

**SECONDHAND CLOTHING AND THE FUTURE OF AFRICAN INDUSTRIALIZATION:
REVITALIZING THE COTTON, TEXTILE, AND APPAREL VALUE CHAIN**



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1.0. Introduction

The importation of secondhand clothing (SHC) into African countries has raised major concerns among policymakers, scholars, and industry stakeholders. Proponents of SHC argue that these garments provide low-income consumers with fashionable options at affordable prices and generate employment opportunities within the informal economy. On the other hand, critics believe that the large-scale importation of secondhand clothing undermines local textile sectors, hinders local manufacturing capabilities, and poses obstacles to the sustainable industrialisation of Africa.

According to Brooks and Simon (2012), the secondhand clothing industry reflects a global process that intertwines consumption patterns in the Global North with development dynamics in the Global South. In Africa, the influx of secondhand clothing often saturates local markets due to its affordability, variety, and perceived value. This situation has led to stagnation or even the demise of many local textile and apparel businesses, which struggle to compete with the low prices of imported secondhand garments.

As Frazer (2008) indicates, the deregulation of trade legislation during the 1980s and 1990s, which was implemented through structural adjustment packages (SAPs) from the International Monetary Fund and the World Bank, facilitated the influx of second-hand clothing (SHC) into the African market. While these regulations aimed to stimulate economic growth and develop markets, they inadvertently established an uneven playing field that undermined regional textile producers. Moreover, the United Nations Conference on Trade and Development (UNCTAD, 2020) asserts that African industrialisation, particularly within the textile and garment value chain, is increasingly jeopardised by an overreliance on second-hand clothing imports. This dependence poses a significant risk to the essential forward and backwards linkages that are crucial for fostering industrial development, which includes sectors such as raw cotton production, textile processing, and fashion design.



The secondhand clothing trade is not without its social and economic advantages. Brooks and Simon (2012) indicate that it generates livelihoods for thousands of individuals engaged in the informal economy and promotes circular economy principles by extending the lifespan of garments. Nevertheless, these benefits in the short term often come at the expense of long-term industrial competitiveness and economic self-sufficiency. This presentation will conduct a critical analysis of the economic, environmental, and policy dimensions of secondhand clothing in Africa, with particular emphasis on its impact on industrialisation efforts within the cotton, textile, and apparel (CTA) sector. We will explore case studies from various countries, analyse trends in international trade, and discuss policy interventions designed to revitalise Africa's industrial base in response to the increasing imports of secondhand clothing.

2.0. Historical Context

Post-Independence Boom: During the 1960s and 1970s, many African countries, including Nigeria, Ghana, and Ethiopia, developed successful textile industries as part of their general state-sponsored plans for industrialisation. The industries drove local economies, created employment, and inspired national pride.

Liberalisation and SHC Inflow: The 1980s and 1990s were a watershed period. As structural adjustment programmes (SAPs) initiated by the IMF and World Bank, many African countries liberalised their economies. This led to an influx of imported secondhand clothing (SHC), which was often retailed at prices well below domestic production cost.

Industry Collapse: The local textile and garment industries, facing intense competition from the influx of cheap SHC, experienced widespread factory closures, layoffs, and capital flight. The slump was especially acute in the dominant textile-producing nations.

Case Example – Nigeria: In the 1980s, Nigeria's textile industry employed over 450,000 people and was one of the largest in sub-Saharan Africa. Today, due to liberalisation and import competition, this number has declined dramatically (UNIDO, 2021).

3.0. Implications of Secondhand Clothing

The implications of secondhand clothing in Africa are far-reaching and complex, cutting across economic, social, environmental, cultural, policy, and diplomatic lines. The section of the policy brief seeks to examine these dimensions to inform sustainable interventions and policy reforms.

Economically, secondhand clothing makes a significant contribution to local livelihoods. It supports a vast ecosystem of importers, distributors, market vendors, tailors, and recyclers. However, this economic benefit comes at a cost. The dominance of imported used garments suppresses the growth of the domestic textile and apparel industries, making it difficult for local manufacturers to compete on price or volume. This has led to deindustrialisation in some economies, stunted employment opportunities in value-added textile processing, and a decline in export potential. Furthermore, the influx of low-cost secondhand clothing destabilises local clothing production, overwhelming domestic markets by pricing below local products and cannibalising demand for clothes produced locally (Frazer, 2008).

