Unravelling the Relationships between Used-Clothing Imports and the Decline of African Clothing Industries

Article *in* Development and Change · November 2012

DOI: 10.1111/j.1467-7660.2012.01797.x

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Development and Change

Published on behalf of the Institute of Social Studies, The Hague

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ABSTRACT

African clothing industries have declined since the implementation of economic liberalization policies in the early 1980s whilst used-clothing imports to Africa have increased. The general effects of economic liberalization on African clothing industries are well documented, although little research has been conducted on the particular impact of increased imports of second-hand clothes on the local manufacturing sectors. Whether these two processes are causally related is difficult to determine due to limitations in official data sets. In this article, the used-clothing trade is explored in detail and a broad range of cultural and local economic processes are investigated. Trends such as declining local purchasing power and the opening of African markets to cheap new clothing imports, as well as imports of used-clothing, are examined, along with the converse boost to African clothing export production resulting from preferential trade agreements in the 2000s. With respect to the differential legal and illegal imports of second-hand clothing to selected African countries, it is demonstrated that official trade data sets often fail to capture the nuances of contemporary social and economic processes.

INTRODUCTION

The long-term trend of clothing manufacturing decline in sub-Saharan Africa[1] since the early 1980s is part of a well-documented general history of African deindustrialization (Gibbon, 1996; Onimode, 1988; Traub-Merz, 2006). One phenomenon coinciding with the closure of clothing factories is the import of used clothing to Africa, which has increased over the same period (Frazer, 2008). The import of used clothing[2] and the economic impacts of the trade have not been widely studied (Field, 2000, 2008; Haggblade,

We would like to thank Ben Fine and the anonymous referees for helpful comments on earlier drafts. Andrew Brooks held an ESRC doctoral studentship which contributed to funding this research and he would like to thank the IESE (Instituto de Estudos Sociais e Económicos), Maputo, Mozambique, for hosting his field research.

1. For the sake of brevity, Africa and African refer to sub-Saharan Africa throughout this article.
2. We include second-hand shoes within the category of used clothing.

Development and Change 43(6): 1265–1290. DOI: 10.1111/j.1467-7660.2012.01797.x

Published by Blackwell Publishing, 9600 Garsington Road, Oxford OX4 2DQ, UK and 350 Main St., Malden, MA 02148, USA

1990; Hansen, 2000). However, several authors have discussed how they believe used-clothing imports directly undermine local new-clothing production, forcing the sector to contract and causing a significant loss of employment, eliminating opportunities for new manufacturers to enter the market and precluding the possibility of industrial upgrade (see Frazer, 2008; Koyi, 2006; Patel, 2004; Webster, 2003). To the casual observer there seems to be an intuitive relationship; cheap imported used clothing entering the market undercuts local production of garments which leads to a clothing manufacturing decline (see Dougherty, 2004; Jester, 2002; Majtenyi, 2010; Slotterback, 2007). Kandiero's (2005: 335) assessment is indicative:

> With the liberalization of the second-hand clothing market, the already deteriorating textiles and clothing industry was severely affected. The garments produced in Malawi have been found to be more expensive than second-hand clothing, and as a result, some of the major factories could not compete with the cheaper prices offered by the second-hand clothing industry and they were forced to close. Initially, the influx of second-hand clothing was seen as 'the best thing that ever happened to Malawi', but the consequences to the clothing industry were devastating . . . . to some the closure of the major textiles and clothing factories can be viewed as 'injury'.

This article examines the extent to which this observation is borne out by the available evidence and forms part of a broader macro-economic pattern across Africa. Attempting to understand the real relationship — if any — between these two trends is more problematic than at first appears. The decline of African clothing industries may be an inevitable 'injury' of economic liberalization, brought about by the vector of new and used-clothing imports, but this simplistic association needs to be questioned and investigated thoroughly. Is there a relationship of cause and effect or are both the decline of clothing manufacture and the increase in used-clothing imports independent symptoms of the economic liberalization policies of the late 1980s and early 1990s that opened African markets to competition and led to the closure of unprotected factories?

We start by investigating how difficult it is to prove the economic impacts of used-clothing imports on new-clothing production using official data sets. Much of the crucial detail of the used-clothing trade remains undocumented in international trade statistics. The available United Nations Statistical Division data (UN Comtrade) do not account for all used-clothing trade practices that take place and have many missing records, as do the UN Industrial Development Organization (UNIDO) records of African clothing industry performance. This makes it challenging to illustrate accurately the two simultaneous trends. The following section outlines how the illegal import of second-hand clothes to markets that are officially closed is commonplace in Africa (Abimbola, 2012; Forrest, 1994; Hansen, 2000; Velia et al., 2006). This further inhibits the modelling of the impact of used-clothing imports on clothing industries. We argue that the extent to which the smuggling of used clothing and the by-passing of import controls contribute to a decline in local manufacture versus displacement of new-clothing imports cannot be determined from the available evidence. A broader range of economic and political factors needs to be considered and studies that depend on official data sets in isolation are of limited utility. A more rigorous approach to investigating the neglected African used-clothing trade is needed.

Throughout this paper we examine the complex realities and explain how attempting to demonstrate a causal relationship between correlating trends is methodologically difficult. We review selected case study research of the new- and used-clothing trades and link this to our own empirical research. The multifaceted processes which led to the decline of African clothing industries have been mediated through the continent's neoliberal transformation. Within the Washington consensus, economic growth and development opportunities were presumed to be possible only by reducing state control and liberalizing markets, but these structural changes have disadvantaged most African clothing manufacturers (Harrison, 2010). For example, in South Africa the clothing industry, which had produced for domestic markets, declined as local retailers took advantage of market liberalization after 1994 and sourced clothing from offshore Asian producers (Gibbon and Ponte, 2005). The realities are complex, though, as there have also been localized economic success stories, such as Lesotho, where the government actively courted economic concessions through AGOA (the African Growth and Opportunities Act), which led to the growth of a labour-intensive, export-orientated clothing sector dominated by foreign manufacturers. However, despite this economic growth, the maltreatment of the female workforce and violent repression of unions provoke further questions about how 'developmental' the limited liberalization success stories have been (Gibbs, 2005).

