

**TEXTILE AND APPAREL SUPPLY CHAIN: STRUCTURE, COMPLEXITY, AND
GLOBAL TRANSFORMATION TRENDS**

**CADEIA DE SUPRIMENTOS TÊXTIL E DE CONFECÇÕES ESTRUTURA
COMPLEXIDADE E TENDÊNCIAS DE TRANSFORMAÇÃO GLOBAL**

**CADENA DE SUMINISTRO TEXTIL Y DE CONFECCIONES: ESTRUCTURA,
COMPLEJIDAD Y TENDENCIAS DE TRANSFORMACIÓN GLOBAL**

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ABSTRACT

The textile and apparel supply chain occupies a strategic position in the global and Brazilian economy, being recognized for its productive relevance and value-creation capacity. However, it faces challenges related to its high complexity, transformations in international trade, and increasing pressure for sustainable and digital practices. This article aims to structure and characterize the main links that make up the textile and apparel supply chain, identifying their interactions, specificities, and implications for strategic management. Methodologically, a systematic literature review was conducted, based on articles indexed in the Scopus and Web of Science databases, complemented by bibliometric analysis to map the main academic contributions on the topic. The results highlight the predominance of buyer-driven structures, the growing importance of outsourcing and logistics services, as well as research gaps related to supply chain coordination, process integration, and adoption of digital technologies. It was found that understanding the structure and complexity of the chain is essential to support strategic decisions by companies, governments, and supporting institutions, contributing to competitiveness and resilience gains. As a contribution, the study emphasizes the need for research advancing the incorporation of emerging topics such as Industry 4.0, sustainability, traceability, and circularity, which are already shaping the global transformation of the sector. In conclusion, characterizing the textile and apparel supply chain enhances the understanding of its challenges and opportunities, providing insights for its adaptation to new international market demands.

Keywords: Supply Chain. Textile Industry. Apparel Industry. Structure. Global Transformation.

RESUMO

A cadeia de suprimentos têxtil e de confecções ocupa posição estratégica na economia global e brasileira, sendo reconhecida por sua relevância produtiva e capacidade de geração de valor. Contudo, enfrenta desafios relacionados à sua elevada complexidade, às transformações no comércio internacional e à crescente pressão por práticas sustentáveis e digitais. Este artigo tem como objetivo estruturar e caracterizar os principais elos que compõem a cadeia de suprimentos têxtil e de confecções, identificando suas interações,

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especificidades e implicações para a gestão estratégica. Metodologicamente, realizou-se uma revisão sistemática da literatura, baseada em artigos indexados nas bases Scopus e Web of Science, complementada por análise bibliométrica para mapear as principais contribuições acadêmicas sobre o tema. Os resultados evidenciam a predominância de estruturas orientadas pelo comprador, a importância crescente da terceirização e dos serviços logísticos, bem como lacunas de pesquisa relacionadas à coordenação da cadeia, integração de processos e adoção de tecnologias digitais. Verificou-se que a compreensão da estrutura e da complexidade da cadeia é essencial para subsidiar decisões estratégicas de empresas, governos e instituições de apoio, contribuindo para ganhos de competitividade e resiliência. Como contribuição, o estudo reforça a necessidade de pesquisas que avancem na incorporação de temas emergentes, como Indústria 4.0, sustentabilidade, rastreabilidade e circularidade, os quais já se configuram como vetores de transformação global do setor. Conclui-se que a caracterização da cadeia de suprimentos têxtil e de confecções amplia a compreensão de seus desafios e oportunidades, fornecendo subsídios para sua adaptação às novas demandas do mercado internacional.

Palavras-chave: Cadeia de Suprimentos. Indústria Têxtil. Indústria de Confecções. Estrutura. Transformação Global.

