Universe International Journal of Interdisciplinary Research
(Peer Reviewed Refereed Journal)
© UIJIR | ISSN (O) – 2582-6417
FEBRUARY 2023 | Vol. 3 Issue 9
www.uijir.com

THE EXPORT STATUS OF ETHIOPIAN TEXTILE AND GARMENT SECTOR POST AFRICAN GROWTH AND OPPORTUNITY ACT BANNING: AN APPRAISAL OF CHALLENGES AND OPPORTUNITIES

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DOI No. – 08.2020-25662434

Abstract

The African Growth and Opportunities Act (here after AGOA) is a United States unilateral trade arrangement enacted in 2000 to provide preferential trade benefits to Sub-Saharan African countries. Its objective is to increase trade and investment between the U.S. and eligible members of the Act by zero rate tariffs to their export their products. Ethiopia has become eligible to AGOA, one year after the enactment of the act as 18th member countries. The country has been among the top beneficiaries of the program and actively leveraged AGOA to attract foreign investment and expand its manufacturing export drive via the development of special industrial parks. However, Biden administration has suspended Ethiopia suspension from AGOA in January 2021 alleging for human right violations.Thus, this paper examines the challenges of Ethiopian textile and garment sector post the AGOA banning. It also discusses the potential opportunities that Ethiopia can utilize to compensate the losses and consequential impacts of banning Ethiopia from AGOA. The writer has employed both qualitative and quantitative data to triangulate the sources. The findings show that Ethiopia's suspension from the AGOA has potential impacts that can exacerbate the economic challenges with the devastating conflicts, the COVID-19 pandemic, and the high inflation in the country. Therefore; enhancing productivity, value addition, and reduction of production costs through efficiency gains needs to be among the major focuses for Ethiopia to be competitive in international trade. Ethiopia should strive to persuade the US to lift the ban on AGOA. Home grown and continental market potentials for trade and development cooperation should be pursued. It is a proper time in history for Ethiopia in particular and for the African continent in general to frame aggressive and pragmatic policies to ultimately free themselves from the chains of exploitative arrangements and dominance by developed countries.

Keywords: *Zero Tariff, AGOA, Garment and Textile, Free Trade, Ethiopian Export*

INTRODUCTION

African Growth and Opportunity Act has encouraged American companies to do business with and invest in sub-Saharan Africa (Zenebe etal, 2014). It has spurred economic growth and regional integration across the continent and provides incentives to African governments to undertake key political and economic reforms. Ethiopia is one of 39 SSA countries that have become beneficiary states of the act. It allows free access for eligible countries to the US market for more than 6,500 eligible commodities (Tai, 2022)

It contains eligibility as a requirement that puts conditions of beneficiary states. (Yanal, 2017) The need to meet internationally recognized human rights requirements, uphold democratic values and build political pluralism, exercise good governance, and advance free market economic policies that eliminate barriers to US trade and investment in the beneficiary countries are among the conditions stated for annual evaluation. These criteria and conditions for African countries to be eligible depend entirely on the US. Each year, Washington determines which nations qualify and the US president grants or withdraws beneficiary status at discretion.

Since 2001 Ethiopia has been one of the key members of the AGOA trade pact. The AGOA preference offers a valuable competitive advantage to Ethiopia's exporters and also provides a market guarantee for companies from the USA investing in Ethiopia.

Out of Ethiopia's total exports to the US market under the AGOA privileges in 2020, the textiles and apparel was the largest beneficiary with a total annual export value of 222.2 million USD under AGOA followed by footwear (11 million dollars) and agricultural products (2.29 million dollars). Ethiopia has benefitted significantly from the AGOA free trade privileges despite relying mainly on Foreign Direct Investment dominated manufacturing subsector which intensively relies on imported intermediate inputs.

Thus, it is not surprising that Ethiopia's export under AGOA has fast accelerated during the past three years when Ethiopia started exporting massively from its emerging industrial parks which are dominated by foreign direct investment companies and use both domestic and foreign inputs. Ethiopia exported a total of about 992 million USD worth of commodities under AGOA between 2000 and 2020, out of which 632 million USD export revenue was received only during the period 2018-2020 (www.AGOA.info).