Detailed empirical case studies have been conducted that provide nuanced explorations of the decline of African clothing industries and the effects of economic liberalization since the early 1980s. These include Andræ and Beckman (1998) on Nigeria; Brooks (2010) and Koyi (2006) on Zambia; Gebre-Egziabher (2007) on Ethiopia; Gibbon on Lesotho (2003a) and Zimbabwe (1996); Hart (2002) and Skinner and Valodia (2002) on South Africa; Kinyanjui et al. (2004), McCormick (1997), McCormick et al. (2007) and Phelps et al. (2009a, 2009b) on Kenya; Mbwambo (2004) and Mbwambo and Kuzilwa (2004) on Tanzania; and Pitcher (2002) on Mozambique. This article does not provide an in-depth review of the decline of African clothing industries. It offers a new analytical perspective by giving an overview of the under-researched international used-clothing trade which has grown through waves of economic liberalization in Africa. We discuss whether and how this may be linked to the decline of textile and clothing industries. Trade liberalization in Africa is not — as is often implied — a uniform process which has been applied homogeneously across the continent. Whilst most countries have experienced long episodes of economic liberalization, some economies have maintained (and even introduced) sectoral interventions or reversed particular liberalization measures, as in the case of trade policy (Yago and Morgan, 2008). Trade reform has also not been implemented uniformly across all commodities. For instance, in Ethiopia quantitative restrictions on used-clothing imports remained in place in the late 1990s and 2000s, whereas imported new shoes were not quantitatively restricted and had a 35 per cent tariff, leading imports from China to out-compete local production (Gebre-Egziabher, 2007). We also examine evidence of contradictory trends in certain geo-economic moments when clothing manufacture and imports of used clothing have increased simultaneously (Mangieri, 2006).

Throughout this article, detailed knowledge of African clothing industries and marketplaces is presented to provide a counterpoint to the fragmented official historical record and enable us to begin properly to understand what is occurring. In conclusion, we ask what we can learn from these trends and demonstrate how studying such relationships requires an approach that involves more than just a casual knowledge of the socio-political contexts of African societies.

WEAKNESSES IN THE DATA: ECONOMIC MODELLING OF THE EFFECT OF USED-CLOTHING IMPORTS

Because of underlying weaknesses in the data, it is not possible to prove conclusively whether there is a causal relationship between used-clothing imports and manufacturing decline using economic modelling. The effect of used-clothing imports from the global North on apparel production in sub-Saharan Africa was first modelled by Bigsten and Wicks (1996) and Wicks and Bigsten (1996). These relatively crude economic assessments conclude that 'used-clothes imports may cause economic damage in the presence of distortions and externalities' (Bigsten and Wicks, 1996: 389). They do not contribute much original empirical work and the basis of their arguments is a theoretical model analysing whether used-clothing imports should be subsidized to provide basic clothing for the poorest of the poor. They conclude that there are more effective uses for aid.

A more recent intervention by Frazer (2008) has also attempted to model the relationship through an instrumental variable approach using published economic data and simplistic geographical concepts. It is an attempt to analyse the macro-economic impact of the export of used clothing from OECD countries on new-clothing production in Africa from 1981 to 2000 and thus actually attempts to test the popular intuitive supposition.[3] Frazer argues that

3. See, for example, Kandiero (2005) as well as Dougherty (2004), Jester (2002), Majtenyi (2010) and Slotterback (2007).

there is a causal link and that used-clothing imports 'have a negative impact on apparel production in Africa, explaining roughly 40% of the decline in African apparel production and 50% of the decline in employment over the period 1981–2000' (2008: 1764). Both this general economic argument and the specific boldness and authority with which Frazer makes his claims warrant criticism. It is not disputed here that African clothing industries in general declined significantly, especially during the period 1981–2000, or that used-clothing imports may have been a substantial factor in that demise; rather, what we assert is that this was an outcome of a broader pattern of economic liberalization (Harrison, 2010; Onimode, 1988). Frazer's attempts to model a causal relationship across the entirety of sub-Saharan Africa relies on two international trade data sets and gives scant consideration to the actual dynamics of the used-clothing trade through discussing trading processes which occur in African marketplaces, or including a nuanced analysis of the impact of new-clothing imports and the broader political-economic context of industrial decline in the face of economic liberalization in the 1980s and 1990s.

Frazer uses United Nations Comtrade and UNIDO Industrial Statistics data sets uncritically and in near isolation from other sources as the basis for his argument. There are known weaknesses in data sets produced for the United Nations Statistical Division such as different definitions, timescales, coverage and remits produced by economically developed nations (Barham, 2008). Missing or inaccurate records are a reality for poor countries, which means that there are fundamental problems with the robustness of research conclusions modelled from these data (Satterthwaite, 2003). Frazer's appendix shows that South Africa is the only African state to have a complete UNIDO data set for all twenty years; only ten other countries have data sets covering at least half the years; nineteen have data for fewer than ten years, while twenty-one countries are omitted from the data set altogether due to a lack of apparel production or employment data. With more missing than complete data, it is difficult to infer robust conclusions, but Frazer's main text is notably lacking in caveats, although this shortcoming is mentioned in the end/footnotes. Frazer should have reflected more critically on the fragmentary resource he relies upon.

Investigating the UNIDO data further reveals that certain key economies, such as Lesotho, have substantial gaps in the record for both the new- and used-clothing trades. For instance, Lesotho has only two years of UNIDO data between 1981 and 2000. Absences such as this may bias the results of Frazer's instrument. Lesotho is highly atypical as it was one of the largest clothing producers in Africa when 'only a handful of sub-Saharan countries' manufactured and exported significant quantities of clothing; data from Gibbon (2003b: 1813–14) demonstrate that Lesotho was the third largest African exporter to the EU and US between 1990 and 2000, after Madagascar and Mauritius. Lesotho continued as one of Africa's largest clothing producers under AGOA after 2000 (Gibbon, 2003a; ILO, 2005). Academics and practitioners alike frequently neglect to reflect critically on the data produced by both impoverished and economically developed states. It is wrong to assume such data are always accurate or that missing records — such as Lesotho in this instance — are typical of the overall population of data.

A further critique that can be levelled at the Frazer study is that it does not ask the right questions in the first instance. By examining only the officially recorded exports of used clothing from OECD countries, the study does not consider imports from non-OECD states or the trade between African countries and so does not reflect the full range of impacts of the used-clothing trade. His approach produces neat outcomes that may be valid in their own right — as an exercise in economic modelling based on two data sets — but the utility of such an endeavour is questionable.

