

Review of Literatures on a comprehensive Analysis in Saudi-Wool Industry for the Future Fashion-Sector Opportunities

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Abstract: Wool is one of the natural resources that can play an important role in the fashion sector. Wool as a fabric is comfortable and has good factors to keep garments in shape. This paper aims at providing a comprehensive analysis in Saudi-Wool Industry for the Future Fashion-Sector Opportunities. Fashion is one of the world's most important industries. In fact, there are four types of wool fabric such as 100% wool or pure wool, virgin wool, recycled wool, wool blend and super wash. And each one has specific characteristic and advantage in term of quality and price. The advantage of the wool blend is very important to enhance fibres plus giving a unique feature to the fabrics. There are several common fibres of natural resources or man-made blended with wool like Viscose, Bamboo, Polyester, Linen and so on. The fashion industry plays a vital role in years ago and today becomes more powerful and influence over society through changing habits and lifestyle. Saudi Arabia is one of the fastest developing countries with total nominal GDP of \$718.472 billion. It has developed from the agricultural society to the modern infrastructure and economic power as regionally and globally. The young Saudi generation nowadays are interested in fashion trends. They tend to be knowledgeable and aware of fashion which gives permission for a lot of international Fashion brands (IFB) be in the country, because its markets are valuable and profitable to attract stakeholders to establish their own companies and make investments. This paper discusses the role of the fashion sector to contribute to move global economy, which is considering the world's seventh largest economy. Consequently, this approach may be useful to the fashion brands to obtain opportunity to establish their business in emerging markets.

Keywords: fashion sector, Saudi, wool industry, wool industry performance

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I. Introduction

One of the main concerns of any nation is how to utilise their natural resources, which is profitable, and has the great impact on its economy in many ways. The power of invest in the natural resources help to raise the country position globally in a specific field that selected. The best example according to the (Humphreys, 2007) Venezuela the Latin American economy has the most natural elements but unfortunately lives in poverty. In different view Tanzania's attempts to create a new idea to bring benefit to the country by using their natural resources such as cotton in the textile industry. Tanzanian Cotton Board (TCB) follows the new strategy to process the cotton through signing an agreement together with China to handle their cotton products and then supplied to regional factories. Also in Africa, there is a new process in clothing industry by using a source of sustainable raw materials that is considered as low-cost while cultivating crops. The professional process that Africans followed that of cotton-producing countries develops highly lucrative production hubs, which supports to cancel many of poverty. So, most of the investors and government realize that some countries with rich natural resources have excellent performance better than others in terms of resource, wealth management and long-term economic development. (Bennie, 2010)

(Kumar, 2016) wool industry was known in 1543 in U.S.A when 20 families migrated from England. These families used to mow and spin wool. In 1765, the wool industry has started flourishing in Europe when Marino sheep have taken prominent role and breed. Over and above, in the Middle East (ME) especially in Persia has a good reputation in the wool industry. Persia used the professional craftsmen who had well knowledge in the wool processing even in 16th century. Their products carry impressive charming design, especially in carpets. Surely, since that time and until now the Persia has reliable reputation in the wool industry.

Moreover, the sheep markets in (ME) especially in Kingdom of Saudi Arabia (KSA) are very rich compared to the neighbouring countries estimated about 5.2 million heads (Adam, 2015). For example, in the Rania district in Saudi the sheep approximately around 250000 heads. Likewise, the value Hafr Al-Batin of wool revenues amounts more than three million, about 14 million Rials (Al Roudhan, 2013). Some of the sources of wools from individuals they live in the desert district of Hafr Al-Batin or from sheep farmer's owners

(Faheed, 2009). According to the director of agriculture in the district of Hafr Al-Batin Dr Fahad M. Al Anzi, the number of livestock farmer's owner in the previous 15 years more than 1900, while cattle numbers exceed the barrier of one and half million head (Al Roudhan, 2013). This is why KSA wool markets are desirable from suppliers and traders from various countries, such as Pakistan, India, Britain and then followed by the other European countries (Shehhi, 2015).

On the other hand, according to the (Gaurilicikaite, 2014), the fashion industry plays a vital role in years ago and today becomes more powerful and influence over society through changing habits and lifestyle. Saudi Arabia is one of the fastest developing countries with total nominal GDP of \$718.472 billion. It has developed from the agricultural society to the modern infrastructure and economic power as regionally and globally. The young Saudi generation nowadays are interested in fashion trends. They tend to be knowledgeable and aware of fashion which gives permission for a lot of international Fashion brands (IFB) be in the country, because its markets are valuable and profitable to attract stakeholders to establish their own companies and make investments.

