

## History Of The Furniture Sector In Brazil

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### Abstract

This study explores the core realms of Entrepreneurship and Supply Chain in the context of the history of the furniture sector in Brazil. The research objective is to evaluate the correlation between trust management in entrepreneurs' profiles and the enhancement of relationship performance in supply chain management. Additionally, an analysis of the entrepreneur's endogenous and exogenous variables is conducted. The sample comprises emerging furniture companies in Minas Gerais, each with a tenure of five to ten years since establishment. Consequently, the study aims to address the following questions: How do enterprises identify potential actors within the sector's framework? What factors influence entrepreneurs' conduct in the supply chain? How can the nexus between trust management and relational variables be gauged to foster the success and maturity of nascent firms? How do the regulations in the state of Minas Gerais impact the emergence of new sustainable conceptual furniture ventures? Armed with answers to these and other questions, the intention is to construct and validate hypotheses derived from the theoretical model. The methodology employs both qualitative and quantitative techniques for comparative analysis and processing of empirical data. It endeavors to portray the entrepreneur's profile, behavior, and integration within the supply chain, all rooted in individual and interorganizational trust. The envisaged research

outcomes possess the potential to enhance the prospects of the sampled companies and refine the comprehension of fundamental facets linked to the significance of supply chain management in furniture enterprises. This contribution encompasses models and concepts catering to the academic-scientific and business communities.

Keywords: Supply chain, Trust, Relationship, Entrepreneurship, Performance, Furniture sector.

### **Introduction**

The initial studies within the realm of entrepreneurship primarily focused on the entrepreneur, exploring sociodemographic and psychological considerations. According to Gartner (1985), entrepreneurs possess distinct individual traits that facilitate the identification of various types (Amit and Muller, 1994; Birley, 1985). Among the variables that enable such characterizations, professional experience emerges as a pivotal factor influencing the capacity to establish a business (Shabbir and Di Gregorio, 1996; Catley and Hamilton, 1998), while education stands out as a characteristic that impacts both initial entry and the evolution of companies (Brush et al., 2006; Fischer et al., 1993). Within the realm of organizational sciences, entrepreneurship also seeks to elucidate specific factors that enhance its standing as a foundational discipline. In Birley's article (1989), the exploration revolves around whether female entrepreneurs differ from their male counterparts in terms of personal traits, motivations, experiences, and outcomes in the entrepreneurial milieu.

Despite the extensive development of entrepreneurship due to the diversity of empirical studies and theoretical models, this field still faces challenges, particularly at the conceptual, methodological, and intervention levels. Therefore, analyzing specific areas can contribute to the enrichment of entrepreneurship (De Palma et al.,

2007). Few studies attempt to explore the relationship between individual and interorganizational trust, among other supply chain functions, as factors contributing to entrepreneurs' success and their network. Trust is recognized by researchers from various fields as a pivotal factor in relations within and between firms, significantly influencing everything from team behavior to the performance of strategic alliances and supply chains. The concept of trust has gained widespread use in social sciences research, attracting attention from a wide range of academic disciplines. Trust is considered an essential variable for understanding societies.

Entrepreneurs, individuals with innovative ideas who develop and market products to the market, seize opportunities, and create new businesses (Schumpeter, 1934; Bygrove and Hoper, 1991), are essential for regional economic and social development. Entrepreneurial orientation plays a crucial role in business performance (Walter et al., 2005, Rauch et al., 2009). However, the entrepreneurial process cannot be left to chance; education plays a central role in identifying and encouraging potential entrepreneurs (Hotter, 1993). Entrepreneurship education depends on education, the business activity context, the university-business relationship, and post-graduate employability (Pittaway et al., 2007; Walter and Dirk, 2012). According to the Global Entrepreneurship Monitor (GEM), entrepreneurship education is becoming increasingly common in educational institutions worldwide, driven by a growing demand for knowledge about the entrepreneurial process and its implications for modern business creation. Therefore, research originating from universities aims to reinforce entrepreneurship education and its relationship with the supply chain. The level of analysis underlying performance studies must also be considered.