The share of Ethiopia's 632 million USD export revenue from the US market under AGOA during the three years ending 2020 is about 41 percent of the country's total export (1541 Million US Dollars) to the US during the same period. This is by far greater than a 25.5 percent share of the total commodities export under AGOA during the period 2000 to 2020 to the country's total export to the US during the same period.

Thus, AGOA became more significant in recent years when Ethiopian Industrial Parks became operational. Ethiopia has become one of the leading SSA exporters of textiles and apparel to the US markets (Abebe, 2010). However, under the Joe Biden administration US has terminated Ethiopia from benefiting from the African Growth and Opportunity Act (AGOA) in January 2021.Such termination is aimed to meet certain political and economic purposes.

It has also created fear on the investors working under AGOA that it will impact their business and on the government as well. Obviously, such exclusion will come up with certain challenges to Ethiopia and it is very important to address the challenges that might the country going to face and coin for potential opportunities to back up the impacts of AGOA termination. Therefore; the core focus of this paper is to analyze the major challenges and opportunities of Ethiopian textile and garment sector after the banning of AGOA.

ETHIOPIA'S TEXTILE AND GARMENT EXPORT PERFORMANCE UNDER AGOA PROGRAM

Ethiopia is one of 39 SSA countries that have been granted duty-free export privileges to the United States under the African Growth and Opportunity Act (Tai, 2022). It allows duty-free access for eligible SSA countries to the US market for more than 6,500 (virtually all of their actual and potential exports) eligible commodities. These products include textiles and garments, motor vehicles and parts, leather products, chemicals, machinery and equipment, agricultural products, and other goods. Garment manufacturing is the largest beneficiary under AGOA and over 80 per cent of workers in the sector are young women.

Ethiopia has a great potential in the textile and garment industry which is growing annually at about an average of 25% in the past 10 years. Ethiopia has 3 million hectares of land suitable for cotton production (Ethiopian **Textile Industry Development Institute Report, 2020/21).**

Ethiopia, as a key members of the AGOA trade pact and its preference offers a valuable competitive advantage to Ethiopia's exporters and also provides a market guarantee for companies from the USA investing in Ethiopia. This has also helped Ethiopia to become one of the leading SSA exporters of textiles and apparel to the US markets.