Socially, secondhand clothing enhances clothing accessibility for low-income households, democratizing fashion consumption. SHC constitutes a vital means of affordable attire for millions of Africans, mostly poor families unable to purchase new, locally manufactured or imported apparel (Baden & Barber, 2005). It also drives creativity and entrepreneurship among youth who upcycle or redesign items for resale. Nevertheless, this dependency on external supply chains reinforces consumer behaviour based on charity and surplus from developed nations, reducing Africa's agency in defining its own fashion ecosystems. Health and hygiene concerns also arise from poorly sanitised items or garments unsuitable for local climates and customs.

Environmentally, the trade raises concerns about textile waste dumping in Africa. A substantial volume of secondhand clothes arriving on the continent is unusable, eventually ending up in landfills or being incinerated, contributing to pollution and greenhouse gas emissions. The absence of proper waste management and circular economy frameworks exacerbates the

ecological strain, especially in coastal cities and informal settlements where such waste accumulates rapidly.

Culturally, the dominance of Western clothing in African markets has eroded indigenous fashion identities and traditional textile craftsmanship. Over time, this has contributed to the loss of unique cultural expressions embedded in local fabric production and dressing customs. The overexposure to Western aesthetics also fuels a form of cultural homogenisation that marginalises Afrocentric design and dress narratives.

From a policy perspective, most African governments have struggled to balance trade liberalization with domestic industry protection. Tariff barriers, outright bans, or quotas on secondhand imports have had mixed results. Countries like Rwanda have attempted to phase out secondhand imports in an effort to revive local manufacturing, but such efforts have faced internal resistance and external pressure, particularly from trade partners.

The East African Community (EAC) countries, comprising Kenya, Uganda, Rwanda, and Tanzania, sought to ban imports of secondhand clothing as a measure to preserve and revive their respective garment and textile industries. Phasing out SHC was a goal set for 2019 by a plan established in 2016. However, the application was met with tremendous pressure from the United States, which stood to withdraw trade privileges awarded under the African Growth and Opportunity Act (AGOA), leading to some reversal by EAC members.

The SHC imports might impede the evolution of intra-African value chains for textiles, defeating one of the purposes of the African Continental Free Trade Area (AfCFTA) —to boost regional trade and industrialisation, stimulate value addition, industrial integration across the borders and offers windows for regional economies to reduce import dependence, for example, SHC, through the creation of strong, competitive domestic industries

Diplomatically, the secondhand clothing trade has strained Africa's trade relations with Western countries. Efforts to restrict or ban such imports are often met with pushback under global trade agreements. For instance, U.S. sanctions were threatened against East African nations under the African Growth and Opportunity Act (AGOA) when they attempted to ban used clothing imports. This underscores the complex intersection of domestic development goals and global trade diplomacy.

Case Example – Kenya: Gikomba Market in Nairobi is one of Africa's largest single locations for SHC. It supports tens of thousands of transporters, tailors, and traders, and earns significant revenue for families and communities.

3.1. Balanced Trade Policies

African governments need to have policies regulating SHC importation so that they do not cut off cheap sources of clothing to low-income consumers. Tariffs and quality controls are strategically employed to discover that balance (Baden & Barber, 2005).

Local Industry Support

Effective industrial policy—like tax rebates, improved infrastructure, credit facilities, and research and development subsidies—is essential for the revival of the local textile industry.

Public Awareness & Cultural Shift

People should be informed about the socio-economic benefits of purchasing and consuming fashion products made domestically, which contribute to national identity and job opportunities.

Case Study: Rwanda

Rwanda initiated phasing out SHC imports in 2016 through the Made-in-Rwanda initiative. Despite the US-imposed trade sanctions, the intervention ensured domestic production and consistency in policies.