RESUMEN

La cadena de suministro textil y de confecciones ocupa una posición estratégica en la economía global y brasileña, siendo reconocida por su relevancia productiva y capacidad de generación de valor. Sin embargo, enfrenta desafíos relacionados con su elevada complejidad, las transformaciones en el comercio internacional y la creciente presión por prácticas sostenibles y digitales. Este artículo tiene como objetivo estructurar y caracterizar los principales eslabones que componen la cadena de suministro textil y de confecciones, identificando sus interacciones, especificidades e implicaciones para la gestión estratégica. Metodológicamente, se realizó una revisión sistemática de la literatura, basada en artículos indexados en las bases Scopus y Web of Science, complementada con un análisis bibliométrico para mapear las principales contribuciones académicas sobre el tema. Los resultados evidencian la predominancia de estructuras orientadas por el comprador, la creciente importancia de la subcontratación y los servicios logísticos, así como vacíos de investigación relacionados con la coordinación de la cadena, la integración de procesos y la adopción de tecnologías digitales. Se constató que la comprensión de la estructura y complejidad de la cadena es esencial para respaldar decisiones estratégicas de empresas, gobiernos e instituciones de apoyo, contribuyendo a ganancias en competitividad y resiliencia. Como contribución, el estudio refuerza la necesidad de investigaciones que avancen en la incorporación de temas emergentes, como Industria 4.0, sostenibilidad, trazabilidad y circularidad, que ya se configuran como vectores de transformación global del sector. En conclusión, la caracterización de la cadena de suministro textil y de confecciones amplía la comprensión de sus desafíos y oportunidades, proporcionando insumos para su adaptación a las nuevas demandas del mercado internacional.

Palabras clave: Cadena de Suministro. Industria Textil. Industria de Confecciones. Estructura. Transformación Global.

1 INTRODUCTION

The Brazilian textile and apparel industry has stood out on the world stage, not only for its professionalism, creativity, and technology, but also for the size of its production park: it is the fifth largest textile industry in the world and the fourth largest in the manufacture of clothing articles (ABIT, 2022). However, in recent years it has been observed that its production has been falling, both for textile manufactured goods and in the manufacture of clothing articles (ABIT, 2022). One of the reasons is related to the deficiency in the management of this chain, which is highly complex (SARDAR and LEE, 2012; MAHMOOD and KESS, 2015). All this complexity that impairs its management also makes the production and distribution process time-consuming, unpredictable and uncompetitive (CAO et al., 2008).

In addition, it has been found that few studies have been carried out with the aim of discussing issues related to its supply chain, consequently about its own structure (KIECKBUSCH, 2010; BEZERRA et al., 2014; ABIT, 2022). Rajput and Bakar (2011) state that few attempts have been made to investigate the textile and apparel supply chain. Sardar and Lee (2012) highlight the need to clarify the concepts of the supply chain in this industrial sector. For this, it is essential to have explicit knowledge and understanding of how the supply chain is structured (LAMBERT, 2014; GEREFFI and FERNANDEZ-STARK, 2016; LAMBERT AND ENZ, 2017).

In this context, this article aims to structure the textile and clothing industry, showing the main links in the supply chain and its business partners. To this end, it conducts a review of the structured literature of works on the textile and clothing industry. Seeking to present the main links of this chain and the activities carried out by its main links.

Thus, in addition to this introduction, the article presents a literature review on the textile and apparel supply chain in section two, the methodological procedures in section three, presents the structures of the textile and apparel supply chain in section four, along with the research discussions and, finally, the conclusions of the research and suggestions for future work.

