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School of Graduate Studies

Department of Project Management

**Change Management in fast Growing Fashion Industry in the case
of Nazareth Garment Share Company**

By Liyu Dender

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of Nazareth Garment Share Company**

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**ST. MARY'S UNIVERSITY
SCHOOL OF GRADUATE STUDIES**

**CHANGE MANGMENT IN FAST GROWING FASHION
INDUSTRY IN THE CASE OF NAZARETH GARMENT SHARE
COMPANY**

**BY
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LIST OF ABBREVIATIONS AND ACRONYMS

AGOA-African Growth Opportunity Act

NGSC- Nazareth Garment Share Company

AQL- Acceptable quality level

ILO- International Labor Organization

GAVC-Global Apparel Value Chain

EBA- Everything but Arms

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Abstract

In this paper the study has focused on the fast-growing fashion industry. The study explored the growth of fashion trends globally and the pressure that is creating on manufacturing companies. Due to seasonal changes and rapid fashion demand manufacturing companies are required to cut back their longer lead times and shorten the process of transporting and manufacturing process to deliver seasonal garments on the right time. The general objective of this study is to investigate the challenges face by rapid change in fast growing fashion industry using Nazareth Garment share company as a case study. It was discussed on the different factors that are challenging the manufacturing companies' ability of growing with the same pace with the growing fashion industry. The research explores in depth factors which are affecting the export performance of Nazareth garments share company. Even though there are external and internal factors affecting the time delivery the study focused on the internal factors. Data was gathered and analyses using both qualitative and quantitative approach. Data was gathered by direct and phone interview, questioner, observation and referring the recorded reports. The research finally identified that factors like quality, poor productivity and long logistics lead time cause a delay on exports and in the context of fast fashion delay is not a tolerable problem as the fashion is seasonal. In all over the study recommends the manufacturing companies to adapt a vertical integration manufacturing practices which can play an important role by substituting imports that can cut back the excess lead time on the value chain of fast-growing fashion industry.

Key word; Fast fashion, apparel industry, garment retailer, lead time

DECLARATION

I, the undersigned, declare that this thesis entitled “Change management in Fast growing fashion industry, in the case of Nazareth garments share company’ is my original work, prepared under the guidance of Dr. Muluadam Alemu (PhD). All sources of materials used for the thesis have been duly acknowledged. This thesis has not been submitted for any degree on any other university.

Liyu Dender

St. Mary’s University, Addis Ababa Jun 2021

ENDORSEMENT

This thesis is submitted to St. Mary 's University, School of Graduate Studies for examination with my approval as a university advisor.

Muluadam Alemu (Ph.D)



St. Mary's University, Addis Ababa

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CHAPTER ONE: INTRODUCTION

1.1 Background of the study

Fast fashion is production and sales of low-priced and disposable garments with a good quality it was first introduced at the end of 1990's with a characteristic of rapid change in the fashion industry (Kowloon,2019), (Barn and Lea-Greenway, 2006; Bhardwaj & Fairhurst, 2010; Nikolay,2016). Its rapid trend came from the development of industrialization and globalization with an advance technological efficiency on production of fabric and trims make it possible to sell garments in cheap price but with higher rate of sales (Anguelov,2016).

Fast fashion is highly dependent on seasonal production with on timely presentation of fashionable wears to consumers; as a result, speed is the main factor that defined the industry. From design to raw material production and assembly of garment components to packing and selling the final product fast fashion demand a shorter lead time, so all this burden of rushing the product with the exact requirement on the right time falls on the mainly on the shoulders of garment manufacturers. Thus, these companies expected to bring a continuous improving ways and methods of working to bring up their speed for satisfaction of their customers demand without failing to produce in the right quality and on the right time to sustain their sales performance.

Trends change frequently as a part of human development and fashion is one of the most common trends that link humankind. Fashion has been impacted by globalization, People with different culture and norms are coming as one society in recent modern world. in early eras garments used to represent culture, lifestyle and rank in different society and people used to dress according to their cultural and geographical influence, Now a days because of the globalization effect on the growth of fashion industry the clothes in markets all over the world are becoming same as the industry is bringing the world together by motivating consumer to buy fashionable and seasonal garments by presenting and introducing a variety of fashion designs despite the cultural and status differences (Anguelov,2016).

Big retailer of fashion like Zara and H&M become the leading giants for the concept of fast fashion with their own multiple seasons of fashion development and design need a manufacturer

with the ability of achieving their goals by delivering on time with the right quality and at cheaper cost (Anguelov, 2016).

Currently the garment industry is growing and changing very fast. Retailers of different brands around the world are looking for the best manufacturer who can bring quality, cost, and time on the best interest of the client. Due to some attractive factors like government incentives, Free trade agreements and cheap cost on labor as well as electricity, a lot of global fashion leading retailers like PVH and H&M have shown interest in Ethiopian garment industry on the past few years, and as a result they participated on sourcing from Ethiopian manufacturing companies which are owned by foreign investors (Esther & Martje, n.d), (Mamo & Gabriela, 2017), (Oqubay, 2015)

The Ethiopian garment manufacturing industry have not succeeded and developed as expected due to the lack of compatibility with the current growth rate of fashion industry in the past years. Developing countries like Bangladesh and Egypt have the biggest shares of apparel production because they managed to overcome the change and rapidly growing demand in the industry by continuously improving their manufacturing system and reducing waste which leads to longest lead time and delay on delivery. (M.hossani & Hosoe, 2017; UN , 1999)

This study discussed how the developing garment industry in Ethiopia can deal with such a rapidly changing industry demand with the right quality product and on time delivery with the shorter lead time by exploring and assessing the major obstacles which affects the Ethiopian Garment industry to not overflow in garment production and export.

The study was conducted in one of the manufacturing companies located in Adama, Ethiopia named Nazareth Garment Share Company which is established in 1992 E.C by a Korean Investors. The Company has been producing different Garment Wares to different local and international Retailors through the years. Clients like Ethiopia Airlines and different local customers as well as big retailers like H&M, but as its long year experience in the industry it have not progress much when it comes to its performance , over the years NGSC have passed through internal and external changes that affected its growth and no significant growth have been recorder in the company that take it to the development road, the company have been struggling on finding continuous export orders , keeping sustainable sales and expanding and growing due to the challenges it faced internally and externally on the change that have

happened on the apparel and fashion industry. This study has explored the challenges that manufacturing company Nazareth Garment face due to the fast growing and changing fashion industry.

1.2 Statement of the Problem

Nowadays customers trend is changing, technology is evolving, fashion is rapidly transforming on a daily basis and coping up with this change is a matter of existence in the business for manufacturing companies in garment industry. Speed is an important aspect of fast fashion as the name indicates. The production time and delivery to the right customer without fail is the key to sustain in this industry (Cietttá, 2010, as cited in Kowloon, 2019). So, it is expected that manufacturing companies are required to adopt this trend and respond to it quicker. On the garment production companies like Nazareth Garment, it is very expected to have a flexible and fast ways of making the garments to deliver it on the right season and right quality for sales to keep the retailing companies who are handling this with the direct consumers happy and satisfy.

Report have shown that the NGSC (Nazareth Garment Share Company's) export declined over the past few years because of failed on time delivery. In 2018 the company started to export 100%, with a plan of making a sell of five million dollars annually, the export goal was achieved by 55 % in the same year. The company was able to accept big orders with different retailing companies in USA in 2019 as a result the export sales report shows an increment by 99.9 %. (NGSC, Export sales report, (2018,2019))

The production capacity of the company was encouraging to attract the foreign garment retailers, but due to delay happened in its exporting clients lost their confident on the company to proceed placing their orders so, on year 2020 the export decreased to its lowest of 9.53 %. (NGSC, Export sales report, (2020)).

On the year 2020 when the global pandemic COVID-19 hit the world, the international trade activities were affected, and largest fashion industry was one of the biggest industries which faced a sudden decline in fashion demands.

As shutting down of big retailing shops in the USA and Europe Market because of COVID-19 production orders were cancelled from all over the world, and NGSC also faced same order cancelation as a result NGSC sales in the year 2021 fall to the ground with a report of 0 \$, (NGSC, Export sales Report, 2018-2021)

Big fashionable wear brands like owners of ZARA, H&M and GAP which are a giant garment retailer around the globe specially in the bigger market of North America are known for their rapidly change fashion cloths. (Kowloon, 2019, Nikolay, 2016).

Recently a lot of different brands are joining this trend to compute and sustain the fashion industry. Even though the normal identified seasons are four as Autumn, Summer, Winter and Spring, for the fast fashion these seasons are not important as they have their own seasonal sales. retaining companies like H&M needs to replace its store with new product every eight weeks while ZARA and Forever 21 need to sell their stock out within two and six weeks respectively (Cline, 2012 as cited in Kowloon, 2019).

Such rapid change in fast growing fashion industry is a challenge for garment manufacturing companies in Ethiopia like Nazareth Garment share company to be able to sustain in this big market demand, with huge opportunities and challenges.

Textile and garment industry in Ethiopia is highly challenging and not advanced. despite a lot of big garment retailers show huge interest to source from Ethiopia despite the risk level they need to take is big due to the problems like not having skilled manpower and shortage and low-quality cotton production, the unavailability of high-quality cotton production force the retailer to source their textile from elsewhere, (Francis ,2015 cited in Esther & Martji,n.d).

Manufacturing companies like Nazareth Garment Share Company needs to import raw materials from Asia and other world parts due to the retailer's high quality cotton product demand and request. Importing raw material has been a core problem to late delivery of finish product. Comparing to the change that is happening in the industry the companies working methods are still traditional and not advanced.

NGSC (Nazareth Garment Share Company) has faced delays on its import's raw materials at both Sea and Land transportation due to several challenges on the transportation and logistics of

the goods to being it in the warehouse on the time in the year of 2018 and 2019 (NGSC, Logistics report of 2018,2019).

Quality is a factor that can drag the on-time delivery backwards or forward, even if the manufacturer will be able to overcome the challenges on sourcing and transporting the raw materials into the factory warehouse as well as producing the garment in a required quantity at the right date if the quality of production will be under acceptable quality level (AQL) then the delivery as well as the community of potential orders will be under question mark. That is why garment manufacturing companies are responsible to make sure that they meet the required quality level by their customer in order to pass the external audit conducted by third party before approving the shipment. (Rahaman,2016).

Producing in acceptable quality level is another challenging factor for Nazareth Garment share company, NGSC experienced cancelation of order from its customer because of failed quality audit from some of its exports.

