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Ethiopian Fashion Between Local Heritage and Global Horizons: Insights from Young Designers in Addis Ababa

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Abstract

This article offers an exploratory overview of the contemporary Ethiopian textile, fashion and apparel system. The contribution originated from a teaching experience in Addis Ababa within the framework of the AICS–UNIDO-funded project *"Ethiopia: Support to Youth and Women through Products and Services Development and Public–Private Partnerships in the Fashion Value Chain"* which prompted the authors to deepen their understanding of the local fashion ecosystem. Drawing on informal conversations, observations, and ethnographically oriented field notes, the authors developed the analysis through desk research and a review of the relevant literature. The picture that emerges reveals both the creativity and strong entrepreneurial drive of Ethiopian designers, alongside the structural barriers they commonly face, including limited access to materials, investment, and institutional support. Designers are shown to negotiate ongoing tensions between cultural heritage and global aesthetics, while also contending with local consumption patterns situated between second-hand clothing markets and international brands. These dynamics highlight both the challenges and the potential of the Ethiopian fashion scene, pointing to opportunities for mutual learning and for fostering fashion practices that are sustainable, globally relevant, and firmly grounded in local contexts.

Keywords: Ethiopian fashion; global-local dynamics; CCIs; fashion supply chains; emerging fashion designers

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1. Introduction

This paper presents an exploratory overview of the contemporary Ethiopian fashion scene, situated within the broader framework of fashion studies. It approaches fashion both as a crossroads of imaginaries, immaterial heritage, sociocultural trends, and identities negotiated within a given society [1,2], and as a multifaceted and mature industry capable of generating employment, fostering technical and technological innovation, and contributing significantly to a country's economic power, as it has been highlighted for the African continent specifically [3,4].

Moreover, fashion has long been shaped by Eurocentric perspectives [5–7], and only relatively recently has scholarship engaged more systematically with postcolonial and decolonial approaches, challenging the assumption that fashion is inevitably tied to the modern Western world [8]. These perspectives have opened the door to rethinking the historical dominance of Euro-American fashion centres in both industry narratives and

academic research, highlighting the need to examine other geographies, histories, and forms of creativity [9,10]. Fashion hubs around the world that are often described as "new" or "recently discovered" have, in fact, been active for decades. While there is growing attention to valorising local talent and narrating these fashion scenes in more authentic and appropriate ways, many of these vibrant cities continue to struggle within a competitive landscape dominated by the so-called "Big Four": Paris, London, Milan, and New York [7,11].

The African continent, in particular, has long struggled to be perceived, recognised, and narrated as a legitimate fashion scene, a condition largely shaped by the enduring effects of colonisation and exoticism [12,13]. Yet cities such as Lagos in Nigeria, Johannesburg in South Africa, Accra in Ghana, and Dakar in Senegal, among others, are vibrant fashion centres actively participating in the broader reconfiguration of global fashion geographies [14,15]. Specifically, fashion designers on the African continent occupy a strategic position as cultural micro-entrepreneurs, with the potential to contribute simultaneously to economic development and to critically engage with global value chains. As England et al. argue [16], African fashion designers are key actors within smaller local or national markets that nonetheless operate with increasing international reach.

This growing recognition has also emerged at the policy level. At the MONDIACULT 2025 Conference, UNESCO[1] highlighted Africa's central role in global cultural growth, identifying cultural and creative industries, including fashion, as both economic drivers and expressions of the continent's generative cultural diversity. These affirmations are situated within a wider international policy landscape that increasingly recognises culture as a driver of inclusive development. Similarly, Italy's *Piano Mattei per l'Africa*[2], launched in 2024, aims to establish a new paradigm in relations with African countries based on equal partnerships and mutual benefit. Within the cultural field, *Piano Mattei* promotes collaboration with cultural institutions and museums, alongside training programmes and support for cultural and creative industries, including cinema, fashion, and design, positioning culture as a strategic domain for shared development.

This paper situates itself within this framework and focuses specifically on Ethiopia. Italy and Ethiopia are linked by a colonial past, as Italy made two unsuccessful attempts to colonise Ethiopia: first between 1895 and 1896, and later under the Fascist regime. The latter campaign began in 1935 and was declared victorious in 1936, although Fascist control remained fragile, and military operations continued in the form of guerrilla warfare [17]. Despite being brief, brutal, and ultimately unsuccessful, Italy's colonial experience left a lasting mark on creative and artistic imaginaries within Italy, as trajectories of creativity were deeply entangled with systems of exploitation and commercial propaganda. This dynamic was highlighted by the project Decolonising the Gaze[3], which, under the direction of artist and activist Caterina Pecchioli, in 2022, examined a collection of objects from the former Colonial Museum of Rome, now *Museo delle Civiltà*. Produced in Ethiopia and other Italian colonies such as Eritrea and Somalia for sale at national and international colonial fairs, these artefacts concealed forms of colonial extraction while simultaneously shaping aesthetic imaginaries and consumer narratives [18,19]. While fully acknowledging the colonial past that connects the two countries, this paper does not aim to offer a retrospective account but instead focuses on the contemporary characteristics and dynamics of the Ethiopian fashion scene.

Ethiopia is characterised by a constellation of regional and ethnic identities and heritages, which has given rise to a multiplicity of clothing traditions that continue to survive and thrive, alongside longstanding forms of know-how and craftsmanship, particularly in cotton weaving and leatherwork. Alongside this traditional heritage, Addis Ababa is an urban hub in which cultural and creative industries are shaping the environment for

a young generation of creatives. These designers balance inherited cultural references with global aesthetics while attempting to carve out a market space situated between traditional garments, second-hand clothing, and modern and contemporary fashion. Their practices are marked by a strong entrepreneurial drive alongside creativity. Within this context, the project *"Ethiopia: Support to Youth and Women through Products and Services Development and Public–Private Partnerships in the Fashion Value Chain"*, financed by the Italian Agency for International Cooperation and Development (AICS) through the United Nations Industrial Development Organization (UNIDO), provided the framework for the authors' participation in Addis Ababa in a teaching capacity. Their interaction with young emerging designers and their exposure to the city's cultural and creative scene sparked a curiosity to better understand the dynamics shaping the local fashion ecosystem. This interest was further shaped by the authors' complementary backgrounds, bringing together perspectives grounded in both Ethiopian and Italian engagements with fashion practice and scholarship.