2 LITERATURE REVIEW ON THE TEXTILE AND APPAREL SUPPLY CHAIN

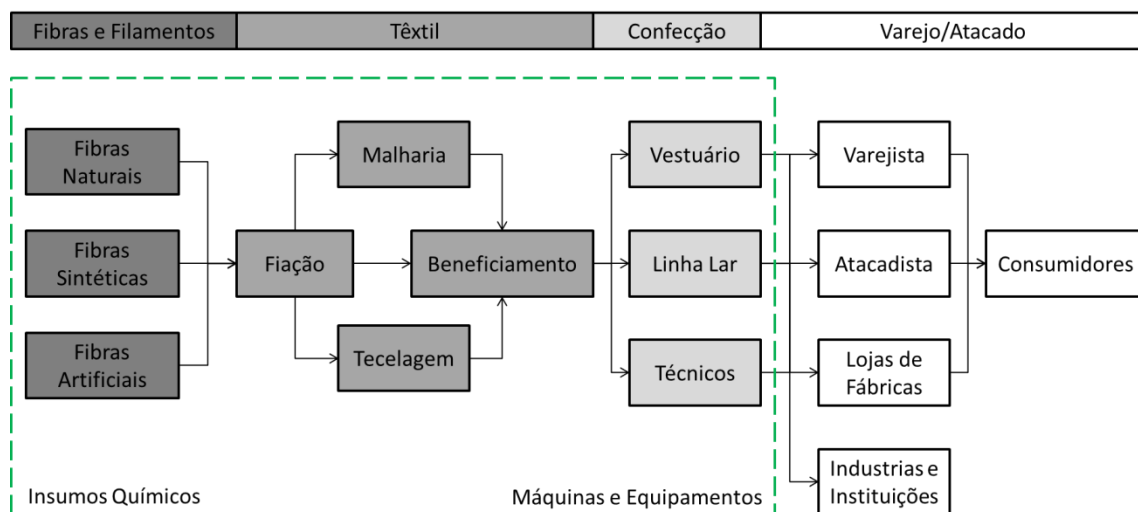
The textile and apparel supply chain (CSTC) is made up of several actors that are directly and indirectly involved in the manufacturing and distribution process of products. These actors are fiber companies, textiles, clothing companies and retailers, in addition to

these, there are logistics processes that are usually carried out by service providers (SARDAR and LEE, 2012), however, as logistics services will be discussed in a specific item, I will not address them now. Therefore, in this item, only the main actors (companies) that make up this chain will be presented.

The importance of presenting the main actors of the CSTC is related to the type of structure that the chain can assume, in general terms the composition follows a basic pattern similar to that illustrated in figure 1, but depending on the actions carried out within the chain, characteristics can be developed that influenced the type of structure of the chain as presented in (item 4) that discusses the types of structure in the CSTC.

Figure 1

Textile and Apparel Supply Chain, actors and their interactions



Source: Adapted from Sardar and Lee (2012).

2.1 FIBER AND FILAMENT INDUSTRY

Spinning can be defined as a succession of operations through which a mass of initially disordered textile fibers (flakes) is transformed into a set of great length, whose section has a few dozen fibers more or less oriented and attached to it by a twist.

Fibers are generally classified into two groups: natural, and chemical. Natural fibers include plant fibers, such as cotton, linen, jute, and cellulosic fibers and fibers of animal origin, such as wool, which are produced by agricultural companies (ABIT, 2022). Chemical fibers are divided into two groups: synthetic fibers include nylon, polyester, and acrylic, and man-made fibers include viscose and acetate. The production of chemical fibers usually requires significant capital and specific technical knowledge (KIECKBUSCH, 2010).

After the production of the yarns, they are distributed to the textile industry where they are used as raw material for the production of fabrics, or they are sent to the clothing industry where they are used as inputs for the manufacture of garments.

2.2 TEXTILE INDUSTRY

This segment of the supply chain transforms the yarn into fabric, through weaving, knitting or by a non-woven process and performs the final finishing of the product by the beneficiation process. In a weaving process, the threads are woven longitudinally and transversely at right angles to form the weft that gives rise to the flat weave. This process, apparently simple, requires, however, prior preparation of the yarn, such as warping and ironing. Yarns can be woven by a simple process to produce basic goods and then dyed in a certain color to suit a specific customer (KIECKBUSCH, 2010). Another option is to dye the yarns first and then carry out the weaving process. The knitting process is relatively simpler than that of flat fabrics, not requiring the previous procedures of yarn preparation. This process uses a single set of threads that are connected through loops, which gives knitted fabrics greater flexibility and elasticity, compared to flat fabrics (ABIT, 2022). The non-woven process, on the other hand, provides a flat, flexible and porous structure, consisting of a veil or blanket of fibers, or filaments, directionally or randomly oriented, consolidated by processes: mechanical (friction), chemical (adhesion) and thermal (cohesion) or a combination of these (KIECKBUSCH, 2010). Fabric processing means, in general, all the processes to which a fabric is subjected after its weaving, and aims to improve the visual and touch characteristics of the textile material, among others. It basically includes the processes of preparation (bleaching, purging and desizing), dyeing or printing, finishing, as well as special processes (RECH, 2008).

