

THE FOOTWEAR INDUSTRY OF LEON, MEXICO. CHARACTERISTICS OF SMALL AND MEDIUM ENTERPRISES (SMEs) AS CONDITIONANTS TO EXPORT THEIR PRODUCTS

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Abstract

In this research, the SMEs (Small and Medium Enterprises) current competitive position of Leon's Leather Footwear Industry is analyzed. Firstly, the foundations of international competitiveness that justify the development of a national export strategy to increase economic development are stated. Secondly, a diagnosis of the Leather Footwear Industry is presented at a local level based on the application of surveys to 50 SMEs of that Mexican region. The measurement instrument consisted of 2 sections: the first one was configured to detect the strengths and weaknesses of the organizations and the second one to measure the entrepreneurs' perception of the foreign trade barriers. It is concluded that Internationalization and Exporting Culture are the most important opportunities of the sector meanwhile the Knowledge Barriers are the most challenging components, contrary to what was expected, the Financial Strength was not the most important factor that restricts the SME's exporting activity.

Keyword: SME, footwear industry, competitiveness, exports

1. Background

The origin of the footwear industry in Mexico date back to the seventeenth century, however it was until 1920 that Leon became consolidated as the national footwear capital (Velazis, 2015).

At the end of the seventies, the Mexican footwear industry produced 210 million pairs per year and was a source of direct employment for 115,000 workers (CIATEG, CICEJ, CEEPS, 1993); but from 1982 the level of production and employment stagnated and two years later, according to calculations made by the Center for Research and Technological Assistance of Guanajuato (CIATEG), the economically active population that worked in the industry was reduced to 84,960 employees, there was a loss of more than 30,000 jobs which represented approximately 26% of the total.

These difficult period for the industry was due to the Asian competition in the national market and in the USA. With the formation of the export maquiladora industry, the Mexican producers located mainly in the Bajio, faced the challenges in the US market and in the high quality shoe segment; by this time the Chinese producers had already ventured with exports of plastic and textile footwear to cover in 1988 20% of the total US and only 40% of average prices. At that time many Mexican producers decided to direct their efforts to increase their share of the popular market and in general did not invest in tools and advanced technology or innovative designs, as they considered that the abundance of labor and raw materials at affordable prices was sufficient to reproduce the models of the fashion catalogs of Barcelona, Paris, Milan or New York.

In summary, after an important growth under the protection of the Mexican Government, there was a stagnation in the Mexican footwear industry, which was worsened by the reduction of trade tariffs, and the inability to face international competition as a consequence of the opening of the country's economy. In addition, although domestic production still accounted for most of the country's demand, since 1982 it has become volatile.

In their study of this period of transition, (Ortiz & Martinez, 2000) mention that the commercial opening was a hard blow for the Mexican footwear sector, given its very low level of competitiveness, although they point out that some companies managed to get ahead thanks to their adaptation to the demands of consumers.

Due to this situation, in the last decades of the twentieth century many traditional workshops have been forced to close at the height of the globalization process, with a policy of fixed commercial openness added to other adverse economic events such as devaluations, loss of foreign capital and the entry of Asian products mainly from China (Velazis, 2015).

2. Definition of the problem

SMEs are important but fragile; that provide the majority of employment and GDP in developing countries but that, lacking protection mechanisms of scale, have short half-lives resulting in precarious employment and shortage of innovations (Diaz M., Lorenzo, & Solis, 2005). The approach proposed by the (Organization for Economic Cooperation and Development [OECD], 2014) is that competitiveness is a measure of the advantages and disadvantages of a country when selling its products in international markets.

In 2009 99% of the Mexican companies dedicated to the production of footwear are SMEs (up to 250 employees) and that their economic and social importance is reflected in the generation of 70% of employment and 60% of production total of the Mexican footwear industry (National Institute of Geography and Statistics [INEGI], 2014).