Situated within a decolonial analytical framework and drawing on both the existing literature and ethnographic notes collected in a teaching context, this paper examines the Ethiopian fashion ecosystem, paying particular attention to how power relations, cultural positioning, and material constraints shape the practices of emerging designers. Within this perspective, the paper explores how creativity, production processes, and market positioning are negotiated in a context marked by both local specificities and global asymmetries. In doing so, it asks how designers navigate these conditions and what this reveals about the possibilities and limitations of fashion development beyond dominant Eurocentric frameworks.

2. Project Description, Approach and Positionality

2.1. Project and Participants Description

The project *"Ethiopia: Support to Youth and Women through Products and Services Development and Public–Private Partnerships in the Fashion Value Chain"* (nicknamed ULTRAFASHION—Show Your Talent in Italy!) aims to sustain and amplify the talent of emerging professionals within Ethiopia's fashion and textile sector. Funded by the Italian Agency for International Cooperation and Development (AICS) and the United Nations Industrial Development Organization (UNIDO), the project is structured over an 18-month period, with alternating phases conducted between Addis Ababa and Milan, involving mobility of both faculty and participants.

The initial phases of the project, in Addis Ababa in fall 2024, comprised in-person lectures, practical exercises, and case study analysis, followed by one-to-one personalised coaching sessions online and continuous feedback in the following months. In October 2025, a selected group of participants attended an immersive experience in Milan, Italy, including visits to laboratories and companies across different segments of the fashion market and supply chain, as well as receiving individual mentorship during the development and presentation of a capsule collection. This paper draws on the two-week fieldwork conducted in Addis Ababa in 2024.

The participants enrolled in the ULTRAFASHION training activities were predominantly female; this gender distribution was described by participants as unsurprising, as they explained that the only profession within the fashion supply chain traditionally associated with male labour is hand weaving. By contrast, roles perceived as more creative and/or detail-oriented, such as embroidery, sewing, and design, are traditionally considered female occupations.

Regarding areas of specialisation, the majority of participants reported practising primarily in womenswear design and occasionally produced matching garments for men, generally traditional pieces intended for couples or family occasions.

In terms of age, the majority of participants were aged between 25 and 34; those who held a university degree had studied either architecture or business, as these fields were perceived as useful pathways for pursuing a career in the creative industries. Those with formal training in fashion (often following the first degree) had studied at one of the main training institutions in Addis Ababa: Next Fashion Design College, Anna Getaneh's incubator African Mosaique. However, the majority of the participants reported being largely self-taught. Many participants indicated that they had followed some training or online tutorials, although the precise nature and extent of these learning experiences remain unclear. This points to an area worthy of further investigation, as understanding these informal learning pathways could shed light on the development of skills and practices within the local fashion sector.

Some were students participating primarily for general training rather than professional activity, while a small group was fully established designers with commercial operations, such as their own store or brand, and some had previously presented capsule collections at national or international events. Most participants, however, were running small-scale fashion activities alongside other commitments, aiming to gradually develop these into full-time ventures at varying stages of growth and success.

The teaching programme addressed multiple dimensions of the fashion system. Participants were introduced to the cultural aspects of fashion by researchers from ModaCult—Centre for the Study of Fashion and Cultural Production, acquired business tools to structure and advance their individual projects through lecturers from the E4Impact Foundation, and developed organisational and technical competencies related to collection design through guidance provided by Ms. Michelle Ngonmo, founder and president of the Afro Fashion Association (AFA).

Multiple instructors were present at all times, enabling systematic feedback collection, identification of emerging needs, and responsive support for participants. In some instances, students were divided into smaller groups to foster active engagement and interaction, transforming the classroom environment into a dynamic space for dialogue, exchange, and mutual learning.

2.2. Approach and Positionality

Given the team's role as scholars in a lecturing and mentoring capacity, attention was paid to potential imbalances in power, knowledge, and cultural perspective between teachers and participants. This was particularly important in light of the faculty's composition, which, although diverse, was predominantly European and white, calling for continued reflexivity in engagement with participants. To mitigate these dynamics, in accordance with a decolonisation of methodologies approach [20], the project adopted Culturally Responsive Methodology [21] as a guiding principle, informing the design of activities as well as every interaction with participants. Rather than relying on a formal university-style lecturing format, interactive and dialogical learning environments were fostered, encouraging participant-led discussion, mutual exchange, and co-construction of knowledge. This approach positioned participants as active contributors, valuing their expertise, experiences, and cultural perspectives, and ensured that empirical insights were grounded in local understandings.

The teaching activities were conducted in an informal setting, with no frontal lecturing, but rather with all participants and instructors seated together. From the outset, participants were invited to engage on an equal footing, with the teaching team positioning themselves

not as authorities seeking to reshape existing practices, but as contributors sharing their expertise. This approach was grounded in an explicit acknowledgement of the team's limited familiarity with the specificities of the Ethiopian context, and in the recognition that participants' active input was essential to ensure that the training process remained relevant and locally embedded. The Italian team also benefitted from the mediation of Ethiopian colleagues and facilitators, as well as from designers with stronger English skills, who often assisted by translating or supporting communication when needed. This contributed to a relaxed and open environment in which participants felt comfortable contributing during sessions, engaging in peer discussions, and informally sharing their perspectives during breaks.

The material discussed in this article draws primarily on mission diaries written in an ethnographic style during the authors' stay in Addis Ababa. These diaries included notes taken following informal conversations with people encountered throughout the experience, as well as reflections emerging from discussions within the project team and with the more than seventy young emerging designers who participated in the ULTRAFASHION training programme. The daily interactions that took place during the activities provided numerous opportunities for exchange, both in collective settings and in smaller group discussions. The information recorded in the diaries was shared willingly and spontaneously by participants, who were verbally informed that notes might be taken and who gave their consent for these to be recorded in anonymous form.

Ethnographic field observations were also conducted in a spontaneous and responsive manner, guided by suggestions from local contacts and participants. They included visits to cultural sites, landmarks and museums in Addis Ababa, spaces that are rich in cultural industries, not exclusively related to fashion. Specific fashion-related sites were also included, such as Sabahar weaving and dyeing laboratories, the laboratories and shop of African Mosaique which is not only a brand but also a fashion incubator founded and run by former top model, activist, and designer Anna Getaneh, in addition to several fashion shops in the Bole district.