It is important to note that policies aimed at promoting economic growth hold significant implications in this regard, positioning the government

as an essential player in entrepreneurship promotion (Mendez et al., 2012; Dodd et al., 2012). In Latin America, entrepreneurs are critical actors in productive development, making significant contributions to job creation and businesses oriented towards domestic demand. These businesses are characterized by low direct export coefficients, forming a heterogeneous universe that ranges from micro and small businesses to subsistence businesses, with varying degrees of competitiveness and export capacity (Buitelaar, 2010).

#### Context and research objectives

In the context of entrepreneurship in Brazil (SEBRAE, 2012), the average annual growth rate of employers in the country exhibited a slight negative fluctuation of -0.1% per year from 2001 to 2011, stabilizing at around 3.2 million individuals. During the same period, the number of self-employed individuals increased from 17 million to 19.7 million, marking an expansion of 2.7 million new self-employed individuals, representing an average annual growth rate of 1.5%. When considering the aggregate of employers and self-employed individuals as an approximation of the total number of entrepreneurs in the country, the total increased from 20.2 million to 22.8 million entrepreneurs, an expansion of 2.6 million new entrepreneurs between 2001 and 2011. Combined, employers and self-employed individuals exhibited an average expansion rate of 1.2% per year. Throughout the period from 2001 to 2011, men predominated among employers and self-employed individuals, although women's participation in both categories increased during the same period. Among employers, the proportion of women increased from 23.4% to 28.3% between 2001 and 2011. Likewise, among self-employed workers, the proportion of women increased from 29.6% to 31.2%. The data points to a significant increase in the educational level of entrepreneurs during the analyzed period.

The furniture sector in Brazil has a long and rich history dating back to the colonial period when the country was still a Portuguese colony. At that time, furniture was mainly imported from Europe, but local craftsmen also produced pieces of furniture for wealthy families. In the 19th century, with the arrival of Italian immigrants, the furniture industry began to develop more rapidly. The first factories were established in the state of São Paulo, and the industry started to grow in other states as well. During the 20th century, the Brazilian furniture industry went through several changes. In the 1950s and 1960s, there was a boom in the production of modern furniture inspired by international trends. In the 1970s and 1980s, the industry faced a crisis due to economic instability and competition from imported furniture.

However, in the 1990s, the industry began to recover thanks to government policies that encouraged exports and the development of new technologies. Today, Brazil is one of the largest producers and exporters of furniture in the world, with a wide range of products that combine design, quality, and sustainability.

#### Research problem statement

Entrepreneurship within the supply chain has garnered significant attention as a crucial driver of innovation and economic growth. Understanding the dynamics of business creation and destruction, as well as the factors that determine these processes, is essential. Two fundamental schools of thought have emerged in the study of entrepreneurship: the individual-centric perspective and the environmental perspective. The individual-centric perspective facilitates the identification and utilization of business opportunities by identifying individuals within society who possess entrepreneurial attributes. This school of thought revolves around explaining entrepreneurship as a function of human traits, such as the ability to cope with uncertainty, tolerance for risk, and need for achievement.

Environmental perspective prioritizes the industrial and macro-environment as the primary determinants of entrepreneurship. It seeks explanations within the environment that entrepreneurs face. Key situational factors considered as determinants include technological change leading to creative destruction, industrial dynamics, market structure, and overall economic or social stability.

While both approaches have their merits, it is important to recognize that entrepreneurs do not operate in isolation. They must engage with suppliers, competitors, potential customers, shareholders, investors, and their personal network. Studies tend to focus on the entrepreneur's social networks rather than the broader business network that constitutes the supply chain - the center of commercial, business, and relational operations.

### **Methodology**

The fulfillment of the methodology requires theoretical-methodological preparation. The research undertaken applies the following methodologies. The overarching research problem is to investigate the effect of entrepreneur profile variables on supply chain management. With the aim of studying entrepreneurs within the supply chain of the furniture sector in Brazil, the research questions guiding this project and facilitating the structuring of the general problem are as follows. Research questions:

**Question 1:** How do enterprises identify potential actors within the furniture sector's supply chain?

**Question 2:** What variables influence entrepreneurs' behavior within the supply chain of the furniture sector?

**Question 3:** How can the relationship between trust management and relationship dynamics be measured as variables for the success and maturity of new businesses?