1.1 Problem Statement

This research for a comprehensive analysis based on the Saudi-wool industry is seen critical, as the number of wool factories are not increasing in the kingdom. Wool factory owners are facing impediments from specific elements that pull them backwards in this domain and never allow them advancing forward. Such as in Pakistan, although have a lot of raw materials but illiteracy to process and lack of modern methods to process raw wool not properly managed (Shabbir, 2016). Comparing to a positive situation in India, nowadays the woollen sector becomes more successful through having big brands names even in outside India (Kumar, 2016). Another practical case in Afghanistan, Marketing Opportunities established tanning and leather industry to raise the level of interest in their national economy. It would generate employment and economic wealth in the processing sector (Thomson, 2005). This has led to an analytic the international performance of wool sector based on future fashion industry. Spotlighting on this matter is serious to raise the country position and economy.

The second problem is that sheep wool in the Kingdom of Saudi is inactive (Inert) and wasted (Alhbashan, 2010). The woollen industry in India for instance, after independence from Britain, was in sub-standard condition but Indian government motivated and continued developing and organizing the wool industry since British colony left. They put effort to increase production of woollen yarn, woollen garment to raise the country economy. In Saudi the owners of wool factories still have not been gaining sufficient support and care from the government that consisting of the Ministry of Agriculture, Industry and Commerce, to encourage establish the good environment to develop the wool sector. (Kumar, 2016)

As well as, lack of awareness is another problem from stakeholders (Alhbashan, 2010). Misunderstanding plays a big role through not realisation the beneficial of wool industry and projects related with wool to utilize in various industries. The developed countries could be taking the best example to lead forward like Australia is the largest producer of clothes made of wool and it supplies approximately two-thirds of the wool in the world market. The awareness to know of the value of the wool industry in an economy and at the same time observing the new technology that follows from advanced countries which are support to perceiving stakeholders attention. Definitely, help to build new factories and training of national manpower to employ them in these factories, and it supports contribute to reducing the level of unemployment in Saudi Arabia. (Shabbir, 2016)

1.3 Research Objective

The main objective of this study is to analyse the wool sector for future opportunities in fashion industry in Saudi Arabia. Since people are increasingly looking for fashion and new style in the famous International brands. Hence, encourage government and investors to help grow the wool markets. To achieve this aim, the study was conducted in the woollen industry, and the most important, countries that try to increase growth and development in this domain. Furthermore, this will be the first study on the Saudi wool sector, which will provide an empirical guide on the importance of benefiting from animal wealth to increase the income of the state and raise its status economy when the implementation of this work on the ground.

II. Literature Review

2.1 Analysis of the Wool Sector Performance

According to (IDRC, 2010), Saudi Arabia has the lowest total early-stage entrepreneurial activity rate of all the factor-driven economies in its study. However, research into this issue has produced mainly general overviews on the major challenges facing the advancement of Saudi Arabia towards industrialisation and the diversification of its economy with a theoretical perspective. Instead, research needs to document different experiences in the wool industry, especially those that have been marginalised. Doing so, the author asserts,

provides academics with an opportunity to demonstrate to the public the worth of their studies of economic diversity and value to help develop alternative strategies.

Islam and Khan, (2013); Raichurkar, (2015); and Shabbir, (2016) found the importance of the textile industry in the economy of India, Bangladesh and Pakistan are quite high according to the wool analysis performance in developing countries. Authors highlight the efforts from developing countries in wool sector performance is keeping to grow even if the circumstances in some event not very well. This approach may be suitable for increasing effective development in a diverse in the wool industry. (Islam and Khan, 2013) examine the woollen performance-manufacturing sector in Bangladesh one of the impoverished nation's biggest industries that earned more than \$18 billion in the year until the middle of 2012. The authors present the strength of wool produces in Bangladesh, which helped lift the country's poor economy in several years. While enhancing its production capabilities and taking an important position in the textile industry both locally and globally.

(Raichurkar, 2015) considers the government in India aware of the interest of analyse the industry to invest in textile industry to increasing growth of a country more than 17% per year. Raichurkar found that the India textile sector is one of the mainstays of the national economy. Which is by 2021 is expected to increase over than 140\$ billion. This is why start looking for challenges for rapid growth and put analyses to study this situation deeply, to at least could be in a competitive position with other competitiveness countries such as China. By enhancing purchasing new machinery or improve the existing machinery to introduce new method can be very valid to increasing the research and development (R & D) related to this majors. This viewpoint is strengthened by the fact that author proves the importance of these industrial flows in different regions in India, via its strong production rule of a wide range of fibres either from natural or synthetic sources made the country a sourcing centre.

Table 2.1: Import & Export Categories of India Wool Industry

Import						
Wool Categories	2007	2008	2009	2010	2011	2012
Greasy	35567	29915	33220	35612	39329	46754
Degreased	57515	35838	35040	39098	39184	27521
Hair waste	2465	1321	1545	1763	1415	1377
Export						
Greasy	19	47	110	69	162	249
Degreased	39	48	513	688	390	94
Hair waste	58	273	486	677	1991	1800

(Source: Special Report, 2016)

(Kumar, 2016) believes that government of India aware serious encourage to achieved right planning to put strategies for the textile industry, especially for the wool sector in a good manner to develop the industry. The article for that purpose assisted in planning to place eleven plans to for each five years of achievement Table 2.1 shows in details the five-year plan. All the previous five-year plans demonstrate the government efforts to develop the industry. In addition, in July 2005 was approved on Scheme of Integrated Textile Park (SITP) to set up new textile parks, which will be of international standards. This project will facilitate three main elements as investment, production and employment. Scheme for Netted Textile Park (SNTP) was attracting foreign direct investment by providing financial motivation and Technology.