Academic research on Ethiopian fashion and textiles can be broadly organised into four interconnected strands: (1) indigenous textile traditions and cultural heritage; (2) contemporary challenges of appropriation, consumption, and identity; (3) industrialisation, global production networks, and export-oriented apparel; and (4) sustainability, circularity, and supply chain transformation. Overall, while existing scholarship offers a rich understanding of Ethiopian textiles as heritage, industry, and site of global entanglement, relatively little attention has been paid to contemporary fashion designers as cultural and economic intermediaries negotiating these multiple scales simultaneously. In particular, the lived experiences, creative strategies, and transnational aspirations of emerging designers remain underexplored.

Building on this framework, the paper discusses the main themes that characterise the Ethiopian fashion ecosystem, combining recent literature with insights from the October 2024 training experience in Addis Ababa.

3. Ethiopian Textile and Apparel System

3.1. Raw Materials and Supply Chains

According to the available literature, the Ethiopian fashion system is potentially a complete system, spanning from the cultivation of certain fibres to spinning, dyeing, weaving, and garment production. This material supply chain is complemented by an emerging immaterial chain concentrated in the capital, Addis Ababa, primarily centred on a small number of nationally and regionally established designers and supported by some training programmes, often financed through international cooperation initiatives.

A substantial body of literature foregrounds Ethiopia's long-standing textile traditions, emphasising hand weaving as both a cultural practice and a socio-economic activity. Studies document the historical continuity of cottage-based textile production, transmitted across generations and deeply embedded in everyday life, ritual practices, and ethnic identity [22,23]. Regional textile traditions, such as Dorze weaving, Wollo Gabi, and leather garments like Debelo and Lemed, are analysed as carriers of symbolic meaning and aesthetic value, while also being increasingly reframed as potential resources for contemporary design development and international markets [24,25].

More specifically, the literature identifies two strands within the textile sector: one industrial, the other based on local production, the traditional cottage textile industry. When referring to fibres, cotton dominates almost exclusively. Smallholder cotton farmers supply cotton fibre, which is then hand-spun using a drop spindle and subsequently woven into fabric on handlooms, exemplifying local craftsmanship [26]. The other indigenous fibre, silk, is produced on a much smaller scale. Based on conversations and field visits, there appears to be a single company employing around one hundred people that provides a fully local silk supply chain, from silkworm to finished, stylised fashion product.

Research indicates, however, that even local cotton production only partially satisfies the industry's needs, with figures varying across sources. According to Kabish, Degefu, and Gebregiorgis [27], 40% of cotton fabric must be imported, whereas Mengie, Tiku, Kassa, and Tsegaye [28] estimate this figure at 90%. With imported materials accounting for between 40% and 90% of the supply chain, the scarcity of foreign currency and the volatility of the Ethiopian birr emerge as significant constraints. These conditions affect the sector at multiple levels, from the cost of basic components to the capacity of brands to scale their production.

The structure of the Ethiopian textile and apparel industry reflects a complex coexistence of national, private, and transnational forms of production, shaped by industrial policy, global value chains, and development cooperation. Over the past two decades, Ethiopia's textile and apparel sector has grown as part of a broader transition from an agriculture-based economy toward industrialisation, with strong state involvement and increasing international integration [29,30]. Mekuria [31] describes the cotton sector as encompassing both irrigation-based and rain-fed farming, large commercial farms, smallholder farms, different ginning methods (saw and roller), and both a well-developed modern textile industry and traditional handloom weaving.

From an ownership perspective, the industry is highly diversified, including state-owned enterprises, endowment- or party-owned firms, locally owned private companies, diaspora-owned businesses, and a growing number of foreign-owned firms [29,32]. This diversity distinguishes Ethiopia from many other Sub-Saharan African apparel exporters, where foreign firms dominate almost exclusively [32]. Local firms range from former state enterprises and vertically integrated mills to small- and medium-sized manufacturers serving either export or domestic markets [33]. Foreign firms, particularly from Asia, Europe, and the United States, have been the primary drivers of export growth, often operating within global production networks coordinated by international buyers [34].

Government industrial policy has played a central role in shaping the sector. The Ethiopian state has actively promoted apparel manufacturing through export incentives, preferential access to EU and US markets, and the creation of industrial parks managed by institutions such as the Industrial Parks Development Corporation and the Ethiopian Investment Commission [30,35,36]. These parks—both publicly owned (e.g., Hawassa, Bole Lemi) and privately owned (e.g., Eastern Industrial Park)—are designed to attract foreign direct investment and integrate Ethiopia into global value chains [35]. Over time, policy has

evolved from encouraging local investment in export apparel to actively courting foreign investors capable of bringing capital, technology, and access to international markets [30,32].

Additionally, the suspension since 2022 of AGOA (the African Growth and Opportunity Act), a United States trade initiative that grants duty-free access to the US market for eligible African countries, represents a further structural constraint. This shift has likely reshaped local competition and limited access to materials, even for smaller designers [37].

A key structural distinction within the industry concerns levels of vertical integration. Historically, much apparel production depended heavily on imported fabrics. More recently, transnational investors—particularly from Asia—have established large, vertically integrated textile and apparel factories, enhancing the potential for local sourcing of export-quality fabrics and for upgrading within the value chain [34,38].

In terms of products and markets, the industry serves both domestic and international demand. Export-oriented firms primarily produce standardised, price-sensitive apparel for foreign brands and retailers, targeting EU and US markets [30]. Local firms supplying the domestic market tend to focus on workwear, basic fashion items, and sewing services, while traditional and cultural dress continues to be produced through decentralised handloom and artisanal systems alongside industrial manufacturing [39,40]. Western-style apparel increasingly coexists with culturally specific garments, reflecting hybrid consumption patterns shaped by urbanisation, globalisation, and local traditions [29,39].

Lastly, an emerging but increasingly prominent strand of literature focuses on sustainability, certification, and circular economy models. Research on cotton certification schemes such as Global Organic Textile Standard (GOTS) and Cotton made in Africa highlights both their transformative potential and their tendency to reproduce global asymmetries, depending on how power and agency are exercised [41][4]. Complementary studies examine sustainable supply chain management practices, circular economy prospects, and second-hand clothing markets, framing Ethiopia as a critical node where global sustainability agendas intersect with local economic realities [42–44].

