ITRC
INTERNATIONAL TRADE & RESEARCH CENTRE

Africa Cotton, Textiles & Apparel Centre

Policy Brief

DECODING AFRICA'S CTA TRADE
EMERGING TRENDS, SHIFTING MARKETS, STRATEGIC IMPLICATIONS

MARCH 2026

INTERNATIONAL TRADE AND RESEARCH CENTRE (ITRC)
AFRICA CTA CENTRE

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Executive Summary

Africa's cotton, textile, and apparel (CTA) sector is entering a period of accelerated structural change. Global trade patterns are being reshaped by sourcing diversification, geopolitical realignments, evolving consumer demand, and most decisively; by the rapid expansion of sustainability and compliance requirements. Together, these forces are redefining not only where production takes place, but the conditions under which countries can participate in global value chains.

Within this shifting landscape, Africa occupies a paradoxical position. The continent remains a significant global producer of raw cotton, yet continues to capture only a marginal share of value in downstream activities such as spinning, weaving, and apparel manufacturing. This imbalance reflects a persistent structural pattern: ***strong participation at the upstream end of the value chain, but limited integration into higher-value, higher-growth segments.***

At the same time, traditional assumptions about competitiveness are becoming increasingly outdated. While preferential trade agreements and tariff reductions have improved nominal market access, they have not translated into a commensurate expansion of Africa's share in global textile and apparel trade.

The emerging reality indicates that market access alone is no longer sufficient to ensure competitiveness. Instead, participation is increasingly determined by a broader set of factors, including production capacity, supply chain reliability, compliance with environmental and social standards, and the ability to meet stringent buyer requirements.

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The constraints limiting Africa's ability to respond to these shifts are well established, but remain largely unresolved. Industrial capacity, particularly in spinning and fabric production, remains limited, creating a "missing middle" within the value chain. Infrastructure deficits, especially in energy and transport, continue to raise the cost of production and reduce competitiveness. Regional trade remains fragmented, with non-tariff barriers constraining the development of integrated supply chains under the African Continental Free Trade Area (AfCFTA). The growing importance of certification, traceability, and due diligence requirements also presents a new layer of complexity, particularly for small and medium-sized enterprises.

The cumulative effect of these is that Africa risks remaining locked into a low-value trade equilibrium; participating in global markets without shaping them, and exporting raw materials while importing higher-value finished goods.

The strategic imperative is therefore to reposition Africa within the CTA value chain, moving from participation to value capture. This requires a shift from fragmented, country-level approaches to coordinated, ecosystem-based industrialisation strategies that align policy, investment, and production systems.

This policy brief identifies five priority areas for action:

1. **Develop integrated regional value chains:** Promote coordinated production systems across countries; linking cotton production, spinning, textile manufacturing, and garment assembly; to enable scale, specialisation, and intra-African trade under AfCFTA.

2. **Scale textile and apparel manufacturing capacity:** Prioritise investment in spinning, weaving, and garment production through cluster-based industrialisation, with a focus on commercially viable hubs rather than dispersed facilities.

3. **Strengthen enabling infrastructure:** Address critical gaps in energy reliability, transport connectivity, and logistics systems to reduce production costs and improve supply chain efficiency.

4. **Build compliance and traceability ecosystems:** Support CTA businesses in meeting evolving global standards through accessible certification systems, digital traceability solutions, and institutional frameworks aligned with international requirements.

5 **Enhance trade intelligence and market positioning:** Improve access to market data, buyer requirements, and product-level insights to enable more strategic export positioning and informed investment decisions.

Advancing these priorities will require coordinated action across governments, industry actors, and development partners. With the right alignment, Africa has a credible pathway to transition from a supplier of raw materials to a competitive participant in higher-value segments of the global CTA industry.

Introduction

Africa’s cotton, textile, and apparel (CTA) sector occupies a critical place in the continent’s industrialisation agenda. With strong linkages to agriculture, manufacturing, trade, and employment, the sector has long been recognised as a potential driver of inclusive growth, job creation, and export diversification. From cotton farming communities to garment factories, the CTA value chain offers one of the few scalable pathways through which African economies can simultaneously address rural livelihoods, industrial development, and participation in global trade.