**Question 4:** How do the laws influence the creation of new sustainable concept furniture businesses?

## **Results**

### Antecedents of the Furniture Industry in Brazil

The furniture industry began with the use of plywood. In 1836, the German Michel Thonet manufactured furniture using curved plywood sheets. This technology reached Brazil in 1890 with the inauguration of the Curved Furniture Company in Rio de Janeiro, marking the beginning of large-scale production. Lafer, Rudinick, Eucatex, and Florence are major companies in the sector, established in the early 20th century. Industries in São Paulo organized themselves and founded Sindimov. In the same state, Mário de Andrade, then an employee of the Department of Culture of the City of São Paulo, organized Brazil's 1st Proletariat Furniture Contest. At the time, the company produced furniture on a large scale using Austrian molds.

According to ABIMÓVEL (2010), the 1960s were a significant period for the sector with the creation of the first design school and the launch of particleboard. The Rio de Janeiro School of Design was inaugurated, and the National Housing Bank (BNH) financed housing construction, driving the furniture sector. The Placas do Paraná industry developed and introduced particleboard to the market, revolutionizing the sector. The Furniture and Carpentry Industry Union of the State of Paraná (Simov) was founded in Paraná, bringing together the sector in the state. The Union of Carpentry, Sawmills, Carpentry, and Tanuaries of Curitiba transformed into the Furniture and Carpentry Industry Union of the State of Paraná (Simov). A year later, Móveis Carraro was established in Bento Gonçalves, RS. The Rio de Janeiro School of Design (ESDA) was inaugurated in 1962, the same year that the Industry and Commerce of Furniture AB Pereira Ltda. set up in Votuporanga, São Paulo, initiating the formation of the region's furniture hub. In the same year, Simbal in Arapongas, PR, began its journey,

becoming one of the country's largest upholstery manufacturers.

1964, during the Military Government, there was a push for housing construction with the establishment of the National Housing Bank (BNH). Seizing this opportunity, Duratex, which was founded in 1951, introduced Duraplac and solidified its position in the market. In the same year, Itatiaia, based in Ubá (MG), began its operations. A revolutionary moment in the Brazilian furniture sector occurred in 1966 when Placas do Paraná launched particleboard sheets onto the market. In 1968, Todeschini, based in Bento Gonçalves (RS) and previously a manufacturer of musical instruments since 1939, entered the kitchen segment. In the same year, Sayerlack, a varnish industry, established an industrial unit in São Paulo. Subsequently, the 1980s marked a period of significant growth for the furniture industry.

During the last decade of the 20th century, the Brazilian furniture sector underwent a process of professionalization. The first Higher Education Course in Furniture Production and the Course in Industrial Furniture Production were introduced. Medium Density Fiberboard (MDF) gained popularity in the domestic market, and the furniture sector became part of the Brazilian Design Program and Promóvel, aimed at boosting Brazil's export figures. Dell Anno became the first company to receive the ISO 9002 certification. In 1991, the Furniture and Wood Artifacts Industries Union of the State of Minas Gerais (Sindimov/MG) was established because of the merger of several unions, including those for sawmills, carpentry, upholstery, among others. The following year, the Brazilian Furniture Industries Association (Abimóvel) was founded.

In the early 21st century, an export enhancement project was launched by the Brazilian Embassy in England, supported by Promóvel, to facilitate the furniture sector's participation in furniture fairs in England. The project "Brazilian Furniture," a



partnership between the Brazilian Furniture Industries Association (Abimóvel) and the Brazilian Trade and Investment Promotion Agency (APEX), supported the international commercial promotion of the sector. In 2001, the Minister of Development, Industry, and Foreign Trade launched the Competitiveness Forum for the Wood and Furniture Production Chain. In 2003, the National Industry Forum was launched by the National Confederation of Industry (CNI) to discuss and enable solutions for the sector. That same year, exports expanded to Europe, Mexico, Latin America, the Arab Gulf, Japan, and the United States.