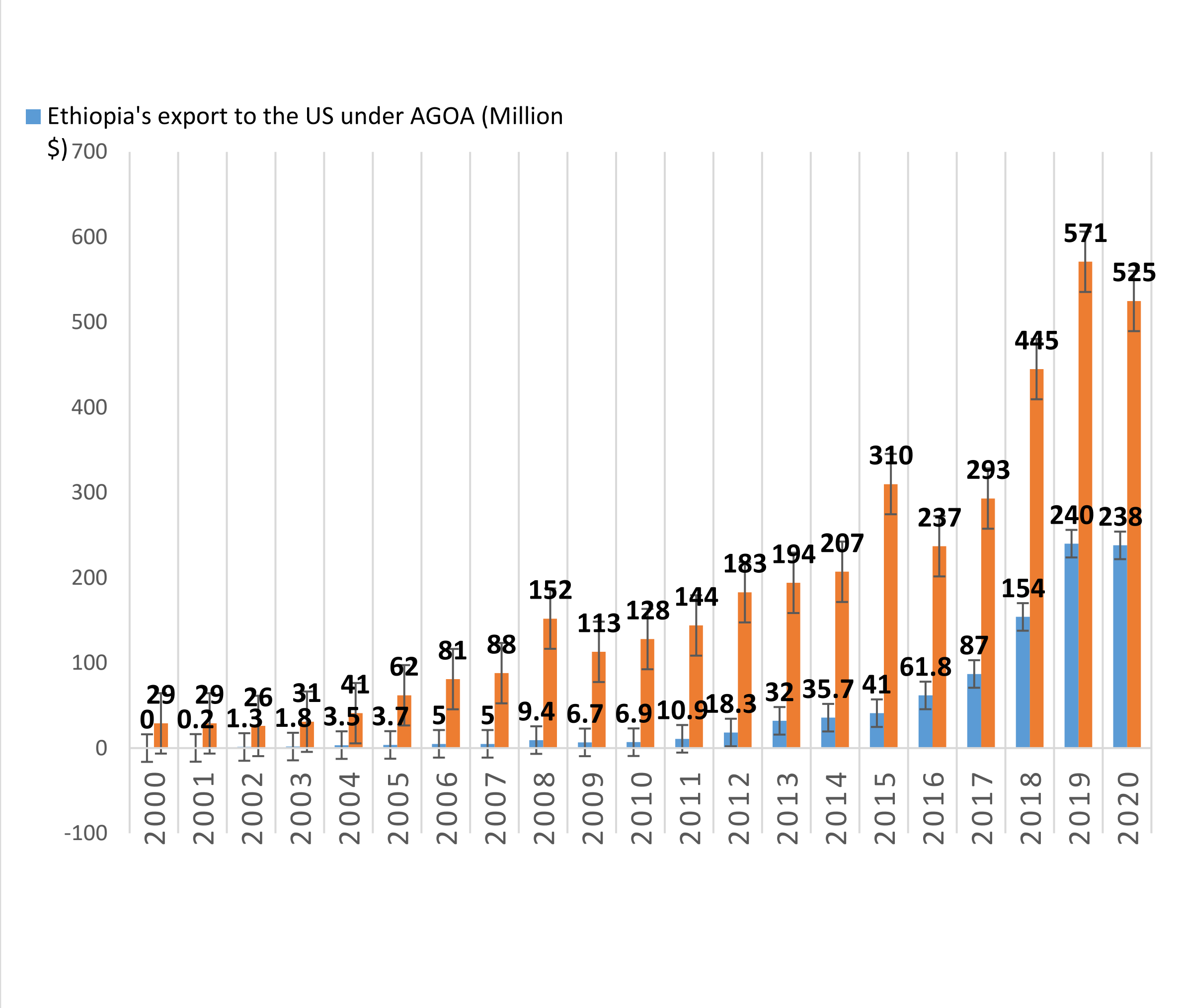
Out of Ethiopia's total exports to the US market under the AGOA privileges in 2020, the textiles and apparel was the largest beneficiary with a total annual export value of 222.2 million USD under AGOA followed by footwear (11 million dollars) and agricultural products (2.29 million dollars). The country has benefitted significantly from the AGOA free trade privileges despite relying mainly on Foreign Direct Investment dominated manufacturing subsector which intensively relies on imported intermediate inputs from other countries(Tai,2022)

Thus, AGOA is one of the five market opportunities that Ethiopia is promoting to attract investors. It was also a pulling factor that the government used to attract potential investors to the country.

The income from the industrial parks have also able to generate more revenues as foreign direct investment increases due to such attractions and it is possible to state that Ethiopia has taken advantage of this opportunity to improve its economy (https://www.partnerafrica-ethiopia.org/impact-of-agoa**).**

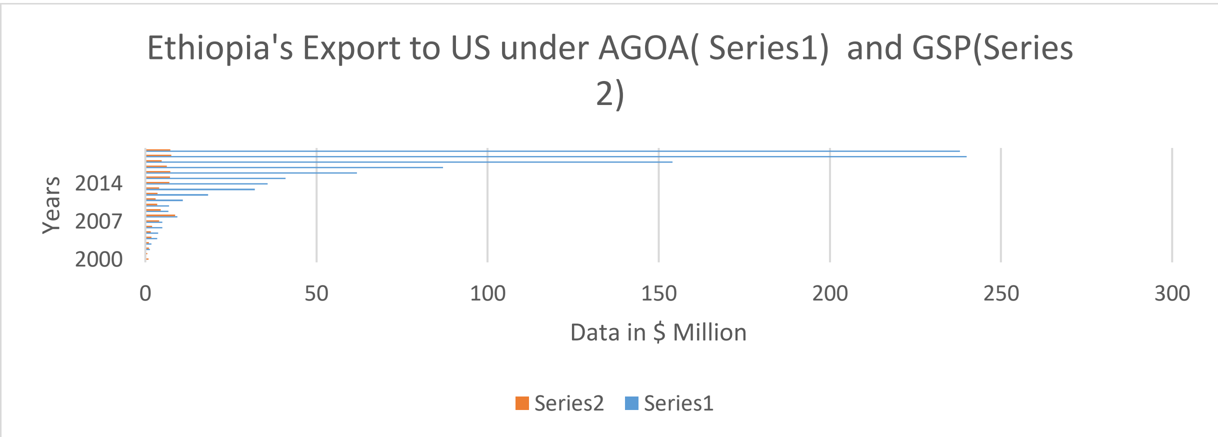
Over the two decades, AGOA has helped Ethiopia to become one of the main Sub-Saharan African garment exporters to the United States (https://ethiopianmonitor.com/2021/07/03/ethiopia). In 2020, out of the $ 525 million in Ethiopia's export to the United States, half are duty-free under AGOA, which includes predominantly clothes, leather footwear, other leather items, flowers, and vegetable products. Between the start of the program in 2000 and 2020, Ethiopia's export through AGOA grew rapidly with an average annual growth rate of 43%. Ethiopia's export through AGOA accounts for only 9.4% of its overall export (UTIC Data Base).

