

Documentation

African Fashion: Changes in African Textile Industries

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Welcome by Franz Schmidjell (VIDC): Dear Ladies and Gentlemen, dear friends, I welcome you in the name of the VIDC Wiener Institut to our panel discussion: African fashion and the changes in the textile industry. Special thanks to our guests on the panel who will be introduced later on by our moderator. I would like to thank the Museum of Ethnology for hosting the exhibition and our panel discussion. I have to add that we appreciate your openness of this historical house towards the diaspora and migrant communities – it will bring more life to it. I thank our partner, the Pan African Forum in Austria, for your cooperation and long time commitment. Organisations like the PANAFPA are the building bridges to the world and bringing more color into our life, the life of our ‘indigenous’ people. After having seen the colorful exhibition, I wonder, why so many people call Africa the „dark continent“. It seems, we Europeans are the ones with gray and black, with dark dresses. I thank the Austrian Development Cooperation for financing to nights discussion and to my colleagues from the VIDC for helping me to prepare this event..

What is the theme for this debate? Normally when we talk about African Fashion we focus on design, wonderful motives, colorful patterns, meaning more about the artistic/aesthetic side - which is very important. But today we would like to link it with the economic issues.

When we look to the African continent, SSA, we saw two contradictory trends in the last years. On the one side the rise of the African fashion industry, within Africa but also on a global level. On the other side we experienced a major decline of the African textile and apparel industry. After the trade liberalization, the African textile industry could hardly compete with the cheap Asian fabrics and second hand clothing from Europe. In Ghana, 25.000 people have been once employed in the textile industry, today only 2.000.

What we like to discuss tonight are following questions: How the success of the African Fashion industry can contribute to a sustainable growth of local African economies? How to improve the local value chain – from fibre to fashion - and how to create better forward and backward linkages and local integration? I know it will be a bit ambitious but we have very interesting people on the panel who will give us some relevant inputs.

Now I would like to hand over to our moderator Mr Kojo Taylor: He is a physicist. He works at the Technical University Vienna, he is Honorary President of the Pan African Forum in Austria, and he is also director of a wonderful cultural group, called the Ghana Minstrel Choir. I wish you an interesting evening.

Kojo Taylor (PANAF, Moderator)

Thank you very much, Franz. You've made the job a bit easier for me by highlighting some of the vital points I was going to make. So I will go straight ahead to make some points clear. When



Africans meet, we meet because we have a problem. And our problem is that we haven't been able to portray or enterprise our products. Even when you are a fashion designer, you still need some appreciation from outside. It will give you the weight to establish yourself. Many of us are criticized; why aren't we able to create a market for ourselves? We have the World Bank, we have

the IMF, and other institutions that always make sure that our products, our economies and our politics are suppressed, and there for we have a so called master-slave relationship. We have to come out of our skins and make sure we have an equal partnership. And that's why I was very happy when VIDC said: Before, it was called development and cooperation, now it's called dialogue and cooperation. So I think the African forum has won a very competent partner and we are very happy to work together.

Now coming up to our panelist, we have Yemi Osunkayo, he comes from Nigeria originally. He's been living in London for about 21 years. He's a fashion designer, and director of a fashion creation that he created himself. He calls it *Kosiba Creation*, which is his mother's name, because in Africa we highly value our mothers. I think it's important to know that. Yemi has won various prizes, allow me to mention four of them. *City People* in Lagos named him *Fashion designer of the Year* in 2012. In 2010, he won a prize called *100+ Black Achievers*, in 2009 he was awarded with the *Fashion Diversity Prize*. Another Prize was the *Excellence Award - Gathering of Africa's Best*.

And I think we'll also be very happy to hear why various African products have been having difficulties on the world market, and why we have to sit down for Europeans to take our materials, design it another way, put it in their market, and people rush to buy that, instead of buying what comes from Africa. So you have the floor, thank you very much.

Yemi Osunkayo – Presentation

Power point: [African Print in Mainstream Fashion](#)



Thank you very much. It is indeed a privilege to share my thoughts on the impact of African fashion, the impact it has had on the textile industry of Sub-Saharan Africa. African influences on mainstream fashion are on the rise again. And this was high on the fashion weeks of London, Paris, New York and Los Angeles. Luxury brands such as Burberry, designers such as John Rocha, Christopher Baby, and Gwen Stephanie, or Elliot Emby, made heavy use of African print. And African-influenced garments were sold in shops like Bloomingdales, Saks Fifth Avenue, and Barney's New York. Print magazines such as Vogue, Elle, something, and something, feature page after page of high fashion editorials of models wearing outfits in bold and stunning African print.

