



CHAPTER 4

The Fashion Industry in Africa: A Global Vision of the Sector

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I INTRODUCTION

Africa is the continent most widely acknowledged for its variety of fashion products. The patterns, designs, materials and metals or colors usually speak of African history and culture. African fashion products also have an essential significance in spreading information and communication within their communities.

The spiritual and historical significance of products is evident not only in the choice of colors, dyes and types of thread but also in the decoration, symbols, jewels and other complementary elements and the shapes

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which are directly related to events, persons and traditional proverbs. Some clothes made from geometric stripes create harmony, others represent storytelling through words and messages that are important to people, families or larger social units. Clothes are also used for special occasions such as tribal events, weddings, funerals, naming ceremonies and burials. Jewels and other accessories such as turbans made with ostrich feathers or straw, and embroidered leather sandals are worn with fabric wrapped around the hips and waist to form a skirt with another piece thrown over the shoulder or made into robes or tunics according to region, historical tradition and custom. The same textile can be used as a backdrop in public ceremonies or in a theater, or as a carpet or tapestry.

Various regions of Africa have specialized in the field of fashion. While South Africa, Lesotho and Swaziland in the south have become important textile and fashion clusters, oriented towards the export of their own brands, North Africa concentrates on the production of clothing because of its geographical proximity to international fashion companies. Morocco, Egypt and Tunisia have developed important industrial hubs made up of small sewing ateliers that employ low-skilled labor, mainly female, and that have specialized in making garments for the leading European fast-fashion brands. West Africa is regarded as one of the world's great textile-producing regions, due to the availability of cotton in at least two different colors: white and pale brown. It is exported to other areas like the northern Sahara, and in both regions there are other colors derived from vegetables, animal hair and mineral sources (Picton 1989). Generally, textiles in Africa are hand made in rural areas using skills and commitment handed down from one generation to another. Southern and Eastern Africa is the main producer of precious stones, some of which are subsequently worked by local craftsmen in artisan workshops, and then sold to large European companies.

African fashion products have inspired fashion designers all over the world, including Jean-Paul Gaultier, John Galliano, Anna Sui and Alexander McQueen, and have been worn by music and film stars such as Rihanna, Beyoncé and Kanye West. However, the African fashion industry is not valued internationally. Whether as a source of sustainable raw materials and quality, as a place where leading fashion brands produce their products, or even for its wealth of skilled, talented, sophisticated designers and makers of textiles, clothes, jewelry and accessories, Africa has so far been under-represented in the global fashion industry.

Despite these difficulties, it is clear that the potential of the African fashion industry lies in its ability to combine modernity and exclusivity with tradition and sustainability (Bell and Morse 2013). Today's African fashion products give artistic expression to the religion, society and economy of the continent. They add extra value because they are produced in a contemporary way but without losing sight of tradition; they are unique products and designs, hand made in small craft workshops or sewing ateliers using sustainable and non-polluting raw materials.

2 ANALYSIS OF FASHION COMPANIES IN AFRICA

Throughout the African continent, a large number of different-sized companies can be found specializing in diverse fashion products: design and production of yarn, cloth, clothing accessories, footwear, jewelry, and so on.

It is important to highlight the use of raw materials obtained naturally, through environmentally sustainable production processes. Thus, in the production stage for textiles, clothing and some accessories, the raw material may be natural, synthetic or cotton. It may come from animals, such as sheep, goats, rabbits or silkworms, mineral fibers including asbestos, or from plants such as cotton, flax and sisal, or may be a synthetic fiber made by extruding a polymer. Other practices developed by local companies relate to the integrated implementation of cleaner and more efficient industrial practices (UNCTAD 2012). With the support of the United Nations Industrial Development Organization (UNIDO) and UNEP, national cleaner production centers have been established in the leading fashion production focus areas of Egypt, Ethiopia, Kenya, Morocco, Mozambique and South Africa. Among other objectives, these centers help companies to increase their efficient use of water, energy and raw materials, improving their competitiveness.

The African fashion industry is an ancient one. The ancient Egyptians began cultivating flax and weaving it into linen. Several other civilizations grew in Africa, where cotton became the most cultivated raw material used for textiles and clothing. Tradition can still be seen in the textile industry that is growing across Africa. For example, the bogolan or mud-cloth is hand-woven Malian clothing; Kente cloth from Ghana is a type of silk and cotton, made of interwoven cloth stripes; and the ndebele is a colorful hand-made textile from South Africa and Zimbabwe. Fibers

extracted from raffia are still used in the production of bags, hats and clothes (Dr. Y 2017).

