

# **Mitigating Internal Export Barriers for Small and Medium-Sized Apparel Enterprises (SMEs) in Washington State: Internationalization and the Renegotiation of the North American Free Trade Agreement (NAFTA)**

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*Internationalization among Washington State apparel SMEs was examined, to determine whether internal barriers were preventing firms from exporting at higher levels. A case study research design and stratified purposeful criterion sampling approach were utilized to collect qualitative data from Washington State apparel SMEs, who manufacture and sell “Made in the USA” consumer products. An analysis of the findings indicated that the growth of e-commerce platforms and establishment of reliable international shipping services have led to a decline in the significance of traditional concerns about internal export barriers for direct, indirect, and hybrid exporters.*

## **INTRODUCTION**

The United States is home to one of the largest apparel markets in the world, with expenditures equaling approximately 250 billion dollars annually (Maloney, 2015). American apparel spending represents about 21% of the 1.2 trillion-dollar global fashion industry (Parker, 2012). Since the consumption of apparel is increasing in America, the United States has attempted to meet consumer demand by maintaining a viable level of domestic production while becoming the largest single importer of textiles and apparel in the world (Rees & Hathcote, 2004). The vertical disintegration and offshoring of apparel manufacturing to a global network of independent subcontractors is largely a result of low labor costs and international trade deals, which cut tariffs on imported goods and create incentives for countries exporting apparel to the United States (Perry & Towers, 2013). The global fashion supply chain is the second most environmentally harmful industry in the world, resulting in poor working conditions at international factories in developing countries and the loss of apparel manufacturing jobs in the United States (Morgan, 2015).

### **The Effects of Offshoring in the Apparel Industry**

As a corporate strategy, offshoring the production of apparel has had a devastating impact on United States apparel manufacturing employment, which has declined more than 80% over the last two decades (U.S. Bureau of Labor and Statistics, 2012). The deindustrialization of the U.S. textile industry has led to the proliferation of imported apparel (Minchin, 2013). Moreover, automation and the increased productivity of textile mills has also cost the U.S. a significant number of apparel manufacturing jobs (Mercer, 2014). The apparel industry in the United States has seen a dramatic shift since the 1960's when

95% of our clothing was made in America. Today we only make about 3% of our apparel in America, and 97% is produced in developing countries (Morgan, 2015). Out of the developing countries that supply the global apparel market, the top five exporters are: China, Bangladesh, India, Turkey, and Vietnam (Fukunishi, Goto & Yamagata, 2013). Table 1 contains developing country suppliers of the global apparel market from 2005-2011 in USD millions.

**TABLE 1**  
**OECD DEVELOPING COUNTRY APPAREL SUPPLIER TABLE**

**Table 1 Developing country suppliers and the global apparel market (2005-2011, USD million, current)**

Exporter	2005	2011	Percentage change (2005-11)	% of total exports in 2011
<b>China</b>	74,162	153,773	107%	37%
<b>Bangladesh</b>	6,889	19,938	189%	4.80%
<b>India</b>	8,738	14,364	64%	3.50%
<b>Turkey</b>	11,833	13,947	18%	3.40%
<b>Viet Nam</b>	4,680	13,153	181%	3.20%
<b>Indonesia</b>	4,958	8,045	63%	1.90%
<b>Mexico</b>	7,305	4,637	-36%	1.10%
<b>Malaysia</b>	2,478	4,567	84%	1.10%
<b>Pakistan</b>	3,603	4,549	26%	1.10%
<b>Cambodia</b>	2,210	4,050	83%	1%
<b>World Total</b>	278,000	412,000	48%	

Source: WTO database.

(Fukunishi, Goto & Yamagata, 2013)

While the International Labor Organization has worked towards the adoption of labor standards that assist governments in establishing legislation to regulate wages and hours, the labor costs associated with producing apparel in developing nations are still much lower than those linked with United States apparel production (International Labor Organization, 2014).

### **The Resurgence of “Made in the USA” Apparel**

Although United States clothing manufacturers are offshoring production in record numbers, the market for “Made in the USA” products is growing in America and across the globe (U.S. Department of Commerce, 2016). The increasing consumption of U.S. apparel and textiles is largely due to country-of-origin effects, which are based on preconceived or actual differences in quality and tend to influence purchasing behavior (Ha-Brookshire & Yoon, 2012). According to a recent study by Consumer Report (2015), 84% of Americans believe apparel manufactured in the United States is reliable, and two out of three Americans are more likely to shop in a store that sells products which are made in the United States. Nevertheless, America’s continued reliance on importing has resulted in a steadily increasing trade deficit which grew 5.3% from 50.4 billion dollars in November to 53.1 billion dollars in December (U.S. Census Bureau, 2017). In fact, the apparel industry’s three largest product categories account for over 22 percent of America’s total trade deficit (Young, 2017).

