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The AFRICAN FASHION Sector

Trends, Challenges & Opportunities for Growth

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SHORT SUMMARY

Africa's vibrant fashion sector

The fashion sector in Africa is brimming with opportunities, driven by the rise of the middle class, a young and growing population, rapid urbanisation, and the emergence of digital technologies. African fashion designers, who often draw their inspiration from traditional know-how and techniques, bring concrete economic benefits to communities while actively contributing to reshaping narratives about the continent.

Today, cities such as Abidjan, Casablanca, Dakar, Johannesburg, Lagos, and Nairobi are nexuses for fashion and design, as well as being financial and commercial hubs. Other cities and regions on the continent are also experiencing significant development in the fashion sector, from the production of raw materials to textiles and accessories.

32 African countries

organize fashion weeks to promote the textile and fashion sector on a regional and international scale

However, African fashion sector still struggles to reach its full potential due to obstacles such as a persistent lack of investment and infrastructure, limited educational and training systems, insufficient intellectual property protection, and difficulties in accessing new markets and sourcing quality materials at an affordable price.

This report identifies the main trends and challenges that are shaping the fashion, textile, and fine crafts sector in Africa in order to provide evidence-based policy recommendations for sustainable growth.

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Foreword

Today, African fashion is booming. Fashion weeks galvanize markets and creators in 32 countries across the continent, from Casablanca to Nairobi, via Lagos and Dakar.

The growth in e-commerce, which attracted 28 per cent of Africans in 2021 compared to 13 per cent in 2017, has led to an increase in local consumers. At the same time, it has created new opportunities for the international development of African brands, whose annual textile, clothing, and footwear exports amount to US$15.5 billion.

For Africa, fashion is a powerful driver of creativity, economic development, and innovation, creating many jobs, especially for women and young people.

To better understand the forces at play in this field, UNESCO as produced the fi st overview of the fashion industry at the continental level, and outlined prospects for its future.

The report underlines the economic and social opportunities created by the sector, 90 per cent of which is composed of small and medium-sized enterprises, whose profits di ectly benefit popu ations. It also sheds light on current and future challenges related to Africa's digital transformation, which UNESCO is accompanying. These new practices are driving innovation and supporting the expansion of an industry that alone could increase the continent's prosperity by 25 per cent.

The report also shows how the sector could be a powerful springboard for gender equality, at a time when only 17 per cent of the 3.5 million cotton farmers in African Least Developed Countries are women. Indeed, there is considerable room for progress in this field, gi en that Africa has the resources to become a key player in global sustainable and organic cotton production.

Nevertheless, the African fashion industry also faces numerous challenges: insufficient in estment and infrastructure, incomplete intellectual property legislation, and elevated fabric sourcing costs. Moreover, in Africa and elsewhere, the sector's environmental impact – one of the biggest sources of pollution worldwide – must be taken into account.

To build a robust and virtuous fashion ecosystem, governments and decision-makers need reliable data and contributions from experts and civil society. Our report offers useful information in this respect.

In particular, it underlines the need for public policies and practices that protect and support creators, while fostering the development of fashion that is both more sustainable and more equitable, not to mention respectful of local skills and knowledge.

For this sector to remain a driver of innovation and creativity, it must also reflect the continen 's cultural diversity, including its rich textile traditions, some of which have been inscribed on UNESCO's intangible cultural heritage lists.

Only in this way will the African fashion industry contribute to the sustainable development goals set by the international community, including those of the Agenda 2063 of the African Union.

To launch this movement and implement the report's recommendations, our Member States and partners can count on UNESCO's support. They can also count on the vibrancy of African creativity and the dynamism of a sector that has boundless potential – as seen in the pages that follow.

Audrey Azoulay

Director-General of UNESCO

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Introduction

The cultural and creative industries (CCIs), which comprise sectors such as fashion and design, are important levers for sustainable development and essential tools to achieve the aspirations of the United Nations' Sustainable Development Goals by 2030. They stimulate economic growth, provide decent employment opportunities, and play a vital role for the well-being of societies and individuals. Recent UNESCO research has demonstrated that CCIs account for **3.1% of global gross domestic product (GDP)** and **6.2% of all employment**. However, while exports of cultural goods and services doubled in value from 2005 to reach US$389.1 billion in 2019, the participation of developing countries in global fl ws of cultural goods has stagnated, accounting for only 5% of total exports.[1]

In response to this imbalance, and as part of its Global Priority Africa and its commitment to the diversity of cultural expressions, UNESCO has launched a series of initiatives to accompany African States in the inclusive and sustainable development of their cultural and creative industries. The main objective of these initiatives is to raise awareness of the socioeconomic value of the cultural and creative sector, generate data to support advocacy efforts, inspire change by sharing examples of innovative initiatives and policies, and spark new partnerships in favour of a strong and resilient African cultural and creative economy.

In this context, the fashion sector, which is a complex ecosystem that includes the textiles, garments, high fashion, and accessories and fine crafts sectors, is a strategic priority: in 2019, the African Union estimated that if the fashion sector was fully developed – from the production of raw materials to textiles and clothing – it would offer the African continent a **considerable gain in prosperity**.[2] Whilst the textiles and garments sector is the second largest sector in the developing world after agriculture,[3] a lot of its potential is still waiting to be realized in Africa. Nonetheless, its potential is undeniable: the market value of clothing and footwear in sub-Saharan Africa alone was estimated at **US$31 billion in 2020** and is set to keep growing every year.[4] This figu e includes the retail of a significant amount of fashion items imported into the continent, which could be substituted by local production and further amplify the sector's potential to generate sustainable employment and revenues.

The African fashion sector has seen significant d velopments in recent years, thanks to increased demand both from an expanding urban middle class in Africa and from international buyers, who both value the originality and quality of African design and craftmanship. Recent growth in e-commerce penetration in Africa, which increased from 13% in 2017 to 28% in 2021, has accelerated the development of the fashion sector, facilitating brands' access to a much wider base of local consumers and international markets.[5]

In addition to its economic value, the fashion sector also possesses rich cultural significance, both f om the point of view of traditional skills and contemporary creativity. From traditional handweaving in Egypt (Sa'eed), inscribed on **UNESCO's List of Intangible Cultural Heritage in Need of Urgent Safeguarding**, to the outstanding designs seen every year on the catwalks of the Lagos Fashion Week (Nigeria), the SA Fashion Week (South Africa) and the Swahili Fashion Week (United Republic of Tanzania), African fashion is a powerful vehicle to express, identify and transmit heritage, and project a confident i age of the future of the continent.

With the support of enabling regulatory frameworks and policies, this sector brimming with opportunities has the potential to create jobs for millions across the continent, especially for women and youth. It can also play a key role in strengthening the representation of African identities through clothing, as well as in re-shaping international perceptions of Africa, positioning it as a leader in the drive for innovation and sustainable design. In addition, fashion can contribute to the achievement of the **17 Goals of United Nations' 2030 Agenda for Sustainable Development**, in particular Goal 5 on gender equality, Goal 8 on decent work and economic growth, Goal 10 on reduced inequalities, and Goal 12 on responsible consumption and production.

This report represents a fi st step to assess the main trends that shape the fashion sector on the continent, as well as the challenges and opportunities it currently faces. While it deals with the fashion ecosystem as a whole in Africa, the report acknowledges the diversity of the people, local contexts, and national industries across the continent. It also recognizes that the main fashion subsectors – textiles, garments, high fashion, and accessories and fine c afts – each possess their own challenges and particularities, which cannot be addressed fully within the scope of the present report. Nevertheless, it is essential to consider the sector in its entirety to make informed decisions that will support its sustainable growth.

In this context, **Chapter 1** shines a light on the current trends shaping the fashion sector in Africa and fuelling its enormous potential, including a growing market and an ebullient creative ecosystem. **Chapter 2** hones in on the main challenges that currently constrain the sector's development, from policy gaps to the lack of formal education and training opportunities. On the basis of this analysis, **Chapter 3** provides concrete recommendations to seize the opportunities offered by the development of the fashion sector in Africa. Finally, the **Annex** provides fi e regional snapshots of the fashion sector with key data, events, and trends.

DEFINITION OF TERMS AND CONCEPTS

Clothes, textiles, and accessories are "**cultural goods**" in the sense of UNESCO's 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions: they are dual in nature, possessing both economic value as commodities and cultural value as vehicles of identity, values, and meaning.

While the fashion sector is a provider of employment, economic growth, and trade, the clothes and accessories it produces are deeply rooted in tradition, craftsmanship, and self-definition as visual exp essions of identities, social status, aspirations, and values. In the context of this study, "**textile**" is understood as cloth or fabric that can be turned into clothing or accessories through a design and manufacturing process. In general, "**fashion**" refers to the creation and design ecosystem which transforms textiles and other materials into wearable items that possess both cultural and economic value. Given the weight that textiles hold as vehicles of identity, particularly in Africa, textile production is considered to be an integral part of the fashion sector in the context of this study. The "**garments**" sector refers to the fashion segment that caters to the mass market with ready-to-wear clothes in standardized sizes, or as is the case in many African countries with low-cost bespoke tailoring. "**High fashion**" refers to exclusive, custom-fitted high-end clothes ade by renowned designers or fashion houses. "**Accessories and fine crafts**" is a term that englobes the production of high-quality accessories in the fashion sector, including jewellery, leather goods, and millinery, as well as the related processes, including embroidery, beading, and button-making. The concept of the "**fashion value chain**" refers to the series of steps that are involved to produce clothes and accessories in the fashion sector. The modern fashion value chain is complex: it overlaps national borders and involves diverse activities from agriculture (raw material cultivation), to international trade and retail, extending to post-consumer stages with repurposing and recycling.

METHODOLOGY AND SOURCES

This report is based on a review of existing studies, articles, and academic literature on the African fashion sector, as well as primary data garnered directly from policymakers and African fashion industry players.

It is important to underline that data on the African fashion sector tends to be fragmented and, in some cases, sparse. When statistical data is available, it tends to focus on the textile and apparel industry rather than on high fashion or design. Moreover, it generally does not illuminate all aspects of fashion sector consumer trends and behaviours.

Faced with this lack of reliable data, UNESCO convened a high-level workshop with experts from the African fashion sector in November 2022. It also launched a survey with its 54 Member States in Africa in February 2023 that gathered responses from 20 policymakers and 99 fashion industry insiders (clothing and accessories designers, textile and garment industrialists, fashion promoters) from 48 African countries. The answers to the survey were often incomplete, and were bolstered by an analysis of national and international statistical databases, which were used to aggregate quantitative data to assess the size and potential of the sector. To complement this analysis, the survey with industry insiders included qualitative questions on their perceptions of gender balance in the sector, the types of local textiles commonly used, and how African consumers sourced their clothing. The responses to such questions enabled the generation of some limited new data based on the informed perceptions of people who are familiar with the fashion sector.

OVERVIEW OF THE AFRICAN FASHION ECOSYSTEM

The contemporary fashion ecosystem is complex and involves several different interlinked spheres of activity. When devising strategies for a country's fashion sector, it is useful to consider the industry in terms of the backward and forward linkages between the various parts of this multifaceted ecosystem. Textile production, garment production, high fashion, and fine crafts in particular have strong interlinkages, which create strong potential for effective synergies.

- The **textile production** process is very labour intensive and therefore has high job-creation potential. It also requires heavy investment in equipment and reliable cheap electricity supply, and therefore rarely develops spontaneously without well-coordinated public and private investment. Access to affordable, good quality textiles in sufficient uantities is a crucial enabler of both the garments and high fashion sectors, with quality being particularly crucial for the latter. Haberdashery inputs (that is, zips, buttons, hooks, ribbons, etc.) are another important requirement, and for the high fashion sector these have to be of exceptional quality.
- The **garment** link of the fashion value chain includes bespoke tailoring, small-scale workshops, and factory-operated mass production. Industrial garment manufacturing needs reliable electricity supply, but can occur with lower equipment needs than textile manufacturing for simple articles of clothing. In all its forms, garment production generates significant e ployment; the greatest efficiency f production, however, is achieved in factory-operated manufacturing, which therefore also has the best capacity to produce affordable clothing. Affordability is a key criterion for the garment sector in a context of global competition and therefore the capacity to benefit from economies of scale is critical.
- The **high fashion** sector, for its part, has creativity and exclusivity as its defining fe tures, producing high quality and, generally, high-cost clothes. The sector's booming creativity often drives trends and innovation in the rest of the fashion ecosystem. High fashion production may thrive in small-scale workshops, but it can benefit f om the manufacturing skills, infrastructure, and distribution logistics that are put in place by the garment production sector, as they enable the high fashion to attain more reliable quality and greater efficienc .
- The **accessories and fine crafts** sector includes jewellery, leather goods, and millinery, as well as the related processes, including embroidery, beading, and button-making. It may develop independently, but is boosted by integration in the greater fashion ecosystem. Where brand development is strong, leather shoes and accessories are often part of bigger fashion houses. Fine craftwork such as embroidery and beading finds outlets for their products in the garment and high fashion sector. Many accessories are rooted in heritage skills; however, they benefit f om creative design skills to keep them relevant to contemporary tastes and lifestyles.
- **Intermediaries** such as marketing, finance, supply c ain, fintech, and logistics professionals are essential for the smooth functioning of garment, high fashion, and accessories production and distribution. Auxiliary professions such as fashion photographers, fashion journalists, and models are other essential players, especially in an age of digital sales.

> "
>
> *I think being a designer, you are the future. You are the ones creating the trends, you are the ones leading the way, whether you're a fashion designer or product designer or an architect or whatever it is, you are paving the way for the future. So as a designer, it's always important to take that into consideration and be an example for people and have fun with what you do.*
>
> ***Louise Sommerlatte***
> ***Founder and designer of Hamaji***

NOTES

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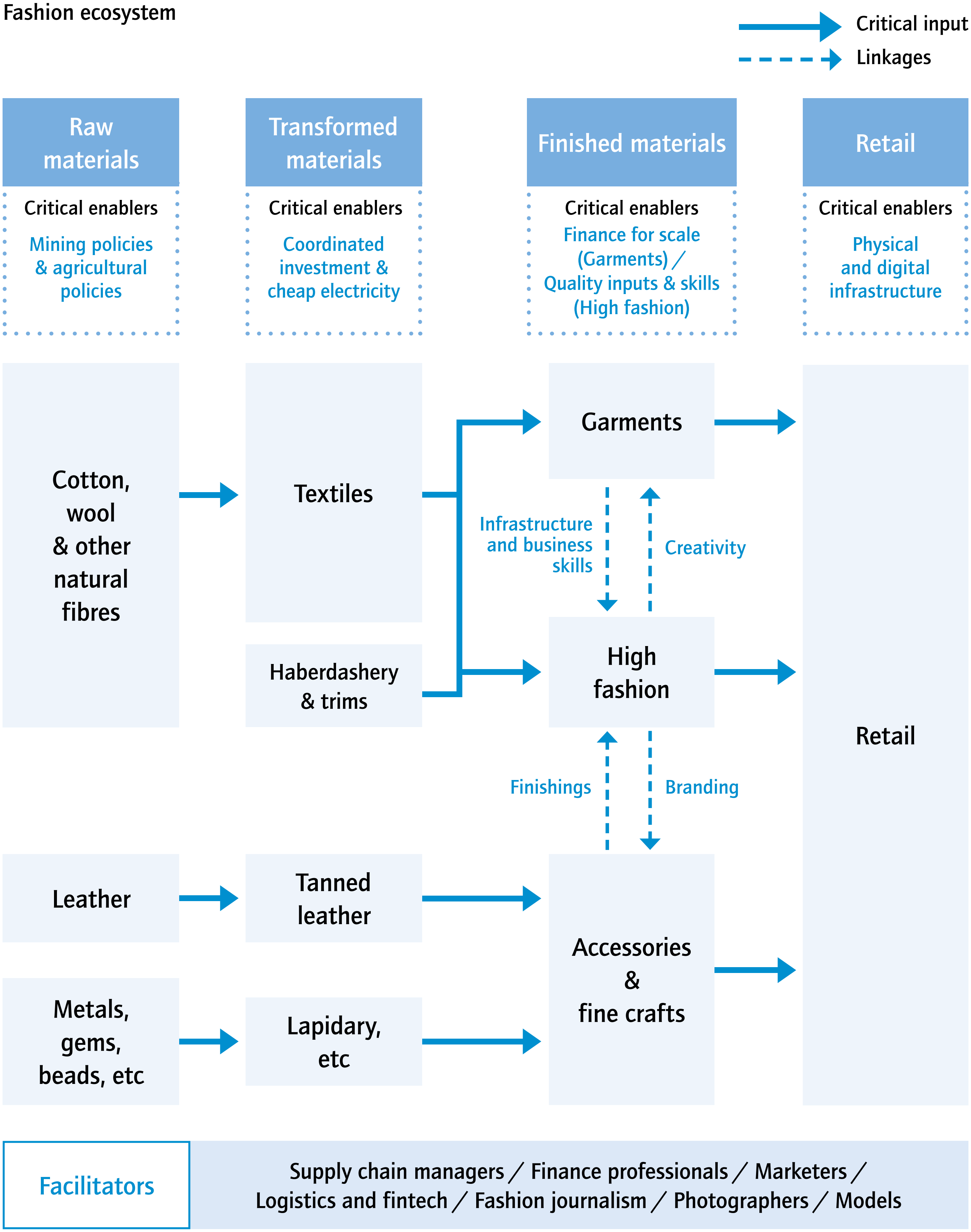
Figure 1

Fashion ecosystem



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Overview of the main trends shaping the African fashion sector

CONTEXT AND HISTORY

Since the post-independence period, fashion in Africa has entailed an interplay between the reaffir ation of heritage and unique aesthetics, and integration into global arenas, whether through convergence or divergence. Inspired by the industrialization success stories of Asian countries like Japan and the Republic of Korea, in which textiles played a major part, many African countries embarked upon **textile industrialization** from the 1960s onwards.