Countries in West and Central Africa, such as Burkina Faso, Ethiopia, Senegal and Mali, have become important suppliers of cotton, an essential raw material for the fashion industry. According to the data provided by OECD in 2015, Africa produced around 1.3 million metric tons of cotton lint, approximately 5% of world cotton production, but its consumption of cotton fiber is around 23% more than its production (OECD 2017). The significant gap between production and consumption suggests that the industry is having difficulty reaching its full potential. However, the African Cotton and Textile Industries Federation (ACTIF) claims that the continent can produce much more cotton than it is currently doing, because they have the necessary soil for cultivation, and a population with skills and production know-how. Since 2016 the Aid by Trade Foundation and ACTIF have been promoting the “Cotton made in Africa” initiative to promote sustainable cotton production in sub-Saharan Africa. The agreement seeks to boost productivity, competitiveness and sustainability of cotton production and strengthen textile production in the continent. This cooperation will also enable a better response to the growing demand for production by retailers such as H&M, PVH or Bestseller. But above all, it seeks to enhance the marketability of African products and ensure a lower environmental impact throughout its production process, taking advantage of the fact that since January 2016 the World Trade Organization (WTO) has allowed African cotton producers to market their merchandise to developed countries without tariffs. This decision is expected to boost cotton exports from the less developed countries of the continent, especially those in the sub-Saharan area such as Burkina Faso, Chad and Mali.

Exports to Europe are increasing on account of the EU’s Economic Partnership Agreements with African countries. However, the primary export target for African fashion products remains the USA. Following the 2000 African Growth and Opportunity Act (AGOA), now renewed to 2025, export of fashion products has been increasing, especially textiles and apparel. Approximately US\$1 billion in apparel is exported annually to the USA under AGOA.¹ Although Egypt is not considered

¹The purpose of AGOA, which was approved by the US Congress in May 2000 and has been renewed to 2025, is to assist the economies of sub-Saharan Africa and to improve economic relations between the United States and the region. The program offers the

Table 1 United States textile and clothing imports, 2016

<i>Country</i>	<i>Imports to USA (thousands US\$)^a</i>	<i>Import product share (%)^b</i>	<i>AHS weighted average (%)^c</i>
Angola	3.08	0.00	9.30
Botswana	4981.05	1.12	14.40
Cameroon	342.41	0.21	16.91
Cote d'Ivoire	100.56	0.01	8.93
Egypt, Arab Rep	898,117	57.51	11.75
Ethiopia	34.457	13.94	15.98
Ghana	6631	1.98	15.05
Kenya	352,218	61.75	13.29
Mauritania	45.68	0.09	13.05
Mozambique	97.19	0.09	1.13
Nigeria	251.74	0.01	8.66
Rwanda	462.63	1.75	8.16

Source World Bank (2018)

^aTotal import/export value in thousands of US dollars current value

^bThe share of total merchandise trade (export or import) accounted for by the product in a given year

^cEffectively applied weighted average (%) tariff—the average of tariffs weighted by their corresponding trade value

one of the countries that export under AGOA, exports from Egypt to the US market reached 898,117 thousands US\$ million in 2018 (World Bank 2018). Of these, about 20% corresponds to products of the fashion industry—mainly textiles and apparel. Table 1 shows US textile and clothing imports in 2016. Note that imports from Egypt are higher than those from other countries such as Kenya or Nigeria that belong to the AGOA Agreement.

Demand for African textiles has increased even though African people do not own the industries. The industries have mixed ownership structures, meaning that people from outside Africa come in and

participants preferential access to US markets with no import taxes. To qualify and remain eligible for AGOA, each sub-Saharan country must be working to improve the rule of law, human rights and respect for core labor standards. AGOA provides duty-free access to textiles and apparel subject to the wearing apparel provisions which have their own requirements and rules of origin. For example, apparel made in a less developed beneficiary country is granted duty-free access, even when the fabric used in such manufacture is sourced from third countries. Textiles are also eligible provided that they are manufactured in the AGOA beneficiary countries (AGOA 2018).

open the factories, sometimes partnering Africans and sometimes not. Examples include Cargill, Olam International and Plexus Cotton Ltd. However, at the clothes level ownership is more oriented toward Asian individuals such as Chinese, Indians and Bangladeshis who have built branches in Africa to benefit from AGOA and duty-free exports to the European Union (Brown 2016). The agreements signed with the USA and the EU also affect the export of precious metals such as gold and diamonds, and raw materials such as cotton. South Africa, Ghana, Mali and Burkina Faso have become gold exporters, while Sierra Leone, the Democratic Republic of the Congo, Angola and Botswana are major exporters of diamonds. As with the textile industry, the exploitation of these materials is in the hands of foreign private companies or joint ventures owned by international companies and local governments.