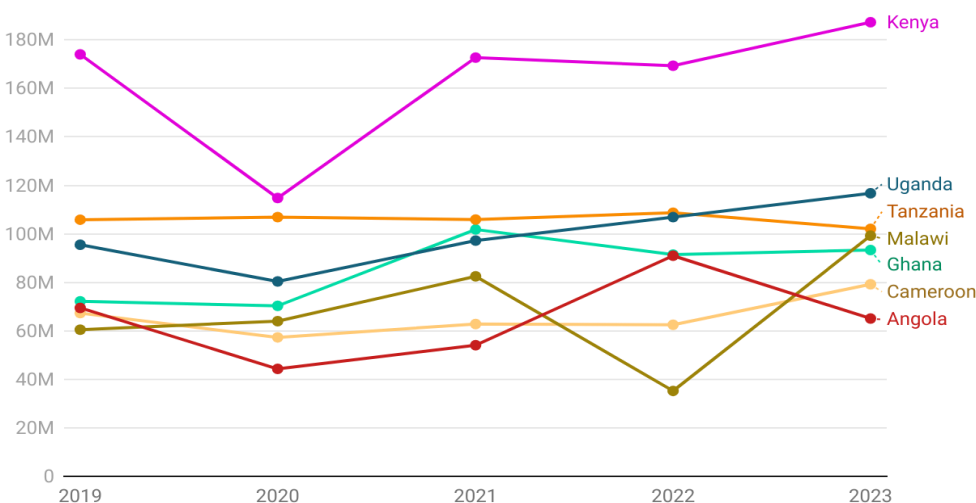
This policy brief draws from the insights from the International Trade and Research Centre (ITRC) webinar hosted in April 2025 titled "Secondhand Clothing and the Future of African Industrialization: Revitalizing the Cotton, Textile, and Apparel Value Chain," where leading experts and stakeholders gathered to identify opportunities for a sustainable, fair, and internationally competitive African textile sector. The key theme of discussions was the role of secondhand clothing in Africa.

4.0. Competing with Secondhand Imports: Strategies for Local Manufacturers

The African clothing industry experienced a sharp decline following the adoption of economic liberalisation policies during the 1980s and 1990s. These reforms, often promoted by international financial institutions such as the IMF and World Bank, included reducing import tariffs, privatising

state enterprises, and opening domestic markets to global competition. While intended to stimulate growth, these changes undermined local industries that were not equipped to compete with the influx of cheaper imports, particularly secondhand clothing and textiles from Europe and North America. In Ghana, for instance, employment in the textile and clothing sector fell by an astonishing 90% between 1975 and 2010. The removal of protective tariffs, coupled with outdated machinery and limited access to financing, rendered local manufacturers uncompetitive. Similarly, Zambia experienced a dramatic decline in sectoral employment, dropping from approximately 25,000 workers in the 1980s to fewer than 5,000 by 2012. The unrestricted importation of used garments, combined with the collapse of local support structures, dealt a significant blow to the industry. In Nigeria, once a continental leader in textile production, employment in the sector plummeted from over 200,000 workers to nearly negligible numbers. This decline was driven by persistent energy shortages, the flood of inexpensive Asian imports, inconsistent industrial policy, and weak infrastructure. Collectively, these factors led to the closure of many textile mills across the continent, contributing to widespread deindustrialisation, job losses, and the erosion of cultural and economic self-reliance. As argued by Brooks (2019), the dominance of secondhand clothing imports not only displaced local production but also reshaped African consumption patterns and economic trajectories in profoundly damaging ways.

Secondhand Clothing Imports in Africa



Source: authors' computation 2025

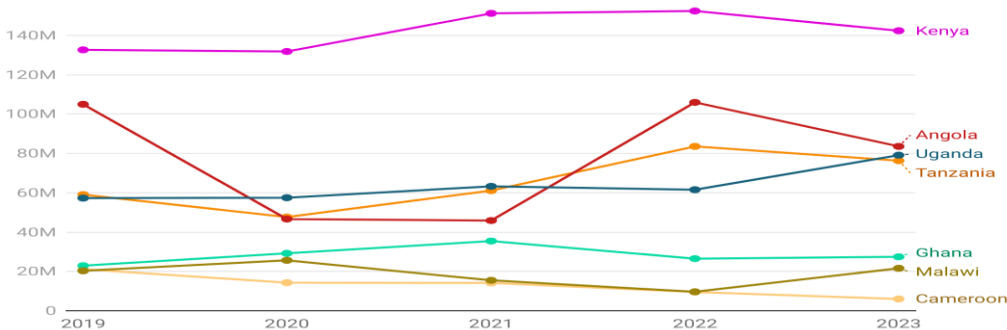
The chart depicts a rising trend of secondhand clothing imports in many African countries. Countries like Kenya and Uganda have seen consistently high and growing volumes of imports—