By the late 1970s, Africa's large economies, such as Côte d'Ivoire, Democratic Republic of the Congo, Kenya, and Nigeria had large industrial textile sectors producing quality fabric appreciated by African consumers. Almost all the smaller African economies also enjoyed a brief period of industrial textile production – for instance, Burkina Faso, Chad, Mozambique, and Zambia all had at least one industrial textile mill during this period. In the West and Central African countries, wax print textiles were often a major output of these factories, catering to local tastes, in addition to providing standard cottons and blends. In some countries, such as Kenya, Morocco, and South Africa, significant **industrial garment production** was appendaged to textile industrialization, whereas in other countries **traditional bespoke tailoring** continued to prevail. The industrial textile and garment sectors historically generated significant employment: in Kenya, it was the leading manufacturing activity in terms of size and employment in the 1970s;[1] in Nigeria, there were 175 textile factories and the sector accounted for 22% of employment in 1984.[2] The post-independence drive toward bolstering industrial textile production, however, largely neglected traditional forms of craft textile production that existed in pre-colonial Africa.[3,4] Nonetheless, thanks to the strength of local aesthetics and individuals' dedication to safeguarding traditions, craft textile production was never abandoned.

The 1980s Structural Adjustment Programs led to the end of most of the fi st wave of textile industrialization in Africa, with the exception of some Southern and Northern African States. Trade liberalization embedded in the Structural Adjustment Programs (SAPs) implemented in the 1980s and 1990s also saw the beginning of the **mass importation of second-hand clothing** into African markets and, later, of **ready-to-wear clothes from foreign fashion brands**.[5]

In the high fashion sector, a fi st generation of internationally recognized designers emerged from the 1970s onwards. These designers were mostly trained in Europe, but drew on local fabrics, styles, and know-how as a means of expressing a new political and socio-economic identity that asserted their countries' sovereignty.[6] These pioneers, who include the likes of **Chris Seydou** (Mali), **Kofi Ansah** (Ghana), **Shade Thomas-Fahm** (Nigeria), **Alphadi** (Niger), **Oumou Sy** (Senegal), and **Pathé'O** (Burkina Faso/Côte d'Ivoire), made a significant ark on the global scene due to the timing of their venture and the powerful ideology underpinning their creations, which was premised on projecting a proud and independent African identity. As **institutional entrepreneurs**,[7] their boldness, creativity, and commitment to shifting norms contributed immensely to building the foundations of contemporary African fashion.

The late 1980s and early 1990s saw several talented female designers rise to prominence, such as Deola Sagoe (Nigeria) and Sally Karago (Kenya). Deola Sagoe founded the House of Deola in 1989, producing cutting-edge women's high fashion and was the fi st black woman to present at AltaRoma, Rome's celebrated fashion week, in 2004.[8] Sally Karago, as one of the fi st internationally recognized designers in Kenya, pioneered the incorporation of the culture of the Maasai people, particularly the checkered shuka fabric and the East African kikoi, into her collections.[9]

By the middle of the 1990s, a number of African countries enjoyed increased political stability and economic recovery, leading to increased prosperity.[10] This period was a defining moment for th continent's overall social and cultural landscape. In 1996, when South African President Thabo Mbeki delivered his African Renaissance speech, it was not just a call for political and economic redefinition, but also for c afting a shared cultural identity as Africans. A decade later, this call still resonated strongly, leading African Union Member States to adopt a Charter for African Cultural Renaissance in 2006. While the Charter made no explicit mention of the fashion sector, it signalled a renewed ethos, which was manifested, in part, by a growing movement of African consumers wanting to buy clothes produced locally.

In this context, many African fashion producers consciously cast themselves as agents of socio-cultural change who contributed to the self-fashioning of their countries and continent, whilst also promoting economic growth and generating employment opportunities.[11] A new wave of Afrocentric garment designers for the mass market emerged, and there was a renewed engagement with traditional textiles and designs. The accessories and fine c afts sector moved beyond a tourist-focused vision to local brand construction, and a new generation of high fashion designers gained ever increasing visibility on the global fashion stage. When asked to characterize the current state of the fashion sector in Africa, many of the industry insiders interviewed for this report used expressions such as "growing", "flourishing", and "full of potential."

At present, the African fashion sector is a hothouse of remarkable talent and brimming with potential, with established and emerging creators and designers combining traditional know-how with innovation and creativity to create products that run the gamut between exquisite high fashion and mass-produced affordable garments and accessories. Thanks to their unique heritage, unreplicable technical skills, and distinctive creative vision, contemporary African fashion designers connect the dots between the past and present, tapping into their cultural roots to create clothes and accessories that help to shape unique and ever-renewed visual narratives about the identity and aspirations of the continent.

Contemporary fashion in many African countries continues, in an age of increasingly globalized visual cultures, to mobilize strong local aesthetics often linked to specific textiles and, in som cases, types of garments. Textiles derived from historical traditions or more recent processes of cultural hybridization – aso-oke, bogolan, toghu, kuba, odelela, lambahoany, kanga, and Berber wool, alongside African wax prints, bazin, and African lace – are fashioned into globally standard designs as well as a myriad of dress styles particular to various regions of the continent, such as agbadas, boubous, kaftans, gandouras, djellabas, hager bahel, gomesi, and umwiteru. Local and regional preferences coexist alongside globalized aesthetics in a combination that often gives African designers a unique and distinctive touch. Most importantly, a growing appetite for specific frican textiles and styles generates sustained and significan demand for made-in-Africa fashion. This trend is manifest in the continued prominence of bespoke tailoring in many African countries, despite the ready availability of cheap second-hand clothing imports and low-cost garments imported from outside the continent. It is also embodied by the creativity of many African high fashion designers and the more than 30 fashion weeks organized across the continent every year.

DYNAMIC AND DIVERSE CREATIVE ECOSYSTEMS

The fashion ecosystem in Africa is complex and multilayered, but at its core are **designers**, **stylists**, **tailors/seamstresses**, and **craftspeople** who evolve alongside each other, responding to the needs (and budgets) of different audiences, creating high fashion, ready-to-wear, and mass-produced garments and accessories. The bulk of African fashion businesses are **micro, small, and medium enterprises (MSMEs)**, which tend to serve a hyper-local market with ready-to-wear and made-to-order clothes and accessories.[12] A **small number of high fashion brands**, mostly concentrated in Côte d'Ivoire, Ghana, Kenya, Nigeria, Rwanda, Senegal, and South Africa provide luxury products for a small group of local and international clients with a high purchasing power. Finally, an ever-growing **industrial garment sector** tends to produce clothes for international fast-fashion brands, acting as a service provider.[13]

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African textiles must be given a chance. They must be produced on the African continent. I am in favour of limiting the entry of imported textiles into the continent. I have difficulty purchasing large quantities of textiles from Africa. I refuse to import, and it directly impacts my production capacities as well as my costs. It is not normal. Africa should have the capacity to industrially produce textiles. It is difficult to make ready-to-wear collections with these constraints. Our fashion remains reserved for a minority because of production costs.

Alphadi

Designer and UNESCO Goodwill Ambassador for African Innovation and Creation

© Manuel Michael

The clothes and accessories produced on the continent are staggeringly diverse, drawing on different cultures, traditions, and aesthetic preferences. Yet, African fashion designers have one thing in common: they act as agents of change, drive innovation, and galvanise society around shared visual narratives.[14] As creative entrepreneurs, they can generate fair employment opportunities, support sustainable revenue streams for local farming communities by choosing to use locally sourced materials produced through sustainable farming methods, reduce waste by upcycling second-hand fabrics, and ensure the transmission of traditional skills and knowledge by employing local weavers and tailors.

This vibrant and diverse creative ecosystem can be divided in four major subsectors that are all inter-dependant and linked: **textiles**, **garments**, **high fashion**, and **fine crafts and accessories**. The dynamism of the African value chain rests on the interplay of these subsectors, which each present their own characteristics, challenges, and opportunities.

TEXTILES

The vibrant African fashion ecosystem is powered, in part, by the **continent's rich tapestry of natural fibres and traditional textiles**, which holds the strategic key to unleash the full development impact of the fashion sector in Africa. On the one hand, because many African countries grow natural fib es, there is a unique opportunity to use the fashion sector as a conduit for industrial development using domestic raw materials, with benefits accruing not ust to fashion sector players but also to farming communities. On the other hand, because of the growing visibility of African textiles through their use by renowned designers, new markets and developments can be opened-up and offer major opportunities for local artisans.

Cotton is the primary natural fib e on the African continent: **37 out of 54 African countries produce cotton crop**, with the continent's biggest producers being concentrated in West Africa.[15] In Benin, for many years Africa's largest cotton producer, cotton contributes between 12 and 13% of GDP.[16] Cotton is a predominant cash crop for many African Least Developed Countries (LDCs), providing income to over **3.5 million farmers, 17% of whom are women**.[17] Africa, furthermore, has the potential to become a leader in sustainable cotton farming: organic cotton fib e output in Sub-Saharan Africa grew by over 90% from 2019 to 2020, and accounted for **7.3% of global organic cotton production**.[18]

In addition to cotton fib e, Southern and Northern African countries also produce significant uantities of wool, while silk is produced in Ethiopia, Madagascar, Namibia, and South Africa. There are also a variety of other fib es mostly used in artisanal production, including raffi (Cameroon, Congo, Côte d'Ivoire, Democratic Republic of the Congo, Liberia, Madagascar, Nigeria) and tree bark (Côte d'Ivoire, Ghana, Uganda). The continent also produces a wide variety of lesser-known fib es, such as jute, kenaf, coir, fla , sisal, ramie, kapok, and abaca, which are in-demand with emerging designers seeking sustainable and local materials.

The wide variety of high-quality natural fib es produced on the continent is a strategic advantage that can contribute to fuelling a thriving fashion sector. However, in 2022, while African cotton fib e production accounted for 7.5% of global production, **sub-Saharan countries exported more than 81% of the raw cotton they produced** rather than transforming and using it locally.[19] By exporting most of its raw fib es, the continent sees a consistent significant loss in the potentia economic value of these crops and restricts the growth of the textile and fashion value chain in Africa. There are notable exceptions to this trend: Egypt, the eleventh largest exporter of raw cotton globally in 2022,[20] also transforms a significant uantity of fib es domestically to meet national demand and feed its flourishin textile industry. Both Egyptian cotton fib e and fabric have a reputation for quality, and the **Cotton Egypt Association** has developed an Egyptian Cotton appellation to distinguish its product on the market, ensuring traceability through DNA tests. Similarly, Ethiopia strives to link its fib e production to its textile production as part of its recent drive to develop its garments sector. In 2020, the country produced 57,000 metric tons of cotton fib e, satisfying a significant art of demand from domestic spinning mills, estimated at 64,000 metric tons.[21]

The African textile market is driven in part by a considerable demand for textiles with aesthetics specifi to a wide array of cultures. Many countries on the continent have a rich repertoire of artisanal fabrics using unique techniques based on vibrant intangible cultural heritage practices, such as strip weaving or cut-pile raffi embroidery. The industry insiders and policy makers interviewed for this report cited over 60 different textiles that they deemed as having significant local, n tional, or regional importance. This list is just the tip of the iceberg and reflects the wid array of techniques and traditions that emerged from generations of careful craftsmanship and have been re-interpreted by contemporary designers.

Three main categories of textiles can be distinguished:

- **Handwoven or semi-mechanically woven textiles:** These traditional textiles still play a prominent role, particularly in West African fashion: Nigeria's aso-oke, Ghana's kente, Mali's bogolan cloth, Burkina Faso's Faso dan fani, or Senegal's mandjak fabric continue to be worn both for the attachment to identity and place that they represent, and are also increasingly reinterpreted in contemporary iterations. In Ethiopia and Eritrea, a significan part of women's fashion is based on hand-woven hager bahel and a wide selection of contemporary shawls and scarves are created using traditional skills. Various styles of raffia fabri , including kuba fabric are popular for accessories and home textiles in many Central African countries, as well as in Côte d'Ivoire and Madagascar. The precision and intricate workmanship involved in the production of these textiles, as well as the need to use high quality materials, means that their production cannot easily be upscaled or industrialized without compromising on authenticity. However, the recognition of their unique cultural value can unlock public and private investments and lead to the implementation of safeguarding measures. Morocco's Ministry for Youth, Culture and Communication lists various weaving techniques as national intangible cultural heritage, while Egypt's Sa'eed weaving technique was inscribed on UNESCO's List of Intangible Cultural Heritage in Need of Urgent Safeguarding in 2020, and bark cloth production by Baganda people in Uganda was inscribed on the Representative List of the Intangible Cultural Heritage of Humanity in 2008. These textiles are particularly interesting for the high fashion and fine c afts sector, which seek quality, exclusivity, and sustainability over quantity.

Africans want to wear Africa. It's really beautiful to see because it hasn't always been like this. When we launched Lagos Fashion Week, we had to create a campaign around "Buy Nigerian", "Buy African" just to encourage people to start buying Nigerian or buying African. But fast forward, a decade after, that's all people want to wear. The only challenge is, can they afford it? Because African fashion unfortunately comes at a price. It comes at a price because of the problems or the bottlenecks that exist when it comes to producing African fashion.

Omoyemi Akerele
Lagos Fashion Week

- **Textiles processed by hand on fabric that may be imported or produced on the continent:** While the weaving process might be done industrially, the finishing of these textiles requires human intervention and skills often steeped in tradition and heritage. For instance, Senegalese or Malian *thiou* fabric are intricately dyed pieces of bazin fabric, while Mauritanian veils are dyed on sheer cotton. Benin, Cameroon, Guinea, Nigeria are renowned for various styles of indigo dyeing, such as leppi, ndop, and adiré.

- **Textiles produced industrially:** The African continent also produces a wide variety of aesthetically distinctive but industrially made textiles, which can fuel the garment sector. Kangas or lesos lined with Swahili proverbs adorn many East African garments, while checkered red shuka fabric associated with Kenyan and Tanzanian Maasai communities have been reinterpreted by contemporary designers. Seshoeshoe (or siShweshe and leteise) is common in countries such as Botswana, Lesotho, and South Africa, while odelela is associated specifically with amibia, retso with Zimbabwe and samakaka with Angola. Many of the industrially produced local textiles listed above were once cultural imports but through cultural syncretization have come to be associated with the style of various countries, communities or regions. The most emblematic industrial textiles in Africa are wax print fabrics, also commonly called African prints, *ankara* and *kitenge* or *chitenge*. Popular in West and Central Africa from the early twentieth century, after being introduced by European traders selling copies of Indonesian batik cloth from Java, wax prints achieved almost continent-wide popularity in the twenty-fi st century, and are presently a staple of many African and diaspora fashion brands. Bazin (also called African damask, Guinea brocade or *shedda*) is a staple for West African boubous and kaftans, while African lace is often a favourite for wedding wear in the same region.

This rich inventory gives an indication of the role that African-made textiles and designs play in the continent's fashion sector. For this report, industry insiders and fashion policymakers were asked for their informed perception on how often they spotted someone dressed or accessorised in the various fabrics associated with their country or wider African aesthetics. The average of responses for all regions suggests that in the average African city, wax print, bazin, or local fabrics can be seen every day, although these were not always produced on the continent.[22] Interviews conducted as part of this research demonstrated that despite a significant local appetite for pan-African fabrics like African lace, bazin, and wax print, these were often imported from outside the continent rather than produced in Africa. This represents a marked decline from the peak of the post-independence wave of textile industrialization, when almost every West and Central African country and many Southern African countries had mills producing wax print fabric, and some produced bazin and African lace. Today, only a few of those fi st-generation mills still operate. Côte d'Ivoire, for example, has two mills printing wax prints, as does Ghana. The quality of those African-produced wax prints is generally appreciated by African consumers, but they are outcompeted on price by cheaper imported wax prints. Some countries are showing that textile sector revival is still possible. Burundi's recently launched **Afritextile mill**, which took over a failed mill, is producing kitenge (wax print) fabrics[23] to feed its fashion sector. Chad's relaunched **Nouvelle Société Textile du Tchad** launched sales of its fi st textile produced with Chadian cotton in July 2021, calling on Chadian tailors and designers to make use of this new supply.[24]

The unique opportunity presented by the availability of high quality local fib es, the rich array of handwoven, hand processed or industrial textiles produced on the continent, and the strength of the demand for African designs means that the sector is ripe for new investments and policies in order to empower industrial textile production and upgrade artisanal production capacity so that craft producers can produce in greater quantities and with more reliable quality, whilst respecting existing traditions and know-how.

Vibrant, reliable, and cost-effective textile production on the continent will serve to resolve one of the key concerns voiced by African garment producers and high fashion designers – access to affordable African-made textiles.

GARMENTS

The African garments sector is undergoing tremendous changes, in part thanks to rapid demographic expansion: by 2030, Africa will be home to **1.7 billion people**.[25] According to projections by the United Nations, Sub-Saharan Africa also offers the **highest growth in the working-age population over the next 20 years**.[26] This growing population is a comparative advantage for the continent, as it will enable the scaling up of industrial garment production, representing an opportunity for job creation and income generation. In addition, a rise in disposable incomes and a growing middle class are expanding the customer base for African fashion. The number of middle-class Africans tripled between 1980 and 2010, to more than 34% of the continent's population[27] and by 2030 **household consumption is predicted to reach US$2.5 trillion**.[28] While a combination of bespoke tailored and imported garments were the main source of clothing for most Africans in the last few decades, economic and social changes have led to **a shift in the balance toward the production of African ready-made garments, both for local consumption and for export**.