Used clothing is also imported to Africa from non-OECD countries, as Bigsten and Wicks (1996: 382) found: '127 countries or trading territories exported used clothes, including many, if not most, developing countries'. Non-OECD exporters and re-exporters are important in the used-clothing trade. The labelling attached to bales of used clothing sold in Mozambique by Canam International (P) Ltd highlights how clothing from North America is exported to grading facilities in India and re-exported to East Africa (Canam, 2009). We have further evidence of the trans-shipment of clothing collected in the UK by Help the Aged which, through their commercial partner, Precycle, is exported from the UK to East European countries such as Poland. In Poland sorting and processing takes place and much clothing is subsequently re-exported to African countries, often via a third European country (Wooldridge, 2006). To realistically model the total impact of the used-clothing trade on clothing manufacturing in Africa, full, accurate data sets that cover all the different countries involved would have to be used. But unfortunately these do not currently exist.

Some African countries import a disproportionately high volume of used clothing relative to their population size: 'There are few major importers of used-clothing into sub-Saharan Africa (SSA): Ghana, Benin, Tanzania, Kenya and Uganda each absorbed between 2% and 4% of world exports and combined, 62% of SSA's imports of used clothing between 1999 and 2003' (Velia et al., 2006: 4). Hansen notes: 'Small countries like Benin, Togo, and Rwanda have appeared on the top ten list of importers due to a great extent to their role in transhipment' (2000: 118). Haggblade (1990) has shown that over half of Rwanda's used-clothing imports are re-exported unofficially to neighbouring African countries. Interviews we carried out in Mozambique[4] demonstrated how used clothing imported to Mozambique is re-exported by small traders to South Africa, Swaziland and Zimbabwe.

4. During the period 9 July 2009 to 30 July 2010.

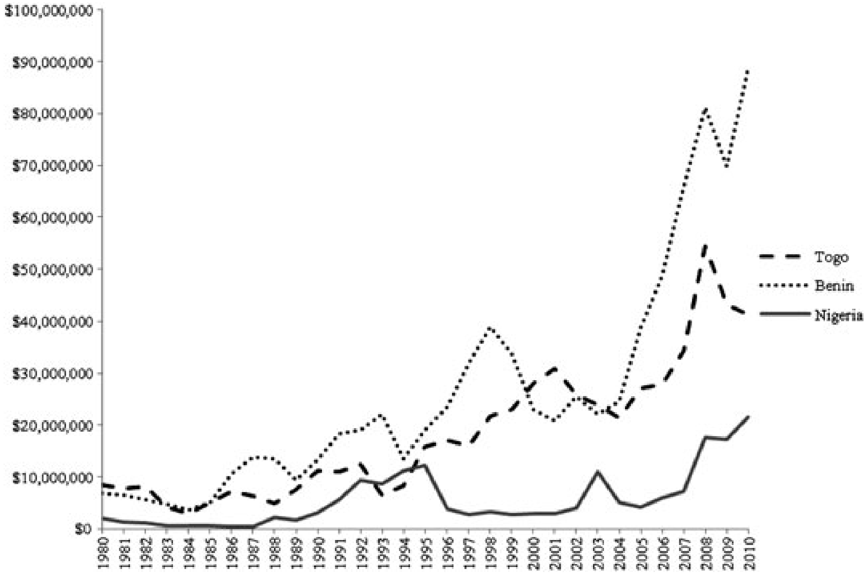
ILLEGAL SHIPMENTS OF USED CLOTHING

In this section we introduce further problems with data records relating to used-clothing imports which inhibit quantitative economic modelling. Illegal trade in used clothing occurs both in exporting countries and in Africa; since these are unrecorded in official statistics, they do not appear in econometric models that rely on such data, such as those of Bigsten and Wicks (1996) and Frazer (2008). Studies from disciplines other than economics (e.g., Field, 2000; Forrest, 1994; Hansen, 2000; Velia et al., 2006) contain accounts of illegal imports and those unofficial imports should also be considered. Thefts of used clothing in the UK intended for export are commonplace and these grey trade patterns will not been traced in official statistics (Lomotey and Fisher, 2006).[5] Illegal imports of used clothing to large, officially closed markets such as Nigeria and South Africa are substantial. This is evidenced by South Africa ranking eleventh and Nigeria fifteenth out of fifty destinations in terms of reported used-clothing exports from OECD countries (1981 to 2000), despite these markets being officially 'closed' to used-clothing imports. The actual imports could be far greater and need to be explored further in order to understand what relationship there may be with the decline in clothing manufacturing in those economically important countries. Including illegal imports in the econometric results highlighted in this paper would give more value to the work of Frazer (2008) and it is argued they would reinforce the displacement of African production for local markets. When clothes are illegally re-exported they will not be retailed in the exportation destination recorded in UN Comtrade statistics and instead reach a different national consumer market in a trade pattern which is not officially documented. They may also have complex effects in the countries of final destination.

Nigeria's large population accounts for nearly one quarter of the sub-Saharan Africa market. As Figure 1 illustrates, between 1980 and 2010 the levels of imports by Nigeria were very low in comparison to Togo and Benin, two much smaller neighbouring markets. As Hansen (2000) and Velia et al. (2006) have suggested, Togo and Benin are among the largest used-clothing importers in Africa. What is causing these large imports to these two small West African states? In an interview[6] with Nigerian used-clothing trader, Aloysius Ihezie of Choice Textiles Division, the regional dynamics of the trade were described as follows: 'The Nigerian market is the largest [in West Africa] even though it's contraband... The relative economic power of Nigeria trickles down [through the West African region]'. There has been an 'almost permanent ban on the importation of textile

5. Interviews with Steve Wooldridge, Help the Aged (London, 3 December 2008) and Brian Lincoln, YMCA (Staines, 10 March 2009).
6. Telephone interview (19 March 2009).

Figure 1. Reported Exports in US$ of Used Clothing from all OECD Countries to Three Selected West African Countries, 1980—2010



Source: UN Comtrade (2011).

products and clothing since the late 1970s' and for example in 1989 nearly 96 per cent of tariff lines for textiles and clothing were subject to import prohibition regimes (Oyejide et al., 2005: 440). Nigeria placed quantitative import restrictions on second-hand clothing products as part of a broader scheme to protect domestic manufacturing. However, these government bans are not implemented effectively (ILO, 2005). Ihezie found that Nigerian borders are 'porous' to used clothing and estimated that '75–80 per cent' of the used clothing imported to West Africa ends up in Nigeria. Benin and Togo have no restrictions on used-clothing imports and cross-border smuggling to Nigeria is rife (Chigbo, 2008; Gbenga-Ogundare et al., 2010; Hansen, 2000). Cotonou (Benin) and Lomé (Togo) are entrepôts specializing in used clothing and other goods formally banned in Nigeria. The trans-border trading communities of Igbo and Abiriban merchants operate the trade and their activities fluctuate with the strength, and degree of restrictions, in the Nigerian market (Forrest, 1994).