After the fabrics are manufactured along with their finishing, they are available for the clothing industry to carry out the final step in the manufacturing process of the supply chain. In this way, the fabrics are distributed in rolls and follow several steps in the making process until the garment is available to the retailer.

2.3 APPAREL INDUSTRY

Since the production of mechanical sewing machines in the 1850s, products that use the sewing process have always been and continue to be a labor-intensive activity with characteristics of low capital investment, allowing the industry to spread widely and mainly in

low-wage regions (FERNANDES, 2008). Despite the apparent automation in the cutting and sewing processes, the elimination of physical labor is not significant. According to Bruce et al. (2004), the clothing industry has always been and continues to be a labor-intensive activity that requires low capital investment, which allows it to fragment easily, especially in low-wage regions.

Despite automation over the years in processes such as cutting and sewing, which has made it possible to reduce the labor required, physical labor is still significant in this industry. From the point of view of the supply chain, clothing is an extensive process that consists of a series of operations, fabric preparation, cutting, sewing, printing, sewing, laundry, accessory appliqué, folding, ironing, among others.

Retailers or distributors maintain very close relationships with the clothing industry, even in some cases being vertically integrated into the supply chain. For example, Christopher (2000) explains the case of Zara, which uses its own highly automated factories and its network of factories (outsourced companies) to streamline its production at certain times.

On the other hand, Gereffi and Frederick (2010) argue that apparel production is vertically disintegrated, with intensive transactions, and involves extremely volatile demand conditions and highly specialized niche markets. They note that this industry works through subcontracting networks, where cut fabric, along with buttons, zippers, or other components, are delivered to independent sewing companies, according to the authors' effect of globalization.

2.4 RETAILER

Retailers occupy the top of the supply chain and their activities consist of the purchase of goods, to supply stores and warehouses, although often these tasks are performed by an individual (responsible person) or department (IEMI, 2005). According to Nowell (2005), retailers maintain relationships with suppliers in various forms through direct interaction, manufacturer's regional office, independent retail agent, or trading company. According to Lupatini (2004), retail salespeople are selected, mainly considering the costs involved. Similarly, the selection and cooperation with suppliers follows the same requirement, that is, the cost. Based on this and other aspects such as fashion trends, product quality level, operational performance, ethical and environmental principles, retailers conduct their business. Generally, the textile and apparel supply chain is directed by retailers who can

interfere, for example, in decisions about the choice of fabrics, accessories, packaging or even in the logistics processes involved.

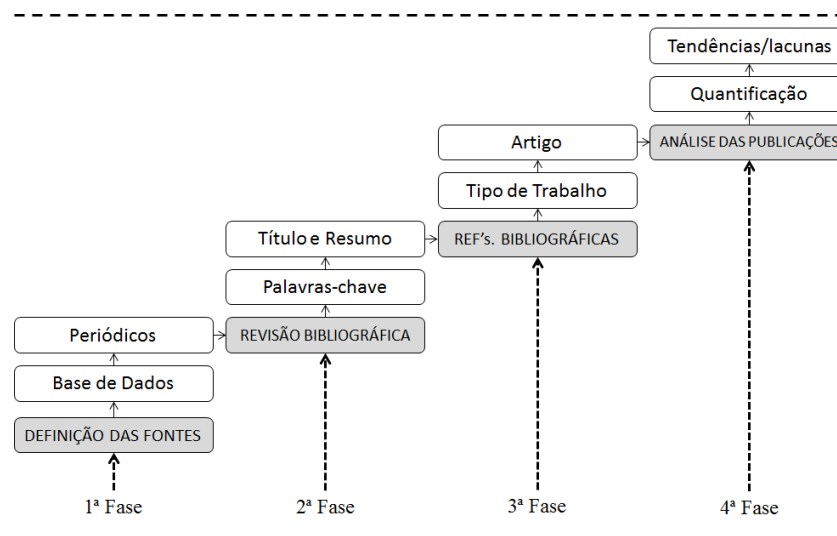
Usually the garments are produced by clothing companies and are sent to the distribution channel of brand companies directly to the retailer (CAO et al., 2008). IEMI (2005) presents another possibility for the manufacture and distribution of parts. According to this author, the pieces can be manufactured, labeled, packaged and sent to an intermediate warehouse before being sent to the retailer, all under the responsibility of the clothing company.