In 2012 Mexico was placed in the 24th place as footwear exporter worldwide while in 2016 it was already in the 26th place, that the exports reflect a modest growth going from 18.74 million pairs in 2010 to 25.36 million pairs of 2016, of which 37.49% correspond to leather footwear (Chamber of the Footwear Industry of the State of Guanajuato [CICEG], 2016); and that on the other side of the country's trade balance imports of that same year were practically triple, 82.14 million pairs of which 10.10% correspond to leather footwear.

Since 2012, Mexico has become an importer of footwear and since then it has not been able to reverse the deficit of its trade balance. Considering in sum these data and the prevailing reality in the productive sector it is possible to affirm that the Mexican footwear industry faces difficulties to position itself in the global market.

2.1 Current status of the research problem

(Hernandez A., 2007) mentions that the fall of the internal consumption, the production of merchandise without quality control and the rise in the prices of the products; in addition to the devaluation of the Mexican peso contributed to the weakening of the Mexican footwear industry.

Duana and Gonzalez, refer that this industry is currently threatened by the low price segments of synthetic footwear, in particular the products imported from China and Brazil, but also by high-end items from Italy and Spain; and that the price is the axis of competition of Mexican companies is the reduction of labor costs (Duana & González, 2014).

Currently, the industry crisis has led companies to develop strategies for commercial survival, not the development of the sector (Dussel, 2016).

In the study by Morales and Ayala it is stated that in general there is confidence in the business relationship between clients and suppliers and it is necessary to strengthen it by formalizing the business relationship through contracts or agreements, where it is sought to cultivate long-term relationships (Morales T., Luna T., & Ayala T., 2010).

In the research conducted by Velazquez-Duran and Rosales-Ortega it is concluded that micro and small enterprises constitute a socio-productive fabric strongly disarticulated by the low levels of cooperation and institutional support they present, a characteristic that predominates in the area of study and that it prevents the coordination of the system as a whole, which generates isolation due to its inability to respond to changes in the international market. This, together with the lack of training and benefits for employees and their limited technological development, leads to limited competitiveness (Velazquez-Duran & Rosales-Ortega, 2011).

In Manzo's work it is concluded that the variables with the highest incidence in determining competitive advantages through the use of ICT in footwear exporting companies located in Leon, are in order of significance: exports, innovation, capital human, quality and price (Manzo, 2015).

3. Fundamentals of Competitiveness

The Organization for Economic Cooperation and Development [OECD], the World Economic Forum [WEF] and the Inter-American Development Bank [IDB]. The Organization for Economic Cooperation and Development (OECD), define competitiveness as the measure in the nation, the free trade system, fair market conditions and proof of international markets; the (World Economic Forum [WEF], 2001) includes the increase of the real income of its people in the long term and the ability to achieve sustained high rates of GDP growth per capita. Finally, the (Inter-American

Development Bank [IDB], 2002) also considers the quality of the economic and institutional environment for the sustainable development of productive activities.

For its part, authors such as Porter, Krugman and Bejarano, say that competitiveness should not restrict to the advantages in the markets, but also consider the factors that determine, in addition the analysis of different contexts: the nation, the region, the sector and the company (Porter M., 1990), (Krugman, 1994) and (Bejarano, 1998).

Porter suggest that the ability to maintain and increase participation in international markets, with a parallel to the standard of living of the population and that the only solid way to achieve this is based on the increase of productivity (Porter M., 1990).

Krugman warns that it is also necessary to consider various determinants of the population's standard of living, such as growth, employment and income distribution, since nations do not compete on equal terms; it is more an internal matter of the nation than an external aspect (Krugman, 1994).

On the other hand, for Bejarano companies and no the companies compete in global markets, so competitiveness is not a short or medium term policy objective, but the search for a sustainable condition characterized by its permanence and directed towards the markets (Bejarano, 1998).

(Porter M., 1990) proposes to establish the competitive potential of a company from the Diamond of competitiveness, which takes into account four interrelated determinants:

- i) the conditions of the factors of production,
- ii) the conditions of the demand,
- iii) the business strategy, structure and rivalry, and
- iv) the related and support sectors

In terms conceived by ECLAC, the generation of genuine competitiveness depends on the possibilities of raising productivity to the level of international best practices, while competitiveness at the microeconomic level means achieving the efficiency standards in force internationally in terms of resource utilization and quality of the product or service offered.