Kenya peaked at \$195 million in 2023, while Uganda recorded a 23 percent increase over five years. This reflects a sustained consumer demand for affordable clothing, but it also highlights the underlying structural weaknesses of the domestic textile and garment industries. Tanzania has maintained a steady import pattern, suggesting a relatively stable market, while countries such as Malawi, Ghana, Cameroon, and Angola have shown fluctuating import values, indicating policy volatility, economic shocks, or inconsistent supply chains.

A collaborative regional framework is essential to establish shared standards for secondhand clothing quality, hygiene, and customs procedures. This would prevent the dumping of substandard or unusable textiles while creating a level playing field for domestic producers. At the same time, informal traders and workers who depend on the secondhand clothing economy for their livelihoods must be included in these transitions. Governments should support the formalisation of these workers through cooperatives, training, and social protection programs.

Furthermore, better trade monitoring and data intelligence are needed to guide decision-making. Countries like Malawi and Cameroon, which experienced sharp swings in import volumes, need stronger institutional capacities to analyse trade flows, monitor donor-country export policies (such as the EU's upcoming Extended Producer Responsibility framework¹), and forecast supply disruptions.

New Clothing Imports in Africa



Source: authors' computation 2025

¹ <https://www.europa-packaging.eu/policy-area/extended-producer-responsibility/>

The chart illustrates the level of new clothing imports across African countries. According to available data, from 2019 to 2023, the following African countries were the top new clothing importing countries: Kenya, Angola, Uganda, Tanzania, Ghana, Malawi, and Côte d'Ivoire.

Kenya remains the largest importer of new clothing, consistently recording figures above \$130 million across the five-year period. Its highest point was in 2021 and 2022, reaching around \$145 million before experiencing a modest drop in 2023. This sustained high volume suggests that Kenya has a robust market for new apparel, likely driven by a mix of growing middle-class demand, well-developed retail networks, and liberalised trade policy.

Angola, which began at a high point in 2019 (just below \$120 million), saw a sharp dip in 2020—falling below \$60 million—but rebounded strongly to become the second-largest importer by 2022. Although it dropped slightly again in 2023, Angola's data indicates significant fluctuations, possibly driven by oil revenue dynamics, currency volatility, and import dependency for consumer goods. Uganda and Tanzania have shown steady growth in new clothing imports, with both countries overtaking the \$60 million mark in 2023. This upward trend reflects increasing urbanisation and disposable income, as well as limited domestic production capacities.

Ghana's new clothing imports, in contrast, have remained relatively stable and moderate, fluctuating between \$30 million and \$45 million. Malawi and Côte d'Ivoire consistently record the lowest import values, below \$30 million throughout the five years, suggesting either stronger local garment production for low-income markets or import restrictions due to economic limitations or protectionist policies.

These data reveal a growing consumer demand for new clothing across several African economies, especially in East and Southern Africa. However, the growth in imports also raises concerns regarding Africa's textile manufacturing base, foreign exchange exposure, and the viability of local fashion industries.

Factors that Impacted the African Clothing Industry

- i. The decline in incomes across many African countries significantly reduced consumer purchasing power, leading to a weakened demand for locally produced clothing.
- ii. The privatisation of textile companies, combined with rent-seeking behaviour and inadequate managerial expertise, resulted in the collapse of numerous factories.

- iii. Heightened competition from the Asian clothing Industry—characterised by higher labour productivity and lower production costs—also played a major role, as these producers gained easier access to African markets under liberalised trade policies.