3 METHODOLOGICAL PROCEDURE

In order to construct the bibliographic framework that allows the adequate characterization of the types of structures existing in the textile and apparel supply chain and the different aspects that contribute to their formation, it was sought, at first, to identify publications concerning the theme. Therefore, a literature review method based on the proposal of Marasco (2008) was used, defined by four specific phases, as shown in Figure 2.

Figure 2

Flowchart of the method applied in the research



Source: Author based on the method employed by Marasco (2008).

In defining the sources, the Web of Science databases were chosen, as they provide the main journals in the area of Production Engineering (MILNITZ; TUBINO, 2013) and Scopus, for encompassing the journals that publish the most in Production Engineering and

Logistics (MARASCO, 2008). The research was carried out by searching for publications in journals without time limit to verify the evolution of the themes. The total number of papers found in these databases was the result of combinations of keywords searched in the titles and abstracts of the articles.

The search was carried out in two stages: first a search with the keywords "logistics services" and then with the terms "supply chain management, textile and apparel". The papers found with the combination of keywords "logistics" and "services" are, for the most part, book chapters, standards and conference papers, totaling 9,831 papers. Of this sample, international articles constituted 4,925 articles. Using the keywords "supply chain management" and "textile" and "apparel", 292 publications were identified, including conference articles, book chapters, among others, 209 of which were international articles.

Considering only international publications, the titles of the 4,925 articles were read, selecting those that dealt with logistics services. Thus, 243 publications from the Scopus and Web of Science databases were selected. Another filter used to verify the scientific relevance of the articles was the number of citations, which was used as a criterion for their permanence in the research publication database. The search for this criterion was carried out with the help of the Google Scholar tool, which presents the number of citations of each article through the title of the article. Finally, the abstracts, introduction, and conclusions of the articles were read. Of the 243 articles, only 20 were aligned with the two research themes, and were selected for full reading.

Following the same procedure, the selection of publications on the textile and apparel supply chain was carried out. After reading the titles and abstracts of the 209 articles, only the articles that had a strong relationship with the textile and apparel supply chain were selected, thus accounting for 68 publications in the Scopus and Web of Science databases. These articles were selected based on the number of citations, and subsequent reading of the introduction and conclusion.

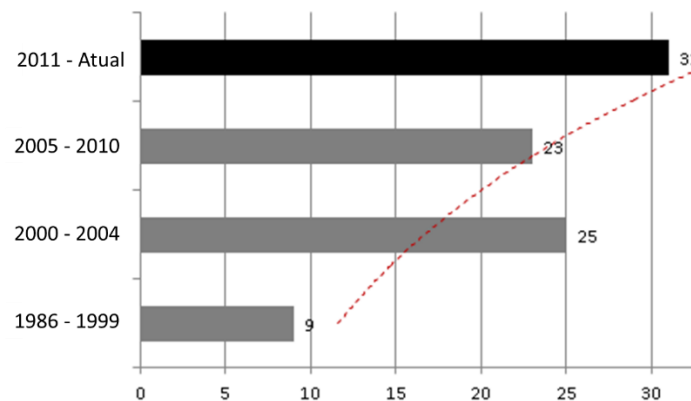
4 RESULTS AND DISCUSSIONS

After the construction of the bibliographic portfolio with 88 articles (20 on logistics services and 68 on the textile and apparel supply chain), a literature review was carried out. From this analysis it was possible to understand the theme and build knowledge about the objective proposed for the research.

Regarding the selected bibliographic portfolio, it is possible to state that it is mostly made up of qualified and recent publications, and that there is a good growth trend in publications on the subject, as can be seen in Figure 3.

Figure 3

Graph of the bibliometrics of the references



Source: Developed by the author.

To portray the research trends on the theme of textile and apparel supply chain, first, an analysis was carried out regarding the subjects dealt with within the theme, in order to identify which main aspects have been addressed in the publications.