3.2. Markets and Consumption

Research on Ethiopian consumers, particularly younger cohorts, reveals ambivalent attitudes towards locally produced fashion, shaped by limited product diversity, weak promotion, and strong external influences, despite the absence of overtly negative ethnocentric attitudes [45].

A controversial place, which cannot be denied, is occupied by the second-hand clothing (SHC) market. It plays a structurally significant role in Ethiopia's apparel and textile ecosystem, as in many other African countries, particularly at the intersection of consumption, livelihoods, and informal economic organisation. Although Ethiopia has officially prohibited the import of second-hand clothing as part of an industrial policy aimed at protecting and fostering domestic textile manufacturing [46,47], SHC remains deeply embedded in everyday consumption practices and urban retail through informal channels.

One of the main advantages of the SHC market is its capacity to provide affordable clothing to low-income consumers. Empirical studies consistently show that second-hand garments are significantly cheaper than locally manufactured new clothing, making them essential for poverty management and meeting basic needs among urban households [42,48]. Beyond consumption, the SHC sector sustains a large number of livelihoods, particularly within the urban informal economy, where street vendors and micro-entrepreneurs rely on the used clothing trade as a primary source of income [49,50].

The organisation of the SHC market is highly informal and socially embedded. Historical and contemporary research highlights the importance of social capital, family ties, and ethnic networks—especially among Gurage traders—in facilitating access to goods,

credit, and market information [51–53]. These networks compensate for the lack of access to formal finance and regulation, but they also limit scalability and legal protection.

At the same time, the SHC market presents notable disadvantages. From an industrial policy perspective, it is often seen as undermining domestic apparel production by offering cheaper alternatives to locally produced garments [46]. Moreover, its informal nature is associated with precarious working conditions, lack of taxation, and regulatory opacity [48].

Recent scholarship suggests that rather than treating SHC solely as a threat, policymakers should recognise its structural role and explore forms of regulated integration with the local apparel value chain. Proposals include formalising SHC retailing through designated markets and linking it to sustainability-focused consumption models, potentially reducing waste while coexisting with local production [42,54]. In this perspective, second-hand clothing is not external to Ethiopia's apparel system but an integral, albeit contested, component of it.

Overall, the Ethiopian textile and apparel industry demonstrates how national industrial strategies, international investors, and development cooperation intersect to produce a heterogeneous industrial landscape, integrating export-oriented manufacturing with domestic, cultural, and emerging creative production [32,35].

Alongside the material supply chain, an 'immaterial infrastructure' of education, communication and events shapes skills development, visibility and access to professional networks.

3.3. Designers' Insights on Supply and Market Positioning

Among the young designers participating in the ULTRAFASHION training programme, the sourcing of raw materials emerged as one of the most frequently cited production challenges, in line with the existing literature. Designers reported significant financial difficulties in procuring fabrics, whether relying on locally handwoven cotton or seeking to import alternative textiles from abroad. While locally woven cotton is widely available, participants often criticised its quality–price ratio and, above all, the lack of material diversification. This scarcity severely limits creative expression and the development of distinctive stylistic identities. Cotton not only contributes to a visual homogeneity across brands, but also imposes material constraints in terms of weight, structure, and garment construction. On the other hand, attempts to import fabrics are hindered by the effects of government-imposed protectionist tariffs, introduced to safeguard and stimulate domestic textile production, which is currently the object of substantial investment.

Most participants described operating within a cottage-industry model, frequently framing their use of locally handwoven cotton as a marker of sustainability. In some cases, sustainability is further articulated through the incorporation of social and educational initiatives, such as inclusion, empowerment, and training, into brand identities. Another recurrent theme, falling under the umbrella of cultural sustainability, is the deliberate effort to develop a contemporary aesthetic rooted in religious, cultural, and tribal traditions. Despite this, designers reported persistent difficulties in justifying price differences and clearly defining their market positioning, whether as high-end labels or emerging start-up brands.

Moreover, challenges emerged related to production quality and technological reliability. Fluctuations in the quality of finished garments were described as common, often resulting from inconsistencies in materials, workmanship, and production processes. At the same time, unreliable digital technologies, ranging from unstable internet connectivity to limited access to appropriate software and digital tools, were identified as significant obstacles, affecting communication, design development, and the ability to engage consistently with markets and professional networks.

The consumer base was generally described as limited in size and relatively immature; public pride in supporting and wearing local designers is perceived as largely absent in Addis Ababa. As a result, many designers primarily work with expatriates, the diaspora, and individuals connected to diplomatic and international cooperation networks. Observations indicated a notable absence of a solid middle or upper-middle class, which would otherwise represent the natural target market for their brands.

Instead, younger middle-class consumers tend to favour Western styles, frequently turning to low-cost second-hand clothing; this preference is closely linked to the evolving landscape of retail opportunities. While second-hand garments were once sold primarily in large, unorganised market piles, they are now increasingly presented in curated boutiques located in areas such as Bole and Arat Kilo, neighbourhoods that also host galleries, studios, cafés, and designers' shops. These boutiques offer carefully selected garments, styled and displayed as coherent collections within aesthetically refined spaces. Crucially, however, the products remain second-hand clothing, acquired at minimal cost, cleaned, and resold within an upmarket retail environment. In some cases, these shops had previously operated as import businesses sourcing garments from Western countries or markets such as Turkey, India, and China. As import duties became prohibitively expensive, they shifted towards this alternative model, which has proven commercially successful. In doing so, they have effectively become direct competitors to local designers and their brands.

4. Power Dynamics Within the Industry

4.1. Institutions, Gatekeeping and Appropriation

The Ethiopian fashion system reveals an intangible value chain that is essential for innovation and identity formation, yet remains constrained by infrastructural, educational, and communicative gaps. Furthermore, this immaterial chain is increasingly outward-oriented, mediated by diaspora networks and global platforms. This orientation is mirrored in multiple processes of gatekeeping, occurring at different stages of the supply chain, operated by a range of actors, but often with a direct or indirect role played by the state.

Gatekeeping in Ethiopian fashion operates through institutional, economic, cultural, and social mechanisms that regulate access to production, markets, and cultural legitimacy. At the industrial level, the Ethiopian state plays a central gatekeeping role by channelling export-oriented fashion production into state-led industrial parks. These parks provide infrastructure and administrative "one-stop shops" that privilege foreign investors and global brands, while effectively excluding smaller local producers who lack capital or political access [36,55]. This model concentrates decision-making power primarily in the hands of the state and transnational buyers, shaping labour conditions, production standards, and pathways of entry into global supply chains.