The apparel industry is a labor incentive industry, as mostly it depends on cheap labor. As the country is not industrialized most of the labors are coming from rural area with a background of farming practice, and with no skill of factory work, so NGSC needs to train the employees every time it hires, in the year 2018 and 2019 the company hired experienced expatriates to transfer to local workers, including middle management employees.

Based on the report of NGSC HR department the company over the past four years an average of 50.25% turnover was recorded in NGSC. Since the manufacturing of garment is driven and depend on labor losing a trained workforce will cause decreasing in productivity and lose of time to bring up new employees' efficiency. (Labor Turnover report HR of Nazareth Garment share company from 2018-2021 E.C)

According to a research conducted in 2016 on one of the garment manufacturing company Shints Garment plc that turnover rate in the industry was more than 50% which is a challenging factor for the garment manufacturing companies in the country. Not having a well experienced work force but hiring and training new work force just to face the turnover will make a big impact on not be able to sustain a trained manpower to cope up with the fast fashion since they will need to train new employees repeatedly (Sewint,2016)

The garment manufacturing is mostly dependent on labor, as it required a bigger number of employees. Based on a report written with the support of European union about sourcing textile and garment in Ethiopia it was explained how the industry in Ethiopia is facing instability in its manpower development, by indicating the unmaintainable number of employees over the years. From 1991 to 2006 the manpower decreases from 30,000 to 22,000, and in 2006 it went down to 10,000 employees which later in 2007 increased to 20,000 workers and in 2013 it reached 42,000 (Central Statistical Agency of Ethiopia, n.d.).

The current number of employees is difficult to assess due to the highest turnover rate. The layover of employees from different manufacturing companies due to COVID -19 effect causing on lack of work order, and political instability in the country factories are facing difficulties to keep their work force operational. (Ethiopian business review, 2021).

1.3 Research Questions

1. How does the change occurring in Fast growing fashion industry affect Nazareth Garment Share Company Performance?
2. What are the factors that are affecting Nazareth garment share companies' practice of change management?

1.4. Objectives of the Study

1.4.1. General objective

The general objective of this study is to investigate the challenges face by rapid change in fast growing fashion industry using Nazareth Garment share company as a case study.

1.4.2. Specific Objectives

1. To evaluate factors affecting Nazareth Garment Share Company's performance.
2. To analyze the factors challenging Nazareth garment share company on its change management practices.
3. To examine the different variables which challenge Nazareth Garment share company's ability of managing change in the industry.

1.5. Significance of the Study

The study fills the gap of information in the Ethiopian Garment industry regarding with dealing of change management in fast changing fashion trends, it also would be helpful to policy makers in the reforming of textile and garment industry development plans or restructuring of different policies regarding industrial revolution and improvement on Ethiopian textile and garment manufacturing sector. Garment manufacturing and exporting companies' managers also might found this sturdy helpful to explore and develop change management plan to adjust their performance growth by referring the findings on this research. Moreover, it would be helping new investment coming to Ethiopian garment and textile industry by providing the information that are challenging the manufacturing sector of garment in the country, as well as this paper would be input and reference for other researchers' studies in the same or related topics.

1.6. Delimitation/Scope of the Study

The geographical Scope of this thesis is Nazareth Garment Share Company which is in Adama city, Ethiopia. Thematically, the study examines fast fashion effects on Garment manufacturing industries specifically Nazareth Garment Share Company and the strategic development plan which will help to overcome the challenges. The time scope evolves on from fiscal year 2018-2021 E.C.

1.6.1. Limitations

The limitation of this study is unable of collecting data flexibly and timely because of COVID-19, but the researcher followed a restriction given by health authorities while collecting data, as well used a phone interview method to conduct interview.

1.7. Organization of the paper

This study has five chapters; the first chapter goes through introduction on the background study of the topic 'Fast Fashion' and explores difference studies about this topic give a clear and brief introduction to the reader. The second chapter explores different Literatures regarding change and change management as well as explores different books and scholars previous research on both topics of change management and fast fashion industry challenges and study results in different companies in the garment industry. The third chapter discuss on the idea of how this studies research design and data collection producers along the detail explanation of sample size and population which will be used to collect data for the input of the study. The fourth chapter is about analyzing and interpreting the collected data to show the collected information for this study. Chapter five is the last chapter in this study which will take the reader towards the findings of the research and conclusion of the researchers and recommendation as well.

CHAPTER TWO: LITERATURE REVIEW

2.1 Conceptual literature

2.1.1 Fast-growing fashion industry

Fashion is a temporary and periodical trend embraced by consumers. (Sproles, 1979). Fashion before mid of 1980's was based on standardized styles that did not change often because of a restricted designs and low-cost mass productions of the factories. Gradually fashion becomes the most common lifestyle to follow by almost every country in the world in 1920 a store for selling "readymade" wears for men, women, and kids start expanding in Europe and USA. In early 19th century a few designers like Coco channel start introducing a higher standard and innovational fashion clothing's for women in Franc, following that a sudden demand of fashionable women's wear start developing in the market, the simple standardize styles of garment start to be not favor by apparel consumers. Since the change was so sudden and unexpected the sales for mass produced seasonal cloths in that season was down. (Sterlacci & Joanne Arbuckle 2008)

In 1990 the fashion emerged itself towards fast fashion because of growing interest by consumers to have variety of designs and unique looks. Since then, the industry of fast fashion is continuously growing and expanding with rapid changes to satisfy the market demand to recent days (Shimamura & Sanches,2012).

Fast Fashion is production of garments with low cost and rapid rate of change. (Bran & Leagreenway,2006), consumers are willing to buy and pay for the cheapest fashionable garment which can be replaced with a new fashion within a few weeks, fashion trend are changing rapidly and the influence of that might be different, for some its music, art politics or seasonal public sensation. This high demand of consumers to purchase more and quick contributes a lot for the rapid growth of fashionable wears. (Hayes & Jones,2006)

Scholars argue about the driving factors for rapidly growing customer demands. A few have argued that these demands are driven by strategic plans of retailers which make consumers to be addicted for fashionable products and quickly fading because the market, others refuse this idea and still believe that the source for change in the fashion industry is actually driven by consumers so manufacturing companies as well as retailers are forced to be able comply with the required rapid change in fashion to satisfy their clients. (Hayes & jones, 2006).

2.1.3 Fashion and Globalization

With the globalization in place the world is becoming one huge town now a days when information flows faster and technological innovation overtaking the human labor, one industry is still depending much on human labor still specially in developing countries which labor power is still the engine of a business to run more specifically the apparel industry. In this fast growing and changing industry people looking for fashionable and innovational wears for their day to day interaction companies who are located in developing countries must work on their work force development planning for them to achieve the goal and stay competent in the industry that is adapting change frequently ,Change can be developed through knowledge by teaching an individual or groups to give them the required knowledge, skill, and experience to implement the needed change in the working environment (Green, 2017).

2.1.4 Fashion Seasons

Before 1990 Fashion used to have a well-known season of four, spring, summer, fall and winter which are Introduction and adoption by fashion leaders, growth and increase in public acceptance, mass conformity, and decline so the fashion that was dominating the consumers market was the same for everyone with the different size. (Bhardwai & Fairhurst ,2010)., Later retailers start to focus on expanding their product ranges and as a result they came up with the idea of adding more phases to the fashion season and additional three to five mid-seasons were added which are the seasons in between the first four seasons which start to put a lot of pressure on apparel manufacturing and suppliers. (Tyler, Heeley & Bhamara, 2006; Muthu & Kowloon, 2019)

The growing of fashion seasons brought up a high competition on the market, so to overcome this challenge the retailers switch from product driven to customer driven production and destruction, as a result they needed a wider factory of garments from all over the world. (Gereffin ,1999).

2.1.5 Fast changing fashion and Expansion Garment Production

Increased fashion seasons and variety production demand in the market retailers expanded their networks to different continents to find a better and cheaper production cost, the cheaper the production cost the cheaper the selling price so that the consumer choose the cheaper with a

quality they needed. So, the garment industry start growing and developing in accelerating speed to satisfy the demand and fill the gap. (Bhardwaj & Fairhurst,2010)

A garment industry is one of the biggest and globalized industries in the modern world. The reason that the industry is called the most globalized one is because of the production and trade of garment all over the world, a manufacturing textile and garment will not be limited to trade within the country of production but rather export it to others as well as import from others. So just like other essential products for human being which link the world globally, despite the difference of culture and norms garments seems to make one language and simply connects consumers around the globe. (Jansson & Power,2010)

As a result of industrial development in Europe and America the labor cost start to rise. So, retailers start sourcing from developing countries like China which employees over 5.3 million workers in the industry, at a time China was offering cheap labor and production cost. These developing countries took these opportunities and used it to grow their industrial revolutions which contributed a lot of their economic growth. From 1970 to 1990, number of workers in textile and footwear industry in Malaysia increased by 597% while Bangladesh 416%, Sri Lanka 385%, Indonesia 271% and 137 % in Korea according to the press release of the oct 28,1996 ILO (International Labor Organization). The reason for the higher rate of increasing of expansion in the industry to developing countries was a cheaper labor cost, this drive the retailer's choice over the last few decades.in 1992 the average hourly labor cost in textile and fashion industry in developed countries was from 9.70 \$ to 13.40 \$ while in developing countries it was only between 1.70\$ to 4.20\$.

Asia is the world's largest manufacturing hub of textile and garment products. China alone was the exporter of 20% of textile and 28% of garment products to the world in 2003.it was noted that in the year between 1961 to 2001 textile and garment trade was the biggest trade made globally comparing to other products, as a result Asian countries economic growth was influenced by that. Most recently the cost of manpower and production is getting higher and higher, so the retailers are looking for a way out by trying to shift most of their garment sourcing towards Africa, the continent with cheaper and younger manpower. As a result, now a days the garment production is expanding in different African countries especially sub-Sharan countries

like Ethiopia are capturing the eyes of world biggest retailing companies like PVH, H&M as well as ZARA. (Hanna & Theuws, n.d).

Africa is the continent with younger labor force with a cheaper wage, so the retailers start turning their eyes from Asian manufacturing industries to African industrial developments on the past few years. The reason of shifting manufacturing of garment from Asia to Africa is based on consumers demand on low cost but high-quality fashion wears, as Asian labor cost increased the cost of fashion also start to rise but to keep the selling price cheap then retailers need a strategy to look on other options where they can cut back few costs and Africa is the best option at this time. different trade agreements like AGOA (African Growth Opportunity Act) and EBA (Everything but Arms), which are giving privilege for sub-Sharan African countries to export their textile and garment productions to United Estate and Europe with a free trade was a huge breakthrough for development of garment manufacturing in African countries, basically in sub-Sharan African. (Perez,2008), (Mitta,2020).