In this sense, the titles, keywords, abstract, and body of the text of the publications were analyzed. In each article, only the key subject of the research was defined, for example, in the article "Managing production outsourcing risks in China's apparel industry: a case study of two apparel retailers" it was identified as outsourcing in the supply chain. The subjects of the respective articles were coded and recorded in a spreadsheet referring to the article database, where the 88 publications are listed. The summary of the main topics covered in the publications is presented in Table 1.

Table 1

Subjects of the articles analyzed

Subject covered	Articles	%
Outsourcing in the supply chain	24	27,27%
Textile and apparel supply chain	20	22,73%
Logistic service	20	22,73%
Supply chain coordination	11	12,50%
Textile and apparel supply chain actors	7	7,95%
Evaluation and selection of suppliers	4	4,55%
Supply chain structures	2	2,27%

Source: Developed by the author.

As shown in figure 3, it is possible to observe that in the last five years publications on the subject have been growing, with studies on outsourcing in the supply chain being the majority of the studies (table 1), corresponding to 27.27% of the total articles. On the other hand, articles on the more general textile and apparel supply chain that do not fit within the defined aspects, but that deal with important points within the context of the research, add up to 22.73% of the articles.

The primary hypothesis that this work defends is that the structures of the textile and apparel supply chains are influenced by some very specific aspects such as outsourcing in the chain, the actors involved, the logistics services used, the type of predominant coordination and practices of evaluation and selection of suppliers.

4.1 TEXTILE AND APPAREL SUPPLY CHAIN STRUCTURES

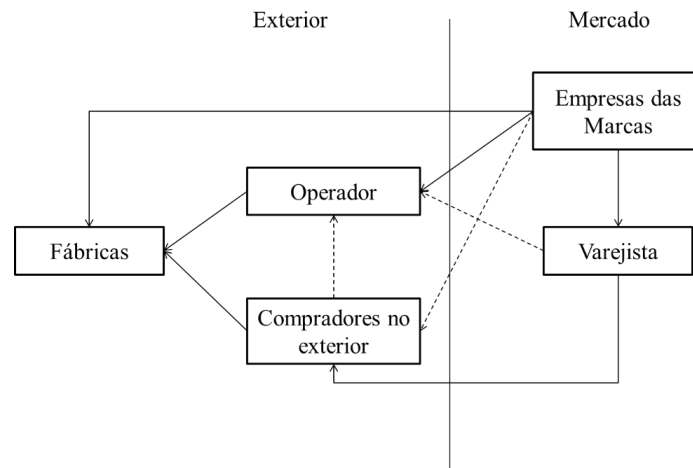
The textile and apparel supply chain (CSTC) may have different structures, being adequate according to the activities and needs of organizations. Gereffi and Korzeniewics (1994) present generic models that map organizational chains, where each participant assumes a specific role in the flow of tangible and intangible goods through their links. The author also adds that the supply chain encompasses all the efforts involved in the production and supply of a final product, from the supplier's supplier to the customer's customer. This item will present the main types of structures for the textile and apparel supply chains found in the articles selected for research.

4.2 BUYER-ORIENTED TEXTILE AND APPAREL SUPPLY CHAIN

One of the main structures of CSTCs is the buyer-driven chains in which large retailers, trade name and trading companies play a vital role in creating decentralized production in a variety of exporting countries, especially third world countries. International contractors typically make the finished products, and specifications are given to them by the brand-name companies that design the products (GEREFFI AND KORZENIEWICS, 1994). Figure 4 illustrates a typical buyer-oriented supply chain.

Figure 4

Buyer-oriented Textile and Apparel Supply Chain



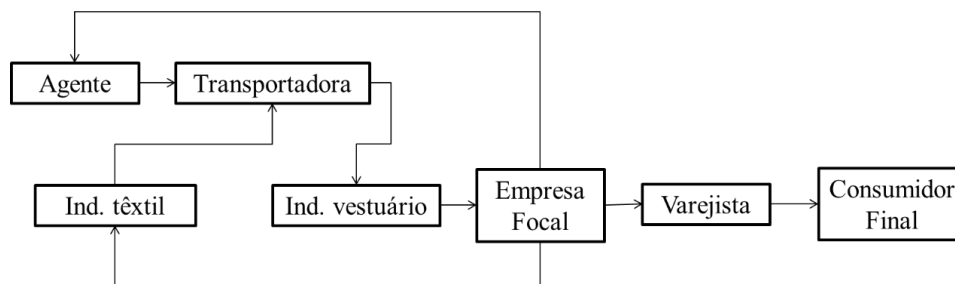
Source: Adapted from Gereffi (1994).