Table 2.2: Five-year plan concept of improving and development the quality of sheep and wool Industry

Five-Year Plan	Objectives
First Year	<ul style="list-style-type: none"> How to increase the production, what is the project expenses, and planning to develop the industry.
Second Year	<ul style="list-style-type: none"> Proposed expenses to set up to development sheep and wool industry in the village and cottage.
Third Year	<ul style="list-style-type: none"> The number of sheep increased from 15 to 17. Improved the wool quality and quantity. Achieved plan to the wool production of 90 million Ibs.
Fourth Year	<ul style="list-style-type: none"> To increase the ability to store wool. Improve the quality of wool. Focusing more on the wool grading, shearing and marketing.
Fifth Year	<ul style="list-style-type: none"> Paid more Attention to sheep and wool industry. For improvement quality of wool, imported sheep were interbred with domestic.
	<ul style="list-style-type: none"> 1979-1980 was about wool production and how to increase

Sixth Year	<p>the speed of sheep reproduction.</p> <ul style="list-style-type: none"> • Focus on the proper sheep wool, which was useful to improve the carpet quality.
Seventh Year	<ul style="list-style-type: none"> • Spent 770 million on modernization of wool industry, development and further expansion. • The role of export promotion council (EPC) has to develop the woollen sector through financial supporting. • The government put laws to manage wool market in India and organise.
Eight Year	<ul style="list-style-type: none"> • Government attempted to increase the production of woollen fibre. • The good visions made the central government touch the result when the production of wool increased from 38.8 million Kilogrammes since 1939-1992 to 44.4 million Kilogrammes in 1996-1997.
Ninth Year	<ul style="list-style-type: none"> • Using Angora wool to develop wool.
Tenth Year	<ul style="list-style-type: none"> • Plan to develop of Pashmina wool. • Handmade carpet listed the highest outgrowth. • The wool production did not achieve good results due to the fluctuations wool prices and a lot of negative phenomena in that period in West.
Eleventh Year	<ul style="list-style-type: none"> • The plan is operating at present from 2007 to 2012.

In a similar vein, (Indian Wool and Woollen Industry Report, 2015) shows in years 2013-2014 wool and woollen exports stood at US\$ 113.24 million from Main Markets and Export Destinations. However, research in to this issue has produced the US and the Germany is the major importers of Indian wool and wool-blended products. (Kashif and Shoeb, 2016) use a Campaign of India initiative that aims to encourage multinational as well as national companies to manufacture their products in India. Which is focus on job creation and skill enhancement in different fields of the economy including Textile and Garments sector. Through this campaign, after initiation of the approach in 2015, India becomes the superior destination globally for foreign direct investment surpassing the USA as well as China.

(Kashif and Shoeb, 2016) argue that some countries analyse woollen industry in wide vision that maybe not help to understand the way to raise the industry in particular. The authors believe to improve the woollen industry in Developing Countries should realise the four major policies like facilitate investment, foster Innovation, protect intellectual property and national manufacturing. Similarly, different countries use this approach but the not incorrect path to move forward as Pakistan and Bangladesh.

Another stream of literature describes some governments is not seriously concerned about the attention to the wool industry. For example, (Shabbir, 2016) in Pakistan the woollen industry is mainly done by the private wool merchants, traders and then from intermediaries to consumers. Shabbir found the SWOT analysis in wool industry in Pakistan is more critical and effective implementation of developing the wool industry. Shabbir also found the weakness and threats are more effects comparing to the strength and opportunities. The main problem is a lack of awareness, traditional management practices, lack of education and poor economic conditions of woolgrowers. Shabbir highlights the lack of motivation for adopting modern methods of sheep management, machine shearing of sheep, washing and grading of raw wool etc.

(Islam and Khan, 2013) the philosophy goes to the developing countries like Bangladesh. The authors present of a model of not impressive facing Bangladesh textile industry such as low productivity due to old textile pieces of machinery that never help to stand in competition as well the lack of investment due external as well as internal problems that restrict the new investment. The article present the performance analysis of the textile sector in Bangladesh according to the Minister on Textile Abdul Latif Siddique explained that some major elements contributing to the more challenges in textile and it smooth export such as high cost of doing business, power shortage; poor industrial infrastructure and slow external demand, considered the main challenges the country facing.

Keeping in view the above studies, the analysis has been developed for use in this research project: Wool sector in Saudi Arabia is an approach to manage and continuously improve all the processes of a development by involving everyone to achieve awareness through stakeholders (both government and investors) to promote the country economy.