Restoring the prominence of the U.S. apparel manufacturing industry is a problem of high importance to the American public; however, few retailers have prioritized exporting “Made in the USA” consumer products to industrialized countries (Rowan, 2014). Since NAFTA has increased export opportunities to Canada and there are fewer regulatory barriers currently preventing the export of “Made in the USA” consumer apparel products, internal obstacles, which include: lack of information on opportunities, poor knowledge of the distribution and marketing tools required to succeed, lack of financial resources and owner’s perceptions toward foreign markets have become increasingly salient research topics (Narayanan, 2015). Despite the internal obstacles many SMEs face, “Made in the USA” apparel accounts for 81% of

all United States apparel exports, and Canada and Mexico are the largest markets for these products, collectively accounting for 37% of U.S. domestic apparel and textiles exports (Freund, 2015).

### The Renegotiation of the North American Free Trade Agreement

While the North American Free Trade Agreement (NAFTA) has increased export opportunities from the U.S. to Canada through lower tariffs, predictable rules and reductions in trade barriers, it has also contributed to the loss of domestic manufacturing jobs (The Wharton School, 2014). With the deindustrialization of industries like apparel becoming commonplace, the renegotiation of NAFTA is a top priority for U.S. politicians and decision makers. The long-awaited confirmation of Robert Lighthizer, America's top trade official, signals U.S. President Donald Trump's administration has begun the process of renegotiating NAFTA and hopes for talks to be complete before elections occur in Mexico during 2018 (Panetta, 2017). There are few observers who believe substantive negotiations of NAFTA are possible in only a few months.

### Washington State Apparel SMEs and the Renegotiation of the North American Free Trade Agreement

Since United States textile producers shipped over eleven billion dollars in products to Canada and Mexico during 2016, the renegotiation of NAFTA would hit the apparel industry particularly hard, as the international trade deal is a vital component of the global supply chain for apparel companies in America (Aguirre, 2017). Washington State small and medium-sized apparel enterprises (SMEs) would be especially vulnerable due to their proximity to the border and dependence on Canadian apparel consumption (Davidson, Storer & Trautman, 2015). More than 80 percent of U.S. apparel companies are SMEs (Letizia, 2013). Apparel exports from Washington State to: Ontario, Vancouver B.C., Quebec, and Manitoba amounted to 4.2 million dollars during 2017 (Government of Canada, 2018). Table 2 shows the amount of Washington State apparel exports going to each Canadian province in 2016 and 2017 in USD.

**TABLE 2  
CANADIAN IMPORTS**

Title	Canadian imports		
Industries	Naics 315 - clothing manufacturing		
Origin	Washington		
Destination	Distribution by province		
Period	Year to date - current year vs. previous year		
Units	Value in U.S. dollars		
	Jan-Dec 2016	Jan-Dec 2017	% Change 2017/2016
Ontario	\$ 1,413,333.00	\$ 2,013,664.00	42.5
British Columbia	\$ 1,436,229.00	\$ 1,906,297.00	32.7
Quebec	\$ 52,452.00	\$ 156,036.00	197.5
Manitoba	\$ 9,564.00	\$ 72,684.00	660.0
Alberta	\$ 73,564.00	\$ 40,462.00	-45.0
New Brunswick	\$ 2,526.00	\$ 2,483.00	-1.7
Saskatchewan	\$ 4,407.00		
Nunavut			
Northwest Territories			
Yukon Territory			
Newfoundland and Labrador			
Nova Scotia			
Prince Edward Island			
Sub-total	\$ 2,992,075.00	\$ 4,191,626.00	40.1
Others	\$ 9,410,583,561.00	\$ 9,928,290,445.00	5.5
Total All Countries	\$ 9,413,575,636.00	\$ 9,932,482,071.00	5.5

Source: Trade Data Online (accessed: February 27, 2018)

(Government of Canada, 2018)

The renegotiation of NAFTA is also of specific concern to Washington State apparel SMEs, due to concessions Canada and Mexico will likely request, resulting from adjustments the two nations have been asked to make tightening the "rules of origin" requirements and expanding the market for "Made in the USA" products in government procurement (Dale & Benzie, 2017). Since Washington State apparel SMEs cannot circumvent pending regulatory changes, it may be to their advantage to act on internationalization now, while the benefits of NAFTA for exporters are still intact (Irwin, 2017). Although Washington State borders Canada and exported 81.9 billion dollars of "Made in the USA" products during 2014, apparel was not one of the top twenty-five export categories (U.S. Census Bureau, 2016). This is accurate despite the fact that Washington State SME wholesalers and manufacturers of apparel generated approximately 3.3 billion dollars in revenue during 2009 and in Seattle, Washington State's largest city, apparel designers are 20% more concentrated than in the rest of the nation (Mefford, 2010).

