Development Policy Research Unit
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Textiles and Clothing in SADC:
Key Issues and Policy Perspectives

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Foreword

The Development Policy Research Unit (DPRU), located within the University of Cape Town's School of Economics, was formed in 1990 to undertake economic policy-oriented research.

The aim of the unit's work is the achievement of more effective public policy for industrial development in South and Southern Africa.

The DPRU's mission is to undertake internationally recognised policy research that contributes to the quality and effectiveness of such policy.

The unit is involved in research activities in the following areas:

- labour markets and poverty
- regulatory reform
- regional integration

These policy briefs are intended to catalyse policy debate. They express the views of their respective authors and not necessarily those of the DPRU.

They present the major research findings of the (ISP). The aim of the ISP is to promote industrial development in the *Southern African Development Community* (SADC) through regional economic integration and cooperation. It is a three-year project that commenced in August 1998 and is funded by the *International Development Research Centre* (IDRC). Ultimately, this project will identify the policies and programmes that support regional interactions that contribute to the industrialisation of SADC national economies.

Textiles and Clothing in SADC: Key Issues and Policy Perspectives

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Introduction

Industrial sectors across the SADC region differ from one another in terms of size, structure and competitiveness. The shifting of market boundaries and the improvement of market access is going to have a significant impact on the size, structure and competitiveness of industries in member SADC states. This policy brief highlights the key issues facing the clothing and textile sector in the SADC in light of new trade, institutional and regulatory agreements. The brief draws on case studies of three clothing and textile-producing countries in the region: Malawi, Mauritius and Zimbabwe.

The Clothing and Textile Industry: A Key Sector in the SADC Region

The clothing and textile industry is a very strategic sector for Southern Africa, as it is in other regions of the world. It is an industry with significant forward and backward linkages, has huge employment creating capacity in both the formal and informal sectors, and it tends to benefit developing countries at various stages of development due to its cross-sectoral linkages with agriculture, and other industrial sectors (e.g. leather, footwear, vehicle upholstery, etc.).

The Clothing and textile industry in the SADC is considered a ‘sensitive’ sector with a long history of tariff (and quota) protection. Almost every single country in Southern Africa, in one form or the other, has some sort of textile and/or clothing manufacturing activity taking place. The dominant producers are South Africa, Mauritius, Zimbabwe and Malawi. The industry in the region is cotton-based, which constitutes a significant advantage in the SADC because of the existence of cotton farmers in South Africa, Zimbabwe, Malawi, Zambia and Tanzania. With the presence of spinners and weavers, garment manufacturers, and cross-border formal and informal trade, the potential for a 'cotton corridor' in the SADC is therefore hardly far-fetched!

Features of the Regional Industry: Malawi, Mauritius and Zimbabwe

- South Africa aside, Mauritius dominates in the region with the most number of firms (Table 1), and the largest quantity of employees (Table 2).

Table 1: Number and Distribution of Firms between SMME's[1] and Large Enterprises[2]

	MALAWI	MAURITIUS	ZIMBABWE	TOTAL
SMME's				
Clothing:	9	136	76	221
Textiles:	13	29	10	52
Large Enterprises				
Clothing:	2	157	52	211
Textiles:	6	12	29	47
TOTAL	**30**	**334**	**167**	**531**

Source: Du Mhango (2000), Gibbon (2000), Jhamna (2000), Muradzikwa (2000).

- The clothing and textile industry in Southern Africa is a huge industry that directly employs up to 260 000 workers[3] and contributes 6% towards the region's national output. However, in the global context the industry is very small, accounting for 2% and 1.5% of world production in textiles and clothing, respectively.

Table 2: Clothing and Textile, and Total Manufacturing Employment in Southern Africa, 1998

	CLOTHING & TEXTILE INDUSTRY	TOTAL MANUFACTURING
Angola	300	51 000
Botswana	2 100	25 750
Lesotho	9 368	17 500
Malawi	10 500	46 000
Mauritius	73 573	110 000
Mozambique	5 100	58 000
Namibia	1 000	18 225
South Africa	136 824	1 460 000
Tanzania	8 000	63 500
Zambia	7 800	59 000
Zimbabwe	18 200	139 000

Source: CSS, DTI, and Department of Labour Lesotho (1999), Valentine (1998)

- A feature of employment in some of the smaller SADC countries (Lesotho, Malawi and Mauritius) is the high percentage of manufacturing employees working in the clothing and textile industry. It must however be noted that manufacturing activity outside of South Africa is very small and therefore manufacturing employment (and as such employment in clothing and textiles) must be seen in the context of a relatively small manufacturing base.