Gatekeeping is also evident in buyer–supplier relations. Export-oriented garment production is governed by strict approval systems (such as physical sample approval) that function as quality control but also reinforce asymmetrical power relations, increasing costs and delays for Ethiopian manufacturers [56]. These dynamics reflect long-standing colonial patterns in textile supply chains, where global buyers control prices and wages, limiting workers' and suppliers' bargaining power [57].

In the traditional and cultural fashion sector, gatekeeping emerges around authenticity and cultural ownership. Weak intellectual property frameworks allow the cultural appropriation of traditional designs without consent or compensation, marginalising weavers and artisans [58,59]. At the same time, cultural elites and producers actively distinguish "authentic" Ethiopian dress from imported or hybrid products, using narratives of origin, religion, and ethnicity as symbolic boundary-making devices [60].

Finally, gatekeeping operates at the social level, particularly for women designers and entrepreneurs. Family and societal norms often delegitimise women's entry into fashion entrepreneurship, framing it as inappropriate or secondary to domestic roles [61]. Taken together, these layers show that Ethiopian fashion is shaped by intersecting forms of gatekeeping that regulate access to resources, recognition, and power.

Cultural appropriation functions as a key mechanism of gatekeeping within Ethiopian fashion by regulating who is entitled to use, reinterpret, and profit from cultural garments and textile designs. In the Ethiopian context, traditional clothing is not merely aesthetic but deeply embedded in religious symbolism, ethnic identity, and historical narratives, particularly those associated with Orthodox Christianity and the northern highlands [60]. As a result, access to these cultural forms is closely monitored and actively contested.

A major gatekeeping issue arises from the absence of robust legal and institutional frameworks protecting traditional designs. This legal vacuum allows designers, traders, and external actors to appropriate cultural garments without consultation, consent, compensation, or formal recognition of the weaving communities who created them [58]. Appropriation is driven primarily by commercial interests, transforming cultural heritage into marketable commodities while systematically excluding artisans from decision-making processes and economic benefits. This exclusion effectively positions cultural producers as outsiders to markets built on their own embodied knowledge.

At the same time, gatekeeping is not only exclusionary but also defensive in nature. The Ethiopian government has actively intervened when cultural designs are perceived to be misused, asserting that traditional dress patterns represent national identity and collective ownership. Public reactions to foreign designers accused of copying Ethiopian motifs illustrate how the state acts as a cultural gatekeeper, defining legitimate versus illegitimate uses of heritage [62]. However, such interventions often prioritise symbolic protection over concrete mechanisms that would economically empower artisans.

Furthermore, commercialization itself becomes a gatekeeping tool. While global fashion and tourism create opportunities for visibility, scholars warn that unchecked commercialization risks exploitation and cultural dilution, thereby reinforcing barriers for artisans with limited access to global markets [59]. In this sense, cultural appropriation in Ethiopian fashion both reflects and reproduces unequal power relations, through which cultural value is extracted while cultural authority remains contested.

4.2. Designers' Views on Creativity and Recognition

Despite the heterogeneity, several shared structural features can be identified, which help make sense of the positions and statements articulated by the young designers we encountered. According to them, a further layer of complexity lies in the struggle to be recognised not merely as producers of clothing, but as actors within the fashion system, where immaterial and stylistic dimensions are as significant as material production. In this sense, the urban space of Addis Ababa, characterised by highly diverse publics in terms of cultural preferences and purchasing power, is the arena in which designers must legitimise their presence, attract audiences, and cultivate brand loyalty. Participants, however, repeatedly denounced the existence of gatekeeping mechanisms that restrict access to what can be explicitly defined as the fashion system. Economic constraints represent the most immediate barrier, limiting sustained market participation. Additional challenges include the fragmentation of the system and the weak legal protection of intellectual property.

From a creative perspective, these issues are particularly impactful. Participants described Ethiopia as a proud and deeply traditional society, and many designers spoke of the difficult balance they are required to negotiate. They expressed frustration towards a conservative social environment strongly anchored in cultural, moral, and religious

values, and only marginally open to innovation in terms of creativity and lifestyle. At the same time, however, they emphasised that compromising their own moral frameworks and value systems was not negotiable, even if these are themselves embedded in the very traditions and social structures that they often find constraining.

Some of the designers specialise in reinterpreting garments associated with religious and ceremonial contexts, where respect for tradition, inherited know-how, and handcraftsmanship, often transmitted within families, remains paramount. Similarly, Muslim women designers work within a similar framework, creating garments for ceremonies and special occasions that adhere to the principles of so-called modest fashion. In all these cases, aesthetic differentiation between brands remains extremely limited, and the survival of the business relies almost exclusively on customer loyalty.

Designers who pursue more experimental directions, drawing on global and contemporary aesthetics, expressed deep concern about the risk of being copied. This anxiety appears to stem largely from widespread tailoring practices, whereby clients bring images sourced online to local tailors to reproduce garments without regard for authorship. For early-stage designers in particular, there is little protection against designs being photographed and replicated, either by clients or by competing designers. This situation provokes both frustration and anger, leading participants to strongly call for stronger copyright protections. However, the implications are more profound: the fear of appropriation acts as a deterrent to experimentation and innovation. Creating something genuinely new only to see it unrecognised and copied the following day was deemed not worth the effort; even when significant time, energy, and financial resources are invested in registering a design, it can still be appropriated with only minimal alterations, leading to questioning the value of trademarking altogether. In the absence of lawyers specialised in fashion and of a legal infrastructure more attuned to creative labour, designers' work remains highly vulnerable to appropriation.

This phenomenon seems to have two main causes. In cases involving other designers, it is linked to intense competition and, at times, unscrupulous attempts to gain recognition or access opportunities. More significantly, however, the reproduction of outfits without consent can be attributed to a broader lack of public recognition of creative labour and of the legitimacy, seriousness, and dignity of building a fashion brand.

5. The Immaterial Infrastructure

5.1. Education and Events

Alongside the development of textile and apparel manufacturing, Ethiopia has witnessed the gradual emergence of an immaterial fashion value chain, encompassing education, design, communication, branding, and creative mediation. This immaterial infrastructure plays a crucial role in shaping skills, identities, and market access, although it remains uneven and only partially institutionalised.