However, despite this potential, the sector’s transformation has remained uneven. While some countries have made targeted progress in developing textile and apparel industries, much of the continent continues to operate at the lower end of the value chain. This structural pattern is becoming increasingly difficult to sustain in a global environment that is evolving rapidly.

Over the past decade, and more sharply in recent years, global CTA trade has undergone significant shifts. Sourcing decisions are being reshaped by geopolitical considerations, supply chain disruptions, and the need for greater resilience. At the same time, sustainability regulations, due diligence frameworks, and traceability requirements are redefining the conditions for market access, particularly in key destination markets.

These changes are not incremental; they represent a fundamental reconfiguration of how the global CTA system operates.

Importantly, these dynamics are advancing at a pace that often exceeds the speed of policy adaptation and industrial response across many African countries. As a result, there is a growing disconnect between evolving global market requirements and existing production, policy, and trade systems on the continent. Without deliberate and coordinated action, this gap risks widening; limiting Africa’s ability to compete effectively in higher-value segments of the CTA value chain.

It is within this context that the Africa CTA Centre convened its March 2026 webinar, “Decoding Africa’s CTA Trade: Emerging Trends, Shifting Markets, and Strategic Implications.” The session brought together industry practitioners, policy experts, and researchers to examine recent trade data, identify emerging market signals, and assess their implications for Africa’s industrial and export positioning. The discussion was grounded in evidence and focused on translating data into strategic insight.

This policy brief builds on those insights. It seeks to move beyond descriptive analysis to provide a structured assessment of the shifts underway in global CTA trade, the constraints shaping Africa’s current position, and the strategic actions required to enhance competitiveness and value capture.

At the centre of this effort is the role of the Africa CTA Centre as a platform for trade intelligence and policy-relevant analysis. By consolidating data, tracking market developments, and facilitating informed dialogue, the Centre aims to support decision-makers across government, industry, and the investment community in navigating an increasingly complex trade environment.

The underlying premise is straightforward but consequential: ***Understanding trade flows is no longer sufficient, strategic positioning within those flows is now of great import.***

The sections that follow examine how Africa's CTA sector is currently positioned, what forces are reshaping the global landscape, and what this means for policy, investment, and industrial strategy going forward.

Africa's CTA Trade Landscape

A clear understanding of Africa's current position in global cotton, textile, and apparel (CTA) trade is essential to identifying both the scale of the opportunity and the nature of the constraints. While headline export figures provide a partial picture, a closer examination of trade composition, market distribution, and competitiveness reveals a more nuanced reality; one defined by persistent structural patterns alongside emerging but underutilised opportunities.

Export Structure and Value Distribution

Africa's participation in the global CTA value chain remains heavily concentrated at the upstream end. A significant proportion of the continent's exports continues to be in the form of raw cotton, with limited transformation into higher-value intermediate and finished products such as yarn, fabrics, and garments.

This export structure has important implications for value capture. The highest margins within the CTA value chain are typically realised in downstream activities; particularly in textile manufacturing, garment production, branding, and retail. By contrast, raw cotton exports capture only a small fraction of the total value generated.

As a result, even where export volumes are substantial, the overall economic return remains constrained.

Data and industry analysis consistently point to a “missing middle” within Africa’s CTA sector. While cotton production is relatively well established in several countries, investment in spinning, weaving, dyeing, and finishing capacity remains limited. This gap restricts the ability of African economies to convert raw materials into higher-value products and participate more fully in global and regional supply chains.

Market Dynamics and Trade Corridors

In the same vein, global demand patterns and trade corridors are evolving in ways that could favour greater African participation, if supply-side conditions can be addressed.

Recent policy developments, such as expanded market access to major economies and shifting sourcing strategies among global buyers, have created new entry points. For instance, large and growing markets in Asia continue to import significant volumes of textile inputs, while regional trade opportunities under the African Continental Free Trade Area (AfCFTA) remain largely untapped.

However, Africa’s share in many of these high-growth markets remains disproportionately low. Even where preferential trade agreements exist, utilisation rates are often limited. This reflects not only gaps in productive capacity, but also challenges related to product standards, reliability of supply, and the ability to meet buyer specifications at scale.