## **LITERATURE REVIEW**

### **Internationalization**

There are a variety of theories and approaches that have been used to explain the successful internationalization of SMEs, which include the stage approach, the network approach, and the international entrepreneurship approach (Bose, 2016). The stage approach, which is part of the Uppsala model, focuses on the acquisition, integration and utilization of knowledge and expertise in international operations to facilitate incremental advancement into international markets (Johanson, & Vahlne, 1977). While the Uppsala model has been criticized for being too simplistic to explain the realities of internationalization, due to its sequential approach and generalizability, the model's theoretical conceptualization and emphasis on learning behavior have resulted in it being used widely (Cho, 2013).

The Uppsala model is particularly relevant to the U.S. apparel industry and has been modified by Cho (2013) to evaluate firm size, firm age, product uniqueness, store atmosphere, brand identity, and domestic growth opportunities in addition to market knowledge and market commitment as explanatory factors. The network theory is similar to the stage theory in that it focuses on gradual internationalization; however this approach has to do with increasing amounts of financial, technological and market relationships with other enterprises that cross national borders (Johanson & Mattsson, 1988). The international entrepreneurship approach represents a significant departure from the rest of the internationalization literature, as it primarily focuses on new international operations by recently developed enterprises and is concerned more with rapid internationalization (Rennie, 1993). According to Giovannetti, Marvasi and Sanfilippo (2015), participation in supply chains also benefits SMEs seeking to internationalize, due primarily to reduced cost of entry and economies of scale. Participation in supply chains increases the likelihood SMEs will export and can be a particularly salient indicator of export ability for downstream suppliers who tend to work more closely with customers and finished products (Giovannetti et al., 2015).

### **The Italian Apparel Industry**

The apparel industry in Italy is an excellent example of a sector that has thrived based largely on exports to industrialized nations of high-quality merchandise manufactured domestically by networked SMEs (Tavoletti, 2011). This renders it an outlier in terms of trends in the internationalization literature, which revolve around the delocalization of apparel manufacturing from industrialized countries to developing nations (Truett & Truett, 2014).

The importance of innovation in the Italian apparel industry, particularly in relationship to driving export performance, cannot be overstated (Boermans & Roelfsema, 2016). This demonstrates that no "single theory" can be used to explain all internationalization patterns, and empirical evidence has proven that decision making related to global manufacturing strategy can be extremely differentiated at the national, sector, and firm levels (Bolisani & Scarso, 1996). Models used to describe or manage the



internationalization process have to be contextualized to the reality of the single firm (Bolisani & Scarso, 1996).

### **Export Promotion Programs**

Internationalization at the firm level is often dependent on a variety of factors and usually involves the development of an emergent plan that evolves as managers of SMEs increase their commitment to international markets (Wilkinson, 2006). Typically, SMEs that internationalize face a variety of internal obstacles and regulatory barriers, making the process risky and costly. The federal government in the United States sponsors export promotion programs (EPPs) to assist firms with international market opportunities, and the primary beneficiaries of EPPs at the state level are SMEs (Haddoud, Jones & Newbery, 2017).

Small and medium-sized enterprises receive a variety of services, including trade shows, trade missions, and other programs provided by state-based foreign trade offices (FTOs). A general association has been found between firm performance and the use of EPPs, while these services have been examined closely, the evaluation of U.S. state-sponsored FTOs has been largely ignored in the academic literature (Freixanet, 2012). According to Wilkinson (2006), State entrepreneurial climate does enhance the positive association between foreign trade offices and state international exports.

