

The gap between the supply and demand sides in the clothing industrial sector

Executive Summary

The number of establishments in the clothing industrial sector (2,325) enterprise, which employs around (69,442) employee, distributed in order of (67%) in the Central Region, and about (23%) in the northern Region, and (10%) in the Southern Region. The majority of establishments working in the sector are single owner (sole proprietorship) (93%), in accordance to their legal status and partnership representing (5%), and about (2%) limited liability enterprises.

the establishments in the clothing industrial sector are classified into three main groups which are: small-sized firms (1-5 employees) with percentage of (91%) from the total size then the large-sized firms (11 employees and more) accounting for (6%), followed by medium-sized firms (6- 10 employees) with percentage of (5%), It is worth mentioning that (53%) of the operating establishment in this sector indicates that there is a decline in the demand for their product in 2013, as well as the expected decline in demand for their products during the years (2014-2016).

the workers in the sector are Distributed according to their gender with (38%) for males (62%) for females. in general the employee educational qualifications are as follows: we find that most of employees have an education level less than secondary level reaching (72%), they were divided by (76%) are female and (67%) males. On the other hand, the percentage of (31%) only from the workers in this sector are Jordanian citizens, compared with (69%) are non-Jordanians. The distribution of non-Jordanians by region are as follows: (67%) accounted in the Central Region and about (72%) in the Northern Region and nearly (78%) in the southern region.

The study showed that the most employable occupation in the sector are: women apparels/ clothing tailor, men clothing tailor/ trousers, and men clothing tailor / shirt, and clothing tailor general, and the quality control examiner, sports and cotton made clothing tailor, and finally seaming machine operator.

The Clothing industrial sector mainly focuses on female employment in general, with a large presence of males in a group of occupation but in staggered percentages. The demand for labor has also concentrated more in the central region, where the size of the demand for

occupation of this sector amounted to around (12,782) in the Central Region, compared with (4,878) in the northern region, and (1997) in the southern region, with total size of aggregate demand amounted to (19,657) for the years (2014-2016).

In general, there is a demand for the years (2014-2016) for the following occupations Men clothing tailor / Trousers (3,497), and men clothing tailor / shirts (3,478), and women apparels/ clothing tailor (3,468), and Sportswear and Cotton tailor (1,483), and folding and rapping labor (847), and clothing final touches and finishing (771) labor, and the quality control examiner with the size of demand being (601). The study showed that the skills mostly demanded within occupations of the sector are: making of Petron according to the required sizes, skill to work on all phases of the pants, the skill of cutting fabric and Vaseline (stuffed material inside clothing/ fabric), the skill of assemble clothing parts using of necessary sewing machines, the skill of clean clothing pieces removing extra threads , and finally the skill of controlling clothing measurement final finishing touches.

The results of the collected data indicates that more than (90%) of business concerns in the clothing industrial sector do not want to recruit new females in this sector, this is mainly due to the non-arising need, followed by the nature of work in some cases is not suitable for women in this sector, especially those occupations related to the use of machines in factories. When examining the occupations which are filled by females within this sector, it is found that the most important occupations in which they are occupied: women apparel clothing tailor (6,921), men's clothing tailor / shirts (6,410), men clothing tailor / pants (5,120), the seaming machine operator(4,383) and Sportswear and cotton tailor (3,762), the aggregate future demand for females reaches (14,083) job opportunity, divided by (5,558) an opportunity for the year 2014, and (4,255) jobs for 2015, while the demand for female (4,270) jobs for the year 2016.

It should be noted that the number of employees with disabilities has reached (511) employee out of (69,442) employees in the sector, which accounts for (0.7%) only, they are working in a group of different occupations in the same sector, but the major careers they concentrate in are as follows: Women clothing apparels, men clothing tailor / outerwear, quality control examiner, and men clothing tailor / trousers. It should be noted that around (40%) of employees with disabilities have a hearing disability, and around (31%) have a mobility disability.

Results of the study disclose that there is a large proportion of establishments who face difficulties in recruitment, and these difficulties are due to the shortage of workers who possess demand skills, in addition to the shortage of labor who have possess values and positive attitudes towards work. With regards to the methods used in recruitment, the study showed that the direct recruitment through personal contacts is the most widely used with percentage reaching (84%), followed by recruitment through the employment agencies with (8%), then the recruitment through newspapers advertisements, websites, advertisements with percentage (6%).

When business owners were asked about the difficulties and challenges faced by the clothing industrial sector (34%) of them answered that the weakness of investment promotion will affect the sector performance negatively, while (33%) referred to increase in taxes, in addition (22%) made reference to the weakness and limitations of laws and legislation governing business.

The Number of special training programs in this sector amounted to (13) training programs, and the number of graduates reached (4,251) graduates during the years (2011-2013). They Graduated from the following programs clothing apparel/ tailor (53%), crocheted worker (19%), and the program's women clothing apparel tailor with (11%). While the real supply size was close to (2,256) graduates.