About 10% of the world's cotton comes from Africa, and most of it is exported to Asia for further manufacturing, when it is labeled "cotton made in Africa". China has been the principal investor in Africa since 2015. The low labor costs and the quality of raw materials have led China to invest in different sectors, from the production of raw materials to fashion products. However, the high exports of cotton do not benefit African countries, since relatively low levels of employment are created, while the benefits derived from sales of the finished product go to other countries. As we saw in Chapter 2, this is what has motivated some international European and North American companies—such as H&M and PVH who produce for Calvin Klein and Tommy Hilfiger—to transfer part of their production to Africa. Likewise, some companies in the footwear sector, such as Sawa or Pikolinos, have started manufacturing in Ethiopia and Kenya, due to the excellent quality of their materials and low labor costs.

The fashion industry in Africa and indeed the sub-Saharan region is facing tensions associated with the domestic and international markets where there is strong competition from cheap Asian products. Additionally, in some subsectors such as textiles, workers and their trade unions find themselves in a dangerous and delicate situation for two reasons. First, they have to fight disrespectful labor practices that include poor wages, lack of benefits and the violation of their rights. Second, they will be involved in restructuring the industry, which is shaped by extreme competition, from Asian industries, putting pressure on workers and the environment alike (Jauch and Traub-Merz 2006).

The gradual withdrawal of the old system, with new trade rules and the ending of the quota system in industrial nations in 2005, has cost Africa many jobs in the industry, as reported by the International Textile, Garment and Leather Workers' Federation (ITGLWF). This withdrawal has left millions of people without a job or a stable income in countries including Lesotho, South Africa, Swaziland, Nigeria, Ghana, Mauritius, Zambia, Madagascar, Tanzania, Malawi, Namibia and Kenya. The ITGLWF set up a meeting to explore plans to help Africa by attracting investment, improving the welfare of workers and increasing the efficiency of the fashion sector.

African countries can only delay Chinese exports for a short time. This could buy some time for producers to improve their efficiency and competitiveness, and add some value to their products by, for example, producing easily exportable high-end fashion products. Some African countries have opened negotiations on duty-free entry of their products to China in exchange for Chinese investment in Africa. For example, manufacturing in Lesotho is based largely on textiles where the majority of its people work. However, with the rapid progress of China and India, cheap and easy countries for textile manufacturing, it became harder for African countries and certainly for Lesotho to compete with them (Mutume 2006).

Another example is Egyptian textiles, seen as the primary pillar of their economy and considered one of the country's main exports apart from oil. This sector is a source of employment, income, welfare and benefits for Egyptians, employing approximately one million of them. Furthermore, Egypt is known as the most significant producer of cotton and textiles in the African continent. Egyptian cotton has an advantage over others because they produce the prized "long staple" cotton, which is considered the gold standard in the textile industry. This type is used for the production of luxurious, high-priced textile products. As a result of the high price, "long staple" and high-end cotton production leads to losses and it cannot be used in Western countries for the production of shirts and jeans. Finally, the Egyptian textile industry is aiming to strengthen its supply chain and expand the industry to add new fashion segments (Zawya 2016).

3 THE AFRICAN FASHION INDUSTRY BY REGION

Africa's colorful, different and original textiles help them create distinctive, glamorous, interesting and lively fashion. The tradition of craftsmanship and textiles is strong, and the introduction of new designers

and entrepreneurs in the fashion industry helps improve the sector and launch more and more of their culture to the world. All countries are fascinated by their designs and cultures. However, the majority of African countries face many challenges regarding textiles and clothing that are under the umbrella of fashion. These challenges include the Chinese domination of the textile industry, the unavailability of fabrics, the lack of an international presence and industry-related education. We will discuss the differences between the North African and Southern African countries using three example countries from each.