In addition to the furniture industry, which generated more than R\$ 14 billion in 2007 and exported US\$ 1.1 billion, there are other industries classified as PMVA (Products of Greater Added Value), including frame production, doors, floors, and other manufactured products that exported 2.2 billion dollars in 2007. These are highly specialized industries using sophisticated machinery that requires highly skilled labor.

2012, the Brazilian furniture sector registered US\$ 723.3 million in exports. Representing around 0.6% of the national GDP and approximately 0.3% of the country's exports (Siqueira, 2013). In recent times, a study by the Institute of Industrial Studies and Marketing (IEMI), in partnership with the Furniture Industries Association of the State of Rio Grande do Sul (MOVERGS), indicated that the furniture sector is expected to grow by 5.5% in 2013, compared to 2.8% the previous year. The sector employs around 6.5 million people. It has also sought significant advancements, with factors of competitiveness tied to technology usage, new raw materials, design, production specialization, commercial and distribution strategies, final product quality, among others (Höfler and Teixeira, 2011). The share of exports from the state of Minas Gerais in relation to the overall Brazilian exports was 2.3% in 2012. Apart from the metropolitan region, there is a significant

concentration of companies in Ubá, Carmo do Cajuru, and Turmalina, in the Vale do Jequitinhonha.

### Entrepreneurship in the Furniture Industry in the State of Minas Gerais

Entrepreneurship plays a vital role in the furniture industry in the state of Minas Gerais. This region has witnessed a significant presence of entrepreneurs and businesses within the sector. The furniture industry in Minas Gerais is characterized by its diverse and dynamic ecosystem, featuring various actors along the supply chain.

Raw Material Suppliers: The industry relies on raw materials such as wood, metal, fabrics, and other components. Suppliers of these materials are crucial to the functioning of the sector. The furniture industry comprises a complex supply chain that involves various actors. Wood suppliers, for instance, play a pivotal role in providing the essential materials for furniture production. The heart of the industry lies with manufacturers who create a wide range of furniture products, from residential to commercial and specialized pieces. These manufacturers can range from large-scale enterprises to small and medium-sized businesses. Entrepreneurs in this sector often include designers and artisans who contribute to the innovation and aesthetics of furniture products. Distributors and wholesalers are responsible for getting the finished furniture products from manufacturers to retail outlets. Furniture retailers, ranging from physical stores to online platforms, connect the products with consumers.

The state of Minas Gerais has been involved in exporting furniture products to international markets, and entrepreneurs engaged in export activities contribute to expanding the reach of Minas Gerais' furniture industry beyond its borders. Additionally, entrepreneurship in the furniture industry extends to support services such as logistics, marketing, branding, and financial services. Government agencies and regulatory bodies impact the industry through

policies, regulations, and incentives that can either support or hinder entrepreneurial activities within the sector.

The dynamics of entrepreneurship in the furniture industry are shaped by the interactions and collaborations among these various actors. Entrepreneurs in Minas Gerais' furniture sector need to navigate challenges related to sourcing materials, design innovation, market competition, and consumer preferences. Successful entrepreneurship within this industry requires a keen understanding of the supply chain, consumer demands, and the ability to adapt to changing trends and technologies.

An analysis of the field of entrepreneurship reveals a concern among scholars about the impact of this phenomenon on the social and economic system. Authors have found empirical evidence of the positive impact of entrepreneurship on the economic growth of regions and countries, in terms of increased job creation (Baldwin and Picot, 1995; Davidsson et al., 1998), productivity, and the generation of greater wealth and well-being (Davidsson et al., 1995; Reynolds, 1999). In addition to its importance for economic growth, some authors have emphasized the strategic function of entrepreneurship as a compensatory mechanism for economic imbalances (Hitt et al., 2002). These pieces of evidence reflect the relevance of entrepreneurship, contributing to its institutionalization as a field of study and intervention. This institutionalization is evident in the guidelines of many governments, which reflect a commitment to promoting entrepreneurial activities in their own countries (Mueller and Thomas, 2001).