Nigerian attempts to implement an import substitution approach to industrialization were not supported by robust customs controls. The former Nigerian President, Olusegun Obasanjo, accused the customs service of 'making nonsense of government's import prohibition policy' (quoted by Gbenga-Ogundare et al., 2010). An impetus for smuggling in Africa is provided by the large differences in the rates of protection between neighbouring countries

(Golub and Mbaye, 2008). The relative poverty of Nigerians, with their low incomes and weak purchasing power, means the consumer clothing market is serviced by illegally imported used clothing transiting through neighbouring countries (as well as imported new clothing), which, even with all the associated transaction costs, represent a cheaper alternative to the relatively expensive new local domestic production. During the 1980s and 1990s, the Nigerian clothing and textile industry faced great difficulties and had periods of decline (Andræ and Beckman, 1998), despite the relatively low official imports of used clothing from OECD countries (see Figure 1). Nigerian textile firms continue to fail. United Nigerian Textiles (UNT) closed in October 2007, with UNT blaming the activities of smugglers, among a number of other factors, for its closure (Economist Intelligence Unit, 2007). The closure was attributed not to the effect of official used-clothing imports to Nigeria but rather the contraband and unreported transborder trade; trying to model the relationship between the two processes using official data sets is, therefore, problematic.

Smuggled used-clothing imports are also common in South Africa, despite the trade being severely restricted by South African government legislation. Velia et al. (2006) have illustrated that Mozambique is a major re-exporter of used clothing to South Africa and document how used clothing is marketed openly in Durban (KwaZulu-Natal province); we observed used garments for sale in markets in Nelspruit (Mpumalanga province). In addition, merchants in Mozambique[7] discussed how traders frequently purchase used-clothing items in Maputo for retail to South African trade clients and private customers on the Mozambican–South African border. Smuggling of used clothing to Zimbabwe from Mozambique is also commonplace and through field research we found examples of both individual 'suitcase traders', who conceal used clothing as their own garments when crossing the border, and larger-scale traders operating with what was believed to be clandestine approval from corrupt customs officials transporting clothing into Zimbabwe. These imports are highly unlikely to be recorded in official statistics.

Whether or not imports are accurately depicted in UN Comtrade statistics, the Mozambican market is, for example, receiving less used clothing than flows through its seaports, and South Africa is receiving more than flows through its harbours. The data concerning these two countries would also skew the results as South Africa is, for sub-Saharan Africa, a large clothing producer and Mozambique is a negligible one. This evidence from Nigeria and Southern Africa supports the main view in the literature and is consistent with Kandiero (2005). The large volume of contraband and unreported transborder trade are likely to have generated a displacement of local production, but proving this quantitatively is very difficult. Drawing attention to this point demonstrates that studies which map causality are weakened when imports are diverted covertly to other markets.

7. Interviews (9 July 2009).

The Nigerian, South African and Zimbabwean cases represent three examples, but there are likely to be more illegal and undocumented transshipments of used clothing in Africa. As Field (2000) has documented in relation to the unlawful used-clothing trades in Zimbabwe and neighbouring countries, researching such practices is very difficult as the individuals involved actively try to conceal their activities. Moses Ikiara, executive director of the Kenya Institute for Public Policy Research and Analysis (quoted by Majtenyi, 2010), gives another example of potential unforeseen relationships between smuggling, used-clothing imports and local production: 'New imported clothing comes in disguised as mitumba [used clothing] and it gets into the market, and of course without paying taxes, which makes it a big challenge for domestic textile producers to be able to find a market'. Such evidence further suggests that the accuracy of official data needs to be questioned and therefore a causal relationship cannot be accurately modelled, especially not without critically considering what the statistics may conceal.

AFRICA AND THE TRANSNATIONAL USED-CLOTHING TRADE

As well as being under-reported in official data sets, the trade of used and unwanted garments from the global North to market stalls in Africa is an important economic issue that has received only limited popular or academic attention. It is vitally important to millions of people's lives (see Baden and Barber, 2005; Field, 2000, 2008; Haggblade, 1990; Hansen, 1994, 1995, 2000; Mangieri, 2006; Velia et al., 2006; Wicks and Bigsten, 1996). There are geographical imbalances in the supply and demand for used clothing, just as there are with the locations of the production and markets for new clothing. In the new clothing trade, imbalances are created principally by asymmetric wage levels and per capita GDP; as has been widely documented, new clothing is produced primarily in low-wage countries and traded internationally to affluent consumer societies (Gereffi and Memedovic, 2003; ILO, 2005; Morris and Barnes, 2009).

The initial stage in the second-hand clothing trade is the generation of a surplus of used clothing in the global North where stimulated demand — principally from the fashion industry — promotes heavy consumption of new clothing so that people discard unwanted clothing that can be worn again (Gregson and Beale, 2004). Used clothing donated in affluent countries, such as Australia, Canada, Spain, the United Kingdom and the United States, is collected by charitable bodies or commercial firms and sold for profit. Much collected used clothing is locally undesirable and is traded to markets where consumers are poor — from Haiti to the Philippines, but especially to Africa. The trade pattern is influenced by a range of geographical and political factors and used clothes are also re-exported and traded between poor countries. Second-hand clothing is officially estimated to account for only about 0.6 per cent of the total global clothing trade (Velia et al., 2006: 4). Nevertheless, such exports from OECD countries were still valued at over US$ 1.9 billion in 2009 (UN Comtrade, 2011), which, as the evidence presented above indicates, is an underestimate of the total international trade in used clothing.

The importance of the used-clothing trade for Africa becomes apparent when one looks beyond the global export figures. Following fieldwork in Kenya, Mozambique, Malawi and Zambia, we are familiar with the type of trade practices of used-clothing markets and large-scale decline of the clothing industry in Africa (see Brooks, 2010, 2012a, 2012b). The potential for a link between used-clothing imports and a decline in clothing manufacture resonates with the pattern of food exports from the global North to Africa. Andræ and Beckman's (1985) in-depth, empirically-based study of the negative impacts of subsidized European and North American grain imports on Nigerian food producers showed how food aid can harm African farmers whilst seemingly providing a benefit for consumers. A similar pattern could be observed with used-clothing imports substituting for the purchase of new clothing, be that local or foreign production, as they command a lower market price. The origins of used clothing and the divergent fortunes of different interest groups or stakeholders in the second-hand clothing trade need to be distinguished as Andræ and Beckman did with food aid. This requires knowledge of how used clothing arrives and is traded in different markets.