3.1 *North Africa*

The North African countries are of two types: the Arabic countries extend from Egypt to Morocco and the rest are regarded as sub-Saharan countries. We select three countries for a discussion of their progress in fashion: Egypt, Nigeria and Mali.

We start with Egypt, the country that links North-east Africa with the Middle East and dates from the time of the Pharaohs. Since the revolution, in 2011, clothes have been improving with new types, new colors and ways of dressing, new emerging fashion designers and new ways of thinking. However, the materials used remain the same. The nineteenth-century German philosopher and sociologist Georg Simmel (1971) said that sometimes, fashion is an imitator helping people to fulfill a particular role and adapt to a specific society. Upper-class Egyptian women travel to Paris, Milan or even Rome to buy branded clothes such as Chanel, Dior and Yves Saint Laurent, a practice that is being transmitted from one generation to another and continues today. In a single Egyptian street, however, we find a variety of different fashions. Some women look sexier and more fashionable than others; some wear bright colors, tight jeans, make-up, shorts and skirts; others wear long dresses and no make-up; and yet others wear face-veils (Abaza 2007).

Fashion has changed in Egypt due to civilization, culture, travel and creative fashion designers developing personal lines and collections with specific signatures and styles, such as Amani El Cherif and Laila Youssef. According to them, Egypt is at the forefront of development and is moving ahead to one day become a city like Paris, New York or Milan. Nevertheless, fashion designers are struggling to improve and become involved in this field because there is no opportunity to learn about fashion in the country, so to learn all the necessary fashion techniques

and know-how, they have to travel to countries such as France, the USA and Italy. We should also not forget Egyptians actresses such as Faten Hamama, Hind Rostom, Soad Hosny and Youstra, an inspiration for fashion designers and ordinary people alike. The other problem that a designer might face in Egypt is scarcity of materials. Not all types of textile needed are available, with the majority imported from abroad, this time from China (El-Tobgy 2013).

Despite the difficult economic situation, Egypt has started to host fashion festivals that show their love for arts, design, clothes, jewelry, accessories, beauty and creativity. These attract tourists from many countries particularly Arab nations.

Nigeria, known as the “Giant of Africa” because of its large population and economy, is situated on the Gulf of Guinea and has many natural landmarks and wildlife reserves. Nigerian fashion is diverse, showing the different religions, ethnic groups and cultures in the country. The fashion industry has developed new structures, earnings and exposure for the clothes and trained many professionals including designers and stylists, make-up artists and hair stylists, journalists and models. With the advent of fashion journalists, many magazines are dedicated solely to fashion and carry interviews with Nigerian fashion designers and models. Nigerian fashion is targeted at the whole world, not just their own people (Oberhofer 2012). The country is gaining a reputation for creative fashion. Some designers are showcasing on world runways, winning acclaim by dressing celebrities including Beyoncé and Michelle Obama. These designers include Maki Oh, Duro Olowu and Jewel by Lisa. Fashion weeks, online media and social media are helping the fashion designers in Nigeria to promote their brands and clothes to a wider market; in addition new retail shops, local multi-brand boutiques and online shops are being developed to showcase Nigerian fashion design. However, there are no schools or training centers to help designers learn more about tailoring, cutting, styling, marketing and public relations. There are no government or official bodies providing funds, while the infrastructure is weak, which slows down production with high costs. With the enhancement of the fashion industry in Nigeria, the economy will flourish, and more employment opportunities will open up, particularly for young people Lloyd and Robbins (2014). Lagos, the largest city in Nigeria, undoubtedly needs more time to match the big four capitals of the fashion world: Milan, London, Paris, and New York.

Mali's official name is the Republic of Mali, a landlocked country in West Africa. Its capital is Bamako, the seventh largest in the West African Urban Center. The fashion industry began to develop in the country in 2011. The fabric of choice for all occasions in Mali is bazin, also called damask. It is hand-dyed polished cotton used in fashion manufacture. The work of women has turned creativity into a source of power to fight poverty. Mali started to export to neighboring countries such as Nigeria and Senegal, and traders from other countries came to Mali on their own initiative to buy bazin. The women of Mali responded to the increased demand by producing new exotic dye colors (Ighobog and Haidara 2012). In May 2016, the Malian trade association launched Project Balma with a workshop with all the equipment needed for clothing and sewing. The objectives were to promote fashion, contribute to sustainable development of the fashion industry in Mali, encourage young designers to start their own fashion line using Malian textiles, and promote "made in Mali" nationally and internationally (Souleymane dit Malkom X 2016). Chris Seydou is a Malian designer who promotes African design all over the world. In the world of haute couture he manages to strike a balance between local tradition and the international market, and he is known for his use of African textiles including the Malian bogolan. He was the first craftsman to give hope to an emerging new generation of stylists providing a new vision of Africa (Rovine 2011). The work of Alphadi, another fashion designer from Mali, has appeared on catwalks from Paris to Dakar and has been widely praised. Seeking to inspire other African fashion designers, Alphadi uses many types of fabrics including silk, leather, hand-dyed and embroidered, to make original, beautiful, one-off garments (Sappellestyle 2013).