2.2 Wool sector History

The date of wool industry has been starting since a long time from different civilizations that always played an important part to the economic. The frame of conflicts in the Ancient Near East (ANE) history never stopped easily but fortunately during the struggles realized the position of wool and how is interest to expand

the landscape where the rich resources of domestic animals like sheep and their wools have the advantage to move the economy forward (Breniquet, nd). The information from aquastat survey was published by (FAO water reports, 2008) in irrigation in the Middle East region. In that work, illustrated the cultivable areas in Kingdom of Saudi Arabia, which is almost 25% of the total area. It a suitable environment to expanding and the government could use to breeding animals like a sheep to produce wool and export it to outside.

In the context of the Aegean Economy literature, (Nosch· 2014) focused on the Bronze Age Aegean (BAA) especially in Knossos (KN) on Crete, the wool sector was the largest sector of the palace economy and affect significantly on producing in large quantities. The organization to manage the wool sector was very accurate for instance, breeding 100,000 sheep for wool production as well individuals divided to do each mission related to textile production.(Al-Sultan, 2012) Inversely, in Saudi, the largest sector affects the state economy is the petroleum. The continued dependence on natural resources as oil since the past decades has an impact on today's Saudi industry. The standpoint from the National Plan for Science Technology and Innovation (NPSTI 2010-2025) the main challenge problems facing an improvement of KSA towards industrialization and diversification of its economy. (McKinsey, 2015) with the changing in the global power market, the Kingdom cannot longer grow based on oil revenue and public expense. The current economic indicator in labour is 41% and productivity sector in Saudi growth only 0.8% from 2003 to 2013 helped to lag as many as emerging economies. (Breniquet, nd) In Mesopotamia Culture (MC) for example, was creating a new methodology to develop both sectors social and economy that worked very professionalism to grow wool production and other useful instruments in the woollen industry. So to avoid economic issues, kingdom needs to understand the possibilities of the non-petroleum economy.

(Munro, 2000) in addition, some archives showed the Interest from owning cattle to raise the level of income. The wool industry was flourishing in the twelfth, thirteen, and early fourteenth centuries. The export does not stop in particular regions but included to the Mediterranean with using different kinds of fabrics from cheap to expensive quality that made from northern France and the close Low Countries. In point of fact, the wool revolution never stopped from previous civilizations that mentioned before. But continued from European to the Byzantine and especially Muslim Markets of Asia Minor to obtain a high level of success that is a requirement to supports to raise a wealth of state.

(Ammidown, 1888) on the other hand, in 1884-wool industry witnessed a marked change in several countries, including the United State has increased 300 million and stock 80 percent. The Australian clip during 1884, with own the richest features of natural an environment with cheap workers, has increased from 50 million to 400 and 50 million pounds. In 1870 the production of wool was increased but not same in the year 1850 materially benefit in all of Europe. Actually, between the years 1870 to 1880 United State got increased consumption of wool around 70 per cent. Wool tariff law is the best step when United State put during 1867, to maintain and secure the industry from decline. The advantage to having the tariff law to know the risk, comparing to other countries with the absence of appropriate protection had lost the progress; industry declined, and could not be able to stand again. The US government divided the industry into three sectors clothing wool, combing wool, and carpet wool that including duties for each one. The protection has been fundamental and has been continued a long time enough to act out all its effects.

(Merrett and Ville, 2015) At mid-nineteenth, the woollen textile industry is one of the major expansions of world production of raw wool and the competition plays a role between efficient countries that continue to progress to produce wool. The International performance of wool sector has different ratio from each producer country since First World War. In effect, four countries have power and control more than 90 percent of world production of wool textile since the eve of Great War UK, France, Germany, and the U.S.A else Japan after WWI was growing as the serious competitor. In the 1918 and 1939 since the two wars, the production of woollen textile did not receive any fast growth in Europe. The situation became worse growth many dangerous elements that threaten producer countries as the deficit in demographics and rising unemployment followed by the major depression, and increasing competition from cheaper cotton and artificial fibers. Between 1840 and 1909 the quantities of sheep dropped from France, Germany, Spain and Britain from 90 million to 72 million. Some rules changed like tariff law cancelled on wool imports in UK, France, and Germany except the United States there is no change in any law procedures.

According to (Yule,2016) the Australian wool producer had almost a great position in the world. Which is exported to supply basic human needs. But during the early of war in 1915 had some obstruction to move forward from Britain government. After lengthy conversations in 1916, the British government agreed to purchase Australia's total wool production for the remainder of the war at a price 55% above the prewar rate. During the years the performance of wool industry goes up and down. In 1939 and 1944 the five top countries that produce wool Australia, New Zealand, South Africa, Argentina and Uruguay were on awareness more to increase their collective sheep quantities from 5 million to 239 million over the same year exactly. Of course, with having a good natural environment helped to develop the industry and supplied over 60% of the world's apparel wool. The performance of Australian wool proved the professional method to be a leader in wool

production with taking a careful step to managing the weight and quality of its fleece through the beginning of 20th century. Moreover, the livestock husbandry caring in Australia helped to own the superior producer of merino wool, considering for nearly one-half of the world’s output.