Second-hand clothing is reproduced as a commodity in the global North. In the period 21 November 2008 to 19 March 2009 we carried out interviews in the UK with five key charitable and commercial operators in the used-clothing trade (Choice Textiles Division, Help the Aged, Oxfam Wastesaver, The Salvation Army Trading Company Ltd and YMCA). Our research demonstrated the hidden professionalism of the charitable used-clothing trade, as unwanted waste clothing is collected and processed on a commercial basis by private firms or charities. Used garments are separated by hand into numerous specific categories and weighed, labelled and bound into tightly packed bales. Different bales are then packaged into containers for export to particular markets. The bales effectively constitute new goods 'produced' in a circuit of labour processes that utilize the material and cultural value still embodied in the recycled clothing. New labour processes are contained within the final cost for consumers in poor countries. According to Tony Clark of Oxfam Wastesaver, a 40-foot shipping container holding 300 bales of finely sorted and graded used clothing is sold on the portside in West Africa for around £ 25,000, whereas the shipping costs are typically only about £ 2,000. As with new clothes entering the African market from overseas, production costs will be reflected in the retail prices. Even when accounting for transport and collection costs within the UK or elsewhere in the global North, this represents a massive increase in the value of used clothing. Indeed the high profits that can be realized through trade have attracted many new commercial actors into this sector[8] (see also Lomotey and Fisher, 2006). Used clothing includes a production cost that is embodied in its final market sales price: it is neither dumped in Africa, nor is it free to the traders who import it. These costs may be much lower than those contained in new locally-produced clothing commodities in Africa or the equivalent imported new clothing.

Trade liberalization policies in the 1980s and 1990s generally opened African market places to used-clothing imports (Field, 2000; Majtenyi, 2010). In terms of volume, used clothing is a significant import for African states, consistently being one of the top ten exports from the US to Africa and frequently the main item shipped into many parts of the continent (Frazer, 2008; Hansen, 2000). Used garments account for over 50 per cent of the clothing market by volume in many sub-Saharan African countries, including Uganda (81 per cent) (Baden and Barber, 2005: 1; Uganda Manufacturers' Association, quoted in Dougherty, 2004). Exports are beneficial for charities and commercial operators in the global North and are positively coded by Northern governments as they act as a self-financing recycling system for clothing waste (House of Lords, 2008). Used clothing can have benefits for Africans as it satisfies a basic human need for clothing, for warmth and protection, and provides a valuable cultural resource which is used to express social identity (Field, 2000; Hansen, 1994, 1995). Those who participate as vendors or importers can profit from the trade and since second-hand clothes are cheaper than new clothes, used-clothing imports offer relief from inflation and the erosion of purchasing power (Wicks and Bigsten, 1996).

There is, however, a strong argument that the used-clothing trade has negative impacts on African economic development. Relatively cheap used clothes are a substitute for the purchase of new garments which are or were often produced locally. African consumers choose between new and used goods and — for financial and/or cultural identity reasons — often prefer used clothing from the global North to more expensive locally produced or imported items (Chigbo, 2008; Hansen, 2004; Veila et al., 2006). Hence, increased imports of used clothing can depress domestic clothing production, but this is a complex issue which requires closer examination.

The used-clothing trade is more than a chain of economic transactions extending from the global North to the global South; it also forms part of a system of provision of clothing commodities which is dependent upon, and interlinked with, the liberalization of African economies, existing international geographies of commerce and cultural transformations in dress within Africa (Fine, 2002; Hansen, 2000). The model of economic liberalization imposed primarily by the World Bank and IMF (which has important geographical differences within Africa) sought to remove African states from

8. Interviews (21 November 2008 to 19 March 2009).

the governance of their economies and viewed societies as amalgamations of rational individuals (Harrison, 2010). This has impacted upon the manner in which clothing is produced and sold in Africa. In recent decades, Africa has seen costly trade liberalization, stagnant economies, persistent 'sub-imperialist' extraction, authoritarianism and shifting legislation of economic activity (Bond, 2006: 9; Gibbon and Ponte, 2005). A common critical view is that structural adjustment policies and the opening of African markets eroded local clothing industries and provided opportunities for individual capital accumulation for used-clothing importers forming part of the 'domestic rentier class' which can be found across liberalized Africa (Carmody, 2009: 1202).

In Mozambique in the 1990s and early 2000s, economic liberalization curtailed opportunities for clothing industry growth and existing state-owned clothing firms were privatized. Privatization was catastrophic as new owners lacked capital, management capacity and competence and stripped factories of their remaining resources 'to buy BMWs, Mercedes and to construct and furnish their houses. And, after using up the money that the companies have, they transform them into warehouses for selling "roupa de calamidades" [second-hand clothing]' (SINTICIM, quoted in Pitcher, 2002: 195). The impact of economic liberalization was comparable in other Mozambican economic sectors including cashew processing, flour mills and furniture manufacturing. Profiteering was facilitated by the used-clothing imports in the process of de-industrialization: 'A number of privatised enterprises were transformed from manufacturing concerns into import-export warehouses or second-hand clothing shops' (Cramer, 2001: 93; see also Hanlon and Smart, 2008). This evidence from Mozambique in the 1990s and early 2000s is consistent with the observations of Kandiero (2005) in Malawi. The next section discusses these interrelationships in Mozambique and shows that they are more complicated when the local market is further considered.

Imports of second-hand clothing are influenced by regional economic geographies and certain ports such as Beira, Cotonou, Dar-es-Salaam, Lomé, Maputo, Mombasa and Mtwara are key nodes in the geography of the used-clothing trade. Second-hand clothes imported to Africa are a relatively low-value commodity, and so often act as the return cargo in shipping containers. For example, Tony Clark of Oxfam Wastesaver explained how empty containers accumulate in Europe when West African bulk products such as cocoa and timber are shipped to European markets, since there is less demand for the return trade route. The surplus capacity in the return trade makes it relatively cheap to export to West Africa; it costs approximately £ 6,000 to send a container from West Africa to Europe but only £ 2,000 for the return leg.