In the furniture sector of Minas Gerais (MG), there is a growing number of entrepreneurs. There are over 140 furniture manufacturing companies in various lines, such as rustic furniture, rustic with a modern touch and finish, modular fine furniture, and aluminum furniture for leisure areas. The monthly production amounts to 28,000/30,000 pieces per month, ranging

from chairs, cabinets, tables, and decorative items. These enterprises have generated around 3,000 direct jobs.

An example highlighted by Sebrae-MG is the "Moveleiro de Passo" project. According to Ricardo Andrade, the project coordinator, most buyers in the furniture chain are retailers who resell to the end consumer. The production from Passos, for instance, is marketed in São Paulo, both in the capital and the interior, Rio de Janeiro, Espírito Santo, Belo Horizonte, and, to a lesser extent, the Northeast. Through a partnership with Sebrae-MG and the support of the Municipality and the Federal Government, furniture makers aim to explore and expand the market for their products. Gleisson Oliveira Bueno, a member of the Municipal Government's office, is one of the coordinators organizing the sector. He affirms that furniture from Passos has already conquered the market and is recognized for its innovative use of reclaimed wood, which is considered environmentally friendly due to its recycling approach.

Given the different theoretical currents that study entrepreneurship, we can consider this discipline as multidisciplinary (Bruyat and Julien, 2000). However, these different perspectives do not always converge to generate a richer and consolidated view of entrepreneurship (Palma and Cunha, 2006). On the contrary, the different currents that study entrepreneurship tend to remain relatively closed, resulting in a mixture of theories and constructs (Sexton and Landström, 2000). In this sense, the main outcome is aimed at deepening the understanding of the entrepreneur's role in the supply chain. Establishing synergies between trust management of the entrepreneur and relationship in the supply chain, to contribute to a more sustainable development of both fields of study.

This research will provide empirical evidence on how trust management through interorganizational relationships affects the entrepreneurial profile in the

furniture sector of Minas Gerais in managing its supply chain. This is relevant because, although the general literature on entrepreneurship has assigned an important role to the effect of social capital and relationships in obtaining resources for the creation and growth of companies, few studies have empirically addressed their effects on corporate-level business behavior (Teng, 2007; Antončič and Prodan, 2008; Ripollés and Blesa, 2006).

#### Answer question 1

According to authors Ofélia and Teixeira (2011), organizations are primarily responsible for shaping the conduct of social actors. Organizations are central not only because they produce goods and services, but also because they generate patterns of behavior and reasoning that contribute to an entrepreneurship fostering sustainable development. Enterprises identify potential actors within the furniture sector's supply chain through a combination of research, networking, and analysis.

For enterprises looking to enter the furniture industry, a step-by-step process can help identify potential actors within the supply chain. This process often starts with comprehensive market research to understand the furniture sector's landscape, including major players, suppliers, manufacturers, distributors, and retailers. Industry directories, trade shows, and exhibitions can also provide valuable insights into potential actors' capabilities and offerings. Supplier audits and supply chain mapping help assess potential actors' suitability and interconnections. Online platforms, networking, and partnerships can also help discover potential actors globally. Ethical sourcing and sustainability considerations are also important factors to consider. Enterprises can issue RFPS or bids, utilize collaborative tools and software, and seek market intelligence firms' insights to identify potential actors. Due diligence, references, and recommendations help validate potential actors' capabilities before finalizing partnerships.

## Answer question 2

Leite (2000) highlights several personal qualities of an entrepreneur, including initiative, vision, courage, determination, decisiveness, respect for others, organizational and leadership skills. There is no universal profession that defines the entrepreneur's profile. Despite a variety of aspects presented in the literature concerning entrepreneurial characteristics, some easily recognizable traits include the need for recognition, security, self-fulfillment, innovation, persuasive ability, self-confidence, risk-taking disposition, and perseverance.