This trend is reinforced by evolving consumer tastes and an excitement for products "Made-in-Africa", which has been fuelled in part by an increase in African creative production in other sectors, particularly film and music. Afrocentric demand is often pan-African or at least regional, with consumers showing interest in textiles and styles from other countries and regions of Africa.

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Box 1 • Iconic African designers promoting local textiles and fine crafts

Many African high fashion or luxury designers actively engage with local textile traditions giving them prominence, as well as catalysing important innovations in their artisanal production. Among early generation fashion designers, Malian **Chris Seydou**, who is often called the father of African fashion, broke moulds by fashioning bogolan textiles into couture mini-skirts and cropped jackets, a cultural crossbreeding that was unprecedented in the 1980s. To achieve his polished look, he worked with artisan dyers to create bogolan designs better suited to contemporary clothing cuts. Fellow pioneer designer **Alphadi** (Niger) has regularly featured kuba, intricately woven raffi cloth originating from the Kuba Kingdom, as well as the craftmanship of Tuareg jewellers. Celebrated Cameroonian designer **Imane Ayissi** is known for his refusal to incorporate wax prints into his work, preferring to shine the spotlight on pre-colonial fabrics such as kente, mandjak, and hand-dyed fabrics in his couture silhouettes. Senegal's **Aissa Dione**, who rose to prominence primarily as a textile designer, undertook ground-breaking work that led to innovations with traditional Senegalese weaving techniques on larger looms, as well as combinations of fib es other than cotton. The United Republic of Tanzania's **Doreen Mashika** works with small-scale kanga producers and women's grass-weaving cooperatives to use these textiles as the basis for her creations. South Africa's Laduma Ngxokolo, founder of the iconic fashion house **Maxhosa Africa**, has produced collections inspired by traditional Xhosa beadwork patterns.

For instance, Senegalese consumers often turn to their local handwoven mandjak fabric, as well as Faso dan fani and koko dunda from Burkina Faso. Similarly, Nigerian-inspired styles have made inroads in Southern and Eastern Africa thanks in part to the popularity of Nollywood films, while Maasai beaded sandals have conquered West Africa. This appetite for African design has also been fed by increased representation in global creative output, such as the international blockbuster film "B ack Panther," which contributed to increasing the desirability and appeal of clothes and accessories that express African identity.

Thanks to their intimate knowledge of the market and understanding of local demand, rising African brands have an incredible opportunity to tap into the zeitgeist and substitute the high quantity of clothing Africa currently imports with locally made products. They are uniquely placed to contribute to remedying the continent's textile, clothing, and footwear trade defici , which stands at roughly US$7.6 billion.

According to the African Development Bank, **micro, small and medium enterprises form 90% of African fashion businesses**, which speaks to the immense diversity of people, ideas, and creations that make up the emerging fashion scene on the continent.[29] Of the African brands occupying an increasingly larger space in the garments sector, many make the strategic decision to occupy niche markets. The bespoke luxury sector, which occupies the middle ground between mass fashion and high fashion and produces small batches of higher-end products that can be sold at higher margins, is the target segment of many smaller African brands who do not yet have the capacity to compete with global mass garment products. There is also a movement toward niche markets based on environmental sustainability or slow-fashion concepts.

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The Rwandan-based **Asantii** brand founded by Maryse Mbonyumutwa has strong social and environmental commitments, for instance sourcing fabrics with attention both to sustainability (organic cotton and recycled polyester) and African-sited production whenever possible.[30] The company runs a program called **Pink Ubuntu**, which commits the company to paying its factory workers above average wages and providing benefits such as free childcare for staff. Another example is the Ethiopian slow-fashion brand **Lemlem**, founded by the former model Liya Kebede in 2007 to contribute to the preservation of traditional weaving skills and creating income for artisan weavers. Production costs, including the sourcing of materials, mean that these niche brands are often selling at price points that are unaffordable for many African consumers.

In addition to the production of garments to meet African demand at different price points, mass production of garments for export is thriving in a few African countries who positioned themselves as service-providers within the global fashion value chains.

After decades of slow progress, integration in global fashion markets has been given a boost by the quest for new global production hubs as wages rise in major garment-producing countries. Egypt, Ethiopia, Lesotho, Madagascar, Mauritius, Morocco, and Tunisia have significan textile and garment manufacturing sector geared towards outsourcing for major global brands such as Guess, H&M, Levi's, Mango, and Zara, as well as for luxury brands such as Chanel, Dior, and Hermès. Outsourcing is particularly strong in North African countries which benefit f om their geographic proximity to European markets. In Tunisia outsourcing is such a significant art of its textiles and garments sector that the Ministry of Industry, Energy and Innovation keeps separate statistics for "totally exporting" enterprises.[31] Other countries, such as Benin, Eswatini, Ghana, Kenya, Rwanda, and the United Republic of Tanzania, are paying particular policy attention to nurturing apparel outsourcing activity and other exports, often under the United States' Africa Growth and Opportunities Act (AGOA) scheme, which affords duty-free access to American markets for African exporters. Kenya for instance had 29 garment manufacturers operating in its export processing zones under the AGOA scheme.[32] In Ghana, one of the country's pioneering female fashion entrepreneurs, Nora Bannerman founded **Sleek Garments**, which exported over 75,000 men's shirts to the United States in 2007.[33]

As a whole, ensuring growth of the garment sector on the continent is a strategic opportunity to stimulate sustainable job creation, especially for women and youth. Historically, the garment industry has been characterised as one of the most female-dominated industries, with **70%-90% of garment workers in developing countries being classified as women**.[34] An improved and well-regulated garment sector in Africa could help to achieve gender equality through financia emancipation and empowerment. Initiatives such as **Better Work Lesotho** are already exploiting this potential, and focus on improving factory working conditions and generating jobs for youth and women in rural areas.

In short, the African garment sector today is incredibly dynamic, but even when its products are intended for the mass market, they remain a luxury product for most Africans, and certainly for African consumers who have in the past decades had increasing recourse to extremely cheap second-hand imports or low-price clothing. Nevertheless, the African demographic boom and the optimism about rising consumer incomes, means that volume of demand to drive a thriving garment sector is poised to explode: the challenge is putting in place the conditions that allow African garment producers to produce at prices that Africans can afford.

> *Lagos Fashion Week is a platform that showcases talent, African talent, not just Nigerian designers. To us, and for us, Lagos Fashion Week is beyond a showcase. It also aims at building on the sector's capacity to contribute to Africa's growing economy by strengthening our existing fashion and creative businesses. We also position Lagos Fashion Week to reemphasize our community's commitment to creating sustainable practices, with traceability, transparency and longevity as strong pillars of our creative design process. We encourage designers to talk about it as well in their work. We protect our artisans and artisanal skills across the continent because we see them as fundamental tools for strengthening creativity.*
>
> ***Omoyemi Akerele***
> ***Lagos Fashion Week***

HIGH FASHION

In parallel to the positive dynamics observed in the garments sector, the surge in African creativity has also resulted in the rise of African high fashion brands. Thanks to iconic fashion designers such as **Pathé'O** (Côte d'Ivoire) – Nelson Mandela's shirtmaker – and **Alphadi** (Niger), as well as new talents such as **Amine Bendriouich** (Morocco), **Adama Paris** (Senegal), **Kente Gentlemen** (Côte d'Ivoire), **Niuku** (Mauritania), **Christie Brown** (Ghana), **Mahlet Afework** (Ethiopia), **Sun Goddess** (South Africa), **Duro Olowu** (Nigeria), and **Imane Ayissi** (Cameroon), African fashion has been making its mark on the international stage. In 2019, **Thebe Magugu** (South Africa) became the first African to win the LVMH Young Designers Award, one of the sector's most prestigious accolades. Nigerian designer **Kenneth Ize** was a co-finalist for the award that year. In 2021, another South African designer, **Lukhanyo Mdingi**, won the LVMH's Karl Lagerfield award.

Thebe Magugu has gone on to design an inclusive sports range collection for Adidas, featuring high performance tennis pieces worn on court by tennis greats Stefanos Tsitsipas and wheelchair tennis champion Dana Mathewson at key tournaments in 2022.

The clothes produced by these exclusive designer brands are only accessible to a small, wealthy percentage of the population on the continent. However, the impact of their work is much larger than their products – they are true agents of change and drivers of innovation who operate at the critical juncture of craft, art, and industry. While their core activities are primarily situated in the creation and design stages of the value chain, they do not work in isolation and are engaged with non-creative sectors and professions. In this vein, high fashion African designers are often more akin to creative entrepreneurs operating small to medium sized businesses that, through their decisions and activities, play a key role in reducing poverty, narrowing inequalities, creating decent and productive employment, and achieving social justice.

Through its visibility and desirability, high fashion shapes the entire value chain. On the continent, the number of dedicated high fashion events is on the rise; to date, there are 32 countries with fashion weeks of different size and scale in Africa. The **Lagos Fashion Week** (Nigeria), the **SA Fashion Week** (South Africa), the **Dakar Fashion Week** (Senegal), and **the Festival international de la mode africaine** (FIMA/different location every year) are well-established, attracting large local and international audiences as well as premium sponsors every year. Smaller events, including the **Glitz Africa Fashion Week** (Ghana), **Swahili Fashion Week and Awards** (United Republic of Tanzania), and **Fashion Week Tunis** (Tunisia) are also gaining in prominence.

The media plays a particularly critical role in the global high fashion industry, where notoriety is key. Major fashion media staples are giving increasing space to African fashion coverage. Edward Enninful, the Ghanaian-born editor for **British Vogue** magazine has regularly showcased African representation as part of the magazine group's drive to increase diversity and inclusion. There is also an emerging cohort of African high fashion blogs and magazines offering visibility and access to industry news. **Industrie Africa**, founded by Tanzanian Nisha Kanabar, operates as a hybrid between fashion journalism, virtual showroom, and online sale platform for curated African luxury and high fashion brands. **Moonlook**, launched by Cameroonian Nelly Wandji, has a similar functioning, with an offering that caters to Francophone speakers. **Gida Journal**, launched in 2022, is an annual print magazine for African fashion and other forms of creative expression focusing on creatives based on the continent. Other references in the sector include the online fashion magazine **Debonair Afrik**, founded in Ghana in 2014, and the fashion and lifestyle blog **Jamila Kyari**.

The visibility offered by traditional and online media is further amplified by celebrities from the Afrodescendent community and diaspora, who play a crucial role in promoting African designers. Personalities such as Beyoncé, Alicia Keys, and Michelle Obama have made the conscious decision to promote the work of African and Afrodescendent designers by wearing their creations at high-visibility events. During her 2023 Renaissance Tour, Beyoncé and her thirty dancers wore designs from Tongoro, the made-in-Africa label founded by Senegalese designer Sarah Diouf. British fashion model Naomi Campbell wore a piece made by Ghanaian designer Steve French Oduro on her fiftieth birthday cover for Essence Magazine and is a vocal advocate for the advancement of African fashion. African celebrities with huge international audiences have made similar choices. In 2017, international bestselling Nigerian author Chimamanda Ngozi Adichie, launched her "**Project Wear Nigerian**" on social media, publicizing her pledge to appear in public only in outfits made by Nigerian designers.[36] The multiple Grammy award-winning Beninese singer Angélique Kidjo has always worn Afrocentric fashion throughout her long career, as has Malian singer Fatoumata Diawara.

> *Fashion is a catalyst to tell deeper, richer, expanded stories from across the African continent. We hope visitors will be inspired and assumptions will be challenged.*[35]
>
> **Dr. Christine Checinska**
> **Senior Curator, Victoria and Albert Museum**

In addition, several targeted events dedicated to African fashion are being regularly organized outside of the continent. **Afro Fashion Week Milano**, which had its eighth show in September 2022, provides an international platform to showcase and support the work of emerging African, Afro-descendent, and Afro-inspired designers in Milan (Italy). The **African Fashion Up** initiative, launched by Share Africa and supported, amongst others, by Galeries Lafayette and Balenciaga, is the first major Parisian event devoted entirely to African fashion. Major fashion houses are also coming to Africa: in December 2022, the global French luxury brand Chanel held its annual "Métiers d'Art" show, a specialty craft-focused show in Dakar, Senegal, a first for a global haute-couture house.

Finally, the growing recognition of contemporary African high fashion as art has helped to cement its status as a cultural and social beacon for the continent.

The landmark Africa Fashion exhibition at London's Victoria and Albert Museum, which ran from July 2022 to April 2023, was a game-changer for the global prominence of African fashion. Curated to celebrate the continent's vitality and innovation in the fashion world, the exhibition brought together a selection of fashion creatives from over 20 countries who have been at the vanguard of African fashion from the twentieth century to today. Dr. Christine Checinska, the lead curator of the exhibition, sought to challenge misconceptions surrounding African fashion, allowing the varied and multiple sources of inspiration, creativity, and visions of African creators to speak for themselves. Commentators, while recognizing that the exhibition was held in a former colonial power, also hailed the event as a major step in de-centering global fashion from the dominant fashion capitals of New York, London, Paris, and Milan.[37]

Africa is often a continent of sharp contrasts, and despite the visibility that African designers are enjoying both within the continent and on the international stage, the market for high fashion remains small. The 2023 Africa Wealth Report, nonetheless, provides reasons for a cautiously positive outlook on the continent's luxury market: it forecasts a **42% rise in the number of African dollar millionaires in the next ten years, reaching around 195,000 by 2031**. The strongest growth in high-net-worth individuals, moreover, is spread across African countries as diverse as Democratic Republic of the Congo, Mauritius, Morocco, Namibia, Rwanda, Seychelles, and Zambia.[38] Furthermore, since international luxury brands currently have very limited presence in African countries, African luxury brands therefore have an opportunity as first-movers and as players who understand local tastes and aesthetics to ensure that the continent's luxury spending goes towards made-in-Africa.

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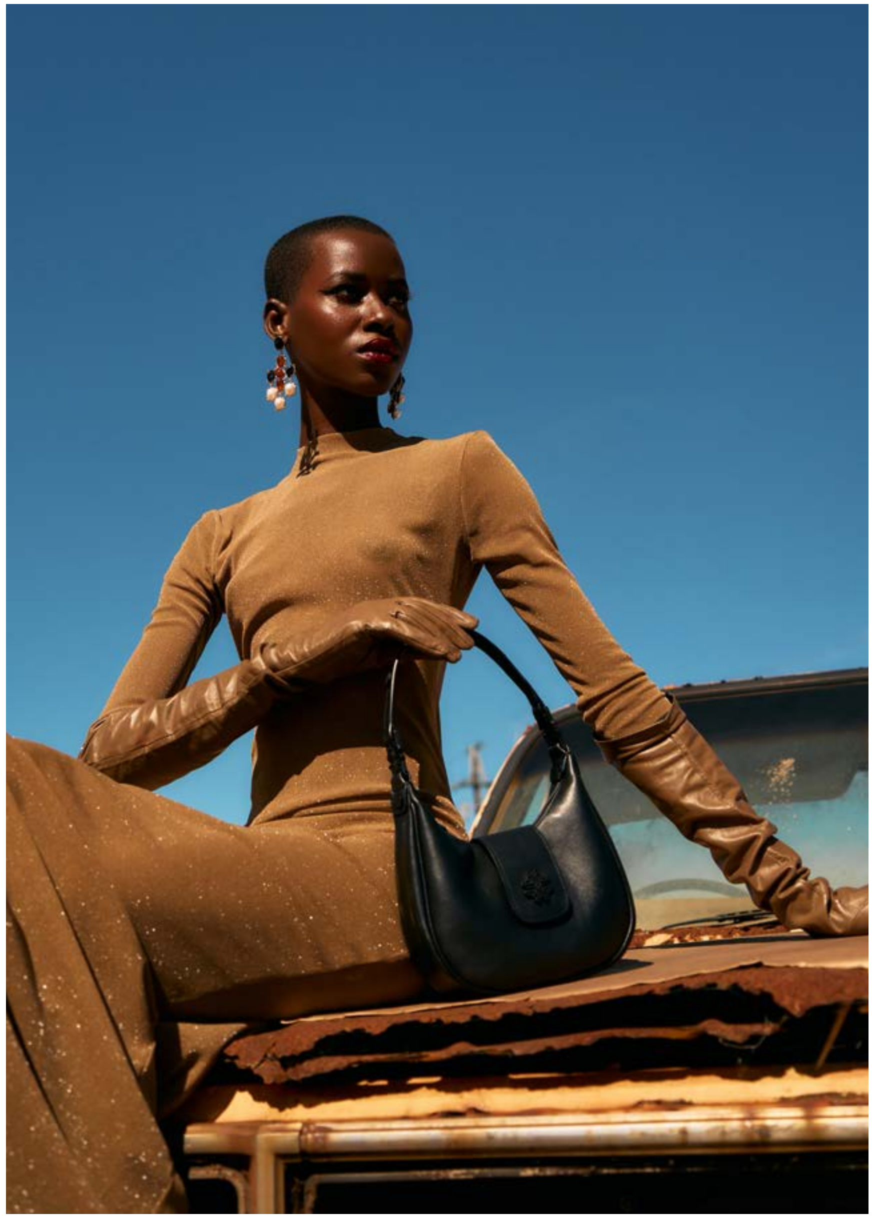
Box 2 • More than a catwalk: the impact of African fashion weeks

Fashion weeks, in addition to bringing exposure to designers and creators, provide networking and learning opportunities, connect designers with investors, and also provide platforms for important industry discussions. For three editions now, Lagos Fashion Week has run the Woven Threads initiative, which focuses on facilitating conversations with all stakeholders across the value chain around responsible production and consumption. Fashion weeks also create a wide range of positive social and economic externalities by bringing people together in one location. From the hospitality industry to tourism and local retail, a wide array of stakeholders benefit f om these events taking place on the African continent.