Figure 1 below indicates that Ethiopia's export through AGOA has increased from 61.8 Million USD (26 percent of the country's total export to the US) in 2016 to 238 (45 percent) in 2020, showing the country's increased use of the free-trade opportunity under AGOA. About 35 anchor companies in industrial parks are engaged in the garment and textile sector of which about 80 percent of their products are exported to the US market using the AGOA scheme. There more than 300 companies working on textile business hiring for more than 70,000 employees (https://agoa.info/profiles/ethiopia.html



Thus, it is not surprising that Ethiopia's export under AGOA has fast accelerated during the past three years when Ethiopia started exporting massively from its emerging industrial parks which are dominated by foreign direct investment companies and use both domestic and foreign (intermediate) inputs.

Figure 2.



Ethiopia's textile and garment manufacturing sector is the largest AGOA beneficiary in the country (Tai,

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FEBRUARY 2023 | Vol. 3 Issue 9
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2022). Between 2000 and 2020, Ethiopia exported $722 million worth of garments to the US duty-free under AGOA, with three quarters of that in the past three years alone. Ethiopia benefits from very favorable rules of origin under AGOA, which allow the utilization of third country fabrics as qualifying input materials.

Ethiopia's leather footwear industry (and to a lesser extent footwear with textile uppers) is one of the key beneficiaries of AGOA preferences (Kemal, 2014). Under AGOA, Ethiopian footwear exporters receive a waiver of the usual 10-20% import duties levied on US shoe imports. Sector exports have grown rapidly since 2012, and $186 million in shoe exports have been shipped under AGOA.

Figure 3.

Ethiopia exported a total of about 992 million USD worth of commodities under AGOA between 2000 and 2020, out of which 632 million USD export revenue was received only during the period 2018-2020 (https://agoa.info/toolkit/guides/15558.html).The share of Ethiopia's 632 million USD export revenue from the US market under AGOA during the three years ending 2020 is about 41 percent of the country's total export (1541 Million US Dollars) to the US during the same period (https://addisfortune.news/ethiopias-agoa-exit-looking-beyond-the-headlines).This is by far greater than a 25.5% share of the total commodities export under AGOA during the period 2000 to 2020 to the country's total export to the US. Accordingly, AGOA has become more significant in recent years when Ethiopian Industrial Parks became operational.

POST AGOA EXCLUSION CHALLENGES TO ETHIOPIAN TEXTILE AND GARMENT SECTOR

Before the suspension of the act; several prominent individuals and institutions including some US law makers (the chairs of the Senate and House subcommittees on Africa) also voiced their concerns and made repeated pleas to the US administration to reconsider the rather abrupt and politically loaded decision on removing Ethiopia from the AGOA trade pact citing that the decision will have effect on ordinary workers and their families (A letter written by Senator Chris Van Hollen and Representative Karen Bass to President Biden,2021)

However, final decision for suspension has been made despite Ethiopia's efforts to explain its position on the unrelated preconditions and unconvincing reasons for the suspension and the potential immediate and direct effects of the suspension on ordinary citizens. So, America has suspended Ethiopia under the Biden administration from AGOA membership in January 2021 employing human rights violations as a reason. Mali and Guiney are also another countries who were delisted from the act in the same year (USA, Statement Release, 2021)

Following such an exclusion measure that has been taken by America has created fear on Ethiopian government and investors about the fates industrial parks that would be closed before they could complete their mission of transitioning Ethiopia's economy from agricultural to manufacturing (https://addisfortune.news/ethiopias-agoa-exit-looking-beyond-the-headlines).