5.0. Sustainable Fashion and Circular Economy in Africa's Cotton, Textile, and Apparel Sector

Sustainable fashion refers to the production and consumption of clothing and accessories in an ethical and environmentally friendly manner, aiming to minimise environmental impacts and ensure ethical working conditions. The circular economy, however, demands a regenerative model aimed at maintaining clothing and accessories as valuable as possible for as long as possible through reuse, recycling, and upcycling. To the amazement of many, sustainability is not a new concept to the world of African fashion—it is an inherent part of their culture. To illustrate, centuries ago, the Mutuba tree in East Africa was used to create bark cloth, while West African cotton and Anaphe silk lie at the basis of Aso Oke fabric weaving. In South Africa, cotton is utilised to create iconic Shweshwe fabrics, while North Africa employs wool and natural fibres in the manufacture of traditional Handira.

Across the continent, other social enterprises are continuing to uphold this heritage with modern-day innovation. In South Africa, there is a range of businesses focused on upcycling used clothing waste, and it strengthens job creation as well as environmental preservation. In Kenya and Nigeria, entities participate in collecting and sorting used textile waste and recycling, enhancing circularity and reducing landfill waste. During their stay in Ghana, ethical sourcing and textile manufacturing companies are gaining recognition for producing high-quality exports to the UK, USA, and EU markets, converting second-hand materials into profitable goods such as wiping rags, fraying lines, and even designer clothing lines.

Sustainability Challenges in Africa's CTA Sector

- i. Textile dyeing and wastewater discharge
- ii. Poor labour conditions in informal garment production
- iii. Heavy reliance on fossil fuels for production and transport
- iv. Limited access to sustainable production technologies and eco-friendly materials
- v. Fragmented value chains that reduce transparency and efficiency. For example, cotton farming, which forms the backbone of the CTA sector, requires significant water and chemical inputs, especially in arid regions.

- vi. Policy & regulatory gaps that hinder sectoral growth and circular initiatives
- vii. Insufficient investment in infrastructure and innovation
- viii. Threat of Fast Fashion and Secondhand Imports

6.0. Recommendations

Public awareness campaigns on SHC can educate consumers about the long-term environmental and health impacts of secondhand clothing while promoting pride in locally made garments and African fashion brands. The future of Africa's clothing industry lies not in isolating from global trade but in strategically using data, regulation, regional cooperation, and industrial policy to balance affordability with sustainability and competitiveness and the following recommendations:

- i. Reestablish the Cotton, Textile, and Apparel Value Chain

African governments should prioritise industrial policy frameworks that restart and build the whole value chain, from cotton farming and textiles to garment manufacturing and distribution. This requires huge investments in modern infrastructure, technology, and human capital training to restore regional competitiveness and employment generation.

- ii. Strengthen Public–Private Partnerships (PPPs)

There should be collaboration between the government, private sector actors, and development partners. PPPs can raise funds, increase efficiency, and speed up industrial upgrades. Such partnerships should be aimed at increasing domestic production capacity, improving trade logistics, and fostering sustainable manufacturing.

- iii. Invest in Infrastructural Development

Restoring Africa's clothing industry needs advanced infrastructure—power, transport, water, and digital systems—to facilitate effective production and supply. Governments must place a high priority on industrial parks, logistics hubs, and technology incubators for the apparel and textile business.

- iv. Encourage Access to Finance

Small and medium-sized enterprises (SMEs) and entrepreneurs operating within the cotton, textile, and apparel (CTA) value chain are generally underserved. Policymakers in the government need to campaign for expert products of finance that include low-cost finance, grants, and capital equity to support innovation, scale, and sustainability in the business.