[1] Measured as being any firm with between 1 and 100 employees.
[2] Measured as being any firm with over 100 employees.
[3] This excludes employees who ply their trade in the informal sector in the form of micro-scale knitting, crocheting and sewing activities. Due to the paucity of data, the exact extent of the informal clothing and textile sector in the region remains unknown.

- To its advantage, the SADC has relatively lower unskilled labour costs in the textile sector (except for South Africa). South Africa's high labour costs are probably offset by its relatively lower energy costs when compared with other SADC countries - energy being a significant input in the industry, especially the textile spinning and weaving process.

Table 3: Hourly costs of unskilled labour in the textile industry, 1997. Per unit energy costs, 2000.

REGION/COUNTRY	UNSKILLED LABOUR COST (US CENTS PER HOUR)	ELECTRICITY COSTS (US CENTS PER UNIT)
1. OECD		
Germany	2500	-
U.K	1300	-
USA	1400	-
2. NON-OECD EUROPE		
Hungary	240	-
Turkey	200	-
3. ASIA		
China	55	-
India	65	-
4. SADC		
Malawi	52	8.5
Mauritius	95	4.8
South Africa	235	3.2
Zambia	95	6.9
Zimbabwe	50	5.1

Source: O'Brien, 1997, http://www.eskom.co.za

- The relatively lower labour costs in SADC are overshadowed by relatively lower labour productivity. Although more recent information is unavailable, in 1995 the OECD countries (and some Asian countries like Hong Kong, Taiwan and China) were 50% more productive in terms of use of labour (KSA Cost Comparison Study, 1995).

- Clothing and textile trade in SADC mirrors the large dependency the region generally has on the EU (Table 4). Although trade linkages do exist between member states, most are more integrated with the EU and the USA than they are within the Southern Africa community.

- Of the clothing exports to the SADC, South Africa is the major market accounting for most of the clothing exports from Malawi (90%) and Zimbabwe (74%) reflecting dependency on South Africa in the context of regional trade.

- South Africa has bilateral agreements with Malawi and Zimbabwe with respect to clothing and textile trade. When South Africa substantially revised the trade agreement in the 1990's, previous preferential market access for Zimbabwe producers was curtailed, and this sparked the beginning of the decline in the clothing and textile activity in Zimbabwe.

Table 4: Textile Trade in Malawi, Mauritius and Zimbabwe, 1999

	TEXTILE IMPORTS	TEXTILE EXPORTS	CLOTHING EXPORTS
MALAWI	**19% (South Africa)** **15% (Zimbabwe)** **4% (Mauritius)** 67% (East Asia[4]) 5% (Other)	**90% (South Africa)** **4% (Zimbabwe)** 6% (Other)	80% (SADC) 12% (Taiwan) 8% (Other)
MAURITIUS	**1% (SADC)** 87% (East Asia) 9% (Europe) 3% (Other)	**2% (South Africa)** **1% (Zimbabwe)** 45% (Europe) 25% (USA) 5% (Madagascar) 22% (Other)	**1% (SADC)** 70% (Europe) 21% (USA) 8% (Other)
ZIMBABWE	**17% (South Africa)** **12% (Botswana)** **9% (Mauritius)** 32% (East Asia) 14% (Europe) 16% (Other)	**14% (Botswana)** **9% (South Africa)** **5% (Malawi)** 37% (Europe) 21% (East Asia) 5% (USA) 9% (Other)	**19% (SADC)** 49% (Europe) 20% (USA) 12% (Other)

Source: Du Mhango, 2000, Jhamna, 2000, Muradzikwa, 2000

- From a South African point of view, exports to Zimbabwe account for the largest portion of South African clothing and textile exports to SADC, while Malawi accounts for the highest portion of clothing and textile imports into South Africa from the SADC region (Table 5).