### **Summary**

Cho's (2013) modified version of the Uppsala model of internationalization, was utilized in this paper due to the introduction of additional explanatory factors that can better describe Washington State apparel SMEs' current involvement in US and Canadian markets. Special attention has been given to SMEs who are downstream suppliers, as they are more likely to be successful in their internationalization efforts due to reduced cost of entry and economies of scale (Giovannetti et al., 2015). Washington State apparel SMEs that manufacture and sell "Made in the USA" consumer products have been selected for the study, because of their ability to demonstrate the factors that lead to export success (Bose, 2016). The Italian apparel industry has been used as a comparative example, as it operates in a way that Washington State apparel SMEs aspire to at the firm, sector, and state levels (Bolisani & Scarso, 1996). Exporting "Made in the USA" consumer products to Canada requires Washington State apparel SMEs to overcome internal obstacles. Businesses that make use of government-sponsored EPPs particularly those administered by state-based FTOs have a better chance of achieving internationalization success (Wilkinson, 2006).

## **METHODOLOGY**

### **Research Questions**

1. What are the internal barriers for Washington State apparel small and medium-sized enterprises seeking to export "Made in the USA" consumer products to Canada?
2. How do internal barriers inhibit internationalization among Washington State apparel small and medium-sized enterprises that sell and manufacture "Made in the USA" consumer products?
3. What is required to mitigate the internal barriers that inhibit internationalization among Washington State apparel small and medium-sized enterprises that sell and manufacture "Made in the USA" consumer products?

### **Research Design**

A qualitative case study research design was utilized in this study. Yin (2018) recommends utilizing a qualitative case study research method when: your main research questions begin with how, why or (a descriptive) what; you have little or no control over behavioral events; and the focus of your study is a contemporary phenomenon or case. A case study design was utilized in this study, due to the how and (descriptive) what research questions. Additional evidence supporting a case study research design was that behavioral events cannot be manipulated like an experiment and the study focuses on internal barriers to exporting, which is a contemporary phenomenon. Another method of determining which research

design to use in this study was looking at other research on SMEs, manufacturing and apparel exports to determine whether there was a trend in the academic literature. A review of the methods section in Bhang, Yang & Reilly's (2016) study on SMEs, manufacturing, and Hawaiian apparel exports indicates that a case study research design has been successful in producing reliable qualitative findings and as a result was an appropriate research method for this study.

### **Population and Sample**

Stratified purposeful criterion sampling was employed in the context of this study to separate or stratify the sample into sub-groups based upon specific criterion from the literature and then collect data from the websites of companies within those sub-groups (Punch, 2006). The U.S. Small Business Administration has guidelines on how small and medium-sized enterprises should be classified. The main factor for apparel manufacturing businesses that have a North American Industry Classification System (NAICS) code of 315 (excluding accessories manufacturers) is having a staff headcount between 1 and 750 employees (U.S. Small Business Administration, 2016).

When determining the appropriate sample size for this study Reference USA's business database was utilized, to create a list of thirty-six Washington State apparel small and medium-sized enterprises under the U.S. Small Business Administration's guidelines for small and medium-sized enterprises (Reference USA, 2018). From the list based on staff headcount data, each company's website was examined to determine if the majority of the consumer apparel products they sell have at least fifty-one percent U.S. content, which is the U.S. Commercial Service's minimum requirement for providing export assistance (U.S. Department of Commerce, 2016). This narrowed the sample size for the study on Washington State small and medium-sized apparel enterprises that manufacture and sell "Made in the USA" consumer products to thirteen businesses. At this point, an independent national "Made in the USA" website, called "The American List" which had fifteen Washington State apparel small and medium-sized enterprises and did not appear in the Reference USA database was discovered (The American List, 2015). The fifteen additional Washington State apparel small and medium-sized enterprises were added to the list, after verifying they fit with the U.S. Small Business Administration's definition of an SME based upon staff headcount and the U.S. Commercial Service's guidelines for domestic product content.

Despite being close to having a workable sample, Carrier's (1999) revelation that support and training needs differ according to the firm's stage of commitment to exporting, meant that for the purposes of this study companies were organized into groups of two to demonstrate the trends among direct exporters (sell directly to international consumers), indirect exporters (sell their products wholesale to international distributors) or those exporters who choose a hybrid approach (sell directly to international consumers and have an international wholesale business). This resulted in a final sample size of four Washington State apparel small and medium-sized enterprises who sell and manufacture "Made in the USA" consumer products and utilize direct, indirect, and hybrid export approaches.

### **Limitations**

Examining internal export barriers for apparel manufacturers and wholesalers in Washington State may result in the identification and subsequent mitigation of obstacles preventing trade with Canada; however it would not fully address pending regulatory issues or substantiate international demand for U.S. apparel products.