Competitiveness in a company is associated with concepts such as profitability, productivity, costs, added value, percentage of market share, level of exports, technological innovation, product quality, among others (Padilla, 2006).

Generally, for the analysis of the competitiveness of a country, sector or sub-sector, indicators such as the measurement of the relative trade balances, penetration rates, export opening, among others that are calculated against the competition, are used. However, these indicators do not allow to know the causes of the behavior or the evolution of the structural factors of development, for which reason they have been questioned.

3.1 Sectorial competitiveness

According to Marcovitch, sectorial competitiveness reflects the capacity to generate the bases for the creation and development of advantages that sustain an international competitive position (Marcovitch, 1998); Gual and Hernandez, citing Cohen et al. (1984), define such competitiveness as the capacity of a sector to increase their participation in the domestic and foreign markets under conditions of free competition, while maintaining a satisfactory growth of the real income generated by the activity: thus for a country it results strategic to identify the sectors that provide advantages not only comparative but competitive (Gual& Hernandez, 1993).

3.2 Internationalization of SMEs

(Martinez, 2006) argues that understanding the globalization processes in which all countries find themselves, the development of exporting SMEs must be considered as an indisputable key to success in national growth programs. At an international level it is clear that the mechanism to achieve economic and social growth is the promotion and strengthening of SMEs that constitute the largest number of economic units and generating employment worldwide.

The results of the research indicate that microenterprises have had a reactive export strategy, unlike medium-sized companies (Westhead, Wright, & Ucbasaran, 2001) this is thought to be the case because small companies use competitive models different from employees by the exporting companies and because the small companies are conditioned by the option of the competitive model that they continue to internationalize (Wolf & Pett, 2000).

Bradinath concludes that, in developing countries, the systematic creation of business competitiveness is related to the success of their exports (Bradinath, 2004).

4. Diagnosis of the Footwear Industry

4.1 World industry

APICCAPS, in its publication World Footwear Yearbook 2017 indicates that global footwear production over the last two years has stagnated at 23 billion pairs, after having presented growth rates of 15% from 2010 to 2014 (ShoeInfoNet, 2017).

At the continental level, the geographical structure of the industry remains largely unchanged; in 2016, Asia recorded 86% of world production, slightly lower than previous years.

At the national level, China's participation in world production has increased steadily during the last decades, reaching a maximum of 62.9% in 2013 with a consecutive decline over the years until reaching 57% in 2016.

During the last decade there was a strong growth of world exports of 25% in terms of volume (13.9 billion pairs) and 78% considering the value (122 billion dollars). However, during the last two years, exports declined 6% in volume and 8% in value. This suggests that a new phase in the development of the industry could have arrived.

As a country, China continues to be the leader in terms of world exports, with 67.3% of the share in 2016, Vietnam follows, but still far away.

Europe continues to lead global footwear imports and in 2016 its share was 48% in terms of value and 37% in terms of volume, the highest registered in 5 years. The United States, which had a share of 22.1% in 2010, only accounted for 19.6% of global imports in 2016. In this scenario, Asia is the second destination of imports in terms of volume.

But, on the other hand, the average export prices have fallen around 2.2% to \$ 8.84 for the past two years, this could be another indication that the industry is entering a period of more intense competition. Even the 2008-2010 economic crisis had not stopped the increase in average prices. The decrease in the average price was mainly caused by the developments in Asia.

The average price of leather footwear maintained its stable price which is 3 to 5 times higher than in other categories. (Portuguese Footwear, Components and Leather Goods Manufacturer's Association [APICCAPS], 2017).

4.2 Mexican industry

According to the (Chamber of the Footwear Industry of Guanajuato [CICEG], 2016) the Mexican footwear industry occupies the position 9 worldwide, its production in 2016 was 254 million pairs of which 172 million pairs corresponded to the state of Guanajuato.