2.1.6 Lead time in fast fashion industry

lead time is the duration from start to end of a process, in the context of garment manufacturing lead time can be defined as duration of time from order receiving to order delivery. The concept fast fashion is all about presenting the fashionable wear to the consumer before it is outdated and in the exact season without fail so time is critical, as retailers depend on seasonal fashion, which is changing rapidly, they demand a shorter lead time plan from manufacturing companies. Fast fashion needs quick change and fast respond, speed is a major player here, satisfying consumers require swift action on providing the required product on the required time. Not being able to deliver the fashionable wear on the right time to the market will bring lose rather than gain. (Kader ,2014)

2.1.7 Lead time in Logistics and supply chain

As known, most of the raw materials used for export garment production in Ethiopia garment industry are sourced from Asia which will cause a longer lead time. This affect the production time that is cutting, sewing, and packing. Such cause leads to rush manufacturing the garment with rushing the process that neglect the quality aspects and focused on only to bring up the required quantity, but since the shipment cannot move without fulfilling the required quality in the stitched garment the delivery will be under question mark. (Khan,2016) (Haan&Theuws,n.d)

Lead time in logistics the time that will be spent from sourcing the raw material to delivering the finished goods. Once the production order is received and sample is approved for mass production by any garment retailer factories start sourcing the raw materials from different manufacturers, in case of Asia most raw materials are sourced within the continent so the lead time is not long but coming to Ethiopia the lead time for sourcing and importing is relatively higher as Ethiopia highly depend on importing of raw materials from Asia and different world countries. (Arigo,2020).

Vertical Integration

Vertical integration is the availability of manufacturing companies for the input of garment production in the same areas, in-house vertical integration means being able to produce all necessary trims and accessories in the same company to supply for the garment production lines only. Vertical integration is confirmed to be a key to success of East Asian firms in developing a strong position in the global apparel value chain (GAVC) as they upgraded their vertical integrations in their apparel industries. (Monsur & Yoshi, n.d), it's unfortunate that Ethiopia is still behind on developing such a vertical integration link in the apparel industry with a scarcity of raw material manufacturers with a quality standard required by global retailers, to cut off the high dependency of importing raw materials from outside. (Getahun,2012)

2.1.8 Lead time in production

Lead time in production is basically the time that is consumed to make the product and it starts from raw material arrival to factory, cutting, producing, and packing of the garment. Once the fabric, trims and accessories arrived at a manufacturing warehouse the lead time of producing

will define if a company will be able to deliver the produced garments within the planned time to the consumer. (Doeringer & Crean,2006 as cited in Nagurney & Yu, 2010)

Total lead time is a summation of order lead time, manufacturing lead time and supply chain, so it is the most competitive factor in the fast fashion industry, manufactures face a challenging computation on the delivery of the garment to the retailers shop within the specific fashion season. From order receiving to

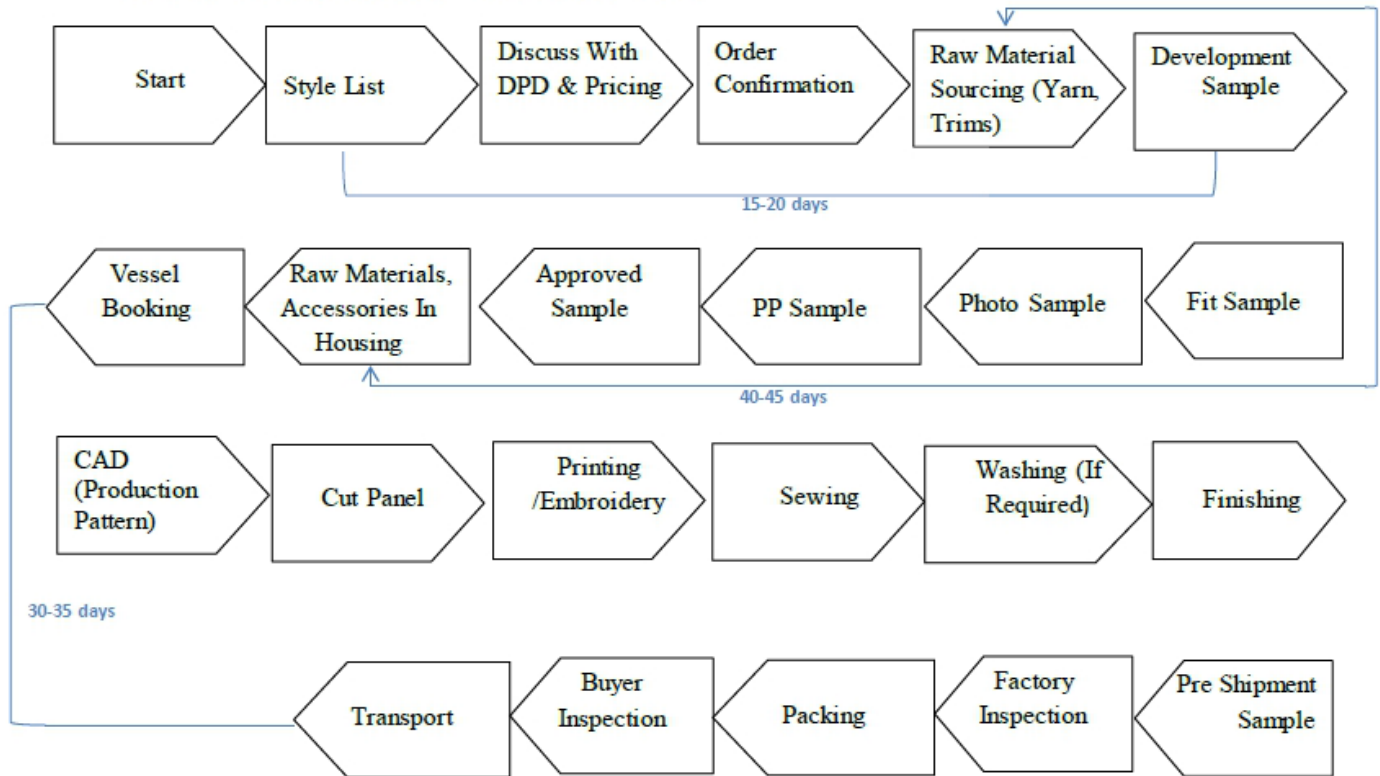


Figure 1.1 a lead time for logistics and production processing and execution system for woven apparel industry. Source (Kader & Akter,(2014)

2.1.9 Delay in Fast fashion

Delay in fast fashion is the term, which is equal to lose, so reducing all lead times from order approval to importing materials for production and producing it with the right time at the right quality to be able deliver it on time for the market is a key for sustainable development for any garment manufacturing company. (Ariggo,2020) Product cost, quality and lead-time are correlated and can bring delay to the delivery as one will affect another. Quality denotes the existence and performance of the product. However, paying high cost to get the product that exceeds the sell period converts to huge loss to the retailer. Fast fashion apparel is time sensitive and follow a very tight timeline and meeting the deadline is important than ever. Quality and lead-time go hand in hand. High quality products with simple design need shorter turnaround time compared to the embroidered or premiere fashion cuts. The time needed for the raw material like fabric, trims or other accessories is important as that would define the timing of the production, and the rate of quality production will influence the output rate and rework reduction, if there is high rework that means low output which leads to quantity reduction that can cause delay on export.

2.1.10 Fast changing Fashion vs. Ethiopia's Apparel manufacturing industry

Even though Ethiopia has been participating in garment and textile production since early 1939 the industry has not developed or modernized until now. The expansion of the manufacturing revival as well as productivity in this industry has been characterized by very low productivity rate from 1970s to recent years. The main reason for no development in this industry is the policy of import substitution which was implemented in most of African countries between the periods of 1960 to 1980. The purpose of import substitution policy was to protect the domestic market from foreign competition and as a result with the purpose of expanding and growing domestic industries. But these police have not brought any good to the development of industries, in fact the production in the country was not compatible with the outside world and has not improved with the standard, so instead of growing it was downsizing. This closed and rigid policy which blocked competition with international production cause a maximum economic damage, in Africa the gross domestic growth rate of the region decreased from 4.3 % to 1.1% per annum between 1971-1985, Ethiopia's value-added share of textile sector also faced a dramatically decrease from 18% to 1% between the year of 1992 to 2007.

Ethiopia has been progressing over the years to develop its Apparel Industry by building industrial free zones to attract foreign direct investment. There were two sequences of industrial park development in the 2010s. The first sequence was part of the growth strategy. The Ministry of Industry established the first industrial park for Garment and Textile production and Export in Bole-Lemi, near Addis-Ababa, in the year of 2012-2013 with an implementation project of \$35m which involved the investment of eight South Korean textile and garment and textile manufacturing companies over a 156-hactar surface area, (Mesfin, 2012a; Staritz & Whitfield, 2019).

Unfortunately, first stage of Special Industry Zones did not meet government expectations. This was mainly due to governance failures in the field of labor turnover and training, as well as import process and hustles of raw material imports through Djibouti port and the traditional custom producer and process in Ethiopia. Lack of coordination among administrative organizations also caused a lag on the race of development and competitiveness in the industry with the global fashion industry. In 2014 global fashion retailer giant PVH which retails brands like Calvin Klein and Tommy Hilfiger assessed the potential of six new locations for apparel production. These six, which happen to be all African, were the result of a shortlisting process. Ethiopia beat Kenya, Tanzania, Ghana, Zambia and Uganda, largely because of the responsiveness of certain individuals in the government, as well as Ethiopia's access to cheap renewable energy and, perhaps most importantly, its cheap labor. While their study showed that productivity was higher in Kenya, as the workforce was more industrialized, PVH chose Ethiopia, where labor costs were lower and government commitment more evident. (Marjolein van Gendt, 2019) so as a result a second development of industrial park took place in 2016 this Industrial Park hosting foreign garment and textile companies, under the support of the Ethiopian Investment Commission. (Mihretu & Llobet, 2017).