Education represents a foundational pillar of this intangible chain. Several studies emphasise the central role of specialised higher education institutions in supplying skilled labour, designers, managers, and researchers to the fashion and textile sector [29,46]. The Ethiopian Institute of Textile and Fashion Technology (EiTEX) at Bahir Dar University emerges consistently as a key actor, being the pioneer institution offering degree programmes in textile engineering, garment technology, fashion design, and leather engineering [63]. Over time, the expansion of textile-oriented universities, including Wolkite University, School of Technology for Garment, Fashion and Textile, and Mekelle University, Department of Textile Engineering, has contributed to building a knowledge base that supports both the industrial and creative dimensions of fashion. In addition, other private institutions in Addis Ababa, funded through private investment as well as interna-

tional organisations, have been established over the past decades. Next Fashion Design College in Addis Ababa, for instance, has offered courses in fashion design, pattern making, sketching, and stitching since its foundation in 2004, while the Mafi Mafi Fashion Academy and Lab, founded in 2024, offers design curricula, and Anna Getaneh's fashion incubator, African Mosaique, has been active from 2021 to 2024, providing mentorship programmes.

Design and creativity operate at the intersection of cultural heritage and contemporary innovation. Ethiopian indigenous clothing and craft traditions have increasingly influenced global fashion narratives, particularly through heritage-based storytelling and culturally grounded branding strategies [59,64]. However, research shows that while traditional skills are frequently mobilised for design inspiration, innovation often remains confined to product aesthetics rather than encompassing the full value chain, thereby limiting scalability and economic impact [64].

In terms of fashion shows and public visibility, what currently exists is a limited ecosystem of fashion-related events, often connected to cultural festivals, religious celebrations, or international showcases abroad. Ethiopian designers, frequently in collaboration with diaspora networks, participate in African and international fashion events, using these platforms to gain visibility and professional connections rather than relying on a stable domestic fashion show circuit [59]. Trade fairs organised through sectoral associations, particularly in the leather industry, also provide structured spaces for market exposure, though these are primarily commercial.

Overall, significant gaps remain within this landscape. Studies highlight a lack of organisational, managerial, and promotional skills across the cultural sector, including fashion-related services such as show production, model management, public relations, and event coordination [29].

Brands such as MAFI MAFI, ZAAF, and African Mosaique have established boutique presences and contribute to fashion communication locally, though their primary revenues often derive from international markets, especially the United States and Europe [29], as is also the case for the well-known, respected, and established brand LemLem. The latter's experience highlights the role of the diaspora as both a primary market and a source of capital. In this sense, diasporic networks function as a "bridge" to global markets, providing legitimacy as well as financial support, while also shaping local trends.

Over the last fifteen years, a significant role has also been played by Hub of Africa Fashion Week, founded and organised by Ms Mahlet Teklemariam, which, thanks to her networks within the fashion sector, has gradually become an established platform with international visibility for the Ethiopian fashion scene. Confirming that key stakeholders often operate across multiple levels, Anna Getaneh's African Mosaique, in addition to functioning as a brand and a fashion incubator, has also sponsored a recurring fashion festival and hosted fashion galas.

These infrastructures interact with institutional arrangements and forms of gatekeeping that regulate access, recognition and the circulation of cultural resources.

5.2. Exposure to Fashion Imaginaries

Within the ULTRAFASHION framework, the themes of fashion imaginaries, geographies, and communication were closely examined and discussed in relation to one another. As fashion is an increasingly global phenomenon, a key focus of the discussion with participants concerned the imaginaries they referenced, the sources from which inspiration was drawn, and the forms of aspiration that emerged from these engagements.

When participants were asked to name places they associated with fashion, Paris, London, Milan and New York were mentioned almost unanimously, confirming that for many emerging designers "making it" continues to be closely tied to the collective imaginary of

accessing the fashion weeks of the so-called "Big Four". Among our participants, Paris emerged as particularly significant, closely followed by Milan.

However, as the discussions and roundtables progressed, it became apparent that many designers possessed only a limited, and often vague, knowledge of international fashion, whether Western or otherwise. When asked to identify international designers they considered points of reference or with whom they felt a stylistic affinity, only a small number were able to provide concrete examples. This exchange proved particularly fruitful, as it redirected the discussion towards recognising the importance of developing a solid understanding of modern and contemporary fashion history and its key actors, both to broaden one's knowledge base and to position oneself as an informed and potentially critical voice within the fashion system.

When the focus shifted towards processes of decolonising the geographies and imaginaries of fashion, Addis Ababa itself emerged as a significant reference point. The city hosts Hub of Africa Fashion Week, one of the most relevant fashion events in East Africa, in which some of the more experienced participants had taken part. Other African cities identified by participants as fashion hubs included Nairobi (Kenya), Lagos (Nigeria), and Johannesburg (South Africa). Notably, this mapping exercise revealed a limited connection with West Africa, as cities such as Accra, Dakar, or Abidjan were never mentioned.

Moreover, as in the discussion of the global fashion context, when participants were asked to name particularly relevant designers who had recently shown in African fashion capitals, most references concerned designers they knew personally. This highlighted a significant issue related to communication. Many participants lamented their limited exposure to high-standard fashion events and emerging trends, pointing to a broader lack of structured and meaningful communication about fashion at the local level. This absence was perceived both within the professional field and in relation to wider audiences.

Most media coverage of these events currently takes place through social media, primarily via the official accounts of fashion weeks and invited designers. The participants, however, noted that this mode of communication tends to be limited in reach and duration and may, at times, struggle to establish credibility, as it can appear predominantly self-referential rather than independently mediated. Desired actions included addressing local audiences by reinforcing the visibility and legitimacy of fashion and creative labour within the national context, while also engaging more strategically with international media circuits.

In this perspective, fashion week organisers could act as intermediaries, fostering connections with global fashion media and collaborating with leading publications to support broader recognition. Such an approach, participants argued, would allow African fashion weeks to gain visibility within major international outlets while avoiding reductive or tokenising representations.

6. The Role of Communication

6.1. Digital Media

Fashion is fundamentally constructed through imaginaries. This is not only because a product must achieve collective legitimacy by being embedded within a credible narrative and context [65], but also because fashion actively shapes aspiration, appeal, and the institutionalisation of beauty and desirability. These imaginaries are inseparable from broader power dynamics, particularly those embedded in global fashion geographies, where the Western world has historically dictated the dominant standards for both product aesthetics and human beauty [66].