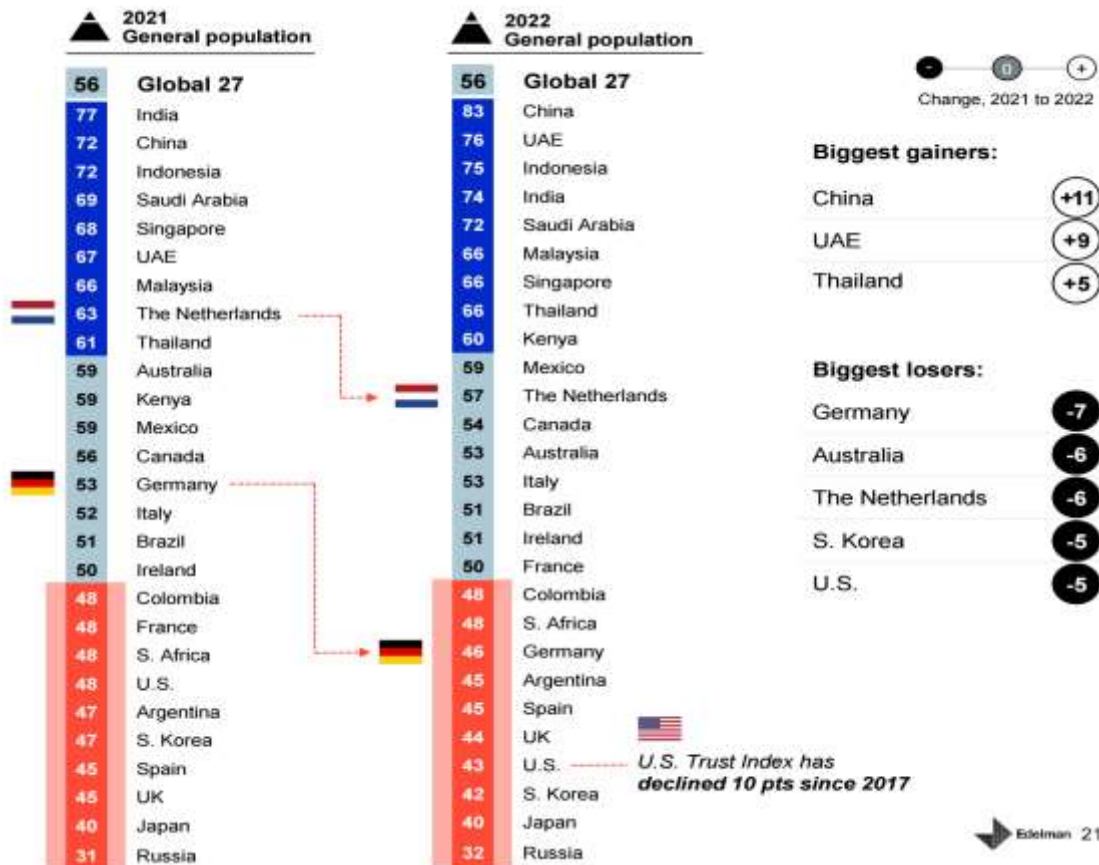
Entrepreneurs' behavior within the supply chain of the furniture sector can be influenced by a variety of variables, including personal qualities, industry dynamics, market conditions, and external factors. The traits and characteristics highlighted by Leite (2000) certainly play a role in shaping entrepreneurs' behavior, but there are additional variables specific to the supply chain context. Entrepreneurs' behavior within the furniture sector's supply chain can be influenced by various variables. Market demand and trends, competition, supplier relationships, risk tolerance, innovation and technology, sustainability and ethics, regulations and compliance, resource constraints, globalization, customer preferences, financial considerations, collaborative networks, geopolitical factors, and macroeconomic conditions can all shape supply chain decisions. Entrepreneurs often respond to changing consumer preferences and market trends and adjust their supply chain strategies accordingly.

The level of competition within the furniture sector can drive entrepreneurs to differentiate their products or find unique supply chain solutions. Strong relationships with suppliers built on trust and collaboration can lead to more effective supply chain management. Entrepreneurial behavior often involves risk-taking, and attitudes toward sustainability and ethical practices can impact supply chain decisions.

Compliance with regulations related to safety, quality standards, and environmental practices can also influence entrepreneurs' behavior. Availability of resources, access to capital, and economic factors such as inflation and currency exchange rates can also impact supply chain decisions.