Despite the fact that the government have invested in the development of the apparel industry still the Ethiopian manufacturing companies could not match the expected productivity and performance by worldwide fashion retailers. As the global fashion industry is growing a rapid phase Ethiopian Apparel manufacturing is still with a big barriers and bondages that is slowing it down as getting input like fabric and accessories into Ethiopia is difficult. Ethiopia has limited availability of locally produced fabrics, trims, or usable cotton these need to be imported from

countries like China, India, Turkey, and Pakistan. This increases the lead-time of the ready-made product. This trend constitutes a major setback in Ethiopia development plan of Textile and Apparel industry. The dramatic decrease of cotton production as well as low cotton quality with a higher risk of contamination of cotton during harvesting, transportation, storage and even in packaging in the country led the industry to rely on imports. The total cost of raw materials consumed by the textile manufacturers reached \$53.8m in 2009/2010 of which 37% of the cost was imported raw materials. All enter the manufacturing process of the textile and garment industry. These imports generate additional costs by the lack of infrastructure which is causing delays in raw materials and accessory supply (Sutton & Kellow, 2010)

For manufacturing companies in countries like Ethiopia the challenge is higher with the risk of losing a customer due to the longer lead time both in its supply chain and manufacturing.(Akter,2014) for longer period the apparel manufacturing lead time was long, complicated and inflexible which was not able to satisfy the increasing demand and needs of garment retailers in the market so improving the supply chain with a principle of just intime was introduced in the industry.(Christopher,2004 as cited in Ciarniene & Vienazindiene, 2014) Global fashion buyers are increasingly focusing on shorter lead times. Logistic is another factor affecting the lead time of import and export process for apparel industry in Ethiopia. As known the country is land locked and using Djibouti sea port as its main import and export gate. The complicated and traditional custom clearance producer and days of hustle to arrange transpiration to and from Djibouti port has been a headache to the development of the industry. As a result, the fashion retailers have not brought their production demand into the country with higher rate, the country have attractive potential but risky challenges which cannot cope with the fast fashion principle,

Unskilled workers and high turnover rate is another obstacle the Textile and apparel industry in Ethiopia. As known the country is still dominated by agricultural practices but not industrialized work force. According to a research industrial work ethic will take 2 generations to come, Training sewing operators with efficiency of 50% to 75% takes at least 6 months. As most of the work force are coming from a rural area the training needs to focus on both soft skills, like how to use toilet and keep environment clean to how to keep personal health and safety while working inside the industry as well as technical skill of on how to use different machineries to

produce garments. Even though companies go through the process of training this employee the turnover rate will affect their production results badly, due to so many factors mainly minimum wage employees leave factory and join another with a small increment after they gather the knowledge from the first company and continuing to shift to a little bit better payment to another one. This uncontrollable turnover rate has been and still is a barrier for the development of productivity and efficiency in the fashion production of Ethiopia. So when companies struggle with the highest turnover which causes the lower productivity that will affect the lead time of production plan as a result of production delay that will affect the on time delivery for exporting.

Quality is the most important aspect of apparel industry, retailers have a third part quality audit requirements before they approve the loading of a shipment to be Exported from the country, Garment manufacturing companies also have their internal Quality check point in their production line. But the highest rework is a visible challenge garment factories still face. As fast fashion is all about right product at right time and with the acceptable quality. (Demise, Zhu, Kltaw & Matebu, 2017),

Longer lead time, poor productivity and quality are the biggest challenges that are limiting the development of Apparel industry in Ethiopia. Even though the country is filled with a potential which make it preferable to be a center of fashion sourcing ground because of this factor the garment producers and retailers are holding back from bringing their orders into Ethiopia since in fast fashion industry delay is unacceptable as the industry focus on time delivery of fashionable wears to the consumers without fail (Yost & Shields, 2017; Khan, 2016; Oqubay, 2019)

High turnover will affect the production process as a result of adding time on training new manpower and bring up the productivity of the factory in a required level, but once the trained manpower will leave after getting the experience the factory will be under pressure to replace the skill. As a result of high turnover productivity decrease which leads to delay on daily production output and failure on the delivery plan. (Hailu, 2016).

2.1.11 Effects of Lead time, Quality, and productivity on the timely delivery

As fast fashion depends on timely trend delay is intolerable, so garment manufacturers fall under a lot of pressure to deliver the products to retailer's store. The highest factor affecting time is lead time, it can be production lead time, logistics/transportation of goods lead time. Quality also plays an important role on affecting the delivery of the finished good, making it right first time is the only way of eliminating unwanted waste of time due to reworking a product repeatedly to fix the defects. So, these three factors affect the delivery of finished product on the required quantity and quality within the right season. The average lead time to produce and deliver a specific order for Ethiopian apparel industry is five months comparing it to the neighboring country Kenya and Northern African country Egypt which is less three months in average. Egyptian and Kenyan infrastructure and logistics are well-developed and facilitate this integration, most production is shipped by sea and takes maximum eight to twenty-eight days to reach the Europe and America. While exporting from Ethiopia takes thirty to forty-five days.

Egypt is home to the only fully vertically integrated textiles industries, where the cultivation of cotton to the production of yarns, fabrics and ready-made garments carried out domestically. This means manufacturing of required raw materials that can be input for garment manufacturing are located inside the country which eliminate the lead time of importing raw materials, Kenya also have developed its vertical integration in its textile and garment industry, but Ethiopia is still very much depending on the import of materials with the higher lead time of logistics. Over the years different fashion leading retailers have shown interest on expanding and shifting their production into Ethiopia but longer lead time is still the obstacle for the growth of the industry.

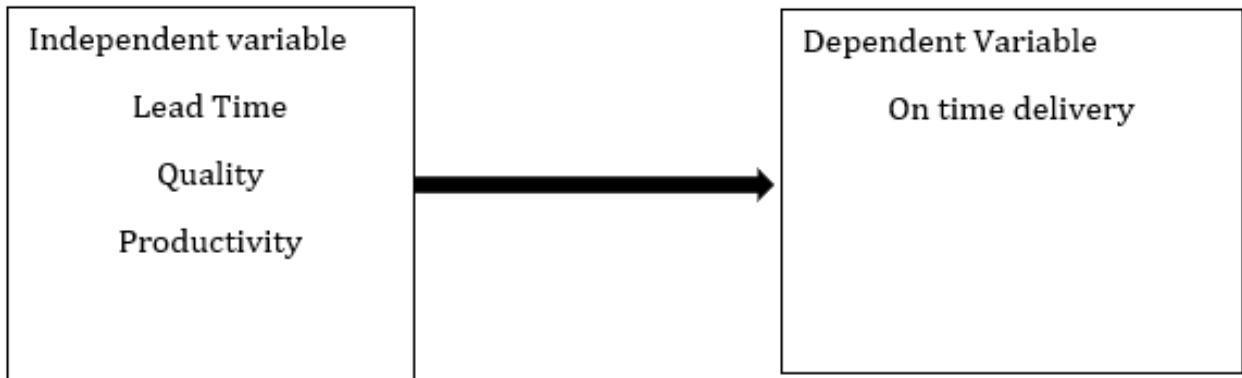


Figure 2.1 Relationships of dependent and independent variables

2.2 Theoretical Framework of the study

2.2.1 Change Management in Fashion industry

According to Kurt Lwin change have three stages, Unfreeze Change and refreeze. So, implementing change begin at the stage of restructuring and reforming the system needs to be changed then implement it so that all the entities will practice and adapt the change in slow progressive steps so finally the change can be executed and used as a normal system who everyone is aware and accepts (Cummings, Bridgman & G Brown, 2016)

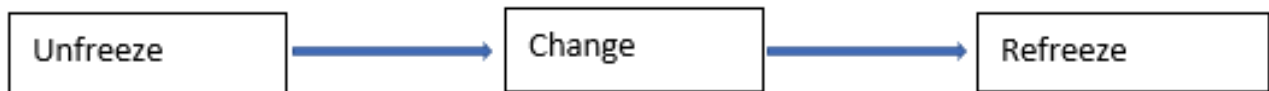


Figure 3.1 Changes as three steps, source Cummings, Bridgman & G Brown (2016)

Whereas the strategical change will be dealt with the management team, developing a strategy which will implement change throughout the company strategic plans will take effort and much commitment to bring to life throughout the high-level departments.

Change is always related risk, if an organization does not have a well-developed change management plan and all the sudden change happens by directly affecting the company's productivity as well as wellbeing it automatically become a risk factory the organization falls in

to. A well-developed risk management plan will create a flexible method which will leave a room for change.

Preparing the organization for change is one of the challenging tasks for Human Resource, since change usually be implemented through organizational practice and culture changes willing manpower towards this change is highly useful for successful change implementation (Aljohani,2016). Change is not always a bad thing for the manufacturers instead bigger opportunities had been discovered in the process of change, if managed correctly companies can succeed through the challenging environment. All it takes is adapting the rapid change that is happening in the fashion industry and creating a strategic plan of dealing with this situation fast. Any organization can go through four types of changes, Operational, strategic, Cultural and Political. Based on the organizational level and character these changes have different impacts, (Aljohani,2016). In the case of garment manufacturing and fashion industry operational change will put high pressure in productivity and quality, as orders change production plan required to be change. Changing production plan and strategy need involvement of each department to bring operational changes which makes it complex and difficult to easily maneuver to the new plan. Garment Companies need to adapt the use of computerized software to track challenges and create fixable planning method (n.a,2016)

Ethiopia is one of the fast-growing economy countries in Africa and one sector which is developing rapid is the industrialization, but the sector is not growing and compatible with the globalization due to different factors like lack of industrial linkage and political and economic ineffectiveness (Oqubay, 2019).The industrial policies in the country are also a huge burden for Garment manufacturing companies to catch up with the globalization and be able to deliver their product without fail. The supply chain interruption and unable to source quality raw materials inside the country instead of importing them from abroad is the big barrier each manufacturer face in the industry. The garment industry is known for using a lot of manpower and most of the labors who work in the industry are uneducated and unskilled manpower, which is very challenging to create a flexible, easy change adaptive manpower so HR (Human Resource) have a very big role to deal with implementing the change in the factory. (Hailu,2016; Khan,2016)