This process is already underway, with exclusive concept stores that have emerged in some African capitals in response to this opportunity. **Merchants on Long** in Capetown, **Alára** in Lagos, **El Fenn** in Marrakesh, **Le Sandaga** in Dakar, **The Lotte** in Accra, and **ABY Concept** in Abidjan are spaces that bring together a range of African-produced luxury goods, from fashion items and beyond.[39,40]

The strategic importance of the African high fashion and luxury segments also lies in the fact that they sell at a price-point that accommodates slow fashion production, making it easier to incorporate quality craftsmanship and heritage-based time-intensive techniques. Indeed, some of the continent's fashion designers have been prominent in reviving or revitalising dyeing and weaving techniques falling into neglect. Burkinabe designer **Sébastien Bazemo**, for instance, gave new life to the *koko dunda* artisanally dyed fabric that had come to be devalued. Today, the textile is not only a staple in Bazemo's collections, but a fashion staple throughout the country that is proudly exported to the subregion, and the government has created a label to authenticate locally dyed koko dunda.[41] Ugandan designers **José Hendo** and Nigerian-German designer **Bobby Kolade**, for their part, have helped drive innovations in production and use of bark cloth in contemporary clothing.[42,43]

The high fashion sector can therefore serve as a conduit for safeguarding traditional skills and intangible cultural heritage practices, while generating revenues for a range of craftworkers and pioneering sustainable practices. The fashion ecosystem's soft power also resides largely in the high fashion and luxury segments, which shape visual culture and influence taste a the local, national, and regional levels.



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ACCESSORIES AND FINE CRAFTS

Rooted in centuries-old traditions, fashion accessories and fine c afts have a long history of prestige and cultural symbolism on the African continent. They are usually produced by highly skilled artisans, who possess an exceptional level of craftsmanship and attention to detail, using sustainable materials and eco-friendly techniques. **Jewellery** created from metals, beads, cowries, animal horns and raffia a e often associated with traditional technical know-how and social practices that affirm cultural identity through adornment. Fine crafts also include **leather craftsmanship**, which is at the core of the production of shoes, bags, and accessories, often in unique African styles. Other fine c aftwork, such as Zulu and Ndebele **beaded** ornaments in South Africa, or the traditional fi e-colour **embroidery** from Egypt's Siwa Oasis, provide unique and high-quality decorative finishes to arments and other fashion articles.

African jewellery making has seen a strong qualitative shift in the past two decades. While at the end of the twentieth century jewellery making was largely the prerogative of traditional craftsmen who sold directly to local customers, or relied on tourist markets and NGO cooperatives, today the African jewellery landscape involves many jewellery designers who have built professional brands with global sales. African high fashion jewellery brands such as **Pichulik** (South Africa), **Ami Doshi Shah** (Kenya), and **Adèle Dejak** (Kenya-Nigeria) are regularly featured in international fashion media outlets for their contemporary creativity. Many designers proudly reference African heritage in their designs: examples are **Adinkra's Jewels** (Ghana) whose pieces pay homage to Akan symbols, **K'tsobe** (Rwanda) jewellery presents itself as inspired by Rwandese culture and nature, and **Karidja and Khadija** (Côte d'Ivoire) handcrafted deluxe bronze pieces designed to blur the boundaries between classic and contemporary African aesthetics. Other brands are paying active attention to the precious metals and stones value chain in Africa, working to add value or ensure that raw materials are responsibly sourced. Boitshoko Kebakile, founder of **House of Divinity**, from diamond-producing Botswana, produces a mix of affordable pieces as well as pieces with semi-precious gems and was motivated to launch her brand to add value to her country's raw materials.[44] UK-based fin jewellery brand **Vanlele's** was launched in 2011 by Guinea-Bissaun former model Vania Leles, who was motivated by her observation that while many of the gemstones she modelled were sourced in Africa, the jewellery was not produced by African brands.[45]

The leather sector, in particular, has seen major developments in recent decades and is brimming with untapped potential. There are leather producing countries in every region of the continent: from Botswana to Tunisia, Senegal to South Sudan, Morocco to Malawi. While some countries are still doing limited processing of raw leather, others are seeing rapid developments in the production of high-quality leather accessories. High quality leather is often an enabler for other parts of the fashion ecosystem: for instance, new ground has been broken in watchmaking by the Ghanaian brand **Caveman**, founded in 2018 by Anthony Mensah Dzamefe, when he noticed an opportunity to make watches with good quality leather straps from Ghanaian leather.[46]

Africa is also home to accessories that are unique to the continent. Headwraps, while often simply prepared as a long strip of fabric, are sometimes prefabricated as a hat would be. In recent years, there has been a growing market of pre-folded Nigerian geles, which are exported to other African countries and diaspora markets. Waistbeads, found in many African cultures, have been elevated to a fine art in Sene al, where they are often referred to as *bine bine*. A bestseller at Senegalese stands in crafts and fashion fairs in the West African region, Senegalese bine bine have also gained a following in Europe and the United States of America.

No matter their origin or form, African fine c afts and fashion accessories are an essential and inalienable part of the continent's dynamic fashion ecosystem, acting both as vehicles for innovation and carriers of cultural heritage that pass down stories, customs, and values from generation to generation. By incorporating traditional symbols, patterns, and techniques, the wide array of fine c afts and accessories produced on the continent proudly celebrates the rich histories of its peoples, ensures their preservation for future generations. In addition, they act as levers for the economic empowerment of local communities: beyond the successful African jewelry or leather brands, many artisans work in cooperatives or community-based organizations, fostering a sense of collective identity and generating sustainable sources of income for communities.

Box 3 • Senegal's leather sector

Senegal enjoys a trade surplus in footwear, importing less than it exports, probably thanks to its large production of leather sandals and babouches, which are popular domestically particularly for menswear, and export well to neighbouring countries. This sector is mainly catered to by artisanal manufacturing, with the commune of Ngaye Mecké particularly renowned for the quality of its leatherworkers. The label **'dallu Ngaye'** has been established as a mark of quality for shoes from the region, even if these are not always individually branded. The commune plans to establish itself as a major leather cluster in Senegal and start exporting quality products to the world.[47] In the global brands segment, designer Milcos Badji, founder of the fashion house **Nio Far**, ventured from trendy t-shirt production into sneaker production, something never attempted in West Africa. Uncompromising on quality, the brand situated itself in the luxury sneakers segment, and collaborated with bogolan artisans from Mali to incorporate the textile in its collections. Nio Far's sneakers are said to have been spotted on King Mohammed VI of Morocco and global music star Alicia Keys among others, but 60% of the brand's sales are to Senegalese customers.[48] In the handbag sector, **L'Artisane**, **Nene Yaya**, and **Maraz Origins** are some of many Senegalese brands that have emerged in recent years to satisfy the vigorous demand for bags with made-in-Africa offerings. These trends in Senegal's leather sector can also be observed in many other African countries, particularly in the bags sector where many dynamic made-in-Africa brands are emerging and capturing part of the market share previously almost exclusively taken up by imports.

BOOMING DIGITAL SALES AND GROWING INTRA-AFRICAN TRADE

In addition to this thriving creative ecosystem described above and rising consumer incomes, which are fuelling an ever-growing demand for African fashion, there are two other factors that have been key in supercharging the sector: the boom in online shopping and the growing increase in intra-regional trade in the wake of the implementation of the African Continental Free Trade Area (AfCFTA).

Digitalization has expanded growth opportunities for African fashion designers tremendously, enabling those previously constrained by limited domestic markets to reach a much wider regional and international customer base without delocalising. E-commerce penetration has grown significantly in ecent years, rising from 13% active paying customers in the general African population in 2017 to 28% in 2021, representing **334 million users**. The share of **active e-commerce customers is expected to rise to 50% by 2025**.[49] In several African countries, the digital economy is becoming one of the main drivers of growth, accounting for more than **5% of GDP**.[50] Today, there are **816 million mobile SIM connections in Sub-Saharan Africa** (77% penetration) and **712 million in the Middle East and North Africa** (116% penetration).

Regardless of size or formality, a wide array of fashion enterprises is seizing new marketing and distribution possibilities offered by the internet and social media to reach domestic, regional, diaspora, and other international markets. Informal garment producers, tailors, and retailers are actively mobilizing social media platforms such as WhatsApp, Instagram, and Facebook to reach customers, often making the most of mobile money payment systems ubiquitous in many African countries for domestic and regional sales. Large brands, as well as a few smaller brands in the luxury segment, run their own e-commerce sites, but many enterprises are benefiting ab ve all from the rise of online platforms that aggregate the offering of several brands, smoothen the digital payments process, and, in some cases, even offer marketing support services.

Many mid-market African and diaspora fashion designers also use international platforms such as **Etsy**, an American-based e-commerce firm focused on andcrafted goods. Meanwhile, South Africa-based **Annes** and the United States-based **The Folklore Marketplace** aggregate a curated offering of African, as well as Afrodescendent for the latter, high fashion design. Digitalisation is also enabling alternative forms of fashion consumption. **La Reina** is Egypt's fi st online platform for fashion item rental, offering several subscription levels which allow people to rent clothes for day-to-day wear or special events.[51] Tunisian fashion start-up **Dabchy** is a peer-to-peer fashion marketplace where users can buy and sell new and used clothing items. The brand counts 500,000 registered users across Algeria, Morocco, and Tunisia.[52]

A new genre of key fashion sector player has emerged with these developments: fashion fintech (financial technolo y) entrepreneurs are behind many of the platforms that enable designers to reach more lucrative markets. Ghanaian Sam Mensah Jr., a former finance e ecutive at Deutsche Bank and Intel Capital, is behind the South African fashion brand **Kisua**, which shot to global fame when Beyoncé was spotted wearing a Kisua jacket in 2015. He set up the fashion house by pulling together a team with experience in global logistics, as well as fashion.

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Designers from across Africa are called on to work on the brand's capsule collections, which thanks to the company's distribution centres on three continents can ship efficiently to many locations. Mensah also set up the aforementioned **Ananse** platform to aggregate a wider offering of designers, in collaboration with partners such as Mastercard Foundation, while **Ecobank** has been rolling out training on e-commerce to fashion creatives in Côte d'Ivoire, Ghana, Kenya, Nigeria, and Senegal.

In addition to fintech ent epreneurs, partnerships with global logistics firms ave been critical for making e-commerce feasible as well as smoothening business-to-business supply trade. DHL has emerged as a key partner to many fashion e-commerce businesses, sometimes thanks to facilitation by development actors. In terms of payment facilities, Africa was a pioneer adopter of mobile money systems and in 2022 Africa accounted for 66.3% of global mobile money transactions.[53] Further improvements in payments facilitation can be expected with the implementation of the **Pan-African Payment and Settlement System** (PAPSS) developed under AfCFTA in collaboration with the African Export-Import Bank (Afreximbank), which aims to enable efficien , low-cost fl w of money across African borders, allowing African customers to make payments in local currency. More widely, the AfCFTA a flagship p oject of the African Union, that is creating an African single market through the elimination of intra-African tariff and a reduction of non-tariff barriers, is expected to give a boost to sourcing and selling within Africa in the fashion sector. AfCFTA entered into force in May 2019, and trading under the agreement commenced in January 2021. Under AfCFTA's ambitions for regional value chain development one could, for instance, envisage Ugandan cotton fabric being bought by a Kenyan fashion house who then sells their jeans to a wide customer base in Burundi, Rwanda, and Tanzania, in addition to its domestic customers. Rules of origin for free trade in textiles and clothing are expected to be specified during th course of 2023: these aim to ensure that a certain level of value addition is occurred within the African continent for a clothing product to benefit f om preferential access. Currently intra-African trade in the textile and apparel sector is worth only about 2.7 billion, and intra-African suppliers account for just 8% of textile and apparel imports in the continent.[54] Under AfCFTA, such intra-African trade is expected to increase by 11%.[55]

In short, the continuous rise of African digital sales platforms, the development of efficient onlin payment systems, and the increased access to internet, especially through mobile phones, represent a critical opportunity to respond to growing demand by connecting a rapidly expanding customer base with African fashion creators, and widen access to fashion produced on the continent. Digital technologies are poised to continue playing a pivotal role in the growth of the African fashion sector beyond e-commerce. In particular, the integration of virtual reality (VR) and augmented reality (AR) in the industry, which remains minimal and focused on the luxury segment of the market, offers a novel and immersive way for customers to experience African fashion. Virtual fashion showcases, like the ECLECTIC collection presented by **Aisha Oladimeji** (Nigeria) during New York Digital Fashion Week, or AR-enabled try-on experiences, like those offered by the South African platform **Reka**, allow consumers to interact with African fashion in a new way. Finally, the metaverse represents a new frontier for African fashion, offering new opportunities for self-expression through clothes and virtual personas, as well as new spaces for brands to engage with customers. Recent research conducted by Analysis Group with the support of Meta estimates that it could add an additional US$40 billion into sub-Saharan Africa's GDP within the next decade,[56] with African metaverses such as **Africarare**, **Ubuntuland** or **Astraverse** poised to drive the sale of digital-only fashion goods.

Box 4 • E-commerce platforms

Amongst the most successful example of e-commerce platforms is **Afrikrea** by ANKA (meaning "ours" in Bambara), an online marketplace for African-inspired fashion micro retailers based in Côte d'Ivoire that supports women-owned SMEs, having 80% female vendors on the platform. ANKA's ambition is to build an infrastructure dedicated to powering e-commerce for its more than 13,000 sellers exporting "all things made of Africa" to a global audience.[57] In Egypt, the **Brantu** e-commerce platform streamlined online shopping for buyers of both Egyptian and international brands. Launched in 2019, it was founded by entrepreneurs who had initially set up a price comparison website for fashion products.[58] Today Brantu deploys digital technologies to also offer marketing services to clothing manufacturers, including a pre-ordering model to help prevent over-production and clothing waste.[59] At the pan-African level, **Industrie Africa** launched an innovative retail platform in 2020 to elevate African fashion designers. In order to help customers make enlightened choices, Industrie Africa developed a sustainability charter, which provides recognition to brands having made special efforts according to the following criteria: environmental, ethical, artisanal, and recycled.

INCREASED SUPPORT FROM GOVERNMENTS AND NON-GOVERNMENTAL ACTORS

African States are increasingly eager to seize the strategic opportunities offered by the fashion sector for sustainable job and revenue creation. Across the continent, there has been an increasing drive on the part of governments to create enabling business environments by putting in place policies and programmes focused on different facets of the fashion value chain. From supporting the garment industry through tax incentives to providing grants to fashion entrepreneurs, some States have provided key support to the industry in recent years.

Within the panoply of strategies and measures that African governments are deploying, certain segments of the fashion sector are given more focus than others. Understandably, in terms of employment and revenues, many governments focus on the development of the industrial garments and textiles sectors. Others chose to focus on the creative and heritage side, integrating fashion as part of their cultural policies. Mauritius, for instance, is a major global player in the apparel sector; however, it does not organize any fashion week, unlike countries with comparable population sizes such as Cabo Verde and Lesotho. By contrast, Burkina Faso has taken many measures to support artisanal textile production (see Box 5), but is still looking for the right approach for industrial textiles and garment production.

One of the most popular ways for African States and local authorities to support locally made textile and garments are to encourage people to wear them. Ghana, Kenya, Lesotho, Malawi, and Rwanda for instance have policies encouraging "**Local wear Fridays**." In Côte d'Ivoire, a "**Local wear day**" for civil servants focuses specifically on t aditional woven fabrics. Some governments are encouraging schools or public institutions to manufacture their uniforms locally, sometimes with traditional textiles. The impact of these policies is twofold: fi st, it mainstreams local fabrics or styles of dress into the professional environment, that is often dominated by Western clothes. Second, the boost they give to demand often drives innovation particularly in artisanal textile production.

Governments also use their significan convening power to support the fashion sector. They are often active initiators or supporters of trade shows which bring together industrialists, finance s, and businesses. One of the biggest and most significant on th continent is the **Africa Sourcing and Fashion Week** organized annually is Addis Ababa, Ethiopia. Other examples are the **Morocco Yarn and Fabric Sourcing Show** (Casablanca, Morocco) and the **International Fair for African Textiles** (SITA – Lomé, Togo). Whilst African fashion weeks are mostly initiated by the private sector, public support for fashion weeks remains relatively low or non-existent in most African countries – these high-profile vents offer an untapped opportunity for local or national governments to support the growth of the high fashion sector, notably by providing support to increase the visibility of emerging designers. Otherwise, some governments are offering grants or funding for domestic designers to attend international fashion weeks outside the continent.