- v. Establish Stakeholder and Value Chain Partnerships

Farmers, producers, designers, traders, and policymakers need to work together to restore a robust CTA ecosystem. Development partners and governments need to create dialogue platforms, innovation labs, and cooperatives where actors come together to co-create local solutions.

vi. Encourage Investment in Modern Manufacturing

Governments must actively attract and invite domestic as well as foreign investment in sophisticated textile and apparel manufacturing. It includes increasing existing facilities, introducing energy-saving technology, and introducing digital equipment in all production lines to become competitive and efficient.

vii. Encourage Cross-Sectoral Collaboration for Collective Development

The apparel and textile sector overlaps with agriculture, technology, logistics, and creative industries. Strategic partnership among these sectors—enabled by public policies—can unleash shared value and innovation. For instance, connecting cotton farmers with designers and manufacturers can enhance supply chain integration and value retention in Africa.

viii. Empower Local Entrepreneurs and SMEs

Small and start-up enterprises are critical to the creation of employment and innovation in the fashion industry. Policy intervention should focus on capacity development programs, incubation centres, raw material availability, and linkage to procurement programs. Women- and youth-owned enterprises should be given priority to foster inclusive growth.

6.1. Our Call to Action



Consumer
Awareness



Infrastructural
Development



Access to Finance



Stakeholders/Value
Chain Collaborations



Secondhand clothing is not our enemy, it is a mirror reflecting where our industries and policies fall short. Real sustainability demands more than donations; it demands development- factories, circular systems, and courage building African brands.

In light of SHC patterns, governments across the continent need to develop comprehensive circular textile policies that promote recycling, reuse, and extended producer responsibility. Instead of imposing abrupt bans on secondhand clothing—which can destabilize local markets and displace informal sector workers—countries should implement phased import regulation strategies. These should be tied to industrial policies that support local and regional textile production, encourage backwards linkages in the cotton-to-garment value chain, and incentivize MSMEs in tailoring, fashion design, and local branding.

Furthermore, African governments should pursue a dual-track strategy: first, support the growth of local garment production through industrial policy, skills development, and SME financing to ensure that rising demand can be met domestically; second, regulate new clothing imports more strategically by supporting AfCFTA, encouraging regional sourcing, and enforcing quality and sustainability standards. Trade policy should not only manage external inflows but also foster competitiveness within regional value chains, facilitating the movement of goods from countries with stronger production capabilities (like South Africa, Lesotho, Ethiopia and Egypt) to those with higher demand but weaker local supply.

7.0. Conclusion

In conclusion, while secondhand clothing addresses immediate consumer needs and supports informal economies, it is imperative to critically examine its broader implications through the implementation of strategic policies, investment in local industries, collaboration on regional value chains, and a renewed cultural emphasis on African fashion. The secondhand clothing market in Africa presents both challenges and opportunities within the context of the continent's industrialisation agenda. While it threatens the livelihoods of local textile businesses by inundating the markets with inexpensive products, it simultaneously offers a crucial access point to advanced circular economic processes that can advance sustainable development.

Conversely, African countries should adopt comprehensive and context-specific policies that balance trade liberalisation with the need to revitalise domestic production capabilities. The policy intervention should have a framework that would transition Africa from being a passive importer

to an active producer and regional distributor of apparel. This transformation should necessitate investment, policy coherence, and robust public-private partnerships across the continent.

Finally, through the alignment of strategies under the AfCFTA, governments can stimulate local industries, promote innovation, and enhance consumer awareness as new clothing imports into Africa not only reflect escalating consumer demand and economic transformations but also highlight the pressing need for coherent policy interventions to reconcile imports with continental industrial advancement and manufactured textiles. Ultimately, the growth of Africa's textile industry will require a collective commitment from all stakeholders—including policymakers, the private sector, civil society, and consumers—to cultivate a dynamic, competitive, and inclusive industry that significantly contributes to economic growth and job creation throughout the continent.

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ABOUT THE HOST INSTITUTION

International Trade and Research Centre (ITRC) - Africa Cotton, Textile and Apparel Centre

The Africa Cotton, Textile and Apparel Centre functions as a hub for facilitating policy dialogue, research, and promoting collaborative initiatives that enhance intra-African trade, investment, market access, and industrialisation of the CTA sector. The Centre prioritise capacity building, evidence-based policy, and upgraded manufacturing capabilities to support sustainable practices and innovative solutions within the cotton, textile, and apparel sectors. Its objective is to equip industry stakeholders with the requisite tools and knowledge to address contemporary challenges,

improve supply chain efficiency, and enhance market access. Ultimately, these efforts will contribute to the economic development of the continent.

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