Fashion print magazines have historically played a central role in shaping these canons and references through both texts and images [67]. Long before the rise of digital platforms, publications such as Vogue, Harper's Bazaar, and Elle functioned as key sites of aesthetic legitimation, establishing visual hierarchies, codifying taste, and defining what and who could be recognised as fashionable. Fashion journalism is indeed considered part of the very process, which is also a process that creates the idea of fashion itself [68]. Although the proliferation of digital media and social networking platforms has transformed the circulation of fashion imagery and narratives, it has not displaced the symbolic authority of these established titles. Rather, historical fashion magazines continue to exert a distinctive power of fascination and legitimation at a global level, maintaining their position as influential arbiters of value within the fashion system.

In Ethiopia, communication and fashion mediation remain among the weakest yet most rapidly evolving elements of the intangible chain. Studies highlight that digital communication infrastructures are still underdeveloped, with limited e-commerce platforms, weak ICT systems, and uneven access to fast communication technologies [46,69]. Nevertheless, social media has become a critical channel for domestic fashion brands, with content marketing, particularly aspirational, entertaining, and participatory content, playing a growing role in brand awareness in Addis Ababa [70].

In particular, the editorial fashion system can be described as emerging, fragmented, and rapidly transforming, rather than as a fully institutionalised ecosystem. Unlike contexts with long-standing traditions of fashion magazines and specialised criticism, fashion communication in Ethiopia develops primarily at the intersection of general media, digital platforms, and marketing practices, with social media playing a central role [70].

A defining characteristic of this system is the weakness of specialised editorial infrastructures. Ethiopia remains among the least represented countries in the global digital sphere, and fashion-oriented media production is limited, making it difficult for stable professional roles, such as fashion editors, critics, or established influencers, to fully emerge [70]. As a result, local designers and domestic brands rely heavily on content marketing strategies and direct engagement with audiences through platforms such as Instagram, Facebook, and TikTok, enabling disintermediated visibility, though weakly regulated [70,71].

At the same time, traditional media institutions, including national print media, television broadcasters, and public agencies, continue to exert significant symbolic influence, even though fashion is not their primary focus. Research on the Ethiopian media landscape highlights enduring features such as political parallelism, media capture, and institutional filtering, which constrain editorial autonomy and limit the diversity of cultural content, including fashion-related representation [72,73]. Visual representation, particularly of women and their clothing, is often shaped by institutional, promotional, or political demands rather than by editorial critique [74].

Looking ahead, the future of the Ethiopian fashion editorial system is closely tied to accelerated digitalisation, expanding social media usage, and the growing involvement of local designers, diaspora actors, and emerging influencers, who are gradually creating alternative spaces for visibility and narrative production [59]. Nevertheless, the lack of professionalisation, editorial archives, and structured critical discourse remains a significant obstacle to establishing a mature fashion editorial system.

6.2. Magazines and the Vogue Case Study

Moving the discussion specifically towards fashion magazines, it quickly emerged that in Ethiopia, there is no publication that designers identify as a fashion magazine in the strict sense of the term. Participants explained this absence in relatively pragmatic terms, arguing

that the country currently lacks a sufficiently large readership for such a publication and that, as a result, an investment in fashion publishing would not be economically viable.

In the absence of a dedicated fashion magazine, participants instead pointed to alternative online platforms that play a role in circulating information about cultural events and creative activities. Among these, LinkUp Addis was frequently identified as a key reference point, alongside What's Out Addis! and initiatives promoted by the Zoma Museum, which was described as a relevant hub for cultural visibility despite not being fashion specific[5].

As a further stimulus for reflection, the editorial history of Vogue was presented, drawing on selected examples from its national editions (e.g., Vogue UK, Vogue Italia, Vogue India) as well as the emblematic regional case of Vogue Arabia. This served as a starting point for discussion with participants regarding the magazine's absence from the African continent, a gap publicly highlighted in 2018 by Naomi Campbell, supermodel, activist, and contributing editor of Vogue UK[6]. Eight years later, no national, regional, or pan-African edition of Vogue has yet been launched.

Designers' perspectives on this issue proved particularly interesting. A very small group expressed clear, and at times rather cynical, antagonism or questioned the magazine's relevance.

Among the sceptical voices, some suggested that Vogue itself might not be necessary, given its highly specific target audience and stringent standards. Instead, they argued for a local publication focused more broadly on lifestyle and the creative industries, including fashion, in order to reach a wider audience.

This position resonates with the historical role of fashion magazines in post-war Europe, which often functioned as guides to modern living at a time when many cultural industries were simultaneously emerging or re-emerging. In post-war Italy, for example, fashion flourished alongside cinema, advertising, and television. Magazines were not merely about clothing; they taught people how to live a modern life [75]. Yet, this was possible because there was already a robust economic infrastructure, while in Ethiopia, the situation is radically different; what exists in abundance is youth and creativity, but the supporting structures are fragile.

The majority of participants strongly argued for the necessity of Vogue's presence in Africa. This group maintained that, whether one liked it or not (and some admitted, somewhat reluctantly, that they did not), Vogue functions as a powerful international gatekeeper. The magazine *does* matter at the global level, and its absence from Africa was therefore perceived as a serious issue, implicitly conveying the message that there is insufficient fashion on the continent to warrant Vogue's attention. Moreover, they further emphasised that the presence of Vogue in Africa would raise standards, create jobs, and exert pressure on the national fashion industries to improve their practices and professionalisation.

When participants were asked whether a national (Ethiopian), regional (East African), or pan-African edition of Vogue would be preferable, the regional option received no support. There was broad consensus that the region encompasses far too many identities, ethnicities, and narratives (particularly for an audience largely unfamiliar with them) to meaningfully represent Ethiopia alongside countries such as Tanzania, Zambia, or Madagascar within a single editorial framework.

Of the two remaining options, national versus pan-African, only a small portion of participants expressed a preference for a hypothetical Vogue Ethiopia. In these cases, the rationale centred on the opportunity to reflect specific cultural realities more accurately and to publish content in both English and Amharic, thereby broadening potential readership.

The vast majority, however, identified greater value in a pan-African platform, which they viewed as capable of fostering both cooperation and competition. Within this per-

spective, the inclusion of articles in both English and French was proposed as a means of maximising accessibility and transnational reach.