Another important point is, the number of graduates from training programs specially geared for this sector who are male were (306) graduates during the years (2011-2013). They have graduated from a program clothing tailor, and men clothing tailor / shirts (80%). In compassion, the number of female graduates from training programs in the clothing industrial sector reached to (3,945) graduate during the years (2011-2013). A large percentage of them graduated from the clothing tailor program (54%), then crochet worker program (20%), and finally the women clothing/ Women's appaitals program (12%).

The graduate from institutions providing training programs in the clothing industrial sector were distributed regionally as follows: (68%) in the Central Region, and (22%) (10%) in the regions of the north and south respectively. On the other hand, the distribution of graduates from institutions providence training in this sector where distributed according to gender as follows: (7%), males with (97% in the Central Region, and about 3% in the northern region), and about 93 percent female (66% in the Central Region, and 24% in the northern region and 10% in the Southern). The results also revealed that the number of trainees with disabilities has reached (10) trainees concentrated in four training programs: production and outfits designer, and the

program of Men's Clothing Tailor / shirt, and the women apparels/ clothing, as well as models Maker (Alpetronat) for clothes. The vast majority have received this training at the Vocational Training Corporation (9 trainees), and one in the design of clothing and Training Services Center. Asked training providers for future training opportunities for people with disabilities, we have found that there are five parties are ready to provide training programs with capacity of (75) trainees.

Varied courses raise the efficiency provided by the providers of training within six training programs which are: assembling clothing pieces by necessary sewing machines with (25) trainees, cycle Aldersh machine processing strings and needles as required and mobilization of the shuttle with a total work amounted to (25) trainees for the years (2011- 2012), followed by calculating the quantities required material for the production cycle (order analysis), and the preparation of lists required for the manufacture of materials and specifications with the total number of trainees being (12) trainees for the year (2012), then the duty cycle Petron according to the required sizes, cycle cost of the product in terms of depreciation account required of raw materials, time and number of required runs for the completion of the order of sewing machines these courses were been concentrated in the central region (65%), and about (25%) and (10%) in each of the northern and southern respectively regions. These courses were addressed to (25) males and (27) females in the Vocational Training Corporation, also about 21 males and 15 females were trained in the design of clothing and Training Services Center. It should be noted that the design of clothing and Training Services Center will provide a course on conducting preparatory processes for clothes in the future to train (12) trainees, of course follow up the implementation apparel orders and develop a plan to market the product and following up the implementation of the training (20) trainees, while vocational education / Ministry of Education will provide a course on of Petron preparation according to the required sizes for training (40) trainees.

From the above, we conclude the existence of a very large numerical gap estimated at (19,657) jobs in this sector, while The size of aggregate supply is (4,251) for the years (2011- 2013), which indicates the presence of a numerical gap estimated at around (15,406) as excess demand (shortage), which means that the market is able to absorb what amount to (100%) of the supply size, and there is still a large surplus of labor demand.

With regards to technical skills, business owners have insisted on the necessity of being possessed by workers at their work places and in those who will be recruited. Since some of

these technical skills are not included within provided training programs. Therefore, in light of the results of this study, it is necessary and sufficient to recommend offering training programs which covers these demanded technical skills. These skills can be summarized as follows: make patterns according to required measurements, working on all steps of making trouser/ pants (assembling pieces, repair and fix the zipper, prepare and assemble the pockets, alvolya machine, prepare and assemble, assemble holders for belt, button holes, button), in addition to ironing and finishing, cutting fabric and vazleen (stuffed material inside clothing fabrics), assemble clothing parts/ piece using required sewing machines, controlling clothing measurement final finishing touches and inspection cleaning clothes pieces/ removing extra threads, and finally folding clothing according to production instruction.

There is future demand for females to work in this sector estimated to be around (14,083) job opportunity for the years (2014-2016) this demand is distributed among different administrative and technical careers. In addition we find that there exist a supply of females, since data of the survey indicated that (4,125) female trainees have graduated from different institutions providing training which are included in the study survey. And here we notice clearly the preliminary numerical gap between what is supplied and what is demanded to be 9,958 excess demand for female workers within the clothing industrial sector.

The sector employs approximately 511 workers with disabilities out of (69,442) workers in the sector, which accounts for 0.7% only, as they work in different occupations in the same sector group, but more occupations that are concentrated in Women apparels Outerwear, and tailor clothing / outerwear, and quality checker, and tailor clothing / trousers. It should be noted that about (40%) of workers with disabilities have a disability hearing, and about (31%) have a disability mobility. The results of the survey revealed that there are (105) establishments operating in the clothing industry are ready to provide (361) jobs. On the other hand, five establishments from the training providers announced that there are (75) trainees with disabilities are being trained in seven different programs.

Based on all the above, the study recommends that it is necessary for the Employment technical and vocational education and training council to form national groups to be responsible for drawing sectoral policies in the area of training and employment of the Jordanian labor force in the clothing industrial sector. In addition, the institutions providing training should take the responsibility to review and develop the demanded training programs in the sector, in addition the should work on merging real lively and pioneering skills which

support employment, in a compulsory package in all their training programs. Furthermore these same institutions should cancel any training programs which is not demanded by the labor market of the sector. Also, The study recommends that it is necessary for the Ministry of Labor to implement the gradual substitutions of Jordanian labor for expatriate labor.