Box 5 • Promotion of Faso dan fani: an intersection of economic development, gender equality and cultural objectives

Government promotion of Burkina Faso's traditional handwoven cotton cloth, Faso dan fani, started in the mid-1980s under Thomas Sankara's government as part of efforts to drive the economic emancipation of women and increase consumption of local products. Many women's weaving cooperatives were set up and under Sankara's dirigiste policies, a decree imposed the wearing of Faso dan fani for civil servants. A second wave of more liberal policy attention followed from around 2015, when members of government started making a concerted effort to dress in the fabric in public appearances. In 2017, as part of measures aimed at promoting cultural identity, a ministerial order officially encouraged state officials to wear Faso dan fani in state ceremonies. The renewed policy attention helped boost innovation in craft textile manufacturing as a greater variety of textile designs and textures were produced to meet rising demand and new tastes. It also provided the impetus to quality bespoke tailoring business to develop into small-scale brands. The fabric is also promoted overseas through private sector events, sometimes with support from the ministry in charge of foreign affairs – a Faso Dan Fani Night has been organized annually in Paris since 2017 and a similar event was organized in Rome in 2019. To protect Faso dan fani weavers from industrially produced copy-cat products, the Ministry of Trade, Industry and Crafts launched a protected label for Faso dan fani woven in Burkina Faso in 2021. A similar step was taken to label koko dunda, another locally processed fabric. Currently, the country is considering policies to adopt the use of Faso dan fani fabric for school uniforms as well as judge's gowns. Thanks to this long-term policy attention, boosted by support from non-governmental actors, Faso dan fani is thriving in local contemporary fashion, and in recent years has found its way onto international high fashion runways.[60]

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Another governmental approach to support the ecosystem has been to put in place tax incentives and other fiscal measu es to improve the attractiveness of the fashion, garment, and textile sector. Mauritius, which was one of the early movers in export-oriented garment manufacturing starting in the 1980s, has a very structured industrial support approach. For many years, the government has provided tax and duty-free incentives to investors, coupled with state-owned infrastructure developments including port, airport, water, electricity, and communication facilities. Fashion sector development is today mainly structured under the **2020-2025 Industrial Policy and Strategic Plan for Mauritius**. South Africa's relatively strong existing industrial base is being boosted by the government's **Clothing and Textiles Competitiveness Programme** which seeks to increase use of local inputs through a 100% local content requirement in manufacturing as well as managing the flood f cheap clothing imports through a 45% import duty.[61] Morocco has supported the production of clothing and accessories through the creation of fashion clusters, such as the **Morocco Denim Fashion Cluster**, in collaboration with the Moroccan Association of Textile and Clothing Industries (AMITH).[62] The public-private partnership has also launched the "**Dayem Morocco**" initiative to strengthen the local sector and reduce dependency on imported yarns and fabrics.[63] Morocco also hosts a national competition for innovation in technical textiles (**Innov'tex Maroc**). The government is also very active in campaigns to promote Moroccan fashion internationally, and these campaigns often highlight Morocco's cultural and craft heritage. In Tunisia, a textile pact was signed in February 2019 between the Government, the **Tunisian Union of Industry, Trade and Handicrafts** (UTICA), and the **Tunisian Federation of Textiles and Clothing** (FTTH) to facilitate the creation of 50,000 jobs by 2023, grow textile exports to US$4 billion annually, increase the Tunisian share of the European market from 2.5% in 2018 to 4%, and regain the country's place as the fi th-largest exporter to the European Union.[64]

More broadly, certain African States have integrated fashion into their development plans. For instance, Ethiopia had the textile and apparel sector as a main pillar in its 2015-2020 Growth and Transformation Plan II. The country targeted to generate **US$30 billion in exports from the textiles and apparel sector by 2030 and generate up to 350,000 jobs.** To achieve this the government has been building industrial parks to enhance the textiles investment and productivity of the country.[65] In Ghana, the Ministry of Trade and Industry contributed to establishing the **Association of Ghana Apparel Manufacturers** in 2017 to better coordinate efforts to boost the sector. The government is also involved in attracting foreign investors in the local sector to develop local manufacturing and support the domestic market.[66]

Box 6 • Fashionomics, an initiative from the African Development Bank

Fashionomics is an initiative that was developed by the African Development Bank (AfDB) in 2015 under the Bank's Gender, Women and Civil Society department, in recognition of the considerable potential for fashion to generate economic growth and employment opportunities, especially for women and youth. Fashionomics functions as a digital platform providing concrete and practical information and training for fashion businesses. It provides free access to webinars and podcasts as well as numerous online and physical masterclasses on all aspects of the fashion business, with topics ranging from ethical fashion, sustainability and circularity, jewellery manufacturing, digital skills for fashion, and international trade, logistics, and e-commerce for fashion entrepreneurs. Its fashion incubator and accelerator programme provides more tailored support to help emerging fashion entrepreneurs get to the next level. In addition, it organizes regular competitions for emerging brands engaged in sustainable fashion on the African continent, offering seed funding to help the winners upscale their production capacity and visibility.

Similarly, the Kenyan government's development strategy, **Kenya Vision 2030**, identified the textile and clothing sector as a key driver of Kenya's industrialization. Kenya's strategy focuses on harnessing the opportunities offered through AGOA, and the National African Growth and Opportunity Act Strategy and Action Plan (2018-2023) is seen as a cornerstone of government action in the field. In addition, the **Kenya Fashion Council (KFCO)** benefits from government support. Nigeria's Central Bank has rolled out a Creative Industries Financing Initiative, which has fashion as one of four target sectors, offering low-interest and long-term loans to creative entrepreneurs.

Ongoing government efforts to support the growth of the fashion sector are complemented by several internationally funded initiatives. On a pan-African level, **Fashionomics Africa**, an initiative of the **African Development Bank** (AfDB) represents one of the most consequential public initiatives to date that signals institutional support for the development of the fashion sector to leverage the sector's high-growth potential for job creation as well as to foster the emergence of circular, sustainable, and digital fashion value chains. The programme mobilizes private and public sector partners to influence a f vourable business environment conducive to attracting investments as well as expanding the access of fashion businesses to market intelligence, and training resources, with a particular focus on supporting women entrepreneurs.[67] On the international level, in 2002, the **United States Agency for International Development (USAID)** created the Trade for **African Development and Enterprise (TRADE)** project, which established the three African Trade Hubs in the continent's eastern, western, and southern regions. The Trade Hubs support implementation of the African Growth and Opportunity Act (AGOA), and the apparel sector is one of the main focus areas.[68] Several international initiatives focus in particular on fostering young talent or on sustainability. For instance, the **Ethical Fashion Initiative** (EFI) helps young African brands to develop on an international scale. In 2022, nine creators from EFI's Designer Accelerator programme were able to showcase their work during a unique presentation at Paris Fashion Week. Among them, **Lukhanyo Mdingi**, winner of the 2021 Karl Lagerfeld Prize, was recognized for the exceptional quality of his work and his commitment to collaborate with local artisans.

Non-governmental actors are also increasingly active in helping develop enabling environments for the African fashion sector. Spaces such as **hubs**, **incubators and accelerators** have been created by non-governmental organizations to support emerging designers and creators by providing them with equipment, skills, and networking opportunities. In the United Republic of Tanzania, the **Fashion Incubator and Accelerator Initiative of Culture and Development East Africa (CDEA)** provides technical and business development support to fashion and accessories designers.[69] The **Africa Fashion Project** (AFP) based in Cameroon, is an incubator for creatives interested in fashion design, artisanal trades, and creative small and medium-sized enterprises (SMEs) to provide machinery, resources and knowledge of the fashion sector.[70] Rwanda's **CollectiveRW** hosts multiple designers in the Rwandan fashion space, with the aim of strengthening and uplifting local communities. They organize **Rwanda Fashion Week** and partner with **The Nest Collective** and the **British Council's East African Arts programme** for regular pop-ups, exhibitions and workshops across the region. In Senegal, **mJangale**, a coding school, has devised programmes for fashion designers and tailors focused on how technology (Arduino, 3D printing, etc.) can be harnessed in fashion. These projects, which are often grassroot and community oriented, help to foster collaborative environments, stimulate innovation, and spark new synergies within the sector.

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The Dakar Design Hub, also in Senegal, offers an innovative multidisciplinary space with professional trainings, including a three-month fashion entrepreneurship programme, as well as design services to encourage the professionalization of the industry. From the increased policy attention of local and national governments to the establishment of hubs and incubators and support programmes by NGOs and INGOs, a wide variety of key actors are now sensitized to the potential of the African fashion sector and mobilized to provide a nurturing environment that will enable it to flourish. Th ough various initiatives, they offer financia support, infrastructure development, skill enhancement, access to markets, and opportunities for international exposure. Moreover, they play a role in encouraging sustainable and ethical practices, as well as the safeguarding of heritage practices, ultimately bolstering the African fashion industry's growth and global influence

Box 7 • The Ethical Fashion Initiative (EFI)[71]

The Ethical Fashion Initiative (EFI) is a public-private partnership between the International Trade Centre (a joint agency of the United Nations and the World Trade Organization), a group of social enterprises and industry partners. Founded in 2009, EFI works at the intersection of international development, the creative industries and the fashion and lifestyle sector, offering sustainability services, products, and development projects. EFI currently chairs the United Nations Alliance for Sustainable Fashion, an initiative of United Nations agencies and allied organizations designed to contribute to the Sustainable Development Goals through coordinated action in the fashion sector. EFI supports a number of projects across Africa, including in Mali, where it partners with producers of the traditional Malian textile Dalifini (ngaga and saran) and Touareg jewellers, and in Côte d'Ivoire, where it works with local communities in rural areas to support the weaving of the traditional Pagne baoulé and create new revenue streams for artisans.

In addition, EFI's flagship initiative, Designer Accelerator, is a two-year programme that aims to support and nurture talented African designers as well as to help develop their brands in order to be more competitively positioned in the international marketplace. In addition to financial assistance, the Accelerator also provides training opportunities, mentorship programmes with industry experts and scholarships to emerging fashion designers and brands that cover all aspects of managing fashion labels, from sourcing sustainable supply chains and trends forecasting to branding and bringing collections to market.

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2

Transversal challenges hindering the growth of the African fashion sector

Despite the enormous potential of the fashion sector on the African continent and the remarkable progress made in recent years, as illustrated in the previous chapter, many transversal challenges impede the sector from taking advantage of existing comparative advantages.

The industry players interviewed for this report were asked to identify the main issues that constrained their work and, more broadly, the development of the fashion sector. A great majority of them identified the ack of public and private investments as the most important challenge facing the sector at present, followed by a lack of formal education opportunities and the cost and availability of local textiles (Figure 2). The concerns they expressed are symptoms of larger systemic fault lines or structural barriers shaping the African fashion sector, which need to be addressed to ensure that it can reach its full potential.

For the purpose of this report, fi e of these major structural barriers are explored, namely:

- The patchwork of support policies currently in place in most countries;
- The insufficient i plementation of intellectual property rights in the fashion sector;
- The gaps in fashion education and training;
- The lack of structured investments and infrastructure; and
- Specific arket challenges and environmental concerns.

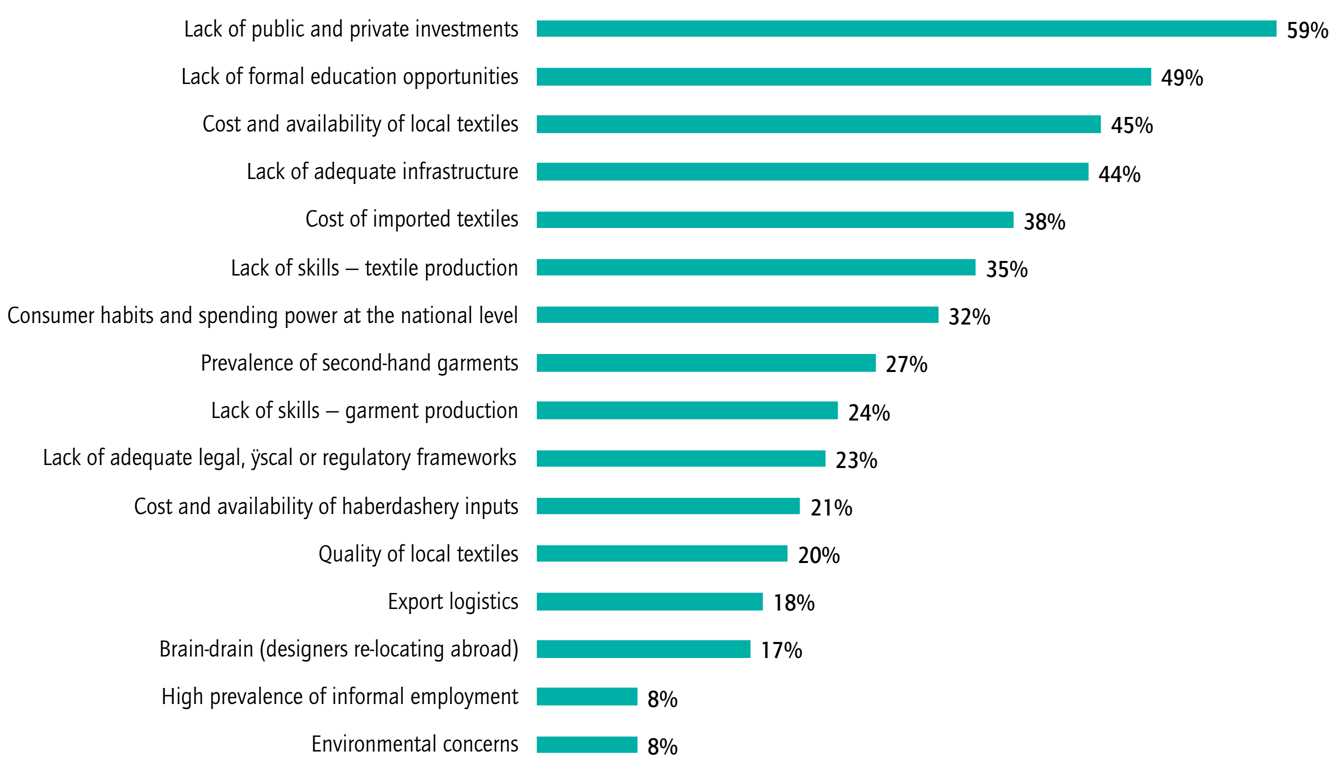
These large ecosystem challenges, each representing a key area for targeted policy intervention, reflect a wider array of day-to-day lived challenges faced by industry players on the ground, as shown in Figure 2.

A PATCHWORK OF POLICIES AND MEASURES ACROSS THE CONTINENT

Despite the growing interest of African governments, financia institutions, and non-governmental organizations in the fashion sector, as illustrated in Chapter 1, the patchwork of policies and measures currently implemented across the continent still leaves several important gaps. At the national level, it is common for different parts of the sector's value chain to be under the responsibility of different ministries that do not usually work together. Indeed, the growth of some segments of the fashion sector, especially textiles and mass garment production, requires industrialization, which involves setting up factories, mechanization, mass employment in a single plant, and promoting cross-border trade.

Figure 2

African fashion professionals' perceptions of main constraints to development of their national fashion sector



These activities are often the remit of ministries in charge of industry and trade, as is the case for Egypt, Kenya, Madagascar, Mauritius, Morocco, and Tunisia, for instance. Ministries in charge of culture in countries such as Botswana, Cabo Verde, Ethiopia, Namibia, and the Seychelles tend to intervene mainly in the heritage and creative design aspects of the fashion sector, but not in other aspects of the ecosystem.

This fragmentation of the sector across different ministerial portfolios often leads to the development of policies that are uncoordinated at best, or contradictory at worst. While international trade agreements negotiated have enhanced market access for African products like raw cotton, these have also opened the door to the import of cheap textiles and (new and second-hand) clothes that flood the frican textile and garment market and stifles local p oduction. In addition, governmental efforts to boost segments of the ecosystem that generate a lot of employment but add little value to the final p oducts, such as cut, make, trims assembly (CMT), often lead to the marginalization of the cultural and creative segments of the value chain (design, marketing, branding), which have the highest potential for sustainable value creation.[1] Yet, because of the high degree of interdependence between the various steps of the fashion value chain, it is impossible to understand and address the challenges faced by African designers and fashion creators unless the entire ecosystem is considered in a holistic and integrated manner. A further barrier to the development of evidence-based policies is the lack of solid data and statistics on the African fashion sector. While this lack can be felt across the continent, it is particularly pronounced in certain geographic zones, including large parts of Central Africa and Eastern Africa and in countries where fashion is largely situated within the informal economy.

Even when specific bodies a e created or funded by governments to support the fashion sector at the national level, as is the case with South Africa's Fashion Council funded by the Department of Trade and Industry, their ability to design and implement policies addressing the entire ecosystem often remains limited. In addition, inconsistent enforcement and implementation of existing policies, which are often a result of a lack of resources or coordination among various government agencies, undermine their effectiveness and can create an uncertain business environment for fashion entrepreneurs, ultimately deterring local and foreign investment, and hindering growth. For instance, while Côte d'Ivoire had drawn up a strategy for the development of its textile industry in 2012, concrete discussions on its implementation only began in 2021 — a decade later.

Box 8 • Fashion Councils in Africa

National or domestic fashion councils have been established in several African countries and cities, including in Egypt, Kenya, Namibia, Nigeria, and South Africa. These fashion councils are usually civil society or industry led multistakeholder special interest not-for-profit groups that aim to shape policymaking in the fashion industry, contribute to the establishment of domestic and international partnerships, and stimulate peer learning and knowledge exchange. They offer masterclasses, organize showcases and events, provide business and legal advice, and create networking opportunities for their members. While some of these councils receive funding from the government, they are usually fully independent bodies. Because they possess an overview of the fashion industry domestically, fashion councils have the potential to act as consultative bodies for ministries and public entities working on developing the sector.