The decision had necessitated some investors inside the industrial parks to lay off their workers after losing orders from the American market, which used to buy duty free export of majority of Ethiopian apparel, garments, and leather products exported from the 13 government-developed industrial parks rented out to international brands such as Calvin Klein, H&M, Zara, Tommy Hilfiger, Warner's, and others.

Industrial parks, which leverage an anchor investor model, an approach designed to attract a global leading brand and its group of suppliers to a single park to establish an integrated production system, will be highly affected. Hawassa Industrial Park, the largest industrial park in the country, just lost its anchor investor in PVH following Ethiopia's exit from AGOA. PVH, whose brands include Calvin Klein and Tommy Hilfiger, has announced it will suspend its operation in the park following the suspension.
Some economists, government officials and company has explain that banning Ethiopia from AGOA has a certain implications in negatively affecting the economy. However; all provided that it should be worked on the way outs and to compensate the losses. The suspension has impacts on Ethiopia's status as a viable investment destination, particularly for western investors as AGOA access was one of the primary foreign investment attractions to Ethiopia. The country has been recognized as the largest African recipient of FDI, despite a 6.1% decline in new FDI due to the COVID-19 pandemic and ongoing conflict in 2020. (https://addiszeybe.com/.../in-search-of-an-antidote-to-the-impact-of-the-agoa-ban**)**.

So,such banning can have potential impacts in attracting prospective foreign investments. It makes the country loses one of its main exporting markets with vast unexploited potential and previous foreign investors such as PVH Close up shop.

The decision on expelling Ethiopia from AGOA has not come as a surprise to many observers in international relations and geopolitics given the US government's recent policy stance towards Ethiopia including pressuring it to sign unfair accord on the Grand Ethiopian Renaissance Dam (GERD) with Egypt and Sudan (https://www.msn.com/en-xl/africa/other/ethiopia-s-suspension-from-agoa-part-of).
From the Ethiopia's perspective, the US's decision to remove Ethiopia from the AGOA beneficiary list is regrettable as it came at a time when most of Ethiopia's recently completed industrial parks are entering full-scale production phase and the country looks at bolstering trade and investment relationship with the United States and other countries in order to realize the fruits of the economic reforms implemented in recent years.

In terms of the potential impact, there is no doubt that the suspension from using the AGOA privileges poses significant challenges, and it is a huge blow to Ethiopia's young and fledgling manufacturing sector. The decision risks affecting the livelihoods of hundreds of thousands of Ethiopians who have been employed (mostly women and young girls) in enterprises producing AGOA beneficiary commodities. The AGOA ban has had an impact on Ethiopia's industrial parks in terms of job prospects.

The investors inside the parks have been forced to lay off approximately 5,000 workers (Ethiopian Industrial Parks Development Corporation, 2022).

The suspension from AGOA, no doubt poses a huge challenge particularly to the livelihoods of workers (mostly women and low skilled individuals with less chances of finding jobs) and their dependent families who will be affected by the abrupt suspension. While it could also exacerbate the low export performance and foreign exchange earning of the country, the suspension from AGOA will have an immediate and direct effect on the livelihoods of the ordinary citizens. President of the Confederation of Ethiopian Trade Unions wrote a letter to the American Ambassador that firmly believes removing Ethiopia from the AGOA eligibility list at this time will make things worse for Ethiopian workers and their families (https://addisfortune.news/delisting-ethiopia-from-agoa-unwise-move-by-the-us).

The likelihood of losing job and hence income, coupled with the rising cost of living will could even worsen the living standard of the ordinary citizens and reverse the gains Ethiopia has made over recent years in terms of improving certain indicators of economic and social development measures. As the suspension from AGOA suddenly without a reasonable grace period that could have been necessary for preparing alternatives particularly by averting the looming effects of the suspension it can has the direct potential to affect the livelihood of the people.

Therefore; AGOA's suspension is expected to challenge Ethiopia in different aspects. Ethiopia can be challenged to fully realize its Ethiopia's ten-year development plan promotes export-led economic growth by boosting its competitiveness, expanding market opportunities, and increasing the range of export products as the main driver of growth and employment. The country has invested more than 1.5 billion dollar in building industrial parks which are aimed to generate more revenues in attracting foreign direct investment and to achieve its transformational plan (https://newbusinessethiopia.com/investment/ethiopia-launchesindustry-park).