3.2 *Southern Africa*

The Republic of South Africa (RSA) stretches along the South Atlantic and Indian Oceans and is the largest country in Southern Africa. The fashion industry has been reviving since the ending of apartheid in 1994. Training institutions were established to train designers, and in 1997 South African Fashion Week was established. National self-confidence began to increase, and South Africans began to exploit the available power and resources to develop their own clothing brands, either traditional or showcasing contemporary African design, rather than relying on international ones. Some of these brands—Sun Goddess, Stoned Cherie

and Loxion Kulca—became internationally accepted. In 2011 the capital, Cape Town, launched the Wear Only ZA initiative to increase fashion design and production in South Africa. This idea fostered the demand for local clothing and built trust between people and the South African brand, which would affect the clothing and textile industry in the country positively.

Fashion weeks attract international designers, customers and entrepreneurs, as well as stimulating tourism, and in South Africa there are two—South African Fashion Week (SAFW) and Mercedes Benz Fashion Week (MBFW)—both under the supervision and collaboration of the African Fashion International (AFI). SAFW supports designers by showcasing their clothing lines, provides them with equipment, and puts them in touch with business entrepreneurs and shops. They have also introduced a virtual shop promoting the work of local designers. In support of the fashion industry, the South African government designated Johannesburg the city of creativity (Kimani 2016). The fashion industry is growing fast, and even though it is facing such challenges as infrastructure and funding, it is reaching a wide range of consumers who care about fashion, through e-commerce, social media and the fact that international industries are looking for something new to see and display. Though the invasion of international brands such as H&M, Zara, Topshop and Cotton On stole many customers from local retailers and designers, the Instagram platform has helped designers to share their clothes, and increase online sales and acquire a loyal customer following. Designers receive feedback on every picture displayed on the application (Ngubane 2017). During the last ten years, emerging young designers have gone on to international careers. David Tlale, an award-winning designer, is a household name in South Africa due to his glamorous culture and expert craftsmanship. He is known as the master of drapery, sculptural detailing and exquisite appliqué (Collison 2017).

The Republic of Angola is situated in Southern Africa with one of its borders on the Atlantic Ocean. It is the seventh largest country in the continent, and its largest city is the capital, Luanda. After the civil war, a fashion industry with talented and creative designers began to appear and gain recognition for their fusion of African and international styles. Over time, Angolan fashion has evolved, and new, talented creative designers have appeared, using new techniques to make clothes. They focus on the quality and the creativity of their unique and innovative clothes, shoes and accessories. Angola's challenges are the poor infrastructure available,

lack of capital, lack of education and the absence of connections with reliable partners. There is also no security or government support for leading fashion designers and creatives in Angola, but they are working hard to get some support and funding, and despite their disadvantages there are some Angolan fashion designers that excel, have achieved a good reputation in the market and are taking Africa and Angola to the world. Carla Silva, one of Angola's top designers, has been in the industry for over twenty years. Her style mixes African and European textiles. Another example is Nadir Tati, known for her top eveningwear brand. Her designs are based on the tradition and culture of Angola, and her purpose is to influence people and instill knowledge of it in the design of clothes (Admin by Adiree 2016).

A number of Angolan models, including Maria Borges and Sharam Diniz, are successful locally and internationally; they are among the top ten African models (MissGoodliving 2016). In an interview with *Forbes*, Borges stated that her native country focuses significantly on the music industry, with a smaller market in fashion and many citizens who do not know the meaning of modeling and fashion designer (Eytan 2017).