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At present, most African countries lack comprehensive policies or strategies to guide the fashion sector's development. For countries where the fashion sector is located in ministries responsible for culture and not trade, GDP data is usually not actively collected, which can lead to the neglect of the sector from other public bodies. There is also a dearth of reliable, gender disaggregated labour data on the sector, especially in situations where large segments are situated in the informal economy. This indicates the need for support in data collection and research by reinforcing relevant government departments' capacities, to invest in effective research, indicator approaches and statistical analysis tools and to facilitate the dissemination of data and the sharing of good practices across the continent.

INTELLECTUAL PROPERTY (IP) IN THE TEXTILE AND FASHION SECTOR VALUE CHAINS

Many African designers struggle to protect their creations as creative goods in the same way that music or books are protected. The issue is twofold: fi st, many national intellectual property bodies face challenges of limited enforcement capacities. Second, emerging fashion designers who lack formal training or administrative support often face significant logistical and financi challenges when registering a design, brand, patent or trademark. The result of this challenge is that many emerging designers see their work re-used or copied or counterfeited without any financial co pensation or recognition. The growing reliance of the fashion sector on digital technologies and the emergence of tools such as generative artificia intelligence creates further intellectual property rights challenges. Designs can be shared and circulated very quickly, notably through social media, and creators can easily lose control of their most precious intangible asset: their creative vision.

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At the continental level, there are two IP bodies: the **Africa Regional Intellectual Property Organization (ARIPO) and the African Intellectual Property Organization (OAPI)**. ARIPO is an intergovernmental organization that facilitates cooperation among Member States on intellectual property matters with the objective of pulling financial and hu an resources and seeking technological advancement for economic, social, technological, scientifi , and industrial development. OAPI encompasses the majority of African French speaking countries, and was created in 1977 with the Bangui Agreement with the goal of fostering cooperation between Member States and the sharing of common objectives in intellectual property matters. While both bodies play crucial roles in harmonizing and facilitating intellectual property protection across multiple countries, they face several challenges that impact their effectiveness and ability to serve their Member States, including the uneven enforcement capacities of each State and effective coordination with national IP offices. Certain tools, suc as ARIPO's Swakopmund Protocol on the Protection of Traditional Knowledge and Expressions of Folklore, which allows Member States to protect and benefit f om their traditional knowledge and cultural expressions, can be used to counter issues of cultural appropriation or misuse, but have not yet been fully deployed in the fashion sector.

Whilst the **AfCFTA Protocol on Intellectual Property Rights**, adopted by the AU Assembly of Heads of State and Government on 19 February 2023, is expected to enable single registration of intellectual property for the entire continent, the IP space in Africa remains significantly fragmented, with a plethora of initiatives and instruments at regional and continental levels. For example, there is a need for more clarity regarding the role and mandate of the AfCFTA Intellectual Property Office (Article 31), its linkages to existing regional IP organizations, ARIPO and OAPI. This is a major obstacle to the implementation of the AfCFTA Protocol and could undermine the ability of African fashion designers to reap the profits f their creations through a pan-African approach, and thus the possibility of fully unleashing the creative economy on the continent.[2]

The question of authenticity and appropriation is an ongoing concern at the national level, especially in the face of the commercial expansion of some prints, patterns, or techniques. Without proper protection, traditional textiles are in danger of being viewed as a generic African fabric, diluting their sociocultural and historical significance, and leading to a loss of potential revenues for the communities from which these textiles have emerged. Traditional textiles, in particular, are often copied and produced more cheaply abroad, creating unfair competition and eroding the market share of traditional producers.

Several grassroot initiatives have been launched in recent years to formally protect African designs and fashion from exploitation through cultural appropriation, and to ensure that creators and craftspeople reap the full economic benefit f om their work. These initiatives range from the formation of trusts to the establishment of geographic indication labels.

Geographic indication labels protect some examples of African fine c afts, traditional designs, and textiles, including **saponé hats** in Burkina Faso and the **kente-oke cloth**, a hybrid of two royal fabrics from West Africa – kente (Ghana) and aso-oke (Nigeria). In addition, the **baoule woven cloth** from Côte d'Ivoire, is in the process of gaining geographic indication protection. A similar case was recently made to protect **Ghana's kente textiles** through geographic indicators to supplement the country's 2005 Copyright Act (Act 690), addressing the issue of third parties producing the textiles abroad. Researchers estimate that between 1994 and 2011, Ghana's exports of kente and other traditional textiles fell by 30%, from US$179.7 million to US$55.3 million, notably because of foreign mass production of cheaper copies abroad.[3] Protecting the textile would formally recognize its value as a cultural good that can only be produced at the nexus of a specific p ace, community, and tradition. In Namibia, **Ekipa ivory jewellery** is protected under the Convention on International Trade in Endangered Species of Wild Fauna and Flora and requires an export permit. Despite recent progress, such protections are rare and far between. In most cases, traditional textiles, forms of dress, or fashion designs benefit f om no formal IP protection, generating significant evenue losses not only for individual designers, but also for entire communities.

INSUFFICIENT TRAINING AND EDUCATION OPPORTUNITIES

One of the main challenges hindering the growth of the African fashion sector is the insufficient t aining and education opportunities that are currently available on the continent. Fashion education in Africa is diverse, ranging from informal learning opportunities to formal education programmes and courses related to design, textiles, marketing, and entrepreneurship. Some countries, particularly those with fashion hubs and vibrant fashion industries, have well-established fashion schools and institutions that provide high-quality education and training. These institutions play a critical role in nurturing talent and promoting creativity within the region. A 2021 study by the **Council for International African Fashion Education (CIAFE)**, indicates that there are over 500 of both public and private fashion training institutions in Africa offering formal fashion training, with more fashion schools in West Africa followed by the Southern African region. However, some institutions indicate on their websites an offer of certific te of participation after training, but it cannot be verifie if these certific tes are accredited. Other schools offer bachelor's and master's degree courses with corresponding certificates.[4]

Box 9 • Maasai Intellectual Property Initiative Trust

The Maasai people from Kenya and the United Republic of Tanzania have managed to control the use of their cultural products by commercial users through the Maasai Intellectual Property Initiative Trust. This initiative is based on an assembly of Maasai elders trained in intellectual property who act as a legal body negotiating with companies via a licensing agent. Before the creation of this Trust, it is estimated that over 1000 companies used Maasai cloth without any benefit to the community. Now, the Trust works with global businesses to generate sustainable income, which is re-invested in projects that support the achievement of the United Nations Sustainable Development Goals for the 3 million indigenous people of Kenya and Tanzania who belong to the Maasai tribe.[5]

> *Teaching fashion in Africa, is not just about the practical elements such as design and making clothing, there are so many elements that need to be prioritized, taught and discussed because fashion in Africa is very different to fashion everywhere else, in Europe or in North America.*
>
> ***Frederica Brooksworth***
> ***Executive Director of the CIAFE***

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The presence of accredited training programmes correlates closely with the vibrancy of the fashion sector in the country; most countries with established fashion weeks also have accredited fashion training programmes. In Nigeria alone, there are over 80 fashion training institutions that offer fashion design courses, while an industry player in South Africa indicates that South Africa has 30 colleges/universities that offer fashion training. In Ghana, there are over 100 fashion training institutions, but only eight schools have recognized accreditations that are clearly stated on their websites.[6] The lack of training programmes in countries where the fashion sector is less developed creates a negative feedback loop, significantly i pairing its growth.

Even when fashion training programmes exist, however, their curricula are not necessarily internationally competitive. There is a risk that some of the techniques, especially in non-accredited schools which lack oversight, are not adapted to the needs of the sector and fail to meet industry needs and standards. In addition, most of the existing curricula focus mainly on creative components of fashion design, neglecting other essential areas such as quality control, fashion technology, business and entrepreneurship, trade law and copyright, which are essential to ensure that young creatives have the knowledge to protect their creations and develop their businesses.[7] Often, talented young graduates end up entering the sector without being fully equipped with the necessary skills and knowledge to succeed.

A significant gender ap remains when it comes to access to education opportunities in the fashion sector in Africa. To address these inequalities, organizations such as the **Africa Fashion Foundation (AFF)** aim to bridge this exclusion through programmes such as **Kayayei**, which works with young women from disadvantaged backgrounds, and the **Roberta Annan Scholarship**, which provides financial support for higher education in the fashion sector. Due to difficulties in accessing educ tion, women entrepreneurs of creative and fashion products may struggle to gain adequate skills or knowledge about trade regulations, certific tes and licences required for export and import, for example, or the necessary guidelines and protocols related to quality, standards, and approvals.

Some of the gaps in fashion education have been filled by altern tive spaces such as hubs, incubators, and accelerators, which offer non-formal training to emerging designers and creators. Nonetheless, informal apprenticeships and on-the-job training are still the norm on the African continent to acquire tailoring skills such as patternmaking, cutting, trimming, and stitching. A growing number of fashion – MSMEs provide opportunities for local tailors to transition to formal employment, ensuring the transmission of the traditional craftsmanship while introducing them to new techniques and contemporary designs.

Traditionally they rely heavily on the use of basic sewing equipment which curtails the ability of local tailors to scale up their operations and bargaining power to negotiate higher prices for their work. Furthermore, while they may be highly knowledgeable in traditional tailoring skills, many may lack sufficient t aining in garment-finishing p ocesses such as fabric treating, pressing and seam finishing which ften require speciality equipment.[8]

This a key challenge for market expansion since garment finishing is a crucial step in ensuring that the finished item f clothing can satisfy quality control guidelines in order for it to be sold in licensed retail stores or even on the international market.

Overall, it is clear that fashion education in Africa needs further streamlining and additional oversight to ensure the effective professionalization in the sector. However, training and upskilling remain a consistent issue, in particular in the area of fashion entrepreneurship.

Box 10 • Hubs and incubators

A thriving ecosystem of hubs and incubators have developed to address education challenges in African fashion. The British Council's ***Creative DNA*** in Kenya that offers business support in form of creative enterprise training and six-week fashion incubator. More ad hoc initiatives, mostly using social media platforms, have also emerged in recent years. For instance, the Lagos-based designer Adebayo Oke-Lawal created ***Orange Culture***, where young creatives have the opportunity to find knowledge, inspiration and mentorship through Instagram Live sessions. Fashion training and education has also benefited from the digital transition, although fully fledged accredited online programmes tailored for the African context have yet to emerge. The ***African Fashion Research Institute (AFRI)***, with other partners including South Africa's ***Stellenbosch Academy of Design and Photography, The Royal Academy*** in London, ***Accra International School of Advertising and Design*** and Berlin's ***AMD Akademie Mode and Design***, has been at the forefront of developing online series, programmes, and workshops for African designers and fashion professionals.[9]

LACK OF STRUCTURED INVESTMENTS AND INFRASTRUCTURE

Lack of public and private investments and the related issue of inadequate infrastructure were among the main challenges affecting the development of the fashion sector according to industry players interviewed for this study.

The fashion industry requires significan capital, and upfront investments must be made to foster product development, marketing, and brand building, expand production capacity, and access new markets. Without structured investment channels, African fashion entrepreneurs and businesses struggle to secure the necessary funding to realize their ambitions, hindering their potential to scale their operations and reach their full potential. The lack of financin opportunities also stifles inn vation, as little investment can be made in research and development initiatives, which would allow designers to experiment with new materials, technologies, and sustainable practices. Most importantly, it prevents brands from scaling up their production and become more competitive on the global stage. This issue disproportionally affects women fashion entrepreneurs, who are more likely to self-select out of the existing credit market because of low perceived creditworthiness. In 2017, the World Bank reported that only 37% of women had a bank account in sub-Saharan Africa, compared with 48% of men, and that the gender gap for access to finance as of 18% in North Africa – the largest in the world.[10]
A few programmes strive to address this gender imbalance, including the **African Development Bank's Affirmative Finance Action for Women in Africa (AFAWA) programme**, which facilitates women's access to finance and st engthens the capacity and financial lite acy of women entrepreneurs across the continent.

However, much more needs to be done to support access to investment for women-owned fashion businesses.

The lack of structured financin opportunities for the fashion sector in Africa goes hand in hand with inadequate infrastructure, which is a major barrier to growth and to the vertical integration of the fashion value chain. In terms of fib e production, the continent sees a consistent and significant los in the potential economic value of crops because it lacks adequate infrastructure to process raw materials locally. Only 2-3% of African cotton grown on the continent is processed there, which restricts the continent to being an exporter of natural resources rather than of processed and high-value goods.

Moreover, it creates a dependency on imported foreign materials such as textiles and yarns, which are subject to infl tion and fluctu ting prices. The dependency on imported textiles restricts the development of Africa's fashion sector due to resulting additional costs and production times. Beyond fib es and textiles, the lack of modern and well-equipped manufacturing facilities also hinders the garment sector. Many fashion businesses struggle with outdated machinery and limited automation, leading to lower production capacity, longer lead times, and reduced cost efficiencies. E en in countries like Mauritius and Tunisia, which have developed manufacturing facilities to support the production of garments for international brands/foreign at a large-scale, these tend not to be available or utilised by African brands/businesses producing ready-made garments. In many countries, the high cost of electricity makes industrialising production expensive and limits the competitiveness of textiles, garments, and even leather products.

In the luxury retail market, lack of modern retail complexes, shopping malls or boutiques as well as unreliable transport links are limiting the distribution of high fashion goods and accessories. Many high fashion designers operate from small outlets or studios in the suburbs of major cities in Africa, but the lack of organized retail spaces impact brands' visibility and reach in a competitive market.

Box 11 • Africa's textiles, clothing, and footwear trade deficit

The African continent exports US$15.5 billion worth of textiles, clothing and footwear annually, but imports US$23.1 billion worth of these products, for a trade deficit of US$7.6 billion[11]. The biggest exporters are Egypt, Morocco, and Tunisia with exports worth US$3.3 billion, 3.1 billion and 2.8 billion respectively.[12] However, Eswatini, Mauritius, and Tunisia are the only countries that register a clear trade surplus for their fashion sectors (defined as textiles, clothing, and footwear), while Morocco's trade deficit is a very slight one. Gambia, Senegal, and Togo, despite significant trade deficits in textiles and clothing, export footwear worth more than double the amount of imports.

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SPECIFIC MARKET CHALLENGES AND ENVIRONMENTAL CONCERNS

Globally, fashion has now entered the unglamorous **top 10 of the most contaminating industries in the world**, together with energy and transport. Every link of the fashion value chain has a high carbon footprint and a negative impact on the environment, including in Africa. In particular, the dominance of fast fashion has fuelled unsustainable models of consumption based on the practice of "buy, use, dispose" which generates mass quantities of waste that is then exported to some countries in the Global South. In fact, Africa is considered to be part of the global waste management system for clothing.[13] While many of the challenges are shared across the fashion industry around the world, such as biodiversity loss, carbon emissions, and wastewater, some issues are specific to the frican continent, including the management of **large amounts of imported second-hand clothes** which is a particularly pernicious problem that has adverse effects both on the environment and on Africa's local textile and apparel sector.[14]

In 2019, Africa accounted for nearly **a third of global imports of second-hand clothes**, estimated at US$5 billion, and about **80% of Africa's population wears second-hand clothes**, mainly imported from the United States, Europe, India, and Pakistan.[15] East Africa imports approximately **12.5% of the total global second-hand clothing market**,[16] and this industry employs 355,000 people in the region.[17] Ghana, in West Africa, also shows a high reliance on second-hand clothing, with an estimated 15 million used garments entering the market weekly in Accra.[18]

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In Kinshasa (Democratic Republic of the Congo), it is estimated that 6% of rubbish is composed of textiles, both from second hand clothing and cuttings from bespoke tailoring. While second-hand clothing markets create income, job opportunities, and livelihoods for many, it is estimated that **40% of all imported second-hand clothing imported into Africa is disposed of as waste in landfill sites**, which causes issues with leakages into the environment and a general lack of waste management systems.[19]

It is undeniable that the sheer volumes in which second-hand clothing is imported into African countries is unsustainable from a waste management perspective.

It is also having adverse effects on domestic textile and apparel industries in Africa by flooding the arket with cheap, often low-quality goods, which represent **unfair competition to domestic garment producers**, who cannot possibly compete with the extremely low prices and ever-growing quantities. Second-hand clothes contribute to a **distortion of the market**, and discourage investments in local production, which limits growth and competitivity for domestic producers. This market dynamic also perpetuates **dependency on foreign goods** in Africa at the expense of self-sufficiency and hinders the development of a robust domestic fashion and textile ecosystem, with all the social and economic benefits t at could come with it. In 2016, East African countries including Burundi, Kenya, Rwanda, Tanzania, and Uganda planned to phase out the second-hand clothes trade by 2019, but only Rwanda has implemented the plan by introducing high taxes on the imports of second-hand clothing to deter its trade.[20] Such efforts to quell the second-hand clothing trade have been met with great resistance from large exporter countries, which retaliated notably by suspending duty-free export privileges. Some progress was made recently thanks to African trade ministers, who adopted, on 1 June, 2023, **rules of origin in the textile and apparel industry** that prevent trading in second-hand clothes across the continent under the preferences of the African Continental Free Trade Area (AfCFTA).[21] Under these rules, a country may accept the import of second-hand clothes but will not be able to export them to other African countries without facing duty charges. Mamkele Mene, Secretary General of AfCFTA, said that the decision to curtail the trade of second-hand clothes is an important step to encourage value-addition and industrialization of the fashion value chain in Africa. This decision is a step in the right direction, but much remains to be done to guarantee its full implementation.