Suspension from AGOA is already impacting this goal. Industrial parks, which leverage an anchor investor model, an approach designed to attract a global leading brand and its group of suppliers to a single park to establish integrated production systems are facing challenges and will be highly affected. Hawassa Industrial Park, the largest industrial park in the country, just lost its anchor investor in PVH following the suspension (https://www.thereporterethiopia.com).
PVH, whose brands include Calvin Klein and Tommy Hilfiger, has announced it will suspend its operation in the park following the suspension. A significant portion of the 20 and above investors in the park are expected to follow suit as their operation is highly linked with PVH. The park was boosting over 95 million dollar in export and employing more than 35,000 workers during the Ethiopian fiscal year 2020/21, despite the COVID19 pandemic.

Another area of impact will be supply chain disruptions. An already established market linkages that leverage the AGOA market access are interrupted, causing export to decline. Ethiopia is struggling to find a market to export 64% of its hides and skins products. As about 78% of the footwear and leather products were previously exported to the US, a significant decline in production and export earnings is expected until the industry establishes new market linkages to make up for the loss (Melaku Alebel, FDRE Ministry of Trade, 2022).

Moreover, Ethiopia's nascent manufacturing industry could see a significant loss of employment. Officials had warned the suspension could take away one million jobs, disproportionately hurting young

women who make up most garment workers. Such a large number of job losses will have significant economic and political ramifications unless alternative market access is established to fill the gap.
Some government officials state that there is a the better performance of industrial parks post AGOA suspension citing the improvements with regard to industrial parks' significant increase in earnings (https://addisfortune.news/making-ends-meet-despite-agoa-delisting).

The industrial parks produced total profit of 340 million birr in the fiscal year that recently 2021/2022, 396 percent increase over the previous year.[1] The Hawassa Industrial Park contributed 563 million birr, Bole Lemi 186 million birr, and Adama 172 million birr of the 1.22 billion birr total revenue generated by industrial parks this year, a 36 percent surge. In fact, for the first time, total revenue topped one billion birr (https://ustr.gov/issue-areas/trade-development/preference-programs/african-growth-and-opportunity-act-agoa).

OPPORTUNITIES AND SUBSEQUENT MEASURES

The unilateral act US in terminating Ethiopia from AGOA has been made and might potentially take time to be reversed. So, Ethiopia has no option but to contemplate on the way outs. There is no doubt that AGOA's suspension threatens Ethiopia's emerging textile and apparel industry and the country's plan to become a manufacturing hub.

The suspension can exacerbate the economic challenges since it is happening to an economy attempting to recover from the effects of the damages caused by the devastating conflict, the COVID-19 pandemic, and the high inflation (https://www.fas.usda.gov/data/ethiopia-food-inflation-stands-high-ethiopia).
The measure also contributes to the reversal of Ethiopia's economic and social progress of the recent decades. Given the negative economic and social impacts of the suspension from AGOA, the judicious order of business is for the US to reconsider the decision and constructively engage with Ethiopia for addressing intricate domestic and regional issues of mutual concern.

So, Ethiopia needs to design short- and long-term strategies to avert the negative consequences of the termination from the AGOA duty free privileges. There are also important lessons to be learnt in dealing with global superpowers scavenging for geopolitical dominance and exclusively dictating the terms of the game in global order. It created a window of opportunity for Ethiopia and other African countries which will likely face the same fate to evaluate existing and future engagements with global powers and design the necessary rebalancing mechanisms. The unconvincing and unilateral termination will also be an opportunity for Ethiopia and the rest of Africa to work together towards strengthening interregional and continental trade opportunities and exploiting the benefits of strong economic integration within Africa.

In the short term, Ethiopia needs to pursue all available strategies that can help find alternative markets for the commodities that can no longer be competitive enough in the US market without the duty exemption.

One of the possible measures will be to aggressively seek and exploit domestic market opportunities supported by national campaigns for promoting the local use of Ethiopian products. Such campaigns will have the potential to not only create a nationalist sentiment and ease market problem for the commodities in the short term but also develops long term culture of using local products which will promote import substitution.