4.3 TEXTILE & APPAREL SUPPLY CHAIN WITH OVERSEAS SUPPLIER WITH SOURCING AGENT

Bruce and Daly (2004) provided characteristics for the CSTC, from the perspective of reducing waste (Lean) and increasing agility in the processes. These chains are usually long and complex, with many parties involved. Figure 5 shows an example of a company's supply chain structure with raw material suppliers from abroad that uses an outsourcing agent.

Figure 5

Textile and Apparel Supply Chain with Supplier abroad with outsourcing agent



Source: Adapted from Bruce and Daly (2004).

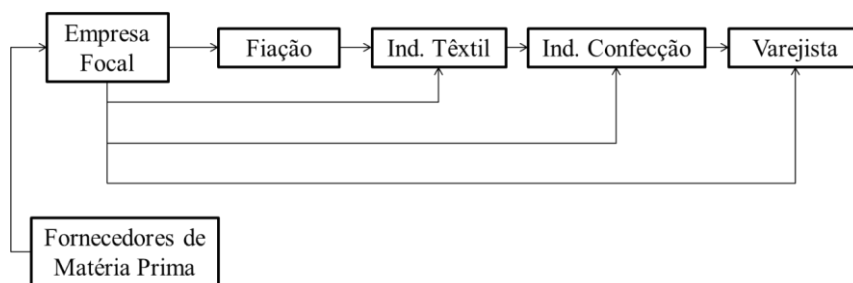
Some problems observed in this type of CSTC structure are long production lead times, difficulties in communicating changes, quality of manufactured products due to quality standards.

4.4 TEXTILE AND APPAREL SUPPLY CHAIN WITH PARTNERS BETWEEN SUPPLIERS AND CUSTOMERS

Another example of a supply chain structure is the focal company that partners directly with suppliers and customers (Figure 6). Generally, companies concentrate their production in other regions or countries and negotiate directly with their customers at the end of the chain, conducting research and developing products to meet the needs of the market where they operate.

Figure 6

Textile and Apparel Supply Chain with partners between suppliers and customers



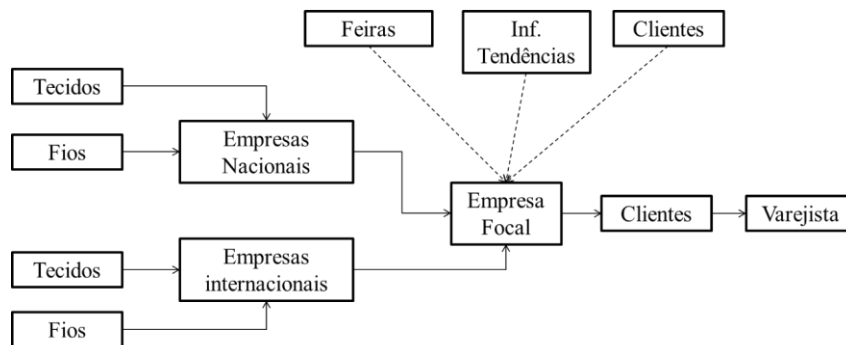
Source: Adapted from Bruce and Daly (2004).

4.5 TEXTILE AND APPAREL SUPPLY CHAIN WITH INTERNAL AND EXTERNAL SUPPLIERS

There is another structure similar to the one shown in Figure 6, it is the chain with mixed supply of textile and apparel products (Figure 7). In this case, the focal company manages both internal and external suppliers in the chain. The mixed supplier base allows this chain to have an optimized performance in its market situation.

Figure 7

Textile and Apparel Supply Chain with internal and external suppliers



Source: Adapted from Leung (2000).