The Republic of Zambia is another landlocked country in Southern Africa. The fashion industry in the country has been evolving locally and internationally due to their design and textiles, which has opened up new job opportunities and helped the country's economy (*Lusakatimes* 2017). In 2014, the Zambia Fashion Council was established; its role was to develop the fashion industry of the country. It is committed to improving the industry by supporting young talented individuals who demonstrate a passion for fashion. The council has launched a program to help gain information and know-how from the fashion industry and learn how it works. They also run biannual workshop seminars (Zambia Fashion Council 2015). The number of fashion designers in Zambia is increasing year on year, showing that talented young people, far from waiting for employment, are starting to create their own opportunities. The Zambian fashion industry is moving fast and it is predicted that in the future the country will have plenty of big fashion houses with internationally known designers working together (Kalpinde 2017).

In conclusion, Northern African and Southern African countries have many similarities, including the absence of infrastructure, partners, education, schools and universities. They are also both trying to improve the fashion sector by learning skills domestically and showcasing them to international audiences. Many of their designers have become

internationally known due to the originality of their designs, which many celebrities are starting to wear. However, the main difference between the two regions is that Northern Africa is moving a little faster than Southern Africa. There are many influencers in fashion, including actors, bloggers, fashion photographers and journalists. Designers, models, clothing stylists, fashion photographers, make-up artists, hair stylists and fashion journalists are flourishing in the Northern African countries, and their fashion shows welcome many local and international designers. The red carpets used to display celebrities' clothes, shoes and accessories are not found in the Southern countries. In the end, Southern African countries will need to work a little harder than those in the North to put themselves on the fashion map, refocusing on local rather than international brands.

4 DEVELOPMENT LEVEL, PRODUCT TYPES, AND ENVIRONMENTAL, ECONOMIC AND SOCIAL SUSTAINABILITY

Each African country has its own cultural products related to its traditions and way of life. Local designers have popularized the continent's image by using materials, designs and textiles that have prompted some celebrities to wear original, unique and beautiful African designs. African-influenced designs can now be found on the catwalks of the four big fashion cities: Paris, Milan, New York and London. Many creative industries including music, TV, dance, cuisine and fashion enable countries to earn billions of dollars and be integrated with the whole world. They offer many job opportunities for the growing workforce and attract tourism, which boosts the economy. Individuals are starting to acknowledge the potential to support the development of the fashion industry, create new jobs, integrate countries, connect societies and strengthen African identities globally.

While the fashion industry in the African continent is continuing to develop, it is still considered to be in its infancy. New technologies in manufacturing, marketing and distribution are boosting the growth of these industries and providing employment for both women and men. This process is adding many values and qualities along with the job opportunities for locals, bringing hope and change to desperate individuals, particularly women and young people, while contributing to the transformation in the structure of the economy and social life of Africans.

Governments need to create the right policy environment for businesses to attract foreign investors who want to work with African designers and build factories. Some of the world's leading clothing companies are opening stores in African countries, such as H&M in Ethiopia. However, the cost of doing business in Africa is high for several reasons, including energy shortages, poor access to and high costs of energy (many manufacturing businesses have to have their own generators), transport, logistics and custom facilities, which impedes business growth. To increase production quality and productivity, they also need to invest in skills, qualifications, know-how, and education. With increasing awareness that education in fashion is essential to the sector's improvement, the governments of Ethiopia, Lesotho and Kenya are building learning centers and tertiary institutions to provide theoretical and practical qualifications for the fashion industry (Gregorio 2016).

In 2015, nine of the fastest-growing economies in the world were African, and though they have represented a small market until now, the rapidly growing middle and super-rich classes are highly conscious of their appearance and their buying choices (Translatemedia 2016). The market for luxury and mid-market fashion is growing in Africa. In Nigeria, for example, with its fashion-conscious population, the economy is showing an increased growth rate. Traditional craftsmanship and textile heritage passed down the generations, together with the emergence of creative designers and entrepreneurs, is boosting the fashion industry and the wider economy. The fashion industry tends to be concentrated in the largest cities, such as Lagos in Nigeria, where the population's broad fashion interest is making for a flourishing industry.