African shipping routes are very important in influencing trade patterns into the continent. Other container routes, such as triangular patterns involving Gulf States, which were mentioned in our Help the Aged interview, can also be influential. The stability of the West African market versus that of

East Africa was further cited as a reason for Choice Textiles and Oxfam's preference for the former region.[9] Clark argued that in Kenya, there had been fluctuations in import regulations which had disrupted shipments, whereas West African markets including Benin, Gabon, Ghana, Senegal and Togo were said to have more stable import regimes. Merchants in Africa do not follow strict rules and trade is determined by expert knowledge, kinship ties and informal networks. The used-clothing trade is complex and influenced by an ever-changing range of economic, geographical and political factors.

Transport geographies within Africa influence trade patterns, but trade is also determined by socio-economic and political factors (Söderbaum and Taylor, 2008). Charities and companies in the used-clothing trade 'need to be constantly changing and adapting' as access to markets is 'volatile'.[10] Despite this volatility, firms which had critical assets to establish themselves in the used-clothing trade have been able to accumulate capital. One of the largest companies in Tanzania, Mohammed Enterprises Tanzania Limited (METL), became involved in the used-clothing trade in 1985 following trade liberalization (Rivoli, 2009). METL was already established as a manufacturing company producing textiles, clothing, soap and bicycles and developed contacts with American used-clothing exporters, growing to import over 4,000 tonnes of used clothing per month via Dar-es-Salaam. This company was successful because it had sufficient capital and well-developed trade assets, such as warehouses, distribution networks and diasporic Tanzanian connections in the United States and Europe that could link it to used-clothing supplies. In this way METL profited from the liberalization of the Tanzanian economy (Rivoli, 2009: 238).

Diasporas and cultural flows also affect patterns of dress. As African economies have become more open through liberalized globalization, different cultural stimuli, such as international clothing fashions, influenced dress styles. This includes, for example, the consumption of jeans among young African women as demonstrated in our research in Malawi and Mozambique. The import and availability of jeans is not a trade process occurring in a cultural vacuum. The meaning(s) of ladies' jeans are socially constructed through cultural diffusion — the media (film, fashion magazines), aspirational imagery, return migration and diaspora connections (Wiegratz, 2010). In parallel to the import of used clothing — which may itself be stimulating the demand — patterns of dress are sustained and reproduced by the material culture which surrounds the used-clothing system of provision (Fine, 2002).

9. Interviews with Tony Clark, Oxfam Wastesaver (Huddersfield, 13 March 2009) and Aloysius Ihezie, Choice Textiles (telephone interview, 19 March 2009).
10. Interview with Paul Ozanne, The Salvation Army Trading Company Ltd (telephone interview, 21 November 2008).

AFRICAN CLOTHING PRODUCTION AND THE LOCAL MARKET

Since the implementation of economic liberalization policies in the 1980s and 1990s, the predominant trend has been decline in the African clothing industry. In Ghana textile and clothing employment fell by 80 per cent from 1975 to 2000; in Zambia from 25,000 in the 1980s to below 10,000 in 2002; and in Nigeria from employing some 200,000 workers to being negligible (Traub-Merz, 2006: 17). In Kenya, McCormick et al. (1997) found in the 1990s that small and medium clothing manufacturers faced low overall demand for clothing in Nairobi. This was due to declining urban incomes, linked to the structural adjustment programmes that formed part of the economic liberalization process. The conditions of urban poverty and deprivation in African cities in the 1980s and 1990s have been well documented (Davis, 2006; Myers, 2011; Riddell, 1997; Simon, 1995; Tevera, 1995). However, evidencing these trends quantitatively is difficult and they may be obscured by inaccurate or inappropriate statistical reporting (Satterthwaite, 2003). What is clear is that economic liberalization in the 1990s was accompanied by restricted purchasing power, especially for African urban populations which had previously provided the main markets for consumer goods. In Kenya the low demand for locally manufactured new clothing in the 1990s was combined with competition from more affordable used clothing. However, different firms experienced different effects. Custom tailors, who mostly served middle-income urban consumers whose incomes had fallen sharply, fared worse than small manufacturing firms which sold their goods in up-country markets to rural people less affected by declining incomes, some of whom gained economically (Simon, 1995).

The weak purchasing power of African consumers persists today and household expenditure remains low in both urban and rural contexts. For example, in Mozambique monthly household expenditure on clothing is 303 Meticals (US$ 10.45)[11] in urban areas and 167 Meticals (US$ 5.76) in rural areas (INE, 2010, quoted in Paulo et al., 2011: 7). This severely limits what can be purchased (see prices in Table 1). Data we have collected in Maputo demonstrate that second-hand clothing sale prices are on average 37.7 per cent of the cost of new clothes for comparable items, based on a sample (n = 2786) of equivalent new and used men's trousers and shirts and women's skirts and blouses and tops. The cheaper second-hand items are therefore in greater demand among the majority of the population which has weak purchasing power.

Despite the weakness of demand in domestic markets for new clothing due to local impoverishment, the long-term trend of decline since the early 1980s has not been uniform across Africa. In recent years there had been

11. At an exchange rate of 29.00 Meticals (MT) to US$ 1 at the mid-point of the field research, 28 December 2009 (OANDA, 2011).

Table 1. Recorded Purchase Prices of New and Second-hand Clothing Items in Maputo, Mozambique

Item	Mean New (Imported) Clothing Price in US$	Mean Second-hand Clothing Price in US$
Men's trousers	10.51	4.42
Men's shirts	7.56	3.61
Women's skirts	8.48	2.76
Women's blouses and tops	7.43	1.83

some growth in African clothing manufacturing for export to the global North (Traub-Merz, 2006). In Kenya, larger firms have moved out of the local market in favour of exports and clothing factories operating under export processing authorities produce for the US retail market (McCormick et al., 1997; Phelps et al., 2009a). This pattern has been observed in other successful clothing manufacturing sectors, as in Lesotho (Gibbon, 2003a). Clothing exports from Lesotho to the US and EU increased dramatically from US$ 24.5 million in 1990 to a high of US$ 455.9 million in 2004, although they subsequently declined to US$ 383.5 million by 2007 (Morris and Barnes, 2009). Large manufacturers, frequently owned by Asian capital, have developed because preferential trade agreements allow exports to markets in the global North and not because they have low labour costs that make their product competitive either domestically or internationally (Hart, 2002; Phelps et al., 2009a).