Of the 11,538 national economic units 3,920 are located in Guanajuato and of these the majority (696) are dedicated to tannery, secondly, to leather goods (338) and thirdly to suppliers (300).

The productive chain of the footwear sector generates altogether 579,000 jobs nationwide and 160,000 jobs in the state of Guanajuato. The participation of the footwear sector in the GDP amounted to 0.22% nationally, 4.97% in the state of Guanajuato and 16.75% in the city of Leon, but if the productive chain is considered in its total these figures increase to 0.43%, 6.30% and 23% respectively.

In 2016 Mexico ranked 26th worldwide as an exporter in pairs (25.36 million pairs) and sale price (\$ 456.60 million dollars) while it ranked 32nd in pair import (82.14 million pairs) and 20 in importation by price (\$ 962.20 million dollars). A favorable data is that the average price of pair of shoes exported is \$ 18.01 dollars while the import is only \$11.71 which would indicate that they are destined to different segments of market, being one of greater purchasing power that acquires Mexican products abroad. However, what is worrisome is the 8% drop in the number of pairs exported in 2016 compared to 2015, while the volume of imported pairs created 3% in that same period. While this may not directly signify a cause-effect relationship, it at least evidences the situation that prevails in the footwear industry.

If we analyze the historical evolution of footwear exports from 2010 to 2016, we can see that 2016 is the first year with a decrease in the volume of exported pairs (Chamber of the Footwear Industry of Guanajuato [CICEG], 2016)

The main export markets in 2016 were USA (78.46%), Guatemala (5.61%) and Canada (2.08%), evidence of the lack of diversification of domestic producers, which in eventual situations such as economic crises or policy changes can impact quite importantly.

The main market to which the products are shipped is USA with an average price of USD 19.33 but to Singapore and Japan, items with a higher unit price (28.66 and 26.48) are sent, which is why they are particularly important destinations for SMEs that can satisfy the requirements of consumers of these countries.

Leather footwear is still the most important of Mexico's production so the efforts of SMEs should continue to improve the quality of these products.

5. Methodology

In order to obtain the diagnosis of the local context, an instrument was prepared consisting of two parts: the first consisted of 43 questions divided into 7 blocks (Organizational Culture, Productive Processes, Finance, Marketing, Export Culture, Research, Development + Research + Innovation [R & D + I] and Internationalization) to obtain a percentage qualification of the company's performance following the Methodology proposed by the INEGI. The second part of the instrument consists of 24 items divided into 7 factors that constitute barriers to export (Knowledge, Exogenous, Cultural, Private and Logistic Support, Tariffs, Resources, and Market Adaptation) that by using the Likert scale, measured the perception of the entrepreneurs. The instrument was applied to companies registered before the Ministry of Finance and Public Credit (SHCP) personally and by telephone, since no response was received by email.

The instrument was applied to 50 companies dedicated to the production of leather footwear, located in Leon. The quantitative analysis of the information obtained using the IBM SPSS Statistics v19 computer system was carried out, including the qualitative analysis of the different phenomena related to the development of foreign trade in the leather footwear sector.

5.1 Results

Table 1. Descriptive Statistics of the Applied Measurement Instrument

| | N | Minimum | Maximum | Average | Divert. tip |
|-------------------------------------------|----|---------|---------|---------|-------------|
| Organizational culture | 50 | 1 | 12 | 4.16 | 3.066 |
| Productive processes | 50 | 0 | 5 | 1.30 | 1.403 |
| Finance | 50 | 0 | 13 | 5.60 | 2.843 |
| Marketing | 50 | -1 | 30 | 8.60 | 6.937 |
| Export culture | 50 | 0 | 9 | 2.60 | 3.077 |
| Development + Research + Innovation | 50 | 0 | 9 | 3.96 | 2.990 |
| Internationalization | 50 | 0 | 5 | .90 | 1.182 |
| Knowledge Barriers | 50 | 10 | 30 | 22.94 | 5.755 |
| Exogenous Barriers | 50 | 7 | 20 | 16.20 | 3.226 |
| Cultural Barriers | 50 | 2 | 15 | 11.04 | 3.276 |
| Barriers of Private Support and Logistics | 50 | 2 | 15 | 11.50 | 2.880 |
| Customs barriers | 50 | 4 | 15 | 11.60 | 2.799 |
| Resource Barriers | 50 | 2 | 15 | 12.26 | 2.769 |
| Market Adaptation Barriers | 50 | 4 | 10 | 8.10 | 1.832 |
| Valid | 50 | | | | |