Foreign brands, especially luxury brands, find it hard to penetrate the African market. For example, only Louis Vuitton has opened stores in South Africa. Non-African brands prefer to enter the continent through South Africa, because of its European tastes. Toesland (2016) claims that the label "Made in Africa" does not have the same effect on customers as "Made in France", "Made in Italy" or "Made in The United States", but African designers such as the Nigerian Adebayo Oke-Lawal are working hard to improve their image. Toesland (2016) goes on to say that the world is paying more attention to African fashion design and the culture of which it is an integral part; and the media, fashion buyers and entrepreneurs are noticing and talking about these unstoppable, fresh and highly profitable voices. Designers have emerged from different countries, each with their own style of clothes, while also introducing

culture, tradition and contemporary touches. Bags, jewelry, turbans and hats are made that relate to the clothes; for example, the turban is one of the main accessories because it is an integral part of tradition and culture. African fashion is known for its audacious use of color, from acid oranges to luminous blues, with printed designs that have global appeal, as well as being affordable and attracting people of all classes. Streetwear, as worn by rap singers, is a style now seen across the world. Adebayo Oke-Lawal is one of the African designers behind the streetwear brand and the orange culture, which has been described as more of a movement for a creative class of men than a clothing line (Gbadamosi 2016). Other designers have revealed their personalities through their apparel, shoe and accessory designs. Some have opened virtual or physical stores as well as showing two haute couture and prêt-à-porter collections each year for global audiences.

The textile and fashion industry, like all industries, has its own impact on the environment. Rapidly changing trends inducing consumption lead to much environmentally damaging use of resources and clothing waste (Fletcher 2007). While transportation and agriculture are the critical factors for climate change, “fast fashion” also plays a significant role. The garment industry is the world’s second-biggest polluter, due to its complex global supply chain from the farming of cotton to the manufacture, dyeing, printing and bleaching of fibers, all of which use chemicals. Cotton production uses a great deal of water and high percentages of fertilizer and pesticides to increase output, which contributes to air and groundwater pollution, and soil degradation. Each year, a large quantity of textiles is sent to waste, because of the production of non-conformities, most synthetic fibers do not decompose and wool releases methane after a year’s decomposition in landfill (Stecca and Ndachengedzwa 2016).

According to Turner (2013), the fashion industry enhances economic development in the African continent in three ways. First, it encourages entrepreneurship—for example by helping a creative individual with an eye for fashion, creativity and color to generate income locally by opening stores and internationally through the internet. Second, it stimulates the local economy by employing talented dressmakers, textile artists, models and support staff to showcase collections. Third, it acts as a sustainable business model based on the hereditary clothing and apparel industry. Many women and young people work in the labor-intensive fashion industry, helping to improve their underdeveloped and

developing countries' competitiveness. Through their work in this sector, women are increasing their independence and making progress toward gender equality.

5 OPPORTUNITIES AND CHALLENGES OF THE AFRICAN FASHION INDUSTRY

The fashion industry in Africa is proving to the world that it is unstoppable, fresh and highly profitable. Fashion markets are fascinated by African culture and design. Why, then, are African fashion companies not successful on the more famous fashion catwalks?

Within Africa, the biggest markets for fashion products are South Africa and Nigeria, which have both developed a strong fashion industry, with local fashion companies becoming referents in international markets. Other countries such as Ethiopia and Mauritius are on the rise and are experiencing growing demand for fashion products. Young African designers are finding opportunities to showcase their work in platforms like Swahili Fashion Week in Tanzania, Kenya Fashion week in Kenya, Lagos Fashion and Design Week in Nigeria.

The potential market for Africa's fashion industry is enormous in both size and value. The interest in African design has always been there, but lack of visibility and exposure made it difficult for African designers to show their potential to the world. With the increasing use of e-commerce, Africa's role as both a consumer and producer of fashion is on the rise. Social media and other communications channels give African companies and people the opportunity to purchase from retailers with no physical presence on the continent and allow small fashion houses to showcase their collections to a global audience. African shopping websites such as Afrikrea, Jumia and Konga give global access to fashion and offer on-trend fashion at all price levels with products that are just beginning to gain well-deserved visibility.

The industry has the potential to diversify African economies and become one of their main drivers. In order to achieve this, however, African governments and other stakeholders need to invest and open up opportunities for the talent pool available in Africa. The growing importance of young people should also be taken into account, especially women who experience low levels of education and high levels of unemployment. They need to be supported through the promotion of projects that they can lead and which may favor their participation in the labor

market. Taking Nigeria as an example, the country has a large population base, 62% of whom are under the age of 25. About 40% of the population are urban dwellers, including a rich upper class and a growing middle class with considerable spending power. Nigerian consumption patterns are changing. People know and love fashion from their travels, social events and the media. The Nigerian fashion industry's growth potential is high, and with the right investment and support, it could become the engine of growth for the national economy. Organizations such as ECOWAS and the British Council have become involved in identifying young talent and empowering them with training and tours of fashion weeks in the United Kingdom and elsewhere.