In parallel, there are emerging signs of industrial clustering in selected countries, particularly where targeted investments in industrial parks, logistics, and export-oriented manufacturing have begun to take shape. These developments suggest that progress is possible, but also highlight the unevenness of industrial capacity across the continent.

The Market Access Paradox

One of the defining features of the current trade environment is what can be described as a “market access paradox.” Over the past two decades, tariffs on CTA products have declined significantly through multilateral agreements, regional trade frameworks, and preferential schemes. In principle, this should have lowered barriers to entry and facilitated increased participation from emerging producers.

In practice however, Africa’s share of global textile and apparel trade has not expanded in proportion to these improved access conditions. In several product categories, participation remains marginal, particularly when compared to established manufacturing hubs in Asia.

This divergence points to a fundamental shift in the nature of competitiveness. While tariff barriers have diminished, non-tariff factors, including production capacity, infrastructure efficiency, compliance with standards, and supply chain integration have become the primary determinants of trade performance.

The implication of this is that while the market is readily accessible, supplier readiness remains a critical constraint. Until these structural constraints are addressed, expanded market access alone will be insufficient to drive meaningful growth in Africa’s CTA exports or to enable a transition toward higher-value participation in global trade.

Drivers of Change in Global CTA Trade

The global cotton, textile, and apparel (CTA) industry is being reshaped by a set of interrelated structural forces that are redefining how value chains are organised, how sourcing decisions are made, and what constitutes competitiveness.

These drivers represent a deep transformation in the architecture of global production and trade. . They signal a fundamental shift in which the global CTA trade environment is becoming more complex, more regulated, and more performance-driven, raising both the bar and the stakes for participation.

Buyer-Driven Value Chains

At the core of the CTA industry is a buyer-driven value chain, where large international brands and retailers exercise significant influence over production networks. These firms determine sourcing locations, set product specifications, and increasingly define the standards that suppliers must meet.

Historically, this model facilitated the relocation of production from advanced economies to lower-cost manufacturing hubs, particularly across Asia. Over time, it has also contributed to the emergence of complex, multi-country production systems, where design, input sourcing, manufacturing, and distribution are geographically dispersed.

Today, buyer expectations extend beyond cost efficiency. Decisions are increasingly informed by considerations such as supply chain transparency, compliance with labour and environmental standards, and the ability to respond quickly to changing market demand. This evolution is reshaping the geography of production and creating new entry points, but also new barriers, for emerging suppliers.

Sourcing Diversification and Risk Mitigation

Recent global disruptions, including the COVID-19 pandemic, geopolitical tensions, and logistics bottlenecks, have exposed the risks associated with highly concentrated sourcing models. In response, many brands are actively pursuing diversification strategies to reduce dependency on single-country suppliers.

The so-called “China+1” approach has become a defining feature of this shift, with buyers seeking to complement existing supply bases with alternative production locations. At the same time, nearshoring and regionalisation trends are gaining traction, particularly in relation to European and North American markets, where proximity can reduce lead times and improve supply chain resilience.

For Africa, these shifts present a potential window of opportunity. However, the ability to capture this opportunity depends on whether production systems can meet the requirements of scale, reliability, and integration that diversified sourcing models demand.

Sustainability and Compliance as Trade Filters

Perhaps the most significant structural shift is the growing role of sustainability and compliance as determining factors in trade participation. Regulatory frameworks in key markets are increasingly embedding due diligence requirements, obliging firms to demonstrate responsible practices across their entire supply chains.

This has elevated the importance of certification, traceability, and adherence to environmental and social standards.

Compliance is no longer confined to Tier 1 suppliers; it extends across multiple layers of the value chain, including raw material sourcing.

For many exporters, particularly in developing markets, this introduces new cost and capacity challenges. It also creates a competitive divide between suppliers that can meet these requirements and those that cannot.

Speed, Cost, and Reliability Pressures

Alongside these structural shifts, the economics of the CTA industry continue to be shaped by pressures related to speed, cost, and operational reliability. The rise of e-commerce, fast fashion, and increasingly data-driven retail models has compressed production timelines and increased demand volatility.