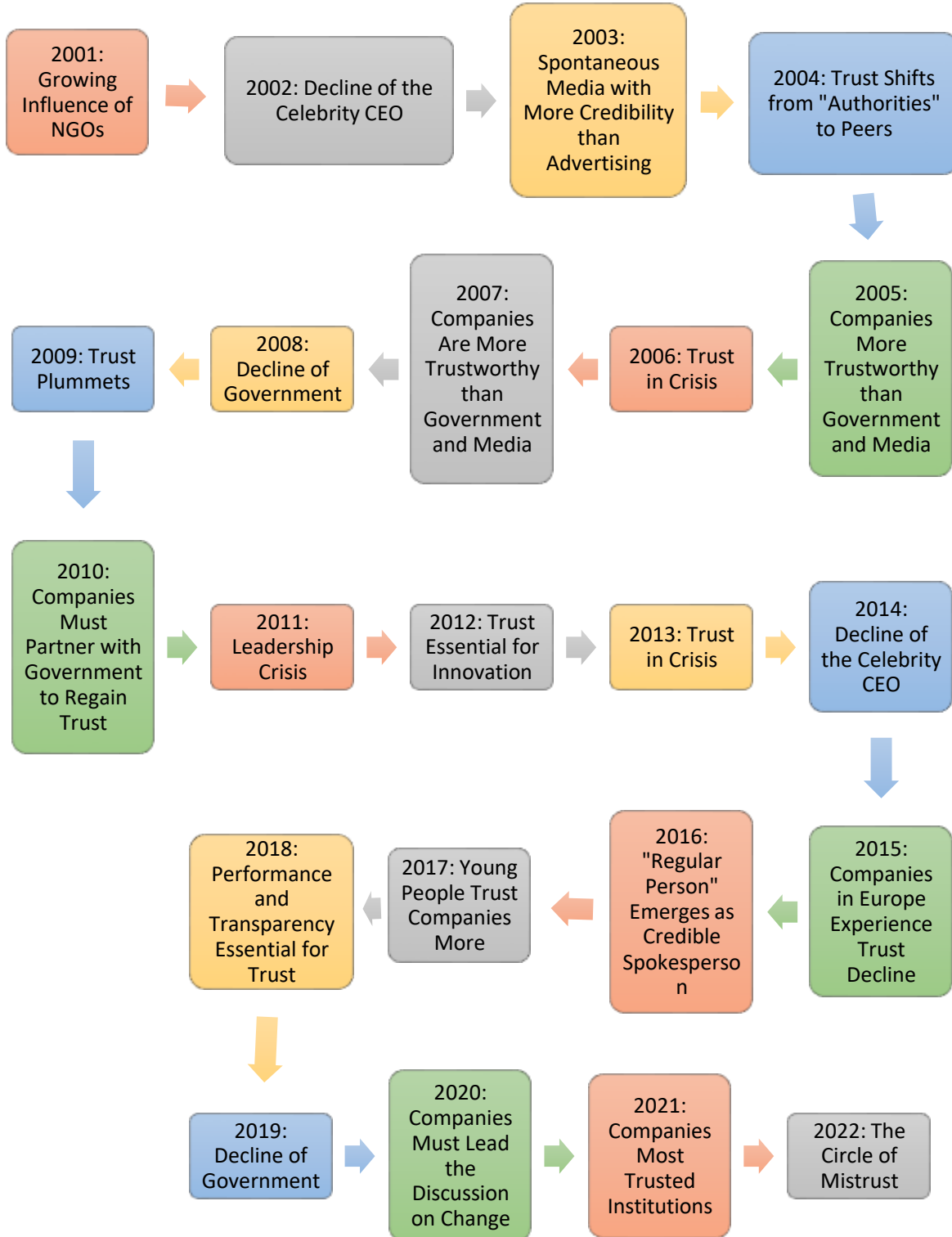
Answer question 3

According to the 2022 Edelman Trust Barometer (Graph 1), trust in businesses in Brazil was neutral between 2021 to 2022. This may be directly related to the performance levels across various industries. In another result, people are placing more trust in peers and industry experts (Graph 2). However, empirical findings by Klyver and Foley (2012) reveal the universality in the diversity of business relationship networks in two ways: it's practiced across all cultures and is being adopted into dominant cultures. Thus, this project focuses on establishing the relationship between these two categories.