### **Delimitations**

The primary focus of this study was to assist Washington State manufacturers of apparel goods who sell "Made in the USA" consumer products. The findings of this study will help determine whether there are internal barriers preventing apparel SMEs from exporting consumer products to Canada. In terms of transferability, the results of this study may only be generalizable to other U.S. States that have a sizeable apparel industry and border a Canadian province. Also, the results of a similar study examining the internal barriers preventing SMEs from exporting Canadian apparel to U.S. Border States would likely raise different conclusions. In order to facilitate the reduction of threats to the validity and credibility of

this study, cross-case analysis was employed to ensure the data is presented in an organized and systematic way.

## FINDINGS

### Direct Exporters

Direct exporting is often considered the most ambitious and difficult form of exporting, due to the fact that each part of the process is handled by the company selling the product being purchased by international consumers (U.S. Department of Commerce, 2018). The direct exporters, whose websites were selected, each serve a unique segment of the Washington State apparel market. For the direct exporter sample, a menswear boutique and a baby clothing retailer were selected. The menswear boutique was the only firm in this category that operated a brick and mortar retail location.

Despite the challenges normally associated with direct exporting, an evaluation of direct, indirect, and hybrid exporter’s websites indicated that direct exporting is likely the least difficult form of internationalization, due to technological advances in shipping and the proliferation of e-commerce website platforms. The firms profiled in this category were not as established, in terms of size or age, as their hybrid exporting counterparts. No indirect exporters, who weren’t also exporting directly were identified for this study.

### Hybrid Exporters

Utilizing a mixture of direct and indirect exporting approaches, can be extremely advantageous for SMEs, allowing them to reach more consumers in international apparel markets. Firms who use both direct and indirect exporting approaches, were the largest and most established SMEs in this study. A well-known outdoor retailer and a vintage sportswear company were identified as utilizing hybrid exporting strategies. Each firm in the hybrid exporting sample, also employed an omnichannel sales strategy, serving customers who shop, online, at brick and mortar locations, and by telephone. Table 3 contains a cross-case analysis of data obtained by evaluating hybrid and direct exporters websites.

**TABLE 3  
CROSS-CASE ANALYSIS OF HYBRID AND DIRECT EXPORTERS WEBSITE DATA**

Hybrid Exporters					
Market Segment	Age	# of Brick and Mortar Locations	# of Intl. Countries Shipped To	# of Intl. Distributors	E-Commerce Website
Outdoor Apparel	121yrs	19	38	1+	Yes
Vintage Sportswear	30yrs	1	4	1+	Yes
Direct Exporters					
Market Segment	Age	# of Brick and Mortar Locations	# of Intl. Countries Shipped To	# of Intl. Distributors	E-Commerce Website
Menswear Boutique	8yrs	1	2	0	Yes
Baby Clothing	34yrs	0	3	0	Yes

## **DISCUSSION**

Given the changing regulatory environment for Washington State SMEs who sell and manufacture “Made in the USA” apparel, it may benefit retailers to pursue internationalization while the benefits of NAFTA are still intact for exporters. While historically Washington State apparel SMEs internationalized gradually, employing the network or stage approach, the growth of the internet and availability of reliable international shipping services puts direct exporting within reach for new businesses seeking to maximize their impact. As e-commerce platforms and shipping companies have shouldered more of the risks and costs of fulfilling international online orders, internal barriers to exporting have become less significant for new businesses. Once Washington State SMEs who sell and manufacture “Made in the USA” apparel have seen their product do well in specific foreign markets, they can approach international distributors who seek products with the potential for global success. Although this process can be difficult for SMEs to manage, while tending to the concerns of their domestic customer base, the importance of utilizing Washington State export promotion programs (EPPs) cannot be overstated. Internationalization success at the macro level will require SMEs, to ensure they take advantage of opportunities to collaborate with other local businesses who sell, manufacture, and export “Made in the USA” products.

## **CONCLUSION**

With the market for "Made in the USA" products growing domestically and around the globe, many are looking at the renegotiation of NAFTA as a way to bring manufacturing jobs back into the U.S., despite the unintended consequences this could have on American exports. It may be wise for Washington State apparel SMEs considering internationalization to pursue it now, while the benefits of exporting under the North American Free Trade Agreement are still intact. Direct exporting under an international entrepreneurship or network model has become more feasible due to the proliferation of e-commerce platforms and international shipping services, which have contributed to a decline in the significance of traditional concerns about internal obstacles to internationalization.

## **DISCLAIMER**

This article was written in Jordan Lucas Knox’s personal capacity as a Doctoral Candidate at City University of Seattle and in no way reflects the beliefs, opinions or policies of the U.S. Department of State.



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