Table 2.3: The changing growth of Australian wool performance

Australian Wool History	Years
Increasing wool in a local market in the two cities Melbourne and Sydney	1880
The sheep quantities grow rapidly to reach 13 million	Mid Century
Wool production began its changeable growth reaching 19 million km	1850
Wool production increased to reach 210 million	1890
Wool production growing to reach 350 million	WW1
Again wool production expansion to reach 446 million	1939
The first wool exports from Australia to Britain	1807-1808
Wools increasing by an annual of per cent	1830
Wool accounted for more than 90 per cent of exports	1840
The wool production accounted for a third to a half of the total. Turn Australia became the largest wool producer and exporter in the world	1860 up to Second WW

2.3 Fashion sector in Saudi Arabia opportunities

(McKinsey and Company, 2017) Fashion is one of the world’s most important industries. The report discusses the role of the fashion sector to contribute to move global economy, which is considering the world’s seventh largest economy. Consequently, this approach may be useful to the fashion brands to obtain opportunity to establish their business in emerging markets. Besides, (Terry and Avril, 2005; and Elaine, 2008) the term of fashion is used to demonstrate those who wanted to be more in style and good looking no matter how small that group is. The authors agree that fashion defined as the art which holds a message has allowed to everyone to express their beliefs and cultures with other people since millennia through their clothes style. This method helps to penetration new markets and brings opportunity to the fashion industry to enter a new region easily anywhere.

According to the (Sector Analysis, 2012) Saudi Arabia ‘s retail market is the largest among the Gulf States and is the 2nd largest in the Mena region. The article illustrated how the Saudi market is growing and increasing in demand due the young population. Also found that clothing and shoes is the senior retail sales industry and was worth \$9,7billion in year 2011. The article highlights the Saudi consumers generally have a high brand-consciousness, which supports the fashion market to going forward.

(Al Tawil, 2010) analyses that both domestic production and factories are few to produce varieties of fashion clothing categories in Saudi. Al Tawil found that the changing habits and lifestyle play role between young generations in Saudis to demand for Western fashion clothing. Al Tawil found also that media, social media and women joining the labour force now days contribute to an improving and changing life style and dress codes. Al Tawil focuses on the Saudi market has become trendy and head for to require the latest style and designs.

Mannix and Torres, (2014) agree that the development international marketing lies in 'Think Global and Act Local. The author present a mechanism to support companies that interested to produce their products across borders. The paper shows Saudi is emerging fashion markets in the (ME) stands to be one of the fastest-growing markets as it embodies a destination for fashion retailers and has posted 15% growth in 2010, with expected further growth in the future.

McKinsey and Company, (2017) suggests the retail and wholesale domain could be ripe for further growth and modify and could become a serious driver of kingdom private-sector growth. The reports showed that the government could help grow the sector by encouraging and improving the business environment to remove current barriers. While this direction will achieve the rapid growth through a capacity and greater productivity over the retail and wholesale trade.

Fry, 2001; and Jonse, (2003) investigate that Arabic countries most important and thrilling zone to the fashion due economy. The authors found three main factors can create the region more exciting such as characterized by young generations compared to other developed economies, and a higher level of living and disposable revenue than most non-western economies. According to the (Jones,2003) believes that the Middle East has become an attractive fashion marketplace for global brand companies such EU and US. (Marinov,

2007; and Busnaina et al. 2010) penetrating Arab markets is not actually easy. However, the process into this issue consider to achieve and understand consumers satisfaction. Also high demanding to buying Western Style in Saudi due to the explosion of fashion in the last 6 years. Additionally, concentrate on the value of cultural and contextual factors play a significant role in shaping their buyers behavioral aspects.

According to (Jeddah Chamber, 2016) the population in Saudi is expected to increase more than 37 million over the next 10 years. Jeddah Chamber approves that affluent growth population has increased the demand for national and international retailers in the Saudi. This process may suitable to making the fashion sector more strong and influential to the consumer. (Al Tawil, 2010) agree that International brands are doing very well in Saudi markets. Al Tawil found that price, word of mouth and branching have helped many of International brands franchises to gain and expand their share of the Saudi market.

2.4 History of Fashion Industry

According to (Laver and Probert, 1982) fashion industry has been going through several stages from different civilizations started with Egyptians until the growth of new costume in France. The author explains the types of factors and circumstances that have occurred in the fashion sector over the past years and discuss how the shape of designs shifts in the several stages. For example,

(Steel, 1988) analyses people lifestyle through wearing clothes in different period of time. Steel found that the fashion style taste change among people since Rome Empire 476 A.D. to Duke Pepin time 751. Steel focus on the dress transformation every century, which assist people in finding their desires.