African factories have been producing for affluent export markets rather than impoverished local markets. Increases in output and job creation have been stimulated by trade agreements, especially the US African Growth and Opportunities Act (AGOA), which allow African factories to produce clothing for markets in the global North. AGOA (2000–2015) provides duty-free and quota-free access to the US market for apparel items made in sub-Saharan Africa, spurring increased clothing manufacturing and trade, at least prior to the ending of the Multi-Fibre Agreement in 2005 (African Coalition for Trade, 2007; ILO, 2005). A further complicating factor in unravelling the relationship between used-clothing imports and industrial decline is, therefore, that decreases in production for national consumption may be masked by increases in production for export markets.

Politically motivated preferential trade agreements changed the terms of trade in a process independent of used-clothing imports. This had a positive effect on clothing production and employment in some African contexts, such as Kenya and Lesotho in the early 2000s (Gibbon, 2003a; Phelps et al., 2009a). These positive impacts may, however, have been local and unsustainable as is the case in Kenya following the enactment of AGOA: 'The direct employment created has been substantial although it has declined since the high water mark in 2003' (Phelps et al., 2009b: 88). The net effect of AGOA for the continent as a whole has been more difficult to assess: 'Although anecdotal evidence from Kenya and Lesotho suggests that textile industries in AGOA countries stood to gain from the textile benefits, these benefits were either short-lived or unique compared to other AGOA members' (Zappile, 2011: 63). Some potential beneficiaries of the clothing export opportunities afforded under AGOA may not be able to seize the opportunities because additional barriers to trade, such as a lack of investment and high transport costs, inhibited the growth of clothing industries.

The salient point here is that observed growth of clothing production in certain key economies, such as Kenya and Lesotho, in the 2000s is independent of the African market for both new and used clothing.[12] Mangieri (2006) has shown that used-clothing imports to Kenya grew simultaneously with the increased manufacture and export of apparel in the early 2000s, precisely the opposite relationship to the long-term correlation between industrial decline and used-clothing imports that dominates the literature. Equally, the decline in manufacturing in Kenya and Lesotho since the mid-2000s was the result of decreasing exports to the global North, rather than increased domestic competition from used-clothing imports. Likewise, the earlier decline in clothing manufacturing was linked to a decrease in local market demand as urban incomes fell under structural adjustment programmes, as well as the opening of markets to used-clothing imports and cheap new clothes from Asia in the 1990s.

Kandiero's (2005) observations may therefore have been accurate for Malawi, but this does not account for all the changes which have occurred in the diverse African clothing manufacturing sectors. African-produced clothing is uncompetitive in liberalized open markets, both domestically, regionally and in overseas markets. When liberalization opened borders, it allowed both second-hand and cheap new imports to enter African markets and flow between African countries, especially where internal African border controls are weak (discussed further below). This can lead to increased competitive pressure for African producers in regional markets. For example, African printed *chitenge* fabric (wraps of material worn as a sarong) which is or was produced in countries including Congo (DRC) and Tanzania and exported to neighbouring markets such as Mozambique and Zambia, now competes with cheap imports of printed textiles from China and India, as well as second-hand clothing. In these instances, imported new clothing may be displacing local or regional production, especially when second-hand clothing does not serve a specific cultural niche since it does not have the same symbolic value as printed fabrics produced as low-cost

12. Although there may be backward linkages to suppliers shared between larger export producers and producers selling into domestic markets, and some smaller manufacturers may have benefited as larger firms move out of the domestic market (McCormick et al., 1997; Phelps et al., 2009a).

consumer goods specifically for African markets. However, the impacts of economic liberalization and the opening of markets are not always simple to map. In Mozambique one of the major suppliers of African fabrics is METL, the same company which is a large-scale importer of second-hand clothing to Tanzania (Rivoli, 2009). Furthermore, this company also has an involvement in new clothing manufacture in Mozambique, having reopened the Texmoque factory in Nampula in 2008 (METL, 2011). The opening of the Mozambican economy and GDP growth have allowed people to consume some low-value commodities including new imported printed fabrics from Tanzania and also China, as well as second-hand clothing (Hanlon and Smart, 2008).

Clothing industries have followed different trajectories in neighbouring African countries. On a very modest scale, the Mozambican clothing sector has grown since the mid-2000s, but this has been to the detriment of South African factories. This clothing industry growth came as a result of Mozambican factories producing for export markets, as demonstrated above in relation to Kenya and Lesotho. For example, the MOZTEX factory opened in 2009 in southern Mozambique, employing 614 workers, and exports garments to South Africa and the United States (AllAfrica, 2010; Maccauhub, 2011). Manufacturers have relocated from South Africa because of the lower wage levels (Rogerson, 2004). In the South African labour surplus economy, 'unrealistically progressive' labour market policies are a barrier to employment growth as promoting high productivity per worker is difficult (Skinner and Valodia, 2002: 56). This is having the impact of displacing low-skilled, poorly-paid jobs to neighbouring Mozambique, in what can be read as a failed attempt in South Africa to bargain for increased labour standards in the face of the neoliberal adjustment of the South African economy (Hart, 2002). Liberalization of the Mozambican economy afforded business opportunities for METL and for companies to relocate from South Africa and invest in clothing production, although the small size of the Mozambican clothing sector must also be seen in context. Less than US$ 400,000 worth of clothing was exported in 2005 and in comparison Lesotho exported US$ 494,000,000 (World Bank, 2008: 1). The different impacts of liberalization in Mozambique and South Africa in the mid to late 2000s demonstrate the divergent fortunes of populations within Africa, which extend beyond that accounted for in the claim that there is a singular displacement of local manufacturing caused only by used-clothing imports.

Labour costs in Africa have been shown to be relatively high in comparison to East Asia. In South Africa and Zambia real wages are, however, lower due to the higher local cost of living; surviving on such wages is difficult and working conditions are often poor (Brooks, 2010; Hart, 2002). Specifically, it is low labour productivity which makes production expensive and therefore locally uncompetitive compared to used clothing which has low 'production' costs (as discussed above). Today in African markets, imported used clothing is often competing with new-clothing imports from Asia rather than locally-produced clothing. In such cases any negative impact of used-clothing imports to Africa will not principally affect African producers (that cease to manufacture), or those manufacturing mainly for export, but rather will affect Asian clothing manufacturers that export to Africa (Baden and Barber, 2005). Yet, markets do not consistently function in what the distant economic analyst would intuitively expect to be a logical manner. Local-level commerce in African marketplaces is socially and fiscally complex and should be examined empirically.