Box 12 • Recycle and re-use: a new life for second-hand clothes

The prevalence of second-hand clothing has had surprising effects in shaping the fashion landscape and driving stylistic innovations across the African continent. Despite the multifaceted challenges brought about by the second-hand clothing trade, it would be an oversimplific tion to represent it as solely a product of waste. The used clothing trade has come to assume significan cultural and socioeconomic value for the many enterprising individuals who see the transformative potential of upcycling and repurposing used-clothing items[22]. From the tailors and seamstresses working from open-air markets or their homes to the aspiring designers studying at fashion schools, second-hand clothing is given new life as they are creatively redesigned and altered to create new garments and accessories with a fashionable spin. Mohamed Awale, the founder of the trendy accessories brand ***Suave Studios*** is one such example of how African creatives are responding to and capitalising on these readily available sources of used clothing.[23] Awale draws his inspiration from Gikomba, a mammoth open-air second-hand clothes market in Nairobi, the largest of its kind in East Africa. A team of local tailors take discarded fabrics like denim, leather jackets and suits imported from abroad and skilfully turns them into a variety of fashionable yet affordable items such as backpacks, messenger bags, and smaller goods like wallets and passport holders for Nairobi's hip students and young professionals. The success of Suave Studios attests to the creativity and resourcefulness of young African designers who are adapting imported used clothing to local cultural sensibilities and attracting a growing segment of fashionable yet conscious consumers.

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With regards to other environmental challenges associated with the fashion sector, notably carbon emissions and water pollution, the industrialization of African fashion in many countries is still at such low levels that it can be assumed to have limited effects for the moment. However, the fashion sectors in countries like Egypt, Mauritius, Morocco, and Tunisia are facing similar environmental challenges as in mature markets, and industry players generally express awareness and concern about limiting the environmental impacts of their sector. In Egypt, there is an acute concern on how climate change will affect the water-critical country's ability to continue growing cotton. At the 2022 United Nations Climate Change Conference (COP27) held in Sharm el Sheik, the Egyptian Ministry of Environment presented the **Green Fashion initiative**, set up in 2018 to counter fast fashion, and which has employed 50 women to produce more than 60,000 environmentally friendly pieces since its inception.[24] On the whole, however, both industry and government awareness remains low. Industry players interviewed for this report ranked environmental challenges very low when asked about their current concerns (see Figure 2), but several noted the need to monitor the impact of the industry once it grew bigger. In the meantime, several stakeholders are taking small steps to limit their environmental footprint, notably by collecting their fabric offcuts to tailor patchwork designs or children's clothing to prevent cutoffs going to landfills or being burned

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3

Strategic opportunities for growth

The two previous chapters demonstrated that the African fashion sector is brimming with potential and talent, but that despite a sustained and ever-growing demand for its products, some structural challenges are hindering its full development. Addressing these challenges and exploiting the continent's strategic advantages requires the mobilization of several stakeholders, including governments, learning institutions, civil society, and the private sector to create an enabling environment that will enable every part of the fashion ecosystem to reach its full potential.

The following section outlines a series of recommendations to leverage, upscale, or replicate existing success stories and achievements, and to unleash the potential of the fashion sector for sustainable growth, job creation, women's empowerment, and the diversific tion of African economies. Two types of recommendations are presented: fi st, **overarching recommendations for foundational, transversal policies** that can support the development of multiple components across the fashion ecosystem in Africa. These recommendations can be applied contextually, based on a country's specific needs, st engths, and challenges. Second, **sector-specific recommendations or growth levers** that are tailored to stimulate the growth of specific arts of the fashion ecosystem, namely: textiles, garments, high fashion, and accessories and fine crafts.

It is important to note that the growth levers presented in this chapter are neither mutually exclusive nor exhaustive. Instead, they are roadmaps that can guide countries in defining priorities for action t at leverage their existing resources and comparative advantages (such as population size, agricultural and mining opportunities, infrastructure), in line with their national priorities and aspirations.

As each country possesses different strengths, resources, and priorities, it is expected that they will not be in a position to develop the entire fashion chain equally. As such, all the recommendations presented below are forward-looking; they propose a set of policy and intervention areas that can support the development of a fair and inclusive fashion sector that could benefit all acto s involved throughout the fashion ecosystem.

OVERARCHING RECOMMENDATIONS FOR THE FASHION SECTOR

When devising strategies for a country's fashion sector, it is important to adopt a holistic approach in order to establish solid and complementary links upstream of the textile sector up to fina consumption, to create local added value and jobs, and to deploy actions in favour of economic and social inclusion as well as sustainable development. The vertical integration of the fashion ecosystem will allow the continent to both capture more value from the sector and turbocharge its growth. A few pulse points can be targeted to facilitate this vertical integration, including the development of policies that facilitate access to quality raw materials at lower cost or providing incentives for different producers along the fashion value chain to work together. Backward and forward integration will help reduce risks and dependencies, ensure that value is created and retained locally, as well as enhance control over the market and supply chain.

This can only be achieved through a community-driven approach fostered through meaningful collaborative processes bringing together relevant fashion players and the private and public sectors.

To catalyze this process, Governments and continental and regional bodies may consider:

- **Comprehensive and inclusive policies for the fashion ecosystem**
- **Ensuring fair remuneration and decent work in the fashion sector**
- **Promoting structured investments and infrastructure development across the ecosystem**
- **Leading the way for sustainable fashion**

COMPREHENSIVE AND INCLUSIVE POLICIES FOR THE FASHION ECOSYSTEM

▪ Integrate the fashion ecosystem into national development plans/or strategies

The African Union estimates that the full development of the African fashion value chain would result in a considerable gain in prosperity for the continent. In order to leverage this enormous potential and build a resilient creative economy, States can consider integrating the fashion sector in their national development plans or strategies alongside other industries, establishing clear links between the various parts of the fashion ecosystem and the goals of the United Nations' 2030 Agenda for Sustainable Development, as well as the aspirations of the Agenda 2063 of the African Union.

▪ Enact inter-ministerial coordination to guide the development of the fashion sector

Considering the high degree of interdependence between the various parts of the fashion ecosystem, it is essential to adopt an integrated approach to support the development of the fashion sector. This calls for robust inter-ministerial coordination and the establishment of shared monitoring and implementation mechanisms bringing together ministries responsible for agriculture, culture, education, finance, trade, industry, mining, intellectual property (IP), environment, as well as the national statistical institutions/authorities. Ideally, fashion policies or national strategies should consider the entire value chain from raw material production and textile manufacturing to design, trade, and retail. Each stage should be clearly and adequately addressed to ensure sustainable development and progress. Policies should be developed in a coordinated manner at the national, regional, and continental levels, if possible, through a participatory and inclusive approach.

▪ Develop or strengthen intellectual property legislation

A United Nations report on the role of IP in promoting Africa's development shows how a strong institutionalization of IP at continental, regional, and national levels can contribute to industrialization and the protection of local technologies, know-how, and designs.[1] In the fashion sector in particular, there is strong evidence that the effective implementation of intellectual property laws creates value for brands and producers.[2] There is a need to encourage synergies and cooperation between national intellectual property bodies and other relevant agencies such as ministries of trade, industry, culture, and tourism. An increased role could be given to the African Regional Intellectual Property Organization (ARIPO) and the African Intellectual Property Organization (OAPI) to support such transitions and improvements. Fashion designers, entrepreneurs, and stakeholders should be sensitized to the role of intellectual property bodies and made aware of their rights. Furthermore, governments may consider adapting their copyright laws to include free unregistered design protection, which is generally used to protect industrial designs for a short period of time. This "test" period can be used to determine whether it is worth investing in a more onerous and complicated design registration for a single product. They can also consider setting up training modules or providing technical assistance to help emerging designers register their brands and trademark their logos.

▪ Enhance data collection and analysis

It is essential to have a better understanding of the sector, its various stakeholders, the evolution of markets and the existing challenges at both the national and regional levels in order to develop and implement evidence-based policies. The establishment of a dedicated research agency at the continental level could be encouraged to engage in systematic data collection and analysis, reinforce governments' capacities to monitor the sector, and facilitate the dissemination of data and the sharing of good practices across the continent. On a smaller scale, other continent-wide monitoring initiatives should be supported, such as the work undertaken by the Council for International African Fashion Education (CIAFE) in mapping the state of fashion education and training with the view to provide road maps for improving access to quality education and vocational programmes. Different public and private institutions can be established to target the different aspects of the value chain, conduct studies, develop databases, and provide up-to-date analyses that can serve to identify priority action areas. There is also a major need to support data collection and research by reinforcing relevant government departments' capacities, to develop indicator-based approaches and collect gender disaggregated statistical data.

ENSURING FAIR REMUNERATION AND DECENT WORK IN THE FASHION SECTOR

■ Protect traditional crafts, designs, and know-how

Action should be taken to ensure the authenticity of traditional designs, which often possess strong cultural significance for communities, and to protect them from cultural appropriation and tokenization. Without proper legal protection, traditional design, know-how and techniques are in danger of being commercially exploited by others and could lead to a loss of potential revenues for the communities. It is therefore essential to document traditional knowledge and artisanal skills to guarantee their protection, and affirm the creative and cultural identity of practitioners on the international scene to the benefit of local communities that produce these cultural products.

■ Ensure decent working conditions in the fashion sector in line with international standards paying specific attention to gender equality

It is essential to integrate the International Labour Organization's (ILO) decent work principles in the fashion sector across the African continent. Steps should be taken to ensure a safe workplace for employees in textile and garment production, as well as in high fashion companies, where employees should feel secure thanks to strong company values and a positive co-working environment that encourages mutual respect. Social protection for workers in artisanal production, industrial, and semi-industrial production means that all employers would have access to basic medical care, health insurance (e.g., for medication, non-covered medical services, etc.), coverage for workplace injuries, income protection during non-working periods, insurance schemes for illness, parental leave or disability, retirement benefits, and career transition schemes. Particular attention could be paid to the needs of women through the development of gender-sensitive policies and the establishment of workplaces that foster a gender-responsive culture (e.g. formal complaint mechanisms for claims of gender-based discrimination and violence, and for violation of social and economic rights).

■ Facilitate the establishment of trade unions of professional organizations in the textile, garment, high fashion, accessories, and fine crafts sectors

The textile production, garment production, high fashion, accessories, and fine craft value chains are interdependent, and therefore workers in these sectors would benefit from seeking formal representation in unions or members associations that can defend their interests and increase their bargaining power to demand better pay and working conditions. National associations, trade councils, and chambers of commerce would also contribute to the formalization of the fashion sector and provide an important forum that gives a voice to business stakeholders. Besides the commercial and networking opportunities that come with membership in these representative associations, they also represent the interests and needs of its member organizations and have the lobbying power within national bodies to advocate for favourable policies to support the growth of the fashion sector and to redirect public interest and investment. Membership to a chamber of commerce would allow companies to be registered on an official directory, leading to further formalization and regulation of the sector. For example, the Ghana Chamber of Commerce is the coordinator of the African Growth and Opportunity Act (AGOA) and all garment manufacturing companies in Ghana who export under AGOA are members of the chamber. These garment manufacturers are registered businesses found in the directory of the chamber. This opens the entrepreneurs up to information and opportunities offered under AGOA and other trade relations.[3]

PROMOTING STRUCTURED INVESTMENTS AND INFRASTRUCTURE DEVELOPMENT ACROSS THE ECOSYSTEM

■ Create an enabling and attractive business environment for stakeholders and investors in the fashion sector

Policies should strive to facilitate the emergence of a business environment that is conducive to attracting investments, fostering innovation, and promoting entrepreneurship. Investment funds focused on African fashion, such as those provided through the accelerator established by the Institut français de la mode (IFM) and Birimian,[4] which provides long-term capital, institutional support, and strategic advice for fashion brands to help scale up their businesses, can be replicated at the national level for the different parts of the fashion ecosystem. The establishment of targeted public-private partnerships is key across the fashion ecosystem, as they are levers to foster collaboration between governments, private sector entities, and development organizations to pool resources, expertise, and investments for the growth of the sector.

■ Improve access to financing opportunities for fashion MSMEs and SMEs, with targeted support for women and youth

Enhancing access to financing is crucial to the upscaling of fashion businesses and subsequent development of the fashion sector. The African Development Bank (AfDB), through its Fashionomics programme, works with funders such as the Identity Development Fund Alithea IDF, the Women's Investment Club, the African Export-Import Bank (Afreximbank), the State Bank of Mauritius, Thundafund, and the Senegalese clothing brand SARAYAA, to offer financial assistance to Africa fashion entrepreneurs.[5] Roberta Annan, founder of Africa Fashion Foundation (AFF), also launched the Impact Fund for African Creatives, a €100 million fund for fashion entrepreneurs in Africa in 2021. This funding will award grants up to €50,000 to selected projects.[6] It is important that these continental funding initiatives are replicated on the regional and national levels to support fashion MSMEs and SMEs. It is equally important for governments to ensure that local commercial financial institutions are sensitized to the lucrative potential of fashion businesses and encouraged to offer fashion entrepreneurs loans and guarantees at reasonable interest rates. Capacity building through the organization of workshops, training sessions or information portals can be made available for fashion entrepreneurs to increase their financial literacy and empower them to identify adequate funding opportunities. It is essential that the inequalities in access to finance faced by women and young designers are also addressed by continental and regional bodies, governments and private investors, which could envisage setting up specific funding opportunities targeting women and youth separately to ensure progressive and sustainable development of the sector.

■ Facilitate regional and international trade

Governments should endeavour to negotiate favourable trade agreements to promote the export of African fashion products. This includes reducing tariffs, simplifying customs procedures, and participating in international trade fairs to showcase African designs. At continental level, AfCFTA's prospect of building trade routes and facilitating cross-border trade should receive maximum attention and investment. Well-laid transportation systems linking the different subregions of the continent can facilitate interregional trade. The efficient operation along these trade routes will enhance continental and regional vertical integration. Likewise, the effective implementation of the Pan-African Payment and Settlement System (PAPSS) at the regional and national levels should be prioritized to resolve cross-border payment challenges.

■ Strengthen ties with the African diaspora by facilitating investment in the fashion sector

The support of Afrodescendent communities and the African diaspora has been instrumental in increasing the visibility and desirability of African fashion on the international stage. Celebrities and high-profile endorsements can give designers exposure and access to global markets. The ever-growing interest in African fashion can be leveraged to gain more inter-relational benefits for both the continent and the diaspora. Madagascar's highly export-oriented garment sector is facilitated by foreign direct investment of the diaspora in Asia and Europe. The structured application of this investment, especially the locally embedded nature of the investment has contributed significantly to the growth of Madagascar's garment sector.[7] Incentive schemes could be put in place by governments to facilitate diaspora investments and make entrepreneurship in this sector attractive. However, to ensure local integration and participation, diaspora investments should be met with a percentage of local partnerships.

LEADING THE WAY FOR SUSTAINABLE FASHION

Africa is still a minor contributor to overconsumption and its fashion industry has the opportunity to "get things right" from the start and become global leaders in sustainable fashion. While many African designers are already integrating sustainability in textile waste management through fashion fibre-to-fibre recycling or through other optimized processes focused on recycling and reuse, consumer behaviour in particular can be influenced by promoting a culture of reuse and resale, followed by recycling and repurposing. Upcycling is also key in this process. Through her brand ALMAH, Manal Olama advocates for circularity and sustainability by turning excess materials obtained from the Egyptian Clothing Bank into unique wearable art. One step towards formalizing sustainability in the fashion sector is to take into account international norms and good practices, including from the United Nations Alliance for Sustainable Fashion. Such standards, norms, and ethical codes can contribute to identifying quality criteria and standards for the recognition of a "made-in-Africa" sustainable model that presents an alternative mode of production and consumption in opposition to the excesses of global fast fashion. Fashion communicators can tap into UNEP's Sustainable Fashion Communication Playbook to explain and celebrate the positive ecological, cultural, and social values of the fashion sector. This includes the way in which fashion is deeply intertwined with the natural environment; with the diversity found in cultural heritage, art and craft traditions, customs, beliefs, histories, and practices; and with the wellbeing of the individuals and communities it depends upon.[8]

SECTOR-SPECIFIC GROWTH LEVERS

Depending on the specificities f the domestic context, as well as the priorities, existing infrastructures, and available resources of each country, governments may also choose to implement targeted measures that will support the development of specific segments f the fashion ecosystem, namely: textile production, garment production, high fashion, and accessories and fine c afts.

They can build on existing comparative advantages (for instance, the existence of a developed cotton industry or the popularity of specific t aditional crafts) or decide to invest in part of the sector that has hitherto received little attention. In general, there are three main policy levers that can be activated by governments to bolster each part of the fashion ecosystem:

Enabling regulatory environment

Investment and infrastructure

Skills/Education

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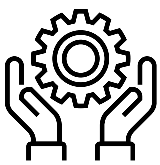
TEXTILES

The global textile and fib e sector has witnessed significant rowth in recent years and is poised to grow at a Compounded Annual Growth Rate (CAGR) of more than 4% by 2027 across the world. Governments that want to boost the growth of their textiles sector may consider the following key actions:

ENABLING REGULATORY ENVIRONMENT



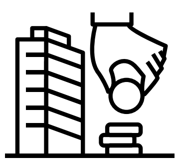
- **Create an enabling environment for investors**

A generally conducive environment should be created for private investment. In order to boost the competitive advantage of local producers against foreign competitors, the introduction of policies such as tax breaks and subsidized production could be envisaged.

- **Protect the uniqueness of African textiles through robust intellectual property legislation**

There is an urgent need to protect traditional textiles and safeguard their unique quality, including through intellectual property legislation, to ensure that communities can reap the full benefit from their heritage.