Lead times are shortening, order sizes are becoming smaller and more frequent, and suppliers are expected to respond with greater flexibility. This places a premium on integrated supply chains, efficient logistics, and real-time production capabilities.

In this context, competitiveness is no longer defined solely by low labour costs. It is determined by a combination of factors, including speed to market, consistency of supply, compliance with standards, and the ability to adapt to rapidly changing demand patterns.

Structural Constraints Limiting Africa's Competitiveness

Despite growing global opportunities, Africa's ability to participate effectively in cotton, textile, and apparel (CTA) trade continues to be constrained by a set of persistent structural barriers. These constraints are interlinked and mutually reinforcing, limiting the continent's capacity to move up the value chain and compete in higher-value segments of global markets.

Industrial Capacity Deficit

A central limitation is the lack of sufficient industrial capacity across key stages of the CTA value chain. While cotton production is relatively well established in several African countries, there is a significant gap in downstream processing; particularly in spinning, weaving, dyeing, and finishing.

This "missing middle" constrains value addition and forces many countries to export raw cotton while importing finished or semi-finished textile products. As a result, opportunities for job creation, skills development, and industrial upgrading are not fully realised.

Where textile and garment manufacturing capacity does exist, it is often concentrated in a limited number of countries and industrial zones, resulting in uneven development across the continent. The absence of scale and integration further reduces competitiveness, particularly in meeting large-volume or time-sensitive orders from global buyers.

Infrastructure Gaps

Infrastructure deficits remain a major cost driver and operational constraint across Africa's CTA sector. Reliable and affordable energy supply is a critical requirement for textile production, particularly in spinning and processing activities, which are energy-intensive. In many countries, inconsistent power supply increases production costs and reduces efficiency.

Transport and logistics systems also present significant challenges. Limited rail connectivity, congested ports, and underdeveloped intermodal transport networks contribute to delays and increased costs. For landlocked countries in particular, the cost of moving goods can represent a substantial proportion of final product value, undermining export competitiveness.

These infrastructure gaps not only affect production efficiency but also weaken supply chain reliability, an increasingly important factor in global sourcing decisions.

Fragmented Regional Trade Systems

Although the African Continental Free Trade Area (AfCFTA) presents a framework for regional integration, its implementation remains uneven. In practice, intra-African trade in CTA products is still limited, and regional value chains remain underdeveloped.

Non-tariff barriers, including complex customs procedures, inconsistent regulatory frameworks, and restrictive transport policies; continue to impede the movement of goods across borders. These constraints increase transaction costs and reduce the feasibility of cross-border production systems.

As a result, the potential for regional specialisation, where different countries contribute to different stages of the value chain, remains largely unrealised.

Compliance and Certification Barriers

The growing importance of sustainability and compliance in global trade introduces an additional layer of constraint. Meeting international standards often requires certification processes that are both costly and complex, particularly for small and medium-sized enterprises.

In many cases, these businesses lack access to the technical support, financing, and institutional frameworks needed to navigate these requirements. Certification is not a one-time process but requires ongoing investment in systems, training, and monitoring.

Without targeted support mechanisms, there is a risk that smaller businesses, despite being central to employment and production, will be excluded from higher-value export markets.

Inherent Risks

The structural constraints outlined above are not merely operational challenges; they have direct and far-reaching strategic implications for Africa's position in the global cotton, textile, and apparel (CTA) industry. Left unaddressed, these constraints risk reinforcing a pattern of participation that generates limited economic transformation.

1. Limited Value Capture:

Africa continues to capture the smallest share of value within the global CTA value chain. While the continent plays a significant role in raw cotton production, the bulk of value creation occurs downstream; in textile manufacturing, garment production, branding, and retail. This imbalance limits the economic returns from trade and constrains the sector's contribution to industrial development.

2. Exposure to Commodity Volatility:

Heavy reliance on raw cotton exports exposes African economies to fluctuations in global commodity prices. Price volatility can have direct impacts on export revenues, farmer incomes, and foreign exchange earnings. Without diversification into higher-value segments, countries remain vulnerable to external market shocks over which they have limited control.