Figure1.2: The history of fashion features (Steele, 1988)



In fact, (Steel, 1988) describes the transference in garments details such as the tightly corseted and hourglass silhouette. The author tries to explain the woman style of 1900 to the modern and stylish woman of the 1990s, which has supported to get a rapidity of evolution unparalleled in any previous era. Also found fashion is a continual revolution especially when the nineteenth century gave life to the twentieth. Nowadays Fashion has become well-known major than before while most of the women are fashionable. Through this new path can see a lot of Fashion TV channels, magazines, fashion shows, models, designers and bloggers. Also different fields such as fashion business, fashion design, fashion merchandising, fashion graphic and so on.

On the other hand (Sue, 2009) the politics, religion, leisure, democracy, success, and age change impact highly to change the fashion industry. Sue Found that the fashion change from different factors to bring new style to the market. One of these factors such as the mass media nowadays play role through spreads fashion news around the world in hours, sometimes second. Sue Also found these days most of television channels coverage of events around the world that enables to see not only what people are doing but also what they are wearing. The positive significant of new fashion can be used to help to develop and increase the products demand.

According to the McKinsey and Company, (2017) one of the challenges fashion companies face is e-commerce sales. The report demonstrated the new fashion plays a role to change the traditional fashion routine through buying from store to digital platforms. While In 2016 new virtual reality (VR) headsets entered the fashion world. This new digital tool maybe changes the basic criteria of fashion sales in the future. For instance,

some fashion brands used the VR headsets in the New York Fashion shows like collections from Prabal Gurung, Rebecca Minkoff, and Erin Fetherston at the same time some brands as Dior and Tommy Hilfiger are using VR in the stores to create a virtual reality of catwalk shows.

(McKinsey and Company, 2017) consumer lifestyles also continued to evolve, and this year saw a marked rise in fashion companies responding to these lifestyles with tailored offers and collections. In this report analyzed the growing of consumer lifestyles in 2016 that divided the industry into four categories sportswear, plus size, genderless, and modest wear. In fact, the new fashion taste and the variety in the society created new strategy to must followed from fashion brands for example, Zara Launched their first fashion collection called “genderless” in March 2017. Mckinsey and Company also found that the Uniqlo and Dolce & Gabbana start to offering in their marketplace new designs for Muslim consumers. Modest wear in Middle East and East Africa is consider being new fashion growing so fast in the market and is estimated to be worth \$327 billion by 2020.



Dolce & Gabbana Abaya Line 2016
Source: (Courtesy 2016)

In addition, Jeddah Chamber, (2016) argued that Saudi Arabia had been one of the top five an oil-based economy producers in the world. The report explains the powerful of petroleum sector that is accounted for 80 percent of the budget revenue, while Saudi government too controls major economic activities. Further, in the mid-2014 the budget revenue decline since that time the government encouraging the growth of the non-oil and private sectors. Therefore, the change of focus from the oil to non-oil sectors is giving a positive result for the Saudi Arabian economy.

(Marinov, 2007) the population of Saudi citizens expected will be over 26 million, including more than 4 million residents belong to different countries around the world. Marinov showed that the country follows Islamic law at the same time contain as many different nationalities from South Asia, US, Europe, and other parts of Asia. Marinov also found that the concept of wearing clothes especially for women is related to Islamic law, which is more about modest style. Saudi Arabia as the Islamic country respected all people and their religion without any racism. In the same view

The economy of the Saudi Arabia according to the (Marinov, 2007) in the past decades Saudi was poorest country relied on agriculture and trade. The article explained the people in Saudi some of them is nomadic which bred livestock in the desert and craftsmen who are living in permanent settlement areas, worked to meet local demands and needs. Moreover, the Eastern province is famous to grow dates and other crops comparing to the Western province (Hijaz) is famous for agriculture, long-distance caravan trade, and providing services to pilgrims to the Mecca and Medina. When the Hejaz Railway appeared, the European colonial interests created more proper situations for the improvement of trade and bolstered the prosperity of merchant horde in Jeddah and Mecca. As well, the oil industry enhanced to encouraged business growth in the Kingdom of Saudi Arabia. Since the discovery of oil in 1938 in the Eastern region led to a unified economy whose growth is promoted by the United State and Europe that need a cheap and reliable source of oil after Second World War.

However, (Al-Obaidi, 1999) during the years the oil revenue in Saudi continued to increase until the government set up to improve the infrastructure of the country and to implement a strategy for diversification of the local income, supporting also the non-oil industries and agriculture.

Table 2.4: Five-years Development Plan in Kingdom of Saudi Arabia between (1970-1995)

Specific Plan Objectives Focus on	
1-	Build an infrastructure of roads, ports and airports.
2-	Decreasing dependence on crude oil while developing the industrial and agricultural sectors.
3-	The development o f human resources to raise the national economy.
4-	Encourage the national economy to be more dependent on private sector.

Table 2.5: Sixth Development Plan in Kingdom of Saudi Arabia between (1996-2000)

Specific Plan Objectives Focus on	
1-	To rationalize government expenditure and make the national economy more dependent on private sector activities, through: <ul style="list-style-type: none"> • To raise the level of production and administrative capacity and to maintain the services and required standards even if the government expenditure is low. • Developing special offers for private companies to encouraging investment in capital within the Kingdom of Saudi Arabia. • Supporting some government projects from private Saudi budget. • To privatizing some government business-oriented activities.
2-	Develop strategies to address all obstacles to maintaining development in various areas, including focusing on education and training.

