

STAKEHOLDER ECOSYSTEM MAPPING v1.

1.1 THE ECOSYSTEM APPROACH

The garment and footwear sector is global and complex. Developing a successful traceability standard requires **engagement, buy-in, and cooperation** from many relevant actors and stakeholders within the system, both at **global and national level**. We have mapped and identified a) the **macrosystem** (the types of organisations and what they do, what part in the ecosystem they play); and the **countries of most-importance** (where the majority of goods are produced), to support the identification of key partners.

Phase 1: Map the macro ecosystem

We have mapped the overall macro ecosystem of the garment and footwear sector. The chart shows stakeholder groups, organised into quadrants:

- Those **producing garment and footwear** across all tiers
Those providing **services for the administration of goods** within the value chain, such as freight forwarders
- **Societal organisations** including campaign groups, academia, donors
- **Government**, regulators, intergovernmental bodies



Agree the quadrant diagram and nomenclature of stakeholder groups.



Agree which of the stakeholder groups are critical to engage with in relation to traceability and production of garments and footwear versus those which we can inform and keep updated on the project.

Phase 2: Map countries of most-importance

We mapped the upper tranche of countries within the garment and footwear value chain, using 2019 World Trade Organisation figures 2019 WTO figures on exporting and importing textiles; and exporting clothing.

We can consider additional countries that are not in the upper tranche but are emerging economies that could be worth engaging with now (e.g. Ethiopia) and / or those countries that have stated traceability aims with their textile industry visions, national action plans etc.



Agree which countries are vital to engage with for the success of the project.

Phase 3: Drill down

Using the recommendations from Phase 1 and 2 we will map out the individual organisations from each stakeholder group for the countries of most-importance, keeping in mind that the type of material / textile will also be an important consideration.



Identify gaps within the current project stakeholder platform and agree national stakeholders to engage with.

Fig 1: Note the colours of the circles are not meaningful at this stage.

Global garment & footwear industry ecosystem



2.2 COUNTRIES OF MOST IMPORTANCE

Using [World Trade Organisation 2019 data](#), the table below shows the top ranked countries in the world clothing and textile market.

Exporters of clothing and textiles and importers of textiles, 2018 by % world share

	Exports clothing	Exports textiles	Imports textiles	Sum total
European Union	28.4	23.5	23.1	74.9
China	31.3	37.6	5.3	74.2
Extra-EU Exports	6.8	7.2	9.7	23.8
United States of America	1.2	4.4	9.1	14.7
Viet Nam	6.2	2.6	5.3	14.2
Bangladesh	6.4		3.3	9.7
India	3.3	5.8		9.0
Turkey	3.1	3.8	1.8	8.7
Indonesia	1.8		2.1	3.8
Korea, Republic of		3.1		3.1
Chinese Taipei		2.9		2.93
Japan			2.7	2.7
Pakistan		2.5		2.5
Mexico			2.0	2.0
Cambodia	1.6			1.6

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