Table 5: South African Textiles and Clothing Trade with SADC, 1999 ***(R million)***

	IMPORTS FROM:	EXPORTS TO:
Angola	0	3.5
Democratic Republic of Congo	0	7
Malawi	345.9	36.8
Mauritius	9.5	74.2
Mozambique	54.2	50.4
Seychelles	0	3.8
Tanzania	3.5	10.5
Zambia	68.5	76.8
Zimbabwe	164.7	105.2
TOTAL	**646.3**	**368.2**

Source: Unpublished Data from the South African Textile Federation, 2000

- The Southern African clothing and textile industry is also highly dependent on the rest of the world (Europe, USA and Asia) for machinery and technology, and for quality dyes, finishes, etc. Malawi imports her technologies and other accessories from South Africa, USA and Hong Kong. Mauritius imports from Europe, Japan, Singapore and Hong Kong, and Zimbabwe meets her technological requirements by sourcing from South Africa and Europe. Yet again, the industries in Malawi and Zimbabwe have close links with technology (machinery) producers and suppliers in South Africa.

[4] Including Singapore, South Korea, Taiwan, Hong Kong, China and India.

Institutional and Regulatory Framework in the SADC

Clothing and textile trade in Southern Africa, like in many other regions of the world, is influenced, or regulated by a plethora of different bilateral and multilateral trade arrangements that have largely been geared towards greater market access and extension of market boundaries for developing regions, like Southern Africa. This brief will focus on just three of those agreements: Lome Convention, SADC Trade Protocol, and AGOA.

Box 1: Other Inter-Industry Linkages

The fact that South Africa imports considerable amounts of cotton from Zimbabwe, Swaziland, Mozambique and Zambia reflects a crucial linkage. *This linkage could indeed be further developed into a 'cotton corridor' in the region, depending on South Africa's willingness to abolish restrictive trade practises*[5]*, where these countries produce cotton and satisfy regional demand of the textile producers, who thereby increase production of yarn and fabric to be turned into garments for the lucrative EU and USA markets*. (Jafta, R, & Jeetah, R, 2001).

Another important inter-industry linkage is with the fabric and yarn suppliers in the region. Zimbabwe is the lowest cost supplier of cotton yarn and fabric in the region (SADC, 1997) suggesting that the 'textile chain' in Southern Africa lends itself to areas of specialisation by the various countries involved. Could Zimbabwe, with other low cost producers with idle capacity (such as Malawi and Zambia) possibly supply the regional demand for cotton yarn and fabric? Could the South African producers shift their resources from this stage of the textile chain to other stages where it has a relatively better comparative, and competitive advantage?

The Lome Convention(s)

The ***Lome Convention*** is a negotiated agreement between ACP countries and the EU that grants preferential access to European markets. Therefore exports from the ACP countries are not subject to any restrictive tariffs. The Lome Convention expired on the 29th of February 2000 and has been replaced by the Benin/Cotonou Convention for the next eight years.

Fresh negotiations will begin (September 2002) to establish regional economic partnership arrangements (REPA's). This would inherently imply reciprocity of trade benefits between regional member states, except for the least developed countries, and indeed this could have implications for industrial location.

Box 2: Impact of Lome Convention

The regional industry has benefited immensely from these two agreements. The spectacular success of the Mauritian industry has been largely attributed to relatively favourable access to international markets resulting from these agreements (Jhamna, 2000). The Zimbabwean producers cited the Lome Convention as a critical factor in either breaking into export markets, or expanding existing export initiatives (Muradzikwa, 2000). Looking at SADC's direction of trade, it is therefore unsurprising that Europe is the major export destination for clothing and textiles. Lome (and now the Benin/Cotonou agreement) grants preferential access to ACP countries.

[5] Protective tariffs, and the requirement that SA spinners (textile producers) have to buy up all South African produced cotton before they are permitted to import cotton.

The Africa Growth and Opportunities Act (AGOA)[6]

The clothing and textile industry in Southern Africa, and indeed in the rest of Africa, have been presented with better growth and development prospects by the promulgation in the USA of the Africa Growth and Opportunities Act. The Act, which expires in 2008, offers Sub-Saharan African countries duty-free and quota-free status into the USA for those products meeting the eligibility requirements, and for the clothing and textile firms in the region, the potential benefits appear to be up for grabs!