I have some images which illustrate exactly what I have been telling you. As you can see, button styling, headgear, the print, this is heavily used and featured. Global celebrities like Beyoncé, Solange Knowles, Rihanna, and even First Lady Michelle Obama have been photographed proudly wearing African print. African influences on fashion make periodic appearances, right back to the iconic African collection by Esther Lamonde in the seventies. Whilst we as Africans celebrate this, the irony is that African designers have been consistently using the same fabrics for their designs, and not getting the same reaction or recognition. But it seems when European or North American designers incorporate it into their work, it suddenly gains the seal of approval, sadly even from fellow Africans. This prejudice can also be seen in the African textile industry. A former vibrant African textile industry seems to be on a sharp decline. At the exact same time, we have seen the resurgence of African print on a global scale.

And as I mentioned earlier, textile industries in countries such as Nigeria, Ghana, South Africa and Zimbabwe seem to have been decimated by lower prices of imported textiles from Asia and second hand clothes from Europe combined with a lack of adequate infrastructure and government support to compete nationally and internationally. These industries had previously been protected from international competition by a number of government measures such as import tariffs and restrictions. The relaxation of such policies and problems such as inadequate electricity supply have created the perfect storm that resulted in the collapse we are seeing now.

Moving forward, we need to explore how we can establish and develop sustainable business links between African designers at home and in the diaspora, and the African textile industry. From taking steps to individually establish mutually beneficial relationships with local weavers and print makers, to lobbying governments to provide adequate support to enable these industries to run the operation with both economic and technological efficiency, to adequately compete on their home turf and internationally.

This would require investments in these countries, and these can be realized if they are able to attend international trade exhibitions where they can meet potential investors and network with other executives to exchange ideas on the practice. I think it would be a great idea for textile companies to forge relationships with colleges and universities that broaden fashion and textile forces and take on students as interns as part of the curriculum.

These young students can then bring fresh ideas to the design department. To keep them internal, these companies can then consult something of big institutions by donating their projects which will be used for innovative designs. The design mustn't feel more minded to then use these fabrics to further collection and repeat orders if the design has commercial success.

On a personal note, I have forged such a relationship with a Ghana-based textile designer who has developed a fabric that is a fusion of the beautiful and captivating patterns of the traditional Kente, with the more subdued colorings of the something to create a fabric called Kente-Oke. The fabric is made of silk threads instead of traditional cotton to make it even more soft and pliable. I then combined the fabric with silk, chiffon, satin, and other things, to create gowns that have an international appeal. Kente-Oke is also perfect for accessories like shoes, bags, and jewelry, as well as soft furnishings like cushions and chair covers.

This is just one example how designers can collaborate directly with the African textile industry. I'm talking from the point of view of an individual, I don't claim to be technical, but I think one drop can create a butterfly effect.

Presentation Pusoletso Nkopane:

Power point: [The Rise of the African Fashion Industry](#)



Good evening everyone. My presentation will be on the rise of the African fashion industry – a youthful perspective on emerging African fashion trends, African diaspora, the internet designers and retail. As you know, it isn't such a positive picture, but at the same time a lot of young Africans are trying to contribute positively and trying to expand the industry in their own ways.

In 2011, I first saw this image. It was Burberry uses African textiles for its 2012 collection.

And from what I saw on the internet, a lot of Africans were either against it, or celebrated, but it got lots of good reviews from different fashion magazines and so forth. And at the same time, Western fashion publication took notice of the frenzy surrounding African influences in the fashion industry. Obviously you know Vogue magazine. Vogue has a monthly or annual issue called the Black issue. They feature black African models and African designers and a lot of opinion pieces about African culture, fashion and music. And this was when the more popular images that I found on the internet that attracted a lot of attention. At the same time, a new book was released last year by Arise magazine editor Helen Jennings. Helen Jennings is a British woman who has wrote for African fashion publications for I think the last five years. I think her book is one of the most popular books, because it's a really, really good book. I myself bought a copy. She basically featured many designers from across Africa. She doesn't talk about some of the constraints, it's more of an editorial overview of African fashion and African designers.

At the same time, young, dynamic Africans in the diaspora emerged as ambassadors of African fashion or African influence in fashion. Two particular African women stood out who are always wearing something African-inspired. The first one over here is Ethiopian-born Julia Sarr-Jamois and she's a fashion editor of Wonderland magazine, a magazine based in the UK, and the second one is Nigerian-born Oromo Elewa, editor of Pop Africana magazine.