Graph 1. Level of Trust in Industries and Businesses in Brazil: Trust in Industries

Source: Edelman Trust Barometer (2022)





## Graph 2. Trust in Brazil: evolution.

Source: Edelman Trust Barometer.

In the state of Minas Gerais, Brazil, laws, and regulations can significantly influence the creation and operation of new sustainable concept furniture businesses. The General Law of Micro and Small Businesses and subsequent amendments provide preferential treatment and simplified registration processes for small businesses and individual microentrepreneurs. The simplified conditions for formalizing businesses and obtaining a CNPJ can reduce barriers to entry for new entrepreneurs in the furniture sector. The distribution of individual microentrepreneurs across various Brazilian states, including Minas Gerais, indicates a decentralized effort in starting businesses. The furniture sector's prevalence of family-owned businesses and its high degree of differentiation align with the entrepreneurial nature of creating new sustainable concept furniture businesses. The legal framework's support for small businesses might contribute to a more collaborative and transparent supply chain ecosystem, where sustainable concept furniture businesses could build trust-based relationships with suppliers and partners.

Niche market opportunities given the coexistence of companies catering to various niches within the furniture sector, new businesses with innovative sustainable concepts could find opportunities to address specific segments of the market, potentially leading to competitive advantages.

The series of presented trends reflects a dynamic evolution in the perception of trust and credibility across various institutions over time. From the rise in the influence of NGOs to the emergence of credible spokespeople from the "common person," along with fluctuations in trust in government and the decline of the celebrity CEO figure, these trends highlight significant shifts in how individuals assess and place trust in different societal actors. The recurring patterns

of trust in companies and their call to lead discussions on change underscore a changing perceived role of businesses in society. However, the presence of moments of trust crisis, as well as the need to navigate a polarized world, underline ongoing challenges in constructing and maintaining trust in a constantly changing environment.

#### Answer question 4

According to Tomaél (2005), the furniture sector is globally recognized as a traditional industry, characterized by a prevalence of family-owned businesses, especially small-scale ones—excluding Germany, where medium and large-sized companies dominate. The sector also exhibits a high degree of differentiation, with a fragmented market allowing the coexistence of companies catering to various niches. These niches range from manufacturing furniture for different socioeconomic classes to serving diverse purposes. This diversity within the sector presents numerous potential entrepreneurs, rendering it a significant sector for the empirical research effort. The overarching objective set for the current research project is to assess the relationship between trust management within the entrepreneur's profile and the enhancement of performance in supply chain management relationships.

The establishment of the General Law of Micro and Small Businesses (Complementary Law No. 123/06) provided preferential treatment to small businesses to ensure fair competition in the market. Subsequently, Complementary Law No. 128, dated December 19, 2008, introduced the concept of the Individual Microentrepreneur. Starting from 2009, the conditions for formalizing businesses with annual revenues of up to R\$ 36,000.001 were significantly simplified. Via the internet, entrepreneurs can obtain their CNPJ (Brazilian National Register of Legal Entities) immediately after completing a quick registration process. While the distribution is concentrated in the Southeast region, there's also significant participation

from Northeastern and Southern states. The states with the highest number of individual microentrepreneurs are São Paulo (23.7%), Rio de Janeiro (12.4%), Minas Gerais (10.1%), Bahia (7.7%), and Rio Grande do Sul (5.6%).

### **Conclusion**

The furniture industry in Brazil has been a significant player in the country's economy for over 100 years, with large-scale production and innovative technologies driving sector growth. The introduction of curved plywood sheets and particleboard sheets has enabled the production of high-quality furniture and enhanced the sector's competitiveness. Additionally, the professionalization of the sector in the late 20th century has led to higher education courses in furniture production and participation in design and export programs, further improving product quality. With approximately 6.5 million employees and over R\$ 14 billion in sales, the sector is a vital contributor to the national economy. However, despite the presence of design and export programs, the sector's contribution to national exports is relatively low, representing only 0.3% of the country's total. The sector's low level of internationalization and lack of production diversification may limit its ability to adapt to changes in market demand, which could potentially hinder future growth.

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