- The basic premise of the Act is the development of bilateral trade between Sub-Saharan Africa and the USA, meaning products, such as clothing garments (apparel), which are eligible for the 'free-entry' status must be manufactured either from locally produced textiles or textiles imported from the USA and then exported as a value-added product to the USA[7].

- But there is a significant concession for those countries whose *per capita* income was less than US $1 500 in 1998. These countries, have a four-year window in which to use imported fabric/textiles from third countries – expected to be in Asia – and then export the finished product to the USA.

- However, destabilising events in Zimbabwe[8] have led the United States government to exclude Zimbabwe from the group of countries eligible for improved trade access to the US market[9]. Therefore in the short-term Zimbabwe does not seem likely to reap the potential benefits of the trade pact.

- More significantly, South African garment manufacturers will not be able to source their input materials from neighbouring Zimbabwe if they wish to export garments into the US market[10]. Malawi and Mauritius are set to benefit from the greater market access provided under the Act.

- Malawi has the added advantage of being classified as one of the 'lesser' developed countries, it can export clothing to the USA independently of where the fabric is made, a privilege that will expire on 30 September 2004 (US Customs Report, 2001).

[6] AGOA is one of two parts of the Trade and Development Act (2000) that deals with trade relations between the USA and Africa . The other part of the Act is the Caribbean Basin Trade Act (CBTA) that deals with trade relations between the USA and Caribbean and Pacific island countries.
[7] Business Report 13/08/2000, "US Growth Act Suits Africa's Exports" by Clive Rubin.
[8] Land occupations, human rights abuses and the perception of a deteriorating law and order situation.
[9] Zimbabwe Independent 13/10/2000, "Zim booted out of US trade pact" by Dumisani Muleya.
[10] See following section on, "Key Policy Issues Emerging".

- What this means is Malawi, like Mozambique and Zambia, is not restricted by the rules of origin that are imposed on relatively more developed African economies like Mauritius and South Africa. This window period needs to be exploited by regional producers and potential investors who may find Malawi, Mozambique, Tanzania and Zambia as being particularly attractive, at least until 2004, with the ability to use imported fabric to produce garments with preferential access into the lucrative US market.

Box 3: Impact of AGOA

For South Africa, the benefits of AGOA are already being realised. US trade statistics show South Africa reaping rewards amounting to US$135 million from January to June (2001) from the AGOA recording benefits. Excluding the benefits accrued to participating oil-producing African countries, South Africa accounted for 72% of total benefits accrued through AGOA. In general, AGOA beneficiary country exports to the USA, including oil, were up 24% in the first three months of 2001[11]. In Malawi, 600 new jobs have been created as a result of AGOA and in Lesotho investments in clothing and textile plant and equipment has soared to US$122 million creating thousands of jobs that pay five to ten times the average wage. Exports from Madagascar to the US are up 126% due to significant Mauritian investment in the clothing industry of that country. Even though the benefits for some countries are starting to materialise, African clothing manufacturers only exported 3% of the apparel they were entitled to ship into the US duty free for the year suggesting there is still huge potential for SADC producers to seize on the opportunities presented by this lucrative market[12].

The SADC Trade Protocol

The SADC Trade and Investment protocol seeks to liberalise trade between member countries in an effort to create a free trade area within eight years, with an estimated market of 120 million people. At the heart of the protocol is the need to harmonise trade and economic policies in the Southern African region. The stated objectives of the SADC Trade and Investment protocol (August 1996) are:

- To liberalise intra-regional trade in goods and services in an equitable manner and to establish a free trade area within the region,
- To enhance industrialisation and economic development within the region
- To foster greater production efficiency and to improve the investment climate within the region.

Within clothing and textile trade, SADC negotiations led to an agreement on a *two-stage transformation* process that is consistent with the cotton-based nature of textiles and clothing in the SADC region. According to this *rule* if a country produces clothing, then the cotton and the fabric has to be sourced from within the region (Tyesi, 2000).

[11] Molebeledi, P (2001). “SA reaps promising AGOA rewards”. Newspaper Article in the Business Day, 29 October 2001.
[12] Sebastian, J (2001). "Knocking Opportunity", Article in, *Business in Africa*, October Edition.