Of the 7 organizational dimensions analyzed, Marketing is the one with the highest standard deviation, while Internationalization and Productive Processes have the lowest deviation.

It is worth mentioning that for this section of the instrument the maximum possible points per category are the following: Organizational Culture: 14, Productive Processes: 5, Finance: 20, Marketing: 30, Export Culture: 14, R & D + I: 9 and Internationalization: 6

Weighing relatively we obtain the following performance averages for each of the dimensions: Organizational Culture: 29.71%, Productive Processes: 26%, Finance: 28%, Marketing: 28.67%, Export Culture: 18.57%, R + D + I: 44% and Internationalization: 15%.

The most important area of opportunity in the companies surveyed is in the Internationalization and Export Culture.

On the other hand, in relation to barriers, Knowledge was the category that presented the highest standard deviation while the Adaptation to Market category registered the lowest deviation.

For each barrier the maximum possible points are: Knowledge Barriers: 30, Exogenous Barriers: 20, Cultural Barriers: 15, Barriers of Private Support and Logistics: 15, Tariff Barriers: 15, Barriers of Resources: 15 and Barriers of Adaptation to the Market: 10.

Performing the relative weighting the following results of the perception of these obstacles are obtained: Knowledge Barriers: 76.47%, Exogenous Barriers: 81%, Cultural Barriers: 73.60%, Barriers of Private Support and Logistics: 76.26%, Tariff Barriers: 77.33%, Resource Barriers: 81.73% and Market Adaptation Barriers: 81%. The interpretation is that businessmen perceive most of the barriers as equally important impediments to exporting being only the Resource Barriers in which industrialists perceive their strength to make international sales.

These annotations give a detailed diagnosis of the reality of the foreign trade of shoemaking SMEs in Leon. In short, the function of Marketing presents a greater deviation because some companies devote significant efforts to position themselves in the market while others make no use of this set of techniques and tools to improve the marketing of their products in local and global environments. In addition, closely related to the lack of knowledge of the national market itself is the inability to enter foreign markets which explains the generalized low performance in the areas of Internationalization and Export Culture of the companies analyzed.

On the other hand, in relation to the analysis of barriers to foreign trade it is important to note that employers perceive them practically at the same level as impediments to the internationalization of their organizations, which indicates a lack of professionalism in the aspects analyzed.

7. Conclusions

Despite the tradition of the leather footwear industry of Leon, it is generally not competitive internationally as evidenced by the annual reports of the sector in which there have been gradual decreases in the competitiveness ranking. Given this historical situation, it is necessary to raise awareness of the need to recognize, first of all, the relevance of building strategies to resolve this contradiction. The export strategy has been proposed as a viable way for SMEs to access the benefits of global markets and thereby promote their competitiveness.

A preponderant conclusion is that the particular characteristics of SMEs are not in themselves an impediment to a successful incursion into foreign markets, however, they require a professionalization that is achieved jointly by employers, trade associations and government.

The results of the diagnostic study carried out in shoemaking SMEs in Leon revealed that the areas related to Internationalization and Export Culture are those that represent the greatest opportunity, while the main barriers perceived by entrepreneurs are market adaptation, exogenous and of

resources, although in general ignorance means that all of them are perceived as important obstacles to internationalization.

Only by working on these areas to promote the internationalization of SME's, a higher level of competitiveness could be reached with the economic and social benefits derived from the growth of the Mexican exports.

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