In this scenario, participants imagined the establishment of editorial offices in multiple capitals across the continent, with the central editorial team tasked with developing criteria capable of recognising and valorising national and local differences. The shared view was that, at least in an initial phase, collective action would be more effective: unity was perceived as strength. Pooling resources was considered a strategic way to generate visibility, attract attention, and assert a recognisable voice, rather than fragmenting efforts and risking the exclusion of countries lacking the economic, infrastructural, or symbolic capital necessary to sustain a national edition.

7. Conclusions

The Ethiopian textile and apparel system is potentially highly integrated, spanning from fibre to finished product—a rarity globally, found in only a few countries such as Italy (which has itself lost much of the integration built up during the 1960s and 1970s). This structural integration could offer considerable potential for the sector, as it would strengthen manufacturing actors while also generating employment at different stages of the supply chain. However, this potential remains unrealised, as the system is fragmented, unstable, and unpredictable, limiting its capacity to connect manufacturing actors to a robust and diversified market. Stronger integration requires the identification of specific and diverse markets. Cultural and creative industries have proven to be drivers of innovation and development, as their publics are diversified in terms of economic and cultural capital, mobilising practices and economies in which producers, publics, media, and imaginaries mutually reinforce one another. To reach such a dynamic trajectory, actors require coordination and connections, the generation of sufficient sales volumes, an organised infrastructure of career pathways within the creative industries, and imaginaries capable of linking cultural heritage with contemporary aesthetics. While full supply-chain integration is both rare and not necessarily required in the contemporary globalised world, efforts aimed at better systematising existing actors and promoting new entrants would be profitable for the Ethiopian textile and apparel sector in its transition toward a fashion industry, at both the manufacturing and the design and communication stages.

A significant unresolved issue concerns the role of the state and institutions, which remains ambiguous. Policies that appear strongly supportive of the textile and apparel sector coexist with protectionist tariffs and limited access to global markets, seemingly prioritising cultural dress over contemporary fashion production. This persistent dynamic continues to constrain designers' ability to operate effectively within both local and international contexts.

At least two notable tensions emerged. The first concerns individual aspirations. While most expressed a commitment to developing a local fashion identity, some acknowledged that their ultimate ambitions lie elsewhere, proving that validation from Western fashion capitals continues to serve as the primary benchmark of professional success. Thus, it is important to critically reflect on the role of international cooperation and training programmes. Designed to support local creative industries, such initiatives may inadvertently reinforce asymmetrical hierarchies by implicitly locating value, legitimacy, and opportunity outside the African continent. In doing so, they risk perpetuating the very dependency they aim to dismantle, reinforcing the notion that the most significant achievements in fashion must occur abroad.

A second tension concerns the symbolic and marketing positioning of many of the designers involved in the project. Most insist on a value proposition centred on infusing contemporary aesthetics into collections that draw heavily on local heritage. However,

contemporary aesthetics and heritage-based forms often do not combine in ways that align with the legitimised imaginaries and standards of global fashion. This tension is pivotal for Ethiopian designers and foregrounds issues that characterise the local system and must be addressed to provide the infrastructure necessary for a fashion system to take off.

First, the legitimisation of designers who seek simultaneously to globalise their vision and foster local values and aesthetics is difficult to achieve, as government action in support of the textile industry appears relatively insensitive to contemporary imaginaries, despite a strong emphasis on modernising manufacturing and technological capacities. Furthermore, the still-limited development of digital media and technologies constitutes a structural hindrance that partly explains the limited international exposure of Ethiopian designers as of autumn 2024. This limitation is compounded by the absence of a dedicated system of fashion media and events, which are crucial for creating public discourses, tastes, and habits related to fashion. Finally, such a shared cultural environment cannot rely solely on the images and narratives produced by fashion practitioners; it must also integrate contributions from other creative fields, including performing arts, photography, music, and visual arts.

The final issue to be raised in concluding this exploratory journey concerns sustainability and its political dimensions. Most designers argue that their work is culturally sustainable, beyond the environmental aspects associated with hand weaving and sewing, because it is rooted in heritage. While at the current stage, we do not feel confident endorsing this argument uncritically, the position articulated by the designers is instructive. Their insistence on embedding collections with religious, tribal, and cultural values represents a form of resistance to some of the most extreme expressions of fast fashion, including textile waste, the commodification of bodies, and disrespectful visual regimes, phenomena they experience as the result of Western intrusions on the continent. Viewing our fully marketized fashion imaginaries and practices from their standpoint invites a reconsideration of the cultural roots of fashion embedded within Western modernity, including values of freedom, solidarity, and community.

Taken together, these insights point to the need for a rethinking of both fashion imaginaries and development frameworks. Ethiopian fashion requires not only resources and visibility, but also a shift in how success, legitimacy, and innovation are imagined, moving away from external validation and towards models that recognise Africa as a site of original and future-facing fashion knowledge.

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Notes

1 Africa identifies culture as a driver of inclusive development during MONDIACULT consultation, available at: https://www.unesco.org/en/articles/africa-identifies-culture-driver-inclusive-development-during-mondiacult-consultation (accessed 27 March 2026).
2 Piano Mattei per l'Africa, available at: https://www.governo.it/it/piano-mattei (accessed 27 March 2026).
3 Decolonizing the Gaze project, available at: https://www.bwblackwhite.org/decolonizingthegaze (accessed 27 March 2026).
4 More about the Global Organic Textile Standard can be found at https://global-standard.org/ (accessed 27 March 2026) and more about Cotton Made in Africa is available at https://cottonmadeinafrica.org/en/ (accessed 27 March 2026).
5 LinkUp Addis available at https://linkupaddis.com/ (accessed on 27 March 2026); What's out Addis available at https://www.whatsoutaddis.com/ (accessed 27 March 2026); Zoma Museum available at https://momaa.org/directory/zoma-museum-addis-ababa/?srsltid=AfmBOooZ-Uo2tbr9RAamPstHL6TZ0brviTx6JTmz2xNK0ot73-7-gtWV (accessed 27 March 2026).
6 REUTERS, Naomi Campbell Urges Vogue to Launch African Edition available at https://www.businessoffashion.com/news/media/naomi-campbell-urges-vogue-to-launch-african-edition/ (accessed 27 March 2026).

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