In my spare time, I read a lot of blogs and a lot of magazines and these two are always mentioned, and I know they have a lot of fanfare across Africa and the African diaspora. Over the last few years, there have been a host of fashion magazines created by Africans, in and around the diaspora, specifically catering to fashion conscious African youth, erstwhile also promoting local continental

fashion. Arise magazine is possibly the biggest fashion magazine in Africa, it's based in Nigeria I believe. They also host a fashion week in New York with Mercedes-Benz.

The second one is Pop Africana, one of the newer magazines. It's really popular, especially among younger Africans such as myself. Another popular one is Fashion Is Black. It's a French magazine, created by a Gambian living in France, and Guba magazine, also based in France and catering to francophone Africa. The next one is Afroklectic, a newer magazine based in Australia. Unbeknownst to me, it seems to be a large African diaspora in Australia, and they've created their own magazine, their own websites, and a lot of their own brands.

Inasmuch as there are prominent African designers and buyers of African fashion based in the West, I think Africans in Africa are also starting their own events to promote fashion designers in Africa and also to somehow promote the industry in Africa. This year alone, there have been so many events across Africa, like the Hub of Africa in Addis Ababa in Ethiopia, and the Fashion Africa in Nairobi, Kenya, Kongo fashion week in Brazzaville, Gaborone fashion week in Botswana, Zimbabwe fashion week, Cape Town fashion week, Angola fashion week, and for the first time this year, the Namibia fashion show. One of the biggest is the Ghana fashion week which is coordinated by Vogue Italia. I know that a lot of people on the internet are talking about it because apparently it's a really good event. Later on this year, there is the Lagos fashion week.

The British newspaper *The Guardian* have a new section called Africa Development or Africa Rising where they feature somewhat positive opinions and debates about Africa and a few weeks ago, they did the top ten African fashion blogs, which they judged by traffic and popularity. There's African Style Daily, One Nigerian Boy, African Fashion Guide, Cïaafrique and Bella Naija.

I've been reading a lot of articles about retail consumers and entrepreneurship. There's a website called *howwemadeitinafrica.com*, where they publish a lot of articles about business affairs in Africa, including on consumers and retail in Africa. One article was talking about retailers in Africa, how all of a sudden a lot of retailers seem to be entering Africa, for instance Gap, Zara, and Mango, in South Africa at least. On the other hand, a lot of traditional African retailers are expanding, for example South Africa based Woolworths expanding into Nigeria and Kenya.

The rise of the female consumer I'm an African woman and I consume a lot, especially when it comes to fashion. According to a recent article on *howwemadeitinafrica.com*, African women are becoming more independent and moving away from traditional, stereotypical roles. More and more

women are earning their own money and supporting families. Women in Africa are buying more because they are earning more money – at least some women, not all.

In the New York Times last week, they wrote an article titled women entrepreneurs drive growth in Africa. And they were talking about how in Africa, a lot of labor is performed by women. One of the women featured was Ethiopian Ms Tilahun, who owns a footwear company called Sole Rebel. She talked about how she created a company with 50 \$. She is one of the rising African entrepreneurs, and from what I've heard, a millionaire. At the same time, according to a World Bank report, many new entrepreneurs in Africa are women.

I have some images when it comes to e-commerce, because many Africans, particularly in the diaspora, are buying via the internet. I myself buy a lot of things from African retailers via the internet, because obviously I cannot just go home and buy them. I will mention a few that are very popular; the first one is called Heritage 1960, created by a Nigerian-American and catering to the American market. She finds designers and textile producers in Africa and connects them with American consumers. The next one is called Sasa Africa. It was founded by MIT students in the US with a Kenyan friend. They help Kenyans who make small accessories connect with American consumers. It's so successful that they are trying something similar in South Africa. When I go there in December, I will be working with Sasa to implement that in my rural hometown of Eastern Cape.

The next one is called Oliberte shoe wear. It was founded by two Ethiopians and is especially popular amongst young, male Africans. I was very impressed when I was living in Japan that you could find Oliberte there. All their products are produced in Ethiopia. The next I would like to mention is Armando Cabral, who is Angolan but lives in Portugal. He makes shoes for men and women. Sole Rebel, as mentioned, was founded by an Ethiopian woman. Her products are especially popular with environmentally conscious consumers.

Finally, the biggest fashion extravaganza next week in South Africa will be the Mercedes-Benz fashion week. From what I've seen when I attended one myself, the South African public are really excited about this. It's become an annual event that garners a lot of attention. It will feature different designers from South Africa, Ghana, Nigeria and the UK. At the same time, they'll be having discussions on how to improve the retail sector and how to encourage more designers from across Africa, and displaying beautiful designs from all over Africa.