2.2.2 Lean Manufacturing principle to manage change in fashion industry.

Lean is a philosophy of manufacturing that focuses on delivering the highest-quality product at the lowest cost and right time by reducing no value adding activities and process which is called waste. Lean manufacturing is among one of the important tools considered by companies trying to maintain market competitiveness (Liker & Wu, 2000). Waste in the context of lean manufacturing is defined as any activity or process that utilizes resources without adding any value (Womack and Jones, 2003). There are several types of waste which are identified by lean manufacturing in production industries, there are seven primary types of waste identified in the manufacturing industries, these wastes are Quality defects, inventory, overproduction, longer transportation, waiting time, over processing, and excessive motion (Svensson, 2001). Lean plays a very important role on reducing unnecessary and non-value adding activities and process which leads to waste of time, energy, money, and material and make sure the operation runs as smooth as it can be to improve productivity and quality, so that garment manufacturing companies will be able to challenge and win the current rapidly changing demand and competition of fast fashion if lean manufacturing principle implemented, as the main concept of lean manufacturing is all about continuous improvement and elimination of waste (Prakash C, 2018). Scholars suggested lean change management which companies has used it and they succeed through this principle. As the lean manufacturing discipline helps a lot of improvement in the manufacturing sector it's highly recommended that manufacturing specially garment factories to adopt the discipline on implementing any change whatsoever. (Khan,2016)

It has been observed that, in developing countries the garment industries are lacking skilled personnel as well as capital to implement new technologies for improving productivity and flexibility. Because of this, garment industries in developing countries have been running in a traditional way for years and are rigid to change. Now the time has come to struggle with increasing global market demand in fashionable garment production. (Gao, Norton, Zhang & Kin-man To, 2009),

Continues Improvement is a process of continuously improving the system, operation, or technicality of a company, where there is a continuous improvement, any change can be easily overcome due to the flexibility and adaptability, as continuous improvement is all about changing the existing system into a better one continuously. Implementation of lean

manufacturing and continuous improvement technique to manage change even before the change happened is the most preferable and favorable way any garment manufacturing company should follow (Obeidat, Al-Aomar & Pei, 2014), Lean can be used as problem solving tool in garment manufacturing industries as the lean principles are wide and have been practice in different industries to bring Productivity. Continuous improvement one of the principles of lean manufacturing and it is a key for problem-solving tool. (Gersten & Riss, 2002,,: 41)

continuous improvement has six steps that are used as a tool to solve rapidly changing trend, this step will allow any company to tackle challenge due to rapidly changing environment. For each process of system if continuous improvement is implemented the result will be significant. A company with a culture of continuously improving its system by eliminating waste will never be caught by surprise when their will be internal and external changes as the company already adapted flexibility in its structure. The below are the steps a company need to follow to apply the continuous improvement. And as the name explains the improvement will never end but progress to new improvements and changes uninterruptedly.

1. Identify process/ system to be improved.
2. Analyze the situation and find solution for change.
3. Act or implement change.
4. Study result or see if the change is making a progress.
5. Standardization
6. Future improvements

2.2.3 Definition of Terms

Garment manufacturers are adopting the better techniques and tools to become a choice of their customers, lean manufacturing plays a big role helping the companies to adapt a principle of continuous improvement and waste elimination both in production and office management areas. Change is inevitable, on recent years even it is becoming day to day part of life. When it comes in apparel and fashion industries consumers are coming with new requirements and fashionable garments to wear in their day-to-day life. Manufacturers must develop their production with quality, cost, and time to achieve this three core competence pillars and be able to win the market share by adapting change quick to cope up with the change and deliver the product on time base.

Change towards -Quality: consumer is always looking for the best quality and the requirement of this quality is very high and demanding. The quality requirement they have before is not the same, as they need more quality products produced in a very specification of requirements.

Change towards- cost: consumers are always in demand of the cheaper cost, no one wants to pay more and more but wants to consume more with less cost, or great with less cost.

Change towards – time: on time delivery is the major issue when it comes to garment production, consumer is looking for a garment fashioned for the specific period and if they will not be able to find those garments on the specific season then they will no longer wants to pay for it.

2.3 Empirical Framework

2.3.1 Review of Studies Conducted outside of Ethiopia.

Bangladesh is one of the highest garment manufacturing hubs, as a result several studies conducted to which indicate a development road to outstand a competitive fast changing industry of fashion. a study conducted in Bangladesh (Khan,2016) shows that for garment manufacturing companies to overcome different challenges which affect their productivity is by using different tools and techniques like, lean manufacturing, advanced and updated planning software, and continuous improvement trends. The study explores in depth how the garment companies located in Bangladesh are exposing to challenges caused by fast development of fashion. Another study was conducted in Bangladesh (Rahaman,2016) explores about how producing garments in a standard acceptable quality is vital for manufacturing companies to survive in the industry by satisfying the customers demand, the study explains that the ability of developing a quality production will be a key aspect on growing on sales and revenue (Islam, M. Khan&R. Khan,2012).

In apparel and textile industry lead time is a big deal as the fast fashion market, reducing lead time is a key factor to maintain the on-time delivery and coping up with the pace of the rapidly growing fashion industry. But in the context of this industry lead time have a longer value chain which starts from sample development, to sourcing and purchasing, manufacturing and packing and delivering. According to a study conducted in one of Europe National Institute of Textile engineering shows (Kadir', Akter,2014)

International labor organization study in Egypt Apparel manufacturing explores that how lean manufacturing principle of reducing waste and improving systems help the country to grow in its apparel production despite the challenging factors of fast fashion.

2.1.5 Studies Conducted inside of Ethiopia.

Ethiopia is one of the developing countries with infant industrialization especially in Textile and Garment sector, according to a study Ethiopia has 122 companies in the sector with a continues growing in numbers. Despite the positive signs of industrial development and expansion the industry face obstacles on different aspects which make it difficult for rapid development and expansion of new companies as well as slow growth of success for the existing manufactures. Not all of these companies strive to success. Even though attracting factors of global retailers is there a big gap in to fill in order to be able compute and win the fast-growing fashion demand and requirements. (Oqubay,2019, Haan&Theuws, n.d), the study supported by Government of Netherland for the development of Garment supply chain in Ethiopia have shown how the industry is facing difficulties of growing and expanding as expected due to several internal and external factors.

Several retailers have interest to start sourcing from Ethiopia , as the countries availability of labor as the industry migrates from countries like India and Bangladesh due to rising labor cost, but even if Ethiopia become a choice in different aspects most of the retailers do not want to take the risk of putting their production in a huge production volume into the country's manufacturing companies and the reason for that was mainly not having confidence in on time delivery on the right quality. The lack of infrastructure development as well as slow growth on vertical manufacturing played an important role on this obstacle to stay as it is. (Hanna &Theuws, n.d.)

According to a published report in 2017 by Margaux Yost and Lauren Shields Ethiopia is the future of potential garment manufacturing hub, its population size is the main factor that fix it into this position, so with all the potential the country holds that can attract a big volume of fashion production. But it needs a significant and swift action against its challenging supply chain and untrained work force if the country wants to grow in this light industry. So, the government needs to give attention towards this obstacle which is slowing down the growth of industrialization opportunities which is very critical on Job Creational and boosting its economy in the coming year (Khuran,2018 as cited on Renkel,2019).

2.3.2 Knowledge gap

As Ethiopia is still a fast-growing economy with most of its population being young it has captured attention of the world's biggest fashion retailers, as explained in the above literature review. But not enough depth of research and development conducted internally and externally on the growing of the industry by developing its efficient on facing changing factors in fast fashion. Due to undeveloped infrastructure and not modernized working system linking organizations to facilitate the effectiveness developing manufacturing industries compatibility is a biggest challenge faced by manufacturing companies like Nazareth garment share company. There is still a gap in the topic of fast fashion and developing manufacturing companies to run with the pace of rapid changing trend in the industry. The research on development and growth of manufacturing companies in Ethiopia by improving the existing obstacle and designing a strategic plan is still not addressed efficiently. the study focused on to fill this knowledge gap on the factors which are dragging the manufacturing companies' capacity behind the fast-growing industry that are not addressed adequately. Nazareth garment share company is amongst one of the garment manufacturing companies in Ethiopia facing challenges of fast fashion, and this research will specifically focus on identifying and evaluating the core challenging factors of change in fast growing fashion industry on manufacturing company of Nazareth garment share company.

2.3.3 Conceptual Framework

Change in fast growing fashion industry is very sensitive on season or time, each fashion has its own season and retailers design each style for a specific season, in fast fashion consumers have a timely demand which they are willing to pay for and if that demand is not met in that very specific season, then the interest of any consumer to pay for the product will fade. As a result of rapid growing fashion industry retailers demand and pressure apparel manufacturing companies to comply on delivery of specific work order on the right time, and of course with the right quality. In the conceptual framework the researcher tried to present the factors affecting a garment manufacturing company that is challenging manufacturers to not cope up with fast fashion.

There are different variables which affects on time delivery. Shortage of raw material in the country forces most manufacturing companies to be dependent in importing with much longer lead time. Longer lead time of logistics affects the lead time of production, which causes a delay in the delivery of goods to the market.

Turnover rate affects production, when the employee turnover is higher the company productivity will decrease, and time will be wasted during production. In the garment industry flow of work should be uninterrupted and continuous, not having a continuous flow of work will affect the production which can be a cause for the delay on delivery of finished products.

The garment industry is a labor incentive industry, training a flexible and skillful manpower is key for growth and adapting any changes in the industry. If the manpower is unskilled and not trained with the changes and challenges occurring in a timely basis, then the manufacturing companies face a challenge on coping with the industry changes.

Longer logistics lead time, longer production lead time and Higher quality defect will contribute delay on production which can be a failure for any manufacturing and exporting company. As discussed, fashion is seasonal and needs to be presented on the required quality and appearance with the right time and season. Different Variables affect the delivery of fashionable wears to the right market and these variables are strongly related.

CHAPTER THREE: RESEARCH DESIGN AND METHODOLOGY

3.1 Research Design

This research is conducted on qualitative and quantitative research analysis with explanatory research design. Explanatory research design was chosen to explore the different variables and their interactions. The research chose to use mixed research analysis methods to associate the quantitative and qualitative data in order to support its findings to best meet the objective of the study. The research conducted in summary of statistics about different variables. Interview was conducted with selected top management participant. The variables and their relationship were explored in this research.

3.2 Population and Sampling Technique

Since the study needs a collection of data from the participant who are and should be very aware of the concept of the research. The technique applied to select the participant is based on a non-probability sampling technique. Currently Nazareth Garment share company has a population of 860 employees sampling technique taken based on size of organization.