3. Industrial Stagnation Risks:

The absence of a strong domestic textile and apparel base limits opportunities for job creation, particularly in labour-intensive manufacturing segments such as garment production. It also slows the pace of technology transfer and industrial upgrading. Over time, this risks entrenching a cycle of low productivity and limited industrial diversification.

4. Risk of Supply Chain Exclusion:

As global buyers increasingly prioritise compliance, traceability, and supply chain reliability, the inability to meet these requirements poses a growing risk of exclusion from higher-value markets. Suppliers that cannot demonstrate adherence to evolving standards may find themselves confined to lower-margin segments or excluded altogether.

Strategic Pathways: From Participation to Value Capture

Addressing Africa's position in the global cotton, textile, and apparel (CTA) industry requires more than incremental improvements. It calls for a shift toward coordinated, system-level strategies that enable countries to move beyond raw material exports and capture greater value across the production chain. The pathways outlined below reflect a set of mutually reinforcing priorities aimed at building competitive, integrated, and future-ready CTA ecosystems.

Build Regional Value Chains

A central priority is the development of integrated regional value chains that connect cotton production to yarn, fabric, and garment manufacturing across multiple countries. No single country is likely to possess all the capabilities required to compete across the full value chain at scale. However, through regional coordination, it is possible to leverage complementary strengths.

The African Continental Free Trade Area (AfCFTA) provides a framework for enabling such integration. By reducing trade barriers and facilitating the movement of intermediate goods, it can support a model of regional specialisation where countries focus on specific stages of production while participating in a broader, interconnected system.

Operationalising this model will require addressing non-tariff barriers, harmonising standards, and investing in cross-border infrastructure. Done effectively, regional value chains can improve efficiency, expand market size, and enhance competitiveness.

Prioritise Garment-Led Industrialisation

Historically, garment manufacturing has served as an entry point for industrialisation in many successful textile-exporting economies. It is relatively less capital-intensive compared to upstream processes and offers significant potential for large-scale job creation, particularly for youth and women.

Prioritising garment production can provide a practical pathway for scaling industrial activity while simultaneously building capabilities that can support upstream integration over time. Importantly, a growing garment sector can stimulate demand for locally produced textiles, creating incentives for investment in spinning and fabric production.

To maximise impact, garment-led strategies should be linked to export markets and supported by targeted policies, including skills development, industrial park development, and access to finance.

Scale Textile Manufacturing Capacity

Closing the “missing middle” within Africa’s CTA value chain requires deliberate investment in textile manufacturing; particularly in spinning, weaving, and finishing. Without this capacity, efforts to expand garment production will remain constrained by reliance on imported inputs.

Rather than dispersed investments, a cluster-based approach to industrialisation offers a more viable pathway. Concentrating production within designated industrial zones can improve access to shared infrastructure, reduce costs, and enhance coordination across businesses. It also facilitates the development of supplier networks and service ecosystems essential for competitiveness.

Invest in Compliance and Traceability Systems

As sustainability and due diligence requirements become integral to global trade, compliance capabilities must be treated as core infrastructure rather than ancillary functions. This includes the development of accessible certification systems, institutional support mechanisms, and digital tools for traceability.

Investments in this area should aim to reduce the cost and complexity of compliance, particularly for small and medium-sized enterprises. Aligning national systems with international standards will be critical in ensuring continued access to key markets.

Strengthen Trade Intelligence and Market Positioning

Finally, improving access to timely and actionable trade intelligence is essential for informed decision-making. This includes data on market demand, product-level trends, pricing, and buyer requirements.

Enhanced visibility into global markets can support more strategic export positioning, enabling business owners and policymakers to identify high-potential segments and align production accordingly. Platforms that consolidate and analyse such data play a critical role in bridging information gaps and supporting competitiveness.

Policy and Investment Priorities

Translating strategy into outcomes will require a deliberate alignment of policy frameworks and investment decisions. The evidence is clear that isolated interventions, whether in infrastructure, industrial development, or trade facilitation; are unlikely to deliver sustained impact unless they are coordinated within a coherent system. The following priorities outline where targeted action can unlock the greatest gains.

