that now plague Ethiopia's textile and apparel sector cause it to lag behind global competition. According to the Vietnamese experience, the Ethiopian government must invest in the construction of major cotton farming, complicated textile, and garment accessory manufacturing industries in order to tackle this problem. Ethiopia has a great deal of potential for growing cotton, but the likely locations are far away and lack infrastructure, and private investors are not interested in such investments. To close the growing gap in the production and trade of textiles and clothing, the government must make such an investment. The nation will gain from such government investment in the form of greater employment, increased export revenue, and general socioeconomic growth along the whole value chain of textile and clothing manufacturing and commerce.

## CONCLUSION

The textile and clothing industry is a dynamic sector for investigating less expensive labor for global production. Due to the labor-intensive nature of the textile and clothing manufacturing industries and the fact that labor represents the majority of the industry's production costs, this industry is typically relocated from industrially developed countries to low-income developing countries. For low-income nations aiming for industrial economic growth, the industry's movement pattern is favorable. The textile and apparel sector benefits low-income developing nations in numerous ways, including: ease of entry into the industry, employment opportunities due to the labor-intensive nature of the sector, export earnings from manufacturing, growth of the industrial culture, and capital accumulation for ongoing heavy industrial economic development. With its agriculture development led industrialization strategic plan, Ethiopia, a low-income nation, strategically joined the textile and clothing manufacturing and trade industries in 1995; nevertheless, the sector has not yet considerably increased its share of the world market. The failure to resolve issues confronting the sector industry, such as backward linkage, delivery and demand side linkage, employee related, utility and facility, and managing and coordination constraints may be the root cause of the country's poor performance in textile and clothing production and trade. The issues that the sector industry is presently facing must be resolved by careful planning and execution if the nation is to progress via the manufacturing industry. Moreover, policymakers must update the strategy when the nation strengthens its position in the global textile and apparel production and trade market.

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