(Al-Obaidi, 1999) the role of non-oil products considered being very important issues to develop the Saudi economy. Seeking and diversifying of other sources is necessary for local income by reducing dependence on oil sources only. Plus, will make some initial changes in terms of incentives and create important policies to attract investors, to form a qualitative leap to improve the country in terms of developing the industrial and agricultural side and raising the level of exports. For example, Saudi Arabia's agriculture sector has the potential to finance the country's food needs and reduce foreign imports. While many Saudis have experience in agriculture. The government attempted to establish agriculturally services and encouraged private investment in agriculture projects by providing loans through the Saudi Arabian Agricultural Bank (SAAB).

In addition, (Al-Obaidi, 1999) the industrial sector has a major role to play in the growth and diversification of the economy. Therefore, government tries to develop the industrial sector through putting many incentive efforts in order to attract investors. To increase the knowledge in industrial sector the government established financial assistance for industrial projects through the Saudi Industrial Development. These loans have made an important contribution towards the establishment o f several industrial projects such as building materials, cement, foodstuffs, minerals, chemicals and other essential products for Saudi citizens, besides the export of surplus products.

2.5 Relationship between stakeholder’s awareness and industry performance in the KSA

(Ferenc, Varmus and Vodak, 2017) stakeholders are the prime part of the business in each scope. It is possible to include, for example, owners, investors, employees, customers, suppliers and secondary public, or government. (Boonstra, 2009) defines Stakeholders are individuals or groups that affect or are affected by the organisation's strategy. The author found that the individual or group of stakeholders would have different expectations, attitudes, and levels of interest for developing the work to the best. This process will undoubtedly achieve growth and progress while releasing the importance of investment and investors to the success of any joint venture.

In general, the Saudi government understand the importance of stakeholders like investors as a major source of knowledge and technological innovation. The Saudi government is keen to give priority to investors restructuring in the development of the administrative and technological aspect while motivating them to invest and provide support to the local market. Indeed, investment has a very big role in the manufacturing phase, which will greatly reduce dependence on oil, which is the country's main supplier. Further, the main role of the

foreign investments contributing to moving the Saudi market forwards and support labour market from unemployment and the development of companies. Recently there is full awareness by investors so the country has lately seen a lot of foreign investment. This, of course, has produced significant growth in local business and joint ventures. The literature indicates many of good rules in the success of any efforts to encourage stakeholders; some of the significant matters have been identified and will be discussed further in the following sub-sections (Marinov, 2007).

2.6 Raising stakeholder awareness opportunities in Saudi

(Marinov, 2007) the Saudi Arabia has made efforts to encourage foreign and local investment by adopting liberal import and export conditions. The author found that there is a good list of laws that Saudi presents to the investors such as no limitations on the quantity of imported goods and there is no tariff barriers or foreign exchange controls. Only the restrictions for products non-halal according to sharia law such as foods, drinks, pork products and so on. The author highlights the importance of consumer behaviour in Saudi Arabia, which is considered by far the largest consumer market in the region.

Moreover, (Marinov, 2007) demonstrates the investment laws of 2000 that is allowed to investors to invest in the Saudi in smooth. The report showed that the government allow full foreign ownership of assets, with corporate taxes fixed at 30%. As well full foreign ownership is encouraged by investment incentives such as reduced utility rates and customs duty exemptions on capital goods and raw materials. This path opened to Saudi Arabia's too attracted foreign investment since the 1960s due stable economic and political.

(McKinsey and Company, 2017) Saudi Arabia possesses non-oil riches, making it a lucrative deal for investors. The report explained that the country has plenty of natural sources, archaeological sites, retail and tourist places that could become domestic and international tourist and business destinations. Also has large local consumer markets, providing an opportunity to enable a productive manufacturing sector. The potential for a resurgent non-oil private sector in Saudi Arabia almost happens but it needs a plan and a practical study to find positive solutions to apply.

Yet it is wise to build good relationships with stakeholders because these common relations are vital to successful business. According to the (Al Surfand Mostafa, 2017) Saudi Arabia has implemented an integrated program that includes Vision 2030, a program aimed to raise the economic situation and find solutions to other non-oil sources. Through this point, Saudi cited some ambitions for vision 2030 will support to get opportunities from stakeholders include;



(Al-Obaidi, 1999) focuses on the government backing the policy of diversifying the sources of local income to non-oil products export sector contrasted with the crude oil export sector. The author tried to present the variation in the revenues of Saudi non-oil product exports when government support the idea according to the kind of industry and years of export during 1984-1994. The author as well showed the positive side that the experience in exporting left an important imprint, which will make the country from industrially developed countries. However, government support is important because it is considered one of the stakeholders, by supporting the industry can thrive and gain position both domestically and globally. It is very important to know how to use non-oil natural resources in the appropriate way and to develop investment plans for the benefit of the state and revitalize its economy.