Population Range	Sample size		
	Low	Medium	High
51-90	5	13	20
91-150	8	20	32
151-280	13	32	50
281-500	20	50	80
501-1200	32	80	125
1201-3200	50	125	200
3201-10,000	80	200	315
10,001-35,000	125	315	500
35,100-150,000	200	500	800

Table 3. 1 sample size determination: Source (J Carvalho,2005, As Cited in Hailu,2016)

As indicated above the population size of the study were 860 which ranges between 501 to 1200 according to Carvalho's sample size determination indicated in Table 3.1 1, from population of 860, 150 samples were taken for directly filling questioner and 116 respondents returned filled. Even if the questioner was distributed with expectation of high response but due to COVID-19 to collect the questioner from the participant were challenging as most of the time factory was closed so the response rate was 77%. Convenient sampling technique has applied on the interview data collection based on the availability and accessibility of participants. Because of the knowledge and experience in the apparel industry 5 Top management of different department participated in the detailed interview.

3.3 Methods of Data Collection

The study used different types of data collections, data was gathered by distributing questionnaires, conducting interviews, observation and from the documented records. The methods depend on different departments and participants as convenient. For the participant who does not have ability to fill the questioner's due to work pressure phone interview was conducted, while data was collected for participant by filling the questioner. And direct observation by the researcher has conducted.

Questionnaire: questioners used to collect a data regarding the research topics, this data collecting tool has been used as the primary data collection method.

Interview: the interview conducted with some participant who is familiar in the industry and working in NGSC, as well as even the managers from the participant who filled the questioner were interviewed to keep the reliability of the collected data.

Observation: direct recorded observation was another data collection method which this study conducted. Observing the methods and practices in the factory is a vital input of data to be collected. Since the researcher working in same garment manufacturing industry for five years and currently working in the case company by using observation to the collection of research data is applied.

Written Documents and Records: on the top of the above data collection methods, research data gathered from the recorded files of the case company. Accuracies of the data is more reliable since the professional personnel for each department organized it over the years. The

research took a base data collection under the approval of Nazareth Garment share company management team.

3.4 Data Analysis Methods

The data was analyzed using explanatory statistics that helped the researcher to describe the data. The result of the interview questions was integrated with the responses of the questioner. The researcher's observation is described on the data analyses chapter, The collected data has been shifted to a computer sheet and processed using excel sheet to analyze the data. Descripted design is used to analyses the collected data and explains the result of the collected data.

Reliability and validity

Cronbach's alpha reliability is one of the most widely used measures of reliability in the social and organizational sciences (Boneet, 2014). The study used Cronbach's alpha to checks the internal consistency of the questioner for accuracy analysis and interpretation. To keep the data validity the research data was reference and checking was done the recorded data. Researcher takes the sample tasting from questioner to test its reliability and the Cronbach's alpha was found to be 0.92 which makes it fall under the acceptable level of reliability.

Number of Items /questions	11
Sum of question Variance	16.5268
Variance of total scores	126.5079
Cronbach's Alpha	0.92

ANOVA

<i>Source of Variation</i>	<i>SS</i>	<i>df</i>	<i>MS</i>	<i>F</i>	<i>P-value</i>	<i>F crit</i>
Rows	241.5152	20	12.07575758	13.30424	5.31E-27	1.623307
Columns	68.64935	10	6.864935065	7.563313779	3.41E-10	1.878282
Error	181.5325	200	0.907662338			
Total	491.697	230				

3.5 Ethical consideration

while collecting data through, Interview as well as questioners the following ethical consideration are going to be seriously followed.

1. Not exposing participant's identity: The participants identity was not exposed during data collection; participants opinion was anonymously gathered.
2. Present the clear information about the research: Respondents had given a brief information regarding the research content before asked to give their responses.
3. Respecting the participants: The approach towards the respondent was polite and respectful.
4. Language: The questioner as well as the interview was conducted in the right language where the respondents were able to participate.

CHAPTER FOUR: RESULTS AND DISCUSSION

The research has followed a qualitative and quantitative research analysis. the researcher has referred different written records from the company based on the formal approval of the top management. The collected records are from different departments of the company, mainly, HR, Logistics and supply chain, Finance, Sales and Marketing as well as General Manager.

Data for collected through questioners and face to face as well as phone interviews. The questioners were distributed based on volunteer of participants, as well as the interview. Researcher has conducted the observation on the relevant areas to strengthen the data.

This chapter presents the data collected on participant's opinion about the practice of rapid change on fast fashion and how the company copes up with this trend. To explore the participant's expert opinion on the factors that affected the company growth on the continuously changing fashion industry.

4.1 characteristics of Respondents

A demographic data collected from the questioner of the respondents on qualification, Service year in the company and department which the respondents' work.

Table 4. 1 characteristic of the studied population

	Variable	Frequency	Percentage
Qualification	Master's degree	2	1.72
	Bachelor's Degree	25	21.55
	College diploma	38	32.76
	Complete grade 12	35	30.17
	Under grade 12	16	13.79
Year of service	More than four years	95	81.9
	Three years	15	12.9
	Less than three years	6	5.2
	Finance	7	6.03
	HR	5	4.31
	Sales	3	2.59

Working Department	Logistics & Supply chain	4	3.45
	Administration & Top management	8	6.90
	Production supervision	35	30.17
	Production Operator and trainer	48	41.38
	Warehouse & Inventory	6	5.17

Source: Own Survey (2021)

From the total participant of 116, 2 (1.72%) have a master's degree, 25(21.55%) of them has a bachelor's university degree, 38(32.76%) has a college diploma while the rest of 35(30.17%) completed grade 12, and the remaining 16(13.79%) was under grade 12.

From the participant 35(30.17%) were on the job assignments of supervision position on the production. While 5(4.31%) were on the work assignment HR department, 7(6.03%) on finance department, 3(2.59%) sales department, 4(3.45%) on logistics department and 6(5.17%) on warehouse and inventory department. The others 48(41.38%) were from the production floor sewing operators and trainers, the rest 8(6.9%) were on the administration and senior management positions.

Based on their service in the company, participant who work within the company for the last four years and plus are 95(81.8%), while 15(12.9%) have stayed for the last three years and the remaining 6(5.17%) were less than three years. Thus, the participant has been with the company more than four years are the majorities which indicated that they are aware of the past four year's status of company's performance.

4.3 Analysis on Export performance

Nazareth garment share company produces and export readymade men's and women's garments for the largest Apparel retailers in USA and Europe. In 2018 the company made its exports worth of 2.7 million USD while on year 2019 it reached to its highest sales pick by exporting a 4.9 million USD worth of goods to its America and Europe Customers. The company was performing well until it faced with a big challenge in 2020, not able to deliver the produced garment on time to the customers. Fast growing fashion industry is extremely and mainly

dependent on seasonal goods failing to deliver the product on the right time was a deal breaker between NGSC and its clients. Many production orders were cancelled by the customers of

NGSC due to lose of confidence on its delivery. Due to the order cancelation, the company's export sales declined to zero in the first half year of 2021. This concludes that the company have faced extreme fail in its export sales on the recent year as a result NGSC turn its face to work with the small local shop owners in Mercato with a less and uncontentious production order. (Sales and marketing of NGSC 2018-2021). The inventory report of NGSC shows that the company have 20,000 finished garments in stock produced for export but was not able to send it out because of customers loss of interest to purchase the product which miss its season of sales.

Even though the company lose its customers due to delay and unable to deliver the manufactured garment it is observed that different cause contributed for the delay. Lack of vertical integration in the country which can supply raw materials for garment manufactures forced Nazareth Garment share company to import its input from different foreign base suppliers. Ethiopia is a land locked country uses Djibouti port for imports and exports, NGSC has no choice except using that port. There is always a longer waiting time to clear any shipment at Djibouti port, not only that but Ethiopian custom clearance in both Djibouti port and after the cargo arrive to country needs to be processed. The company use a third part service to its logistics process which add on delays of service provided by this parties.

On the top of the above data, additional information was collected from the participant on their opinion of why such delay occurred in the companies export orders. From the 150 questioners distributed 116 were returned and the data is presented in the section that follows.

Likert scale was devised to measure 'attitude' in a scientifically accepted and validated manner in 1932 An attitude can be defined as preferential ways of behaving/reacting in a specific circumstance rooted in relatively enduring organization of belief and ideas (around an object, a subject or a concept) acquired through social interaction, (Joshi & Pal, 2015) Likert scale format involves the use of special rating scale that asks respondents to indicate the extent to which they agree or disagree with the idea of the statements about a given subject (Strongly Agree (SA) = 5, Agree (A) = 4, Neutral (N) = 3, Disagree (D) = 2 and Strongly Disagree (SD) = 1. In this research a 5-point Likert scale was chosen.

4.4 Export Delay

Table 4. 2 Participants Opinion on Export delay

Reason for delay in export is	Strongly agree		Disagree		Neutral		Agree		Strongly Disagree	
	F	%	F	%	F	%	F	%	F	%
Longer lead time on logistics on importing of raw materials is a reason for delay in export.	90	77.5862	2	1.72414	4	3.44828	17	14.6552	3	2.58621
Quality rejection is a reason for export delay.	48	41.3793	6	5.17241	5	4.31034	40	34.4828	17	14.6552
Longer Lead time on production is a reason for export delay.	44	37.931	21	18.1034	6	5.17241	40	34.4828	5	4.31034

Source: Own Survey (2021)

Respondents were asked to express their perception if longest lead time on import of raw material was the reason for export delay. The survey is presented in Table 4.2 1 Accordingly, 78.44% and 14.6% of respondents have strongly agreed and agreed; respectively that longest lead time on importing raw material was the reason for export delay. While 3.4% of the respondents remained in the middle of the road to be neutral, insignificant number of respondents have shown their disagreement. An implication of this result is longer led time in raw material import affects the export on time delivery.

The available secondary data recorded by the company revealed that Nazareth Garment share Company so far have lost two big retailers called Wal-Mart (centric brands) and Edwards due to delay on delivery. Now, the delay happens due to several factors, and logistics and transportation lead time was one of the vital influencers regarding this issue. The raw materials imported for the production from different world parts via sea freight had passed two sides of slower custom

procedures and process at Djibouti and Ethiopia. Raw material arrived at the factory very late from the plan which cause a production delay and affected its export shipment schedule. Although the company exported the high volume of garments by air with expensive freight charges to meet the deadline it lost the confidence of its customers for future orders. (NGSC Logistics report of 2019).