The fashion industry has great potential. Lesotho, Kenya, Mauritius and Swaziland (in that order) are the leaders in textile and apparel exports. Fashion product exports as a whole are low, but countries such as Mauritius, Ethiopia and Ghana are launching more production hubs with the aim of supplying both internal African and Western markets. Mauritius alone accounts for 66% of African textile and clothing imports into South Africa.

According to Brown (2016), while many parts of the world were experiencing economic crises, Africa had six of the top ten performing economies with growth rates higher than those of developed countries. If these growth rates remain unchanged, consumers will buy US\$1.4 trillion of goods and services by 2020, as per the World Bank projections for consumer spending. Currently, fashion represents an essential part of the industrial activity of Africa. Strong investment in the sector by international companies and intensive activity led by local entrepreneurs has enabled an important fashion industrial fabric to flourish.

In spite of the vast prospects, of the fashion industry in Africa, African entrepreneurs and local governments still face many challenges. One of the significant challenges is access to capital. The development of an industry that thrives and that produces products with high added value requires financing to start the business, innovate or train its workers. Investment both in machinery for product development and in ICT is required to favor the entrance of African fashion companies into the digital environment.

As we will see in Chapter 5, some supranational organizations, as well as foreign investors, are investing in the future of the African industry. But at local level, public and private institutions still need to contribute to the financing of local companies. If all African governments and other

public and private institutions were committed to fashion industry development, the possibilities would be enormous. Indeed, it will take a joint effort to get the African fashion industry up to speed. All the organizations must work together to build more institutional capacity in the region, identify key trade policy issues that limit exports of textiles and apparel, and advocate for reforms that liberalize trade within the region, and with other countries such as the USA and the European Union.

The poor physical and technological infrastructure is another issue for the African fashion industry. As we shall see in Chapter 5, across most of Africa, infrastructural challenges such as lack of power, the high cost and poor quality of the internet, the lack of good road networks/access, low penetration of online payments and lack of logistics networks makes it more expensive for e-commerce companies to operate and compete with global counterparts.

The lack of an international presence is also significant for African fashion designers, who mostly find their fabrics, textiles and prints being showcased in the international market by Western designers. The promotion of African fashion outside Africa has begun to inspire interest in Africa and its propensity to produce quality brands, and for its potential from an interactive marketing standpoint. In 2015 Valentino launched a line inspired by African colors and designs. In 2009 Louis Vuitton launched a similar line for men using Maasai fabrics.

Finally, industry-related education is another major challenge. Specialized training in the fashion sector is essential, taking the sector's growth potential into account. For women this training is an opportunity to start a professional career, and in certain areas, it would offer opportunities for social and economic growth. However, none of the East African universities offer a fashion program because they do not see the need for it.

Africa's fashion industry needs traditional and digital promotional effort both within and outside the continent, strategic initiatives of mutual benefit to stakeholders, and supply chains and distribution networks that connect and inspire creativity and innovation. The creation of schools and universities offering specialized training in business management and fashion product manufacture, would alleviate the problem of the poorly qualified, especially female, workforce.

The two determining factors in the future of the African fashion industry are sustainability and the promotion of local entrepreneurship. So far the African fashion industry is in the hands of international

fashion companies, who have found a source of quality raw materials and unskilled labor at low cost. The majority of small local businesses, therefore, are limited to the development of productive activities with little added value. This does not guarantee the future of the industry and with it the economic and social sustainability of the territory. Also, the high rate of extraction of raw materials and the high levels of pollution caused by the fashion industry—especially textiles—risk the environmental sustainability of the continent. The future of Africa lies in redirecting its industry in general, and fashion in particular towards the development of local industry, led by local entrepreneurs rooted in the territory, and also in the training of personnel and the development of sustainable practices.

Currently, the creation of value for the customer is the key to the commercial success of the products, and Africa has abundant resources for achieving this. African fashion products are widely valued for the quality of their materials and the originality or tradition of their designs. If to this we add a local industry that develops efficient and sustainable productive processes, and a skilled workforce capable of adding value, the textile industry's chances of success will be greatly increased.

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