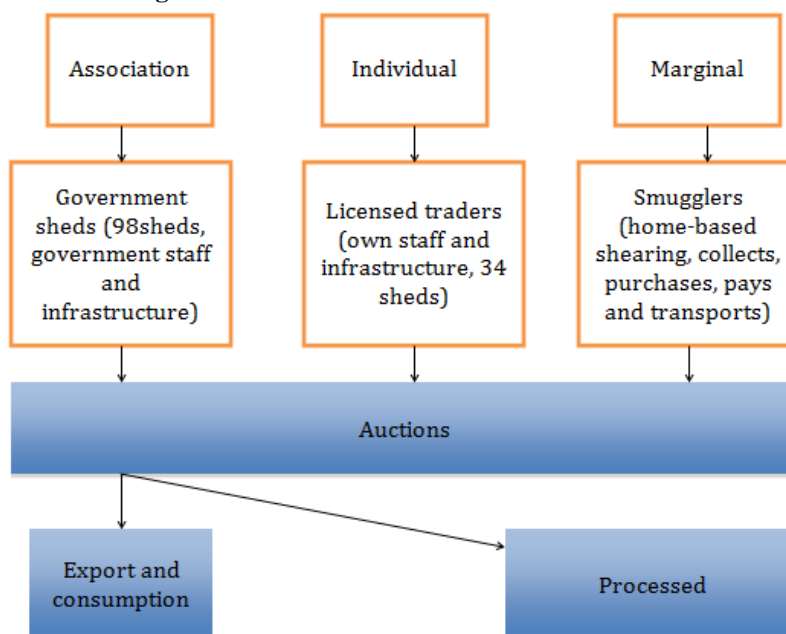
Table 2.6: The Development of KSA Non-Oil Exports (Al-Obaidi, 1999)

Year 1984-1994	84-85	85-86	86-87	87-88	88-89	89-90	90-91	91-92	92-93	93-94
Engineering and Metal	100.04	195.4	321.8	259.4	416.6	964.1	754.8	587.6	883	1096
Chemical and Plastic	120	173.8	247.2	338.8	985.1	683.8	434.8	875.2	530	1046
Food stuff and Drinks	107.6	121.2	91.2	99.3	236.1	251	368.1	1029.1	706	1014
Spinning and Textile plus Leather	13.1	49.5	79.2	113.8	130.9	115.6	218.1	26.7	231	295
Paper and by Products	4.7	7	16.4	103.7	241.1	251.2	298.1	193.4	311	138
Other Miscellaneous	23	60	51	135.5	82	99.6	836.7	337.6	858	992
Total value (Revenue)	368.8	606.9	806.8	1050.5	2091.8	2365.3	2910.6	3049.6	3519	4581
SABIC exports	816.4	2380.4	4648.3	5839.3	9170.7	8563	8129	7512.1	6774	6500
Total	1185.2	2987.3	5455.1	5889.8	11262.5	10928.3	11039.6	610561.7	1029.3	11081

2.7 Relationship between Stakeholders awareness and Industry Performance

(Mokhethi, 2015) the wool industry performance in Lesotho contributed the economy of the country. Mokhethi analysed the wool and mohair sector in Lesotho and recognised the role of stakeholders as government, individual farmers, private traders and marginal groups create value to the industry. Although, the wool industry faces the challenge of disease, lack of feeding and low awareness in sheep husbandry. Except that the wool and mohair industry performance is the most profitable and most wool is exported to China. The output has increased over the past decade, at an average 7.2% per year for wool.

Figure1.5: Lesotho wool and mohair value chain



Source: Tregurtha (undated)

Towards the half of the 20th century, Turkey was seeking carefully to increase national income by imposing investment activities in the industrial sector after the industrial revolution and to thought of expand to increase industrial foreign trade. The focus points in the article that Turkey government is aware to a important of livestock farming investment to the economy functions such as rising exportation, providing raw materials for the industry, obtaining a consistent development through a balanced development of regions and sectors, preventing disguised unemployment in rural areas and migration, creating new employment opportunities in industrial and services sectors, and basing financing of development on its own resources. Also, livestock farming provides basic materials for various industrial branches such as meat, milk, egg, textile, wool and

leather, supports in establishment and development of sub-industrial branches such as feed, medicine and equipment. Consequently, nowadays Turkey as a country contributes to the exportation and takes a strong position in foreign markets. (Durmus and Ozcalik, 2015)

III. Conclusion

In conclusion, the wool industry is an opener for future fashion opportunities not only to Saudi Arabia but also to the whole world. Wool is very crucial for any fashion designer. Wool has become synonymous with the high fashion circuit and its certainly found favour with the industry's top design fashion's emerging set alike. It comes after nearly forty long years of being destroyed by the trend for synthetic fibres. Wool is a sustainable, renewable and eco-friendly fabric, and spun wool has become the coveted textile of choice for fashion designers around the world. In addition, wool industry performance contributes positively to the economy of the country.

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