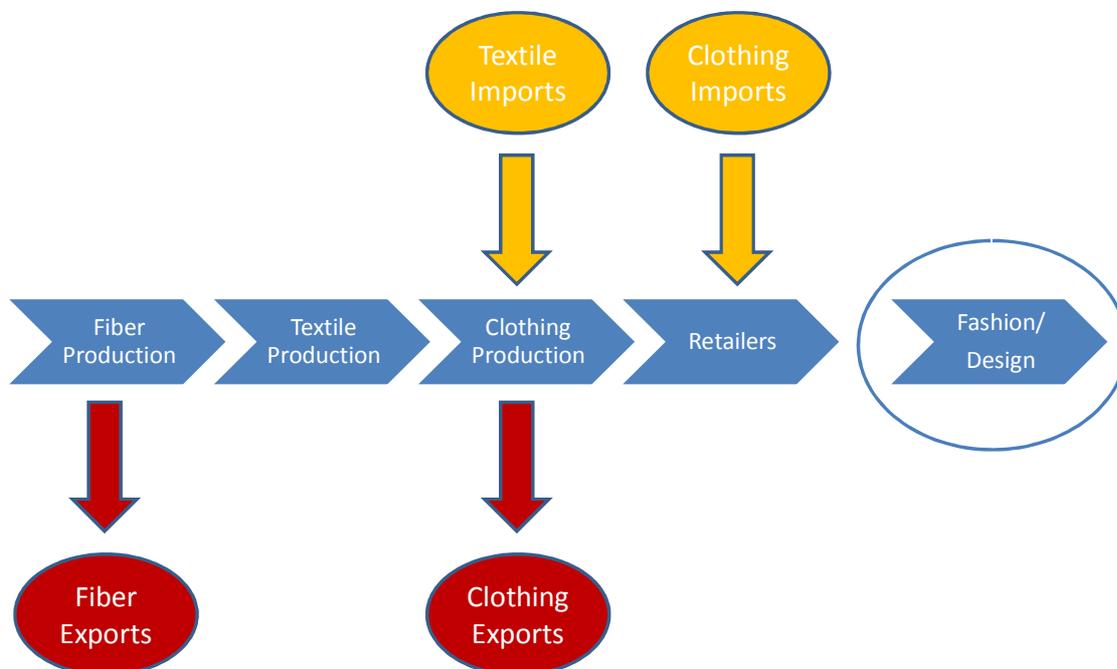
Presentation Cornelia Staritz



Many thanks, I'm very happy to discuss the textile and fashion industry from these different perspectives. There are different contexts in different countries and regions in Africa, but I think you can roughly say there are four different segments of the fashion-textile industry.

These segments are very much disintegrated in Africa. I think there's a potential to increase the links between the segments to have a much broader development impact on Africa by increasing local value added and employment. I want to discuss these four segments along the very simple value chain of the textile, clothing, and fiber sector, and how these segments have developed in Sub-Saharan Africa.

Fiber-Textile-Clothing Value Chain in SSA



Fiber-Textile-Clothing Value Chain in Sub Sahara Africa

First you have fiber production, and there are different types of natural and synthetic fibers. You have cotton which is very important, silk was also mentioned, wool, or other fibers. Then you have textile production. First, yarn is made and then fabrics. This can be quite capital intensive. In an industrial textile firm, huge machines are used and few workers. But in many areas, production is also very labor intensive, where you have mostly women and one weaving machine. So you can produce it in different ways, more capital or more labor intensive. Then you have clothing production, which is taking fabrics and making them into finished apparel, finished garments.

At the end, we have retailers that sell the finished product to the final consumers. There are different types of retailers as already mentioned. In some African countries, there are important domestic retailers like Foschini, Woolworths, and Mr. Price in South Africa. They are large retailers which control the South African market and are increasingly investing in other countries as well.

But we can also see American and European retailers slowly increasing their presence in Africa. Walmart for example, the largest retailer and the largest company in the world, recently bought Massmart in South Africa and their retail networks all over Africa. The retailers have access to the consumers, they can dominate prices, quality standards, and other specifications. This puts a lot of pressure on the firms that produce textiles and clothes. We call this a buyer-driven value chain. We see a very asymmetric power balance within these chains. Although the balance varies, there are similar asymmetries for African countries producing for US or EU retailers or South African retailers. There's a huge price competition.

At the end, I have fashion design which I didn't know where to put because it's important in many places in the value chain. Some designers sell their products directly, so they don't need retailers, while some interact closely with retailers. But they all have to interact with the textile and clothing production stage.