Box 4: Impact of the SADC Trade Protocol

For the textile and clothing industry in particular, the liberalisation policies are likely to set in motion various structural changes to the trade and investment linkages in the region, the location of industry within the region, and to the manner in which firms behave. The benefits of a SADC free trade area are likely to be surpassed by the benefits that accrue to countries if a free trade area with the EU is formed. Mauritius and South Africa for instance export most of their clothing and textile output to Europe (and now also to the USA because of AGOA) and are therefore likely to reap more benefits from expansion of trade with Europe than with SADC. Promotion of a SADC free trade area will yield benefits to all participants, but SADC's small size relative to the global economy and the trade imbalances among its members (South Africa's sizeable bilateral trade surpluses with others) is likely to limit the medium-term scope for trade expansion. South Africa gains more from a free trade agreement with the EU than it will from a SADC free trade area; for the rest of SADC, the gains from greater access to the EU are proportionately even larger[13].

The study by Lewis (2001) considers two options for southern Africa when liberalising trade in the region:

- Establish a Free Trade Area with South Africa, parallel to the EU-South Africa Free Trade Agreement, or

- Liberalise with the EU forming a trilateral Free Trade Agreement

In this 'hub-and-spoke' model[14] the results show that Southern Africa gains far more from a trilateral FTA, as its real GDP increases by 4.1% in contrast to the GDP increase of 0.33% when Southern African forms an FTA with South Africa alone. In addition, the results also show that with a Southern Africa-South Africa FTA, employment increases by 0.7% and 0.9% for skilled and unskilled labour respectively, whereas a trilateral FTA with the EU increases employment by 5.7% and 11.3% for skilled and unskilled labour respectively. Therefore from the point of view of a Southern African country like **Mauritius**, the EU is clearly, according to these results, a more significant regional bloc than the SADC - especially so for Mauritius which has exceedingly strong links with Europe.

The two-stage transformation process

- It is a two-stage process in the sense that the conversion of basic cotton to cotton yarn, and cotton yarn into fabric have to be stages that are present in a SADC member country, using SADC-sourced inputs, if the country is to enjoy free trade status in clothing products.

- In light of the status of some of the least developed countries in the region, a significant concession has been made by the proponents of this two-stage transformation process, SACU. The concession is that for the least developed member states (Malawi, Mozambique, Tanzania and Zambia) only one stage of transformation is required for the next five years. Attached to this concession are also quota restrictions on exports to SACU (Visser, 2000).

- Mauritius and Zimbabwe still have to adhere to the two-stage transformation process. For the Zimbabwean producers (and it could also apply to other

[13] Lewis. J (2001). "The Changing Role and Patterns of Trade in South Africa and SADC".
[14] Where South Africa is the hub!

producers in the region), the two-stage requirement could be problematic because some raw materials such as silk, synthetics, wool, dye is not readily available in satisfactory quantities and quality in the SADC region. This would indeed have a negative impact on Zimbabwe's ability to service it's export market that is dependent upon quality imported inputs.

- Furthermore, Mandindi (2000) in Visser (2000) argues that existing sources of these products in the region are by no means competitive in terms of prices and quality. This again could render regional producers of clothing and textiles as uncompetitive in relation to the rest of the world.

Trade liberalisation measures in the SADC region present fresh challenges and opportunities for firms and industries in the region. Ultimately, the significance and impact of a FTA in Southern Africa depends on how firms and industries respond to these opportunities and threats.

Key Policy Issues Emerging

The clothing and textile sector in SADC faces numerous challenges in light of the changing trade and business environment. Critical policy perspectives arise from the analysis of the sector, and this part of the brief seeks to highlight these key issues.

A 'Cotton Corridor' in SADC

As mentioned earlier, the potential to develop the existing linkages within SADC into a regional 'cotton corridor' is huge. Because of widespread cotton farming in the region, and the large number of yarn and fabric producers and garment manufacturers that exist in the region, possibilities of co-operation with respect to the production is an issue that needs to be examined.