The cost of clothing is not the only concern for impoverished African consumers (Hansen, 2000), since the purchase prices of used commodities are not always lower than the prices of new equivalents. A repeated observation in Mozambique and Zambia is of African merchants concealing new, Chinese-manufactured shoes within displays of used shoes imported from the global North, buffing and tarnishing the brand new goods in an attempt to conceal their origin, because used shoes from Europe or North America command a higher price due to their perceived, or actual, superior quality. This process of attempting to conceal the origin of imported new goods is an example of the type of trade practice which can only be uncovered through fieldwork in African markets and illustrates how quantitative economic research which is based solely on published statistics will not encompass all the processes occurring in the used-clothing trade. The new items sold in African markets are of low quality, as they are made on the basis of narrow cost margins in order to be sold at affordable prices to poor people. However, they are culturally more appealing when they are tailored to local African styles and fashions. In contrast, the used shoes were produced for affluent consumers in the global North. The material quality of second-hand clothes and shoes, notwithstanding that many items are worn or soiled, can be better than locally affordable new goods as they were first produced for a more affluent class of consumers in Australia, Europe or North America.[13] African consumers respond to their desire for locally fashionable trainers when they see a new item among second-hand shoes and purchase this good because they believe it to be stylish and find the model appealing. However, they also think of it as being of a higher quality as they have been tricked by the retailer into believing that it is a used trainer from the global North. Conversely, in many Kenyan periodic and daily markets, used clothes and new garments manufactured in China are sold together openly, without such disguises, but used clothing sells more rapidly.

These examples illustrate that, at the level of informal African market stalls, where the transactions occur which ultimately determine the market impacts of used products, such imports have complex interrelationships with new products and not merely a displacement effect (Hansen, 2004). Used

13. See Besnier (2004) for a comparable discussion of the different values of second-hand clothing in Tongan society.

articles nowadays compete with imported, primarily Asian production, rather than with goods manufactured in Africa, with small-scale African tailoring and manufacturing catering to specific local niches such as school uniforms and traditional dress. Theoretical principles and intuitive suppositions (see Koyi, 2006; Patel, 2004; Webster, 2003) may therefore provide poor approximations to complex realities unless validated empirically. Proving this is difficult since used clothing has significant market impacts that are not readily apparent in official economic data sets.

CONCLUDING REMARKS

This discussion of the globalized used-clothing trade has shown how difficult it is to analyse the local economic impacts in Africa of a trade pattern with complex and dynamic geographies. Many casual observers have linked the decline in African clothing manufacturing to the import of used clothing (see Koyi, 2006; Majtenyi, 2010; Patel, 2004; Webster, 2003). This issue needs to be explored critically and empirically and in relation to the recent history of economic liberalization in Africa (Gibbon, 1996; Harrison, 2010; Onimode, 1988), which has posed multiple challenges for African clothing industries. These difficulties extend beyond increased competition for local markets from legally imported second-hand clothing. Declining incomes reduced Africans' purchasing power, depressing demand; the privatization of textile firms, rentier profiteering and poor management capacity led factories to fail; and increased competition from imported Asian clothing producers, which have greater labour productivity and lower production costs and could export into liberalized African markets, were also important contributing factors (Brooks, 2010; Carmody, 2009; Gebre-Egziabher, 2007; Gibbon, 2003b; Hart, 2002; Pitcher, 2002).

The transnational used-clothing trade is part of a set of socio-economic relations in which cultural factors influence demand in the global South (Hansen, 2000, 2004). Rigorous statistical enquiry that considers such issues could provide a vital tool for the study of the decline in new-clothing manufacture in Africa. Approaching this problem exclusively through published economic statistics fails to reflect what has really occurred in Africa. The studies by Bigsten and Wicks (1996), Frazer (2008) and Wicks and Bigsten (1996) follow an implicit belief in a manufacturing sophistication ladder, where clothing production forms an initial step on a modernist pathway of structural change, a conception influential in development economics, tracing its origin at least as far back as Rostow's (1960) linear stage model of economic development and Perroux's (1950) earlier calls for concentrated investments in dynamic industrial sectors. Such theories do not fit the needs of African citizens or the reality of the globalized world economy. Indeed, the geographical interpretations of such economists are shallow and deterministic, with little attempt to engage with the details of environment, society and politics (Bryceson et al., 2009; Rigg et al., 2009). Complex realities cannot be explained by running regressions without attention to the quality of data sets and the relevance of the models and instrumentation. Consulting sophisticated existing literatures from beyond economics (Field, 2000, 2008; Gibbon, 2003a; Hansen, 2000; Hart, 2002; Traub-Merz, 2006) has allowed us to show that the parallel long-range trends of declining African clothing manufacturing and increasing used-clothing imports should be investigated thoroughly through an approach that uses both economic data and fieldwork-based empirical insights.

This article has explored how the trade in used clothing is also determined by the continuing salience of locally embedded knowledge and social relations and the control of vital trading nodes, along with trade policy, undocumented illegal activities and the return transport of unfilled shipping containers to Africa. We have shown that, despite the long-term trend of industrial decline, preferential trade agreements, principally AGOA, benefitted some larger African clothing manufactures. Exports to the US and EU led to sectoral growth in the 2000s parallel to increased imports of used clothing (Gibbon, 2003b; Majtenyi, 2010). As both Phelps et al. (2009b) and Zappile (2011) have observed, preferential agreements do not automatically lead to increased bilateral trade, but implementing AGOA with longer effective dates could enable African clothing producers to take advantage of improved terms of trade.

The closure of African clothing factories in the 1980s and 1990s was an outcome of policies of economic liberalization (Traub-Merz, 2006). These same macro-economic interventions opened African markets to used-clothing imports, as well as new cheap Asian imports (Onimode, 1988). The correlation is indicative of Africa's subservient role in the global economy and reflects the asymmetric power relationships that dictate trade policy. Although definitively proving whether the relationship is causal has not been possible, both these trends are manifestly symptomatic of the malaise that has embraced Africa following the economically liberal structural adjustment programmes.

Despite this, it is still new clothes rather than the discarded trends from the global North to which people aspire. Impoverished consumers of the second-hand clothing trade are not materially connected to a modern life. Rather, buying discarded second-hand clothes from the global North is a disabling representation of their material deprivation and apartness from the emancipatory promises and glamour of mass consumption. As Harrison (2010) has identified, mobilizing alternatives to neoliberalism in Africa is not straightforward, nor is an immediate end to the dominant ideology of liberalizing African economies likely, although it may be desirable. However, this argument can be more forcibly made when empirical case studies, such as this enquiry into the used-clothing trade and industrial decline, offer a nuanced analysis which reflects the macro-economic changes in Africa rather than suggesting a single factor explanation.

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