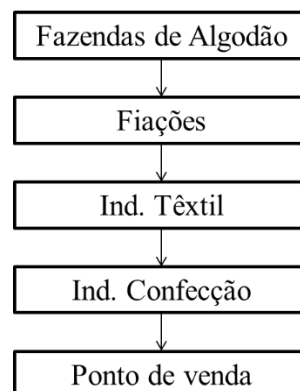
4.6 TEXTILE AND APPAREL SUPPLY CHAIN WITH VERTICAL INTEGRATION

CSTC with vertical integration refers to the process in which the production and distribution steps of a product are controlled by a single company or functional entities of a company, in order to increase the power of the organization or, mainly in terms of cost or efficiency in the market (RICH and HINES, 1997).

Vertically integrated chains are considered to be a conventional form of CSTC, in that they attempt to control the efficiency of the channel through proprietary ownership. Figure 8 shows an example of a chain with vertical integration.

Figure 8

Textile and Apparel Supply Chain with vertical integration



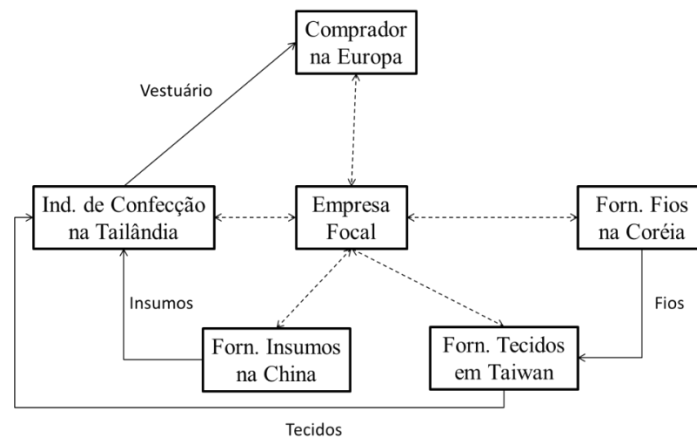
Source: Adapted from Rich and Hines (1997).

4.7 TEXTILE AND APPAREL SUPPLY CHAIN WITH SOURCING AGENT

Finally, Leung (2000) presents a supply chain model where the outsourcing agent is the focal company whose main responsibility is to coordinate the entire supply chain to supply the finished products to its customers who own the brands (Figure 9).

Figure 9

Textile and Apparel Supply Chain with outsourcing agent



Source: Adapted from Leung (2000).

Generally, the agents do not have their own production factories. They help retailers choose suppliers and organize production. Its core competence is its purchasing network and good coordination skills.

In this item, six types of structures for the textile and apparel supply chain were presented. With the exception of vertically integrated chains that rarely use outsourcing in their processes, all other types use this practice as a way to reduce costs, increase availability and flexibility, improve competitiveness, and reduce product development time.

5 CONCLUSION

The Brazilian textile and clothing industry has stood out in the world market both for its business characteristics and for its professionalism, creativity, technology, and its productive dimensions. However, they have been facing difficulties related to their industrial complexity and the performance of the Brazilian economy itself. In addition, it has been verified through several researches that the theme of the textile and clothing supply chain is little explored in academic research, which further reinforces the difficulties faced by this industry.

Based on these difficulties and the performance of little research in this area, this article presented a structuring of the textile and clothing supply chain, showing the main links (companies) in the chain.

As a result of this structuring, the main links in its supply chain were identified, which are: i) the production of textile fibers; ii) the spinning industry; iii) the weaving or knitting industry; iv) the finishing industry; v) the clothing industry; and vi) the retail market.

The main contribution of the research is related to the characterization of the textile and clothing industries, belonging to the supply chain of this industrial sector. This supply chain has become increasingly important for the state and, for the companies that operate in this sector and for government institutions, its characterization allows a better understanding of the environment and enables decision-making of a strategic nature with greater assertiveness, thus improving the management of the chain itself.

As a suggestion for future works, it would be interesting to deepen the studies in order to identify the location of the various companies identified in this research in order to map the supply chain and enable a more precise study on logistical aspects related to the distribution of products along the chain, that is, with the survey of the main products sold in each state and the geographical definition of the companies. An identification of the product flows between the various links of the supply chain could be carried out, determining the quantities transported and logistical difficulties of this process, adding more elements that made the characterization of this industrial sector more complete.

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