The shift to local products will have an additional advantage of easing the foreign exchange burden the country needs to shoulder for importing foreign products serving similar purpose. However, unless properly designed and institutionalized, the potential windfall gains from short term patriotism by Ethiopians of buying local products cannot adequately and sustainably solve the problem. Let alone attract new FDI investors, it will also be a challenge to persuade foreign direct investors to proceed with their operation under such conditions.

There are signals that such challenges are already posed and will test Ethiopia's capacity to keep thousands of workers.

Nonetheless, Ethiopia has to do all it takes to keep the workers by going as far as renegotiating terms with the investors and helping find alternative markets for the products. The recent move by the Ministry of Industry and other stakeholders to source school uniforms (school clothes, shoes, and bags) locally is an example of what can be done to find alternative domestic market for Ethiopia's textile and footwear subsectors which are the two major beneficiaries from AGOA. Other institutions should be encouraged to take similar measures to temporarily ease the burden of the demand shock.

In the long term, there is a need to enhance productivity and productive efficiency, product quality and design, value addition, as well as supply chain and logistics so that Ethiopian products can be more competitiveness both domestically and in the international market without duty free privileges.
Ethiopia should also pursue for alternative market destinations and new market niches both within Africa and outside of Africa. There is a need to revitalize existing regional and continental free trade agreements and cooperation frameworks.

For instance, Ethiopia should look at the opportunities presented by the operationalization of the African Continental Free Trade Area (here after AfCFTA) and prepare itself to be competitive (https://www.worldbank.org/en/topic/trade/publication/the-african-continental-free*)*.

Ethiopia considers the full and effective implementation of the AfCFTA as a pan-African solution for the rather unidirectional North-South engagements and unjust international order on trade and investment. If ACFTA properly implemented and supported by practical steps to remove existing logistical and legal bottlenecks as well as urgently settle other trans-boundary issues such as labor mobility and payment facilities that can hinder commerce, it can help improve inter-African trade and investment and also reduce the unfavorable effects of the unreasonably stringent conditions that are often attached to participations in some existing preferential trade opportunities.

Ethiopia should also opt for the zero tariff export opportunities granted by China to African countries in the latest Forum on China-Africa Cooperation. Given the big and booming Chinese market, the zero tariff export privileges can provide huge opportunities for African countries to get alternative market source for their products without considerable stringent conditionalities for participation.

The zero tariff export opportunities can improve price competitiveness of eligible products in the rather low cost and competitive Chinese market, and hence improve the balance of trade between Africa and China. Thus; the zero-tariff opportunity came at a crucial moment for Ethiopia given the suspension from AGOA which led the country to scramble for alterantive markets which play its own roles in redressing the the sofar impacts of AGOA.

CONCLUSIONS

AGOA is US national law member countries do not have any right to make counter arguments against ground of their suspension. This is a noteworthy difference from the EU's non-reciprocal preferential trade arrangements toward African countries, which are governed by international law and thus cannot be changed only by the EU without agreement among the contracting parties (Yanal, 2017).

It is the discretion of the president of the US; either amend or exclude beneficiaries upon their assessment. Most of the potential partner countries in the AGOA worry about the ambiguity in their approval or continuing eligibility. Unlike other agreements AGOA lacks principle of reciprocity and it is not flexible enough for the member states. This is can be argued that AGOA scheme is incompatible with WTO rules (Article IX of the WTO Agreement).

Despite some measures taken to curb the AGOA impacts it is not wise to undermine the suspension as it can have the potential to exacerbate the economic challenges with the devastating conflict, the COVID-19 pandemic, and the high inflation in the country. It can also contributes to the reversal of Ethiopia's economic and social progress of the recent decades.

Therefore; enhancing productivity, value addition, and reduction of production costs through efficiency gains needs to be among the major focuses for Ethiopia to be competitive in international trade.
There is also a need to take concrete steps to reduce external dependence posed mainly by the unipolar world order not only by rebalancing between the East and the West.

It should also look inwards and the regional and continental market and investment potentials available within Africa that can be enhanced through existing and new pan-African frameworks for trade and development cooperation.

In general, it is a proper time in history for Ethiopia in particular and for the African continent in general to design and pursue aggressive and pragmatic homegrown policies and strategies to ultimately free themselves from the shackles of exploitative arrangements and dominance by developed countries.

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