When we look at Sub-Saharan Africa, we see four sectors that are very disintegrated. We have the cotton sector, which is very important. The cotton sector is huge in some countries in the region, mostly in the West but also some Eastern countries, like Tanzania and Zimbabwe specifically. Sub-Saharan Africa is one of the largest producers of cotton worldwide. But one huge issue is that 95% of all cotton produced in Sub-Saharan Africa is exported to other regions in unprocessed form. This means it is harvested and exported directly without further processing, mostly to China, other Asian

countries, and the European Union. So it's very disintegrated from the rest of the value chain. The cotton sector is very crucial, because it has the potential to grow further and provide employment and alleviate poverty, especially in rural areas in many Sub-Saharan African countries.

The second segment is the textile and clothing sector which produces for the local market. We've already heard that after independence, many African countries tried to build local textile and clothing industries, to produce for the local market and meet local demand. Some examples are Ghana, Nigeria, Kenya, and South Africa. They protected the market to help the local industry. But since the 1980ies, many countries liberalized or had to liberalize their markets in the context of structural adjustment programs for the World Bank or the IMF. The liberalization happened very quickly and many companies couldn't withstand the pressure of the global market. So in many of these countries, the local textile and clothing sector declined dramatically in the 1980ies. For example in Ghana, there used to be 25000 workers in the formal clothing sector, and now there are less than 2000.

This is also related to retailers, because local retailers started to switch to importing clothing. We see many local markets dominated either by cheap imports from Asia or second-hand clothing from Europe. South Africa is the largest market for clothing in Sub-Saharan Africa, and demand has risen significantly in the last years. But the biggest share of this demand is met by imports, and not local production. Two thirds of these imports come from China, and most of the rest from other Asian countries.

But we do see some exceptions. On the one hand, there are still some larger textile firms left, but they are very limited and only in a few countries. But on the other hand, there is a very large informal sector, like tailor-style weaving of traditional clothing, and also uniforms for public procurement, although this is at a small scale in a quite informal context. The large majority of local demand though, is now met by imports.

There is a third segment in the African textile and clothing value chain, which is driven by exports to the US and Europe. In the textile and clothing sector, there are still quite high tariffs in the international trading system, so some countries with preferential trade agreements have developed export-oriented industries. What's interesting about those industries is that they are very disconnected from the local industries. Nearly all of these industries are driven by large, direct investments, mostly from Asia. So it's largely transnational Asian clothing firms that have their head offices in China, Taiwan, or South Korea, that also invest in some African countries, although they

operate only the labor intensive sewing stage in Africa. All the necessary components are imported, assembled in Africa and re-exported to get preferential market access to the US and Europe.

As described, this export production has nearly no linkages to the local economies and is driven by foreign direct investment, so the question is how sustainable it is. The factories can be moved easily and there is large competition. But on the positive side, it has provided employment and export revenues in some countries. There are five countries that dominate these exports: Kenya, Lesotho, Swaziland, Mauritius, and Madagascar. They make 95% of the exports to the US and Europe. Although the working conditions for the mostly female employees that work in these sectors are often very poor, they do provide formal employment.

The fourth sector is the design sector, which is very diverse. There are some designers that are based overseas, others that are based in Sub-Saharan Africa, some produce locally and others abroad, and it's very interesting to see different stories of designers linking up with domestic producers. When you look at the value added or employment numbers, it's still quite small compared to the other sectors. So I think it's a great development, but the question remains how to improve linkages to these other sectors in the value chain.

At the end, I'd like to state three points that I think are important. The first is, I think there's a great potential in the regional and domestic markets. Sure, there can also be exports, but nowadays the local and regional markets are dominated by imports, and there's a huge potential in local production to meet local demand. But for this, I think working with retailers is crucial as they are the most dominant players in the value chain. Making connections, working together with retailers would be an important entry point. Of course it's difficult, they are powerful and have other characteristics and other interests, but I still think specifically between designers and retailers, there is an important connection to be made.

A second point, I think the regional perspective is crucial. Different countries have different advantages: some have cotton, some still have textile mills, others have clothing sectors, others have fashion designers, different cultural and design ideas. There are still huge issues, because sometimes it's easier to import from an African country to the US, than to another African country. This is because tariffs are sometimes higher when exporting within Africa than when exporting to the US or Europe, or because of infrastructural challenges, when it's easier to export via a nearby port to overseas than within the continent.

And the last point, I think it's crucial to look along the value chain, because we have many industry associations that only look at their specific segment, like the cotton board only looks at cotton, or the textile associations, clothing associations, or some fashion associations. We need to look along the whole chain, to see how the segments can be linked and hence increase local value added and employment and development impact. Thank you.