Logistics is one of the challenging factors contributed for delay, sourcing and importing raw material to bring it to factory warehouse is the main assignment for any manufacturer. Despite the plan made ahead the surprise of delay is a familiar incident in the case of NGSC. Most imports did not arrive at factory with the planned time. There are multiple occasions when raw material arrived so late even the factory needed to be closed due to lack of production feeding because of delayed. Working with third part logistic forwarding companies to process the custom clearances add up to the lead time on the process. The road that connected Djibouti and Ethiopia alone takes three days to drive a heave loaded container. Even with the normal on time shipment plan logistics lead time takes 35 to 40 days to import material into the factory.

Table 4.2 demonstrates the result of the survey on quality rejection being a reason for export delay. Accordingly, majority of participants strongly agreed and agreed with 41.37% and 34.348 % respectively; that quality rejection was the reason for the export delay, which indicates that quality rejection can cause delays in products to be exported. While 14.65 % of respondents strongly disagreed and 4.3% of participants chose to be neutral. The rest of respondents have shown their disagreement.

The interview conducted with NGSC quality manger, assured that having reworks leads to longer production lead time. Based on his respond, complicated garment designs took time to be stitched under a customer's quality requirement level. Too much time spent on checking the quality and correcting the mistakes of a garment before passing it the next level leads to delay.

The manger also mentioned before any shipment is loaded into a shipping container, customer's third-party quality auditors would conduct a general quality inspection of the products to confirm its AQL (acceptable quality level) for loading. If a shipment fails AQL the auditors would demand re check on the packed garments before approving it to be shipped, so there is a possibility of additional time to do the re check causing delays in export.

Respondents were asked to express their perception if longest lead time on import of raw material was the reason for export delay. The survey is presented in Table 4.2. Accordingly, 78.44% and 14.6% of respondents have strongly agreed and agreed; respectively that longest lead time on importing raw material was the reason for export delay. While 3.4% of the respondents remained in the middle of the road to be neutral, insignificant number of respondents have shown their disagreement. An implication of this result is longer lead time in raw material import affects the export on time delivery.

Table 4.2 survey result shows that from the respondents asked to express their perception if a longer production lead time was the cause of export delay. 37.9% and 34.4% strongly agreed and agreed; respectively that the longest lead time on production was the reason for export delay. While 18.1% showed their disagreements on the longer lead time being a cause for export delay. 5.1% of the participant chose decided to stand in between to be neutral. An implication of this result shows that longer production lead time would contribute to the delay on export.

According to the Production manager during the phone interview the respondent agreed on production lead time can be the reason for export delay. As productivity is low in the company the production manager highlighted that because of different factors affecting the production process and lead time the challenge on failing of delivering the expected output on planned target might cause the delay on the export plan.

4.5 Poor productivity.

Table 4. 3 Respondent’s opinion on Poor productivity

Reason for poor productivity is.	Strongly agree		Disagree		Neutral		Agree		Strongly Disagree	
	F	%	F	%	F	%	F	%	F	%
a lack of employees training to improve their skills.	39	33.6207	5	4.31034	11	9.48276	52	44.8276	9	7.75862
a fast-changing garment style.	55	47.4138	19	16.3793	1	0.86207	35	30.1724	6	5.17241
a high rate of turnover on skilled manpower	59	50.8621	2	1.72414	10	8.62069	45	38.7931	0	0
Not having a continuous workflow	69	59.4828	12	10.3448	9	7.75862	23	19.8276	3	2.58621

Source: Own Survey (2021)

As shown in Table 4.3 respondents were asked to forward their opinion regarding whether poor productivity is due to lack of employee training to improve skills in this regard, among the total respondents about 33.6% have strongly agreed ,7.75% strongly disagreed ,9.4% have chosen to be neutral and 44.8 % have agreed while 4.3% disagreed. This shows that the higher number of participants agree that training is important to improve the productivity of employees, this means the company have a weakness of providing the needed skill development trainings.

Researchers’ self-observation also proves that there is a lack of training in the company. The HR department have also acknowledged that the department has a weakness in the matter of organizing and conducting a continuous training program to its employees.

According to the General Manger for the industry which is depending mostly in labor developing its manpower capability is essential. Well trained manpower is up to date with the advancement occurring daily. Untrained workforce is not capable of tackling the obstacles the company face due to external influences caused by rapid growth and tends.

Based on a survey shown on Table 4.3 respondents were asked on their opinions of the reason for poor productivity being rapidly changing garment styles. The majority of respondents strongly agreed and agreed 47.41% and 30.17%; respectively that the rapid change garment styles can be a reason for poor productivity. From the total participants about 16.37 % showed their disagreements and about 5.17% strongly disagreed. While insignificant number of respondents remained neutral. This indicates that the changing style affected the productivity.

Interview was held with production and training team members on this regard to integrate the data, and it was proved that when new style introduced to the production team it is challenging and always takes time to bring up the productivity.

In Table 4.3 survey the participants view was asked on the high rate of turnover affecting the productivity. From the total respondents about 50.8% strongly agree and 38.79% of participant agreed on a high turnover being the biggest cause of poor productivity. About 8.62 % of the respondents decided to stay neutral on this matter. While insignificant number of participants showed their disagreement. Based on this it was noted that high turnover is a very challenging factor that has impacted the productivity of the company negatively.

According to the interview with the top managers the turnover rate of the company is more than 50%. the collected and integrated data concludes that the company face unproductivity on the production due to the high turnover rate.

Not having a continuous workflow is the other factor affecting the productivity of the company. Data collected from the interview confirms that a continuous workflow improves productivity. Production line needs a continuous feed of work to keep up the effectiveness and efficiency of the workers.

As shown in Table 4.3 the survey result shows that from the total participants about 59.48% and 19.82% strongly agree and agree; respectively on not having a continuous workflow was the reason for poor productivity, while 10.34% of the participant show their disagreements. About 7.7% of participants remain neutral and the 2.5% of participants strongly disagreed on not having continuous workflow being a reason for poor productivity. So, from this survey it was concluded that continuous workflow plays an important role on productivity of a company.

4.6 Poor quality

Table 4. 4 Respondent’s opinion on reason of poor quality

Reason for poor Quality is	Strongly agree		Disagree		Neutral		Agree		Strongly Disagree	
	F	%	F	%	F	%	F	%	F	%
Lack of training	18	15.5172	29	25	24	20.6897	36	31.0345	9	7.75862
High rate of turnover rate	38	32.7586	8	6.89655	16	13.7931	30	25.8621	24	20.6897
Rapidly changing garment styles	26	22.4138	10	8.62069	3	2.58621	74	63.7931	3	2.58621

Source: Own Survey (2021)

Respondents were asked to express their perception if rapid changing garment style was a reason for poor quality. The survey is presented in Table 4.4. Accordingly, 63.7% and 22.41% of respondents have agreed and strongly agreed; respectively that rapid changing garment style was a reason for poor quality. While 8.62% of the respondents showed their disagreements. About 2.58% of the participants chose to be neutral insignificant number of respondents have shown their disagreement. An implication of this result is the change of style of a garment can bring challenge on sustaining quality of the product.

The interview with Quality department that change in garment style can be a difficult challenge towards quality, in order to make the new style, a customer requirement of quality need to be studied and the appropriate notice need to be made by the quality team, usually the sewing operators need a closer follow up while making the new design and the quality team have a responsibility to follow up the customer quality points on a production floor but usually the

quality standard for the new style is being met after large quantity of defects are made, so rapidly changing style Definity is a cause for poor quality production.

Based on the interview with production and quality department managers on higher turnover plays important role on lack of quality production due to the skill, when a skilled operator leave the company then it will be difficult to replace her/him, especially in the critical operation and especial machine operation it is always hard to train and qualify a new employees with the capability of producing under required quality, And 32.75% of the responded from the questioner strongly agreed,6.89% disagreed 13.79 decided to be Neutral ,while 25.8% agreed and 20.68% strongly disagreed.

Respondents were asked if lack of training causes a poor quality ,31.03% of participant agreed on that lack of training in fact affects the quality production but 7.75% of participant strongly disagreed with this idea,15.5% agreed and 25% disagreed while 20.68 % chose to be neutral. This means most of the participants believe that lack of training can cause a poor-quality product, the training department also agrees that training is very essential on brining the quality to the expected level of acceptance by the operators who are producing the garment.

self-observation made by researcher verifies that there is a gap in employee training and development , the only training the company conduct is for the new recruits and that is all about how to stitch a garment , after operator send from the sewing training line to the production line following the operator skill and performance and growing the capability of the operator by giving a continues training is not implemented in NGSC, not only the operators but worker trainers , supervisors and also managers did not get any training towards their job completely. The researcher strongly agrees that lack of training will reduce productivity and quality which will contribute for the delay of export. And in this fast-growing industry lacking a flexible and compatible manpower who can respond quickly to any change will be a downfall of any company.

The interview conducted with top managers of the company have proved that importing raw material from overseas was biggest challenge the company faced over the past few years. On the top of sourcing and purchasing the materials the poor logistics infrastructure in Djibouti and Ethiopia makes the importing process more complicated and time consuming.

As known Ethiopia is a land locked country with a very challenging logistics infrastructure. Ethiopia use Djibouti's sea port for both importing and exporting. Though the government built the railway to connect both countries and make a swift transit of goods from and to the port the result was not so much satisfactory as the problem of poor logistics infrastructure in both Djibouti and Ethiopia still exists, (Merran,2019).

Turnover is the biggest challenge which crippled the productivity of the company and as a result longer lead time in production is a common problem to be noticed on this research. After investing time and energy to train employees controlling the turnover rate is still a headache to manufacturing companies in Ethiopia.

Having a flexible manpower towards change is essential in these days rapidly growing industry, turnover is the biggest obstacle which affects this process directly. For a company to practice change management it needs to train employees which can participate in the development of the company, but having unsustainable manpower will not bring development to new trends in the factory.

Higher turnover rate, interrupted workflow, lack of skilled manpower and rapidly changing fashion styles are some of the indirect factors which contributed for the export delay. The company noted to be weak on planning a continuous manpower development and training plan to make its workforce flexible and skillful. In such rapidly growing fashion industry, having a skilled and trained manpower is essential to tackle clients changing demand and to deliver the required product with the right quality, cost, and time.

Despite all the challenges mentioned delivering finished garments on the required time is extremely dependent on the arrival of raw material, the lead time of production and the passing of AQL test by the third-party auditors, hence longer lead time on imports leads to production delay causing a failure on the export delivery plan.