South Africa, with the largest industry in the region has the highest tariffs on cotton, yarn and fabrics, and in addition, there is a requirement that South African textile producers have to buy up all the South African produced cotton before they are permitted to import cotton. These kind of protective measures need to be abolished if a successful 'cotton corridor' is to be developed in SADC. It basically implies some kind of specialisation among countries in areas of the production chain where each respective country has a relative comparative or competitive advantage.

Relocation and De-Industrialisation

These are major issues that are beginning to emerge in Southern Africa. In Mauritius, clothing manufacturers are relocating their low quality mass-produced operations to relatively lower cost countries such as Madagascar and Mozambique. The 'push' factors behind these relocations are increasing labour costs, and declining labour productivity.

For Zimbabwe clothing and textile producers, the playing field has tilted against them. The macroeconomic meltdown has taken its toll on the general industrial performance in Zimbabwe. However, the situation in Zimbabwe is exacerbated by her non-eligibility status under AGOA. Not qualifying for eligibility not only denies Zimbabwe producers easy access into the US market, but also denies them a market in some of the SADC countries. For instance, under the Act, Mauritius and South Africa are not allowed to use fabric made in Mozambique with Zimbabwean yarn.

Though Mozambique and other least developed countries may use Zimbabwe yarn and fabric (until 2004), Mauritius and South Africa may not, not even indirectly, until Zimbabwe becomes eligible (Coughlin, 2001). Zimbabwean cotton yarn and fabric producers could face tougher times ahead, in spite of the already depressed state of the industry. More significantly, South African garment manufacturers will not be able to source their input materials from neighbouring Zimbabwe if they wish to export garments into the US market. Malawi and Mauritius are set to benefit from the greater market access provided under the Act.

It is therefore unsurprising that there are fears of de-industrialisation in some SADC countries (like Zimbabwe). However from a regional perspective, SADC as a whole may well benefit in terms of increased welfare under AGOA, but individual countries such as Zimbabwe may incur the damaging effects of de-industrialisation. As the *Fallacy of Composition* asserts, "what is true for the individual is not necessarily true for the group of individuals"!

Overlapping Agreements

The existence of Overlapping Regional (SADC and COMESA) as well as bilateral trade agreements must be dealt with at both the political and administrative levels. It is becoming clearer that as long as numerous SADC members remain involved in conflicting regional arrangements or trade liberalisation commitments, actual progress in expanding trade and development could well be limited.

The COMESA free trade area is already operational and is at a more advanced stage than the SADC. The SADC free trade area continues to be bogged down by political differences between countries (or at least between the countries' leaders) and the lack of political will. Furthermore, the strengthening of capacity and efficiency of institutions in SADC[15] is necessary to encourage investment, facilitate trade, and seek out opportunities to be exploited by regional business enterprises.

Second Hand Clothing and Illegal Imports

[15] Investment promotion agencies, standards association bureau's, trade-promoting bodies, dispute settlement mechanisms customs and border control, etc.

This is a 'grey' area that is causing much concern in SADC. On the one hand, second hand clothing (sometimes donations from industrialised nations) and illegal imports provide a means of cheap clothing for scores of relatively poor people in Southern Africa. On the other hand, these imports have devastating effects on clothing and textile producers in the region. Indeed, in some countries (such as Malawi and Zimbabwe) de-industrialisation is, or has occurred because of such imports[16]. Policies need to be put in place to ban second hand clothing imports because of its medium-to-long term effects on industrial activity in the region. Strict controls at border posts (where most of the smuggling takes place) need to be enforced and complemented by increased human resource capacity so as to stamp out corruption and enhance efficiency.

Concluding Remarks

In the final analysis, the prospects for the clothing and textile industry in SADC depends on how firms respond to the opportunities and threats that characterise the changing trade and business environment in the region. Although the SADC Trade Protocol will result in some benefits for member states, the benefits are relatively smaller than those to be gained from SADC forming a free trade area with the EU. This mirrors SADC's dependency on Europe as a destination for clothing and textile output. The benefits of AGOA are already being reaped and the opportunities that AGOA presents to regional firms are yet to be fully exploited.

By no means is the above analysis exhaustive. It does however provide insights into the key issues that will influence the prospects for renewed growth and development of the clothing and textile industry in Southern Africa.

[16] Survey results show that Zimbabwean producers view second-hand clothing imports as a major contributing factor to the decline of the industry, a decline that started in the 1990's.

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