Industrial Policy

A renewed focus on industrial policy is essential to accelerate value addition within the CTA sector. Governments should prioritise the development of integrated industrial clusters that concentrate spinning, weaving, garment manufacturing, and supporting services within defined geographic zones. This approach enables economies of scale, reduces production costs, and fosters linkages across the value chain.

In parallel, incentive frameworks should be recalibrated to encourage downstream processing rather than the continued export of raw materials. This may include fiscal incentives, targeted subsidies, and access to serviced industrial land, with clear performance benchmarks tied to value addition and export outcomes.

Trade Policy and AfCFTA Implementation

The effective implementation of the African Continental Free Trade Area (AfCFTA) remains central to unlocking regional value chains. While tariff reductions are important, the more immediate priority lies in addressing non-tariff barriers that constrain cross-border trade.

Simplifying customs procedures, harmonising standards, and improving coordination between border agencies will be critical in reducing transaction costs and enabling the seamless movement of intermediate goods. A functional regional trade system is a prerequisite for the development of multi-country production networks within the CTA sector.

Infrastructure Investment

Infrastructure deficits, particularly in energy and transport, continue to undermine competitiveness. Addressing these gaps requires sustained investment in reliable and affordable power supply, including the integration of renewable energy solutions where feasible.

At the same time, strengthening transport corridors is essential to improving connectivity between production centres, ports, and regional markets. Efficient logistics systems reduce lead times, lower costs, and enhance supply chain reliability; factors that are increasingly decisive in global sourcing decisions.

Compliance Ecosystems

As compliance requirements become integral to market access, there is a need to build supportive ecosystems that enable Africa CTA businesses to meet international standards. This includes establishing accessible certification systems, strengthening regulatory institutions, and providing technical assistance to firms navigating complex compliance processes.

Public-private collaboration will be important in ensuring that compliance systems are both credible and commercially viable, particularly for small and medium-sized enterprises.

Financing and Investment Models

Scaling industrial capacity will require significant capital investment, often in environments perceived as high-risk. Innovative financing mechanisms, such as blended finance structures, can play a critical role in mobilising private investment by sharing risk between public and private actors.

In addition, targeted instruments aimed at de-risking industrial projects, such as guarantees, concessional financing, and co-investment platforms, can help unlock investment in priority segments of the CTA value chain.

Conclusion

Africa's cotton, textile, and apparel sector stands at a decisive moment. The global environment is shifting in ways that create real and tangible opportunities for new and emerging production hubs. Demand is evolving, sourcing patterns are diversifying, and the strategic importance of resilient and sustainable supply chains continues to grow.

The constraints limiting Africa's participation are well understood. Gaps in industrial capacity, infrastructure, regional integration, and compliance readiness continue to shape the continent's position within the global value chain. While these are not new challenges, they have become more urgent in a trade environment that is increasingly competitive, standards-driven, and time-sensitive.

The pathway forward is also clear. Building regional value chains, scaling manufacturing capacity, strengthening compliance systems, and improving trade intelligence are not abstract ambitions, they are practical, achievable priorities. What is required is aligned investment across policy frameworks, institutions, and production ecosystems.

The opportunity is real. The constraints are known. The solutions are within reach.

Africa's future in global CTA trade will be determined by its ability to align policy, investment, and production systems with the realities of a rapidly evolving global market.

Appendix

About The Contributors

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2. **Eme Bassey** is a textile, apparel, and industrial development specialist with over a decade of experience working across Africa's manufacturing and trade ecosystems
3. **Dr. Jean-Baptiste Damestoy** is a Strategy Advisor specializing in industrial policy, public affairs, and sustainable development.

About The Host Institutions

The Africa Cotton, Textile and Apparel Centre, an arm of **The International Trade and Research Centre (ITRC),** is a hub for facilitating policy dialogue, research, and promoting collaborative initiatives that enhance intra-African trade, investment, market access, and industrialisation of the African cotton, textile, and apparel sector.

The Centre prioritise capacity building, evidence-based policy, and upgraded manufacturing capabilities to support sustainable practices and innovative solutions within the Africa CTA sector. 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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"Decoding Africa's CTA Trade: Emerging Trends, Shifting Markets, and Strategic Implications" (Primary source for analysis and synthesis in this policy brief)

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