Due to various discussed factors producing in the acceptable level of quality was the other big factor found out to be a cause of export delay. The companies' personnel and HR department report shows that NGSC was even forced to hire three expert expatriate employees to improve its production quality as there is a lack of experienced manpower in the country. (NGSC, Human Resource and Personnel report of 2018)

CHAPTER FIVE: SUMMARY, CONCLUSION AND RECOMMENDATION

5.1 Summary

This study attempts to assess the fast-growing fashion industry and its challenges in the manufacturing companies. The paper explored the factors affecting the fast fashion regards the changes happening in the fast-growing fashion industry by gathering the relevant data and analyzing it. In this chapter the findings of the research will be discussed along with the conclusion and recommendation as below.

The study has found out that the long lead time logistics process, the poor productivity, and poor quality are the major reasons for the export delay, it also found out that the factors affecting this causes to be worsen and as a result it was known that the reason for poor production and poor quality being a lack of training and high degree of turnover as well as the rapid change of garment styles.

The research finds that the major reason for delay of delivery is highly affected by the lead time on importing of raw materials for the needed production. As a result of shortage in Ethiopia cotton production sourcing textile inputs for the garment manufacturing from Asia and different world countries is a must.

Based on the data found from the Nazareth garment share company logistics history, delay on imports due to the explained factors are familiar problems and challenges they have had faced in the past few years.

The lack of training was a key factor that affected the productivity of employees, and as a result the required quality and quantity level was not able to get. Productivity is a backbone for any company, by increasing efficiency and decreasing waste. But if the work force is not trained and continuously supported with training and development then factories will never progress towards growth.

The study has found that the industry is challenge with high turnover rate, as a result skill development is impossible to keep grow. As a result, the employees' rapid turnover and hiring new workers only to train them for a while and once they start developing the skill leaving. Lack of productivity as well as poor quality is affected with this factor.

Based on interviews the study finds out that there is a gap in planning and improving employee's skill and ability to fit them with the fast-changing fashion industry trends by giving a well organizes and timely trainings, for most of the factors of delay the respondent agree that training is been a root cause for the major problem.

The majority of respondent highly agree on high rate of skilled manpower turnover is impacting the productivity and quality production, which is a big input for the on-time delivery.

According to the data's found in the company logistics and supply chain department it was remarked that delays on raw material import have serious impact on the product delivery.

5.2 Conclusion

Finally, the study concludes that fast fashion is a trend with continuous changes, the fashion industry is growing so fast as its name "fast fashion" and the whole textile and garment manufacturing companies need to be able to develop their capacity and capability with the pace of the fast change.

Speed plays a special role to cope up with the fast changes in the industry, from the production of textile, trims and accessories to the movement of raw materials, production delivery. it is also important to underline the need of government attention towards the infrastructural improvements.

Adapting change quickly and flexibly will help manufacturing industries to survive the challenge easily. Generally, this study concludes that the garment industry in Ethiopia as well as specifically in the case company of Nazareth Garment have been facing a huge challenge which make it cripple and slow its growth. Unable to cope up with the fast fashion industry filled with rapid change trends made it less preferred when it comes to the retailers sourcing choice.

Although Ethiopia has a potential to be one of the biggest textiles and garment manufacturing hub due to the complexity and rigidity towards change the industry is not growing as expected. The shortage of cotton production, lack of vertical manufacturing industries which can produce a substitute raw material of imports with the standard quality hurt companies like Nazareth Garment so bad.

Despite the countries challenging industry infrastructure Nazareth Garment share companies have not been planning any strategic methods to halt the changing and challenging industry and overcome it to be one of the few prefer manufacturing companies in the country. The company is one of the oldest manufacturing companies in the country but due to its rigidity towards change and following same traditional, management system made it lag behind from other producers.

5.3 Recommendation

Proper planning

by making a proper lead time planning from raw material sourcing to logistics and transportation on the base on time farm which can avoid a delay in any imports Nazareth garment can avoid obstacle of an on-time delivery to the finish products.

Despite the fact of long and time-consuming custom procurers and port clearance in both Ethiopia and Djibouti, NGSC only can solve its planning of a head by considering all this external factor who are contributing for the poor logistics and transportation system,

In-House Vertical Integration

Nazareth Garment Share company is in Adama lying on 54,000 Meter square land which gives it a privilege on building a factory that can produce fabric, and trims. this technique helps the company to be a choice by any global retailer as well as it will improve the effectiveness of the company in the apparel industry. This is a long-term solution which can bring growth for the company as well as the country, by being able to supply raw materials for neighbor manufacturing companies which will cut a cost of foreign currency spending on purchase and importing of materials from foreign countries.

Implementing Lean manufacturing.

the principal lean is mainly about waste reduction and productivity improvement; these wastes are big game changers when it comes to manufacturing companies. Reducing a waste of valuable time, material, talent actually improves a lot of effort and cost of once company. Manufacturers like Toyota are practicing this method and they have shown a great success. The lean principle is widely used over different industries as the result of its acceptable outcome.

The researcher recommends that Nazareth garment share company to try bringing the practice of lean manufacturing to reduce its waste and increase its productivity. Lean will also influence the companies flex ability towards change.

Reducing waste of time, motion, talent, defect and transportation brings the productivity to the higher level, if these wastes are not reduced then the company will keep incurring cost while losing money and customer, so it is highly recommended to adopt a tool of lean manufacturing to reduce unwanted and non-value adding factors in the value chain of its production to overcome the competition of fast fashion industry.

Conduct training and personnel development strategy

Practicing procedural training for the manpower will also bring a greater change. Training employees how to cope up with changing fashion demands by make them efficient is a key for success.

Continuous training is essential for the company to bring up the productivity of the garment operators as well as the office personnel's, with a proper and up to date training the company can be comparative in the fashion market, having a manpower well developed is a key for success of any organization, by reducing the traditional way of working and bringing the smart way will increase the efficiency and effectiveness of a manufacturing company.

Understanding the fast fashion concept will help the company seriously consider focusing on its strategic plans, change is inevitable and if Nazareth garment do not make a change management system in its organization and implement it as fast as possible it is doubtful if it can survive in the industry for much time.

Planning lead time for import materials, the company need to work in its lead time plan since it will take much effort and transit the logistics and movement of raw material need a special plan. The second but most important thing that the researcher recommends to the company adapting a continuous improvement trends in all of its organization.

The company needs to develop a training session to bring up the employee's productivity and efficiency level up in order to make the production line effective on producing the right quantity at the right time and on the right quality level.

Lean manufacturing method is and has been effective and efficient in a lot of manufacturing industries including the fashion industry, the researcher strongly recommends that Nazareth Garment share company to establish and develop a lean focused department by hiring skilled personnel to bring up the company's performance level up.

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Appendix

Questioner

Hello, My Name, is Liyu Dender and I am doing my research on Fast changing fashion industry, and I would like to collect some valuable data to support my research. The research I am doing took Nazareth garments share company as a case company and it is conducted for academic purpose. I am asking you to fill the questioner by willingness.

1. How long have you work with Nazareth Garment share company?

- a. three years and more
- b. Two years
- c. more than four years
- d. less than two years

2. What is your qualification?

- a. Under Grade 12
- b. Have a Diploma
- c. Completed grade 12.
- d. Have a university degree.
- e. have a master's degree.

3. In which department are you currently working?

- a. On Senior management and administration
- b. Department of sales
- c. Department of HR
- d. Department of Finance
- e. Department of logistics
- f. Department of warehouse and inventory
- g. Production line supervision department
- h. Production sewing operator.

4. Longer lead time on logistics on importing of raw materials is a reason for delay in export.
 - a. I agree.
 - b. I have a neutral opinion.
 - c. I disagree.
 - d. I strongly agree.
 - e. I strongly disagree.
5. Quality rejection is a reason for export delay.
 - a. I agree.
 - b. I have a neutral opinion.
 - c. I disagree.
 - d. I strongly agree.
 - e. I strongly disagree.
7. Longer Lead time on production is a reason for export delay.
 - a. I agree.
 - b. I have a neutral opinion.
 - c. I disagree.
 - d. I strongly agree.
 - e. I strongly disagree.
8. The reason for poor productivity is a lack of employees training to improve their skills.
 - a. I agree.
 - b. I have a neutral opinion.
 - c. I disagree.
 - d. I strongly agree.

e. I strongly disagree.

9. The reason for poor productivity is a fast-changing garment style.

a. I agree.

b. I have a neutral opinion.

c. I disagree.

d. I strongly agree.

e. I strongly disagree.

10. The reason for poor productivity is a high rate of turnover on skilled manpower.

a. I agree.

b. I have a neutral opinion.

c. I disagree.

d. I strongly agree.

e. I strongly disagree.

11. Not having a continuous workflow is a reason for the poor productivity.

a. I agree.

b. I have a neutral opinion.

c. I disagree.

d. I strongly agree.

e. I strongly disagree.

12. High rate of turnover is a reason for poor productivity.

a. I agree.

b. I have a neutral opinion.

- c. I disagree.
- d. I strongly agree.
- e. I strongly disagree.

13. Lack of training is a reason for poor quality.

- a. I agree.
- b. I have a neutral opinion.
- c. I disagree.
- d. I strongly agree.
- e. I strongly disagree.

14. High rate of turnover rate is a reason for poor quality.

- a. I agree.
- b. I have a neutral opinion.
- c. I disagree.
- d. I strongly agree.
- e. I strongly disagree.

15. Rapidly changing garment styles can be the reason for poor quality.

- a. I agree.
- b. I have a neutral opinion.
- c. I disagree.
- d. I strongly agree.
- e. I strongly disagree.

Interview Question

1. Why do you think fast growing fashion is highly dependent on time?

2. How does delay can affects fast fashion?

3. Why retailer is very sensitive about time?

4. What are the main reasons you believe that are causing delay in importing raw material?

5. how is the logistics infrastructure affecting the manufacturing and exporting industries?

6. How do relate the delay in import can cause delay in export?

7. Do you think that a poor productivity can cause delay on export product?

8. How does productivity affect Export? and how you relate it?

9. What is the challenged you have faced due to turnover of employees in the company?

10. How can you relate turnover affecting your company's performance?

11. How can turnover be an obstacle for on time export of a manufacturing company?

12. How do you think Turnover is affecting a quality production?

13. What is the biggest lose your company experienced regarding export?

14. Do you believe on time delivery is critical to satisfy customers?

15. How much is on time delivery important to keep customers?

16. Have you conduct continuous training for the employees to improve their knowledge and skills?

17. Do you think it is important to give training?