INVESTMENT AND INFRASTRUCTURE



- **Promote value addition by supporting the processing of natural fibres domestically**

Successful textile production depends heavily on vertical integration of the entire value system. Backward linkage through the local supply of raw materials ensures constant supply and consistency in production. Countries such as Benin, Burkina Faso, Egypt, Ethiopia, Mali, Senegal, Uganda, and the United Republic of Tanzania that produce cotton in commercial quantities could scale up their abilities to process cotton into fibre and yarn. This adds value to the raw material, improving on its economic viability for local use and export.

- **Leverage sustainable practices as a comparative advantage**

Currently, most African cotton is GM-free (not genetically modified) and over 7.3% of the continent’s cotton production is organic. Prohibiting GM production means that African farmers, national research institutes and ginners will continue saving and breeding their own locally adapted seed, rather than needing to purchase seed every year from foreign multinational corporations. In addition, there should be investment in innovation labs that focus on development of sustainable fibres from waste textile fibres or innovative fibres (combining cotton and silk or other fibres).

- **Create or improve textile clusters and special economic zones**

Establishing textile clusters or special economic zones that bring together industry players in a concentrated area can help to boost productivity and reduce costs. These zones can offer incentives such as tax breaks and streamlined regulations to attract investments and encourage collaboration.

- **Revive low-capacity State-owned textile factories and mechanize weaving to enable large-scale production, when appropriate**

Governments should prioritize the revamping of existing factories to their full capacity, exploring green energy solutions to lower costs. Investments are needed in technology and equipment that will transform segments of the textile sector into modern production hubs. They should also support improved efficiency for artisanal textile production through the use of improved looms and semi-mechanized production processes. Such improvements will ensure larger volume production, lower costs and greater reliability to facilitate use of such fabrics by local and international designers and garment producers.

SKILLS/EDUCATION

■ Upskill artisanal textile productions

Governments can establish vocational training centres and technical institutes that offer hands-on training in textile-related disciplines. These institutions can provide practical skills that are directly applicable to the industry's demands.

■ Support Research and Development (R&D)

Allocate funding for R&D initiatives that focus on improving textile production processes, developing new materials, and enhancing the sector's overall technological capabilities.

■ Safeguard traditional textiles and ensure the continuity of skills

While the production of certain textiles can be industrialized or upscaled, many traditional African textiles depend on skilled artisans who have honed their craft over years of practice generation after generation. To preserve the quality, uniqueness, and authenticity of these textiles, measures should be put in place to facilitate person-to-person mentorship, including the establishment of specialized hubs and workshops.

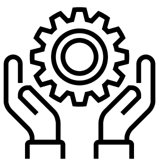
■ Empower women weavers

Efforts could be directed towards sensitizing the public on the socioeconomic benefits of weaving for women, and women should be specially incentivized to join the occupation in countries where it is dominated by men.

GARMENTS

The apparel sector in sub-Saharan Africa alone was estimated at US$31 billion in 2020, and is set to keep growing every year with the rise of the middle class and population growth on the continent. In order to support the development of the garments sector, governments may want to undertake the following actions:

ENABLING REGULATORY ENVIRONMENT



■ Develop and promote a sustainable model of African ready-to-wear

The African garment sector is strategically placed to create its own development path by adopting sustainable practices and models. Governments should consider encouraging the streamlining of production to achieve both social and environmental sustainability. Contextual sustainable garment production practices situated at the intersection of luxury and mass production should be identified, explored, and upscaled when possible.

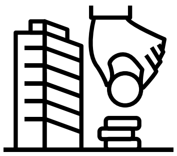
■ Protect domestic brands from unfair foreign competition

Imported second-hand clothes erode the market share of domestic entrepreneurs and imperils the survival of businesses. Rwanda's focus on investing in garment manufacturing for local consumption and export, which led to the increase in tariffs on imported second-hand clothing, is worth emulating across the continent. Though the increase in tariffs on second-hand clothing led to Rwanda's suspension from the African Growth and Opportunity Act (AGOA) in 2018, textile exports between 2018 and 2020 grew by 83%. This growth resulted from an increase in local demand (10% to 20%) and export markets, especially to the Democratic Republic of the Congo where garment value increased from US$636,578 in 2018 to US$30.4 million in 2020.[9]

■ Create conditions to boost local demand

For instance by ensuring that the bulk of State contracts (for instance, school, civil service, army, or police uniforms) favour local designers and textiles, or by providing incentives to institutions that want to place quotas on locally made textiles. National policies such as the Ghana's National Friday Wear programme ensure that not just the general public but also corporate institutions, civil service workers, and students in public schools from primary to secondary all wear locally produced clothes on Fridays. Burkina Faso's policy on mandatory wearing of Faso dan fani by officials for all national occasions is also a national success story of boosting demand for locally produced clothing. Such policies should be emulated on regional, sub-regional, and national levels to boost local and cross-border fashion trade and consumption.

INVESTMENT AND INFRASTRUCTURE



■ Ensure access to working or upfront capital

Purchasing fabric alone can tie up 3-4 months of working capital in garment production. Financial intermediaries that can smooth over the period between cash outlays for inputs and manufacturing and the payments from global (or domestic) buyers can address this challenge.

■ Build modern production hubs and adopt innovative production models

Governments should invest in building production hubs where designers can send their designs and produce in bulk. Modern production factories with high-technological equipment should be built in various African countries to help garment producers to scale up their business and avoid outsourcing manufacturing to companies outside the continent. Garment manufacturing industrial parks or clusters that offer shared infrastructure, such as factories, utilities, and logistics facilities, can attract investment, promote economies of scale, and encourage collaboration. Ethiopia, Kenya, Lesotho, and Mauritius have taken the lead as top garment and apparel manufacturing countries in Africa and may leverage this existing comparative advantage.[10]

■ Facilitate the sourcing of adequate haberdashery

Products such as zips, buttons, thread, measuring tapes, needles, and pins are often, if not always, sourced from outside the continent. The majority of those on the African market are of inferior quality, making the quality ones expensive. The ten global exporting countries of apparel and garments, such as Bangladesh, China, Germany, Turkey, and the United States of America have each specialized some aspects of the value chain and serve as global drivers.[11] In order to facilitate the sourcing of quality haberdashery, small and medium scale garment producers in Africa can make grouped textile and haberdashery orders to reduce costs.

■ Improve or develop logistics and export infrastructure

A dynamic garment sector requires reliable transportation networks, including roads, ports, and airports, to facilitate the movement of raw materials and finished products. Export processing zones with regulatory incentives, tax breaks, and simplified procedures can be designated to attract foreign direct investment and promote garment exports.

■ Optimize existing infrastructure for local production

Countries like Madagascar, Mauritius, and Tunisia, which have the infrastructure for outsource manufacturing for large European brands, can leverage this advantage to support the manufacturing of local or African-produced ready-made garments. This will address the challenge of supply for African countries that have small production units and would like to take advantage of the continental market available through Regional Economic Communities (RECs) and AfCFTA.

SKILLS/EDUCATION

■ Establish technical and vocational training programmes

Develop vocational training programmes that equip individuals with practical skills required in the garment sector, including pattern making, sewing, quality control, and machinery operation. Ensure that accredited educational institutions have access to modern garment production technologies and machinery.

■ Provide digital and technological training

Provide training in digital technologies, such as computer-aided design (CAD), 3D printing, and advanced manufacturing techniques. This prepares individuals for the evolving technological landscape of the garment sector.

■ Strengthen e-commerce know-how

Garment production companies can register for training on e-commerce sales, including practicalities such as taking attractive photos. In addition, they should work with industry stakeholders who address the challenges associated with payment and shipping logistics to be able to expand their market reach.

HIGH FASHION

The overall luxury goods market is estimated to have generated nearly 6 billion dollars in revenues in Africa in 2022, a number that has been growing year on year. A fi th of this income is fueled by high fashion, a market that is expected to grow annually by 0.79% from 2023-2028. Unlike consumers in other countries who turn to foreign luxury brands when their incomes rise, African consumers are more inclined to buy high-end fashion from African designers thanks to a proud heritage that makes African clothing highly valued and to local brands that are catering to consumers' specifi values, identities, and needs.[12] In order to support the development of the high fashion sector, governments may want to undertake the following actions:

ENABLING REGULATORY ENVIRONMENT

- **Promote the mobility of high fashion designers**

Through travel grants and simplified visa procedures, governments can facilitate the participation of African high fashion designers in international fashion events, trade fairs, and exhibitions to showcase African designs at a continental and global scale.

- **Establish preferential treatment measures to support the trade of African high fashion products**

African governments can reduce or limit import tariffs for fashion brands that use traditional African textiles produced on the continent, especially within the framework of the AfCFTA. They can also negotiate trade policies that reduce export barriers and tariffs for domestic luxury fashion products.

- **Optimize resources across the ecosystem**

Designers can utilise the existing manufacturing skills and infrastructure in-country, as well as the distribution logistics that large-scale garment production companies have, to enable high fashion SMEs to enjoy similar economies of scale.

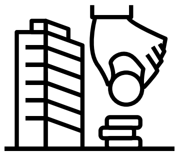
- **Establish international collaborations**

Governments can facilitate the development of partnerships between the domestic high fashion sector and international luxury fashion brands, industry associations, and fashion experts.

- **Develop and enforce stronger and more efficient intellectual property laws to protect original fashion designs and brands**

Governments can introduce regulations that facilitate the registration and enforcement of fashion design patents, as well as the registration of brands.

INVESTMENT AND INFRASTRUCTURE



■ Support the development of fashion weeks, fairs, and trade shows

Fashion weeks, exhibitions, and other fashion events are avenues for showcasing talent and creativity, projecting African excellence and attracting fashion stakeholders across the globe. Government and private investors should partner with the organizers of these events to promote African high fashion and boost the entire fashion ecosystem. It has been observed that countries with structured fashion events, such as Nigeria, Morocco, and South Africa, have better developed fashion ecosystems. Lagos Fashion Week in Nigeria brings together not just fashion designers, but other professionals related to the fashion ecosystem, such as modelling agencies, photographers, stylists, influencers, reporters, and garment manufacturers. It also makes room for masterclasses for young designers, as well as discussions on business models and strategies. The goal of each organized event is to build on the quality of the Nigerian fashion sector.[13] The various fashion events in the different subregions should be synchronized with each other and dates well chosen to ensure no overlapping, especially the major ones.

■ Develop sustainable and long-term financing opportunities for high fashion MSMEs and SMEs, with targeted support for women and youth

Creating dedicated funds or grant programmes specifically aimed at supporting emerging designers, fashion startups, and established fashion businesses can provide vital financial support for design, production, marketing, and expansion. Emerging high fashion designers and brands can be supported by ensuring access to low-interest loans or establishing microfinance programmes that target small-scale fashion entrepreneurs, especially in rural and underserved areas, providing them with the necessary capital to start or expand their businesses.

■ Support the development of retail outlets

There has emerged an exclusive sales strategy for luxury fashion goods in Africa termed “concept stores.” The idea is to bring together, in one space, African-produced luxury fashion goods and offer consumers a better shopping experience. Fashion concept stores are intentional, with every aspect of the shopping experience, reaching beyond clothes to include products and services that cater to select lifestyles. They juxtapose global influence with local themes and consider the need for sustainable practices.[14] Such shops, like Bold in Africa in Kampala, Uganda, stock brands from designers from 11 countries in Africa can be replicated across the continent. In 2020, five of the top 25 listed retailers in Africa were headquartered in South Africa. Egypt, Morocco, and Nigeria also offer robust luxury potential.[15]

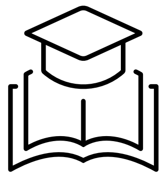
■ Strengthen e-commerce

Digital infrastructure, including e-commerce platforms, online marketplaces, and digital marketing tools, should be developed to help high fashion businesses reach broader audiences.

■ Effective logistical systems

It is imperative that policies also target building effective courier systems that link the countries on the continent and outside the continent. The cross-border trade of high fashion goods will benefit from AfCFTA’s prospect of building trade routes supported by well-laid transportation systems linking the different subregions of the continent.

SKILLS/EDUCATION



■ Establish accredited fashion schools and institutes, and encourage the development of specialized fashion education programmes

Institutions should provide comprehensive professional training in various aspects of the high fashion industry through comprehensive curricula, including areas such as fashion technology, quality control, business and entrepreneurship, trade law, and copyright. At least one institution should offer state-of-the-art facilities, experienced faculty, and exposure to standard industry practices.

■ Provide financial support for fashion education

Scholarships and grants should be available for talented individuals with limited financial means, enabling them to pursue fashion education and training. When government resources are limited, establishing partnerships with private enterprises that can sponsor the training of talented students may be considered.

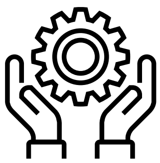
■ Integrate creative entrepreneurship in curricula

To stimulate the sustainable growth of the high fashion sector, countries where it is in its infancy may want to invest in creating training programmes with specializations in fashion entrepreneurship, management, buying, and styling. These programmes should also equip young designers with marketing and business skills, and offer networking opportunities and internships to help them grow their career.

ACCESSORIES AND FINE CRAFTS

In order to support the development of this component of the fashion sector, countries could consider undertaking the following actions:

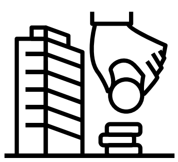
ENABLING REGULATORY ENVIRONMENT



- **Develop geographic indication labels or quality standards and certifications**

African countries whose fine crafts are made from materials such as beads, raffia, cowries, metals, leather, and wood and have not been protected under geographic indication labels or community-based intellectual property, should draw lessons from pioneering countries that have taken first steps in this direction. Such protections and recognitions can unlock public and private investments and lead to the implementation of safeguarding measures.

INVESTMENT AND INFRASTRUCTURE



- **Invest in infrastructures suitable for the production and conservation of high-end creations**

A more streamlined investment in fine craft production would entail improving every aspect of the value chain, especially the local production of raw materials, such as metals, stones, leather, and feathers. Local production and sourcing gives countries control over the value chain and ensures local embeddedness of production that adds value to the local economy. Inspiration can be taken from Thailand, which developed its jewellery manufacturing over the past 25 years in order to attract a large proportion of fine and high jewellery manufacturing companies. Thailand's investment in quality material, technologies, and training, while providing attractive prices and scalability opportunities, has proved very effective.

- **Establish a pan-African or continental network platform for fine crafts**

In order to achieve integrated, cross-regional excellence in accessories and fine craft production, there is the need for an overarching regional network for artisan production or hand made products on the continent. Similarly, countries may wish to set up an advisory council that sets standards, advises professionals on their entrepreneurial journeys, and establishes centres of creative excellence.

SKILLS/EDUCATION

▪ Upscale training opportunities, notably by merging traditional know-how and modern techniques in fine crafts

The use of beads, raffia, cowries, metals, leather, wood, and other local materials to make neck, leg, and hand pieces, as well as bags and footwear, are prestigious crafts in African societies. There are higher educational institutions such as the Durban University of Technology, Department of Fine Art and Jewellery Design in South Africa that have institutionalized fine crafts education, but training in the sector remains largely informal through the apprenticeship system. Efforts should be directed towards improving programmes in TVET (technical and vocational education and training) especially for leather accessories, which have huge potential in many African countries. The training in crafts has two dimensions: artistic and technical training. The formal training system should acknowledge and integrate the multitude of know-how and traditional practices that exist throughout the African continent representing real assets and giving an invaluable identity to its fine crafts sector. The better identification of this knowledge and its protection would reinforce the sector on the international scene.

▪ Build stronger bridges between the accessories and fine crafts sector and the rest of the fashion sector in order to create new opportunities for craftsmen and artists

Fashion accessories are integral to traditional African dressing. Accessories and fine crafts are particularly essential to high fashion, which gives great importance to traditional know-how and high-standard techniques. The *Africa Fashion* exhibition held at the Victoria and Albert Museum in 2022-2023, demonstrates how African designers have been able to fuse fine crafts with fashion in innovative ways.[16] To build on this trend, it would be important to encourage fashion designers to use local know-how through incentive measures, quality labels, and more spaces for professional encounters such as trade shows. Non-physical platforms and spaces that exhibit and showcase clothing, such as fashion weeks, could partner with fine craft producers and make them an integral part of African fashion shows. The focus of fashion celebrations should expand to include works of jewellers, shoemakers, bag makers and other fashion accessory producers.

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11. www.fib e2fashion.com. "Top 10 Exporting Countries of Textile and Apparel Industry." *Fibre2Fashion, www.fibre2fashion.com/industry-article/8471/top-10-exporting-countries-of-textile-and-apparel-industry*

12. "Africa's Emerging Fashion Industry." *Toppan Digital Language,* 29 Sept. 2016. *https://toppandigital.com/translation-blog/africas-emerging-fashion-industry/*

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Annex

Regional overviews

CENTRAL AFRICA

THE REGION IN NUMBERS		
	Exports of textiles, clothing and footwear, US$	**Imports** of textiles, clothing and footwear, US$
Burundi (2020)	1,280,720	48,681,750
Cameroon (2018)*	215,224,850	198,158,270
Central African Republic (2018)	1,414,510	11,760,690
Chad	n.a.	n.a.
Congo (2020)	759,050	44,230,140
Democratic Rep. of the Congo (2020)	4,656,940	226,527,880
Equatorial Guinea	n.a.	n.a.
Gabon	n.a.	n.a.
Sao Tome and Principe (2020)	8,510	4,695,250

Source: World Bank World Integrated Trade Statistics Database

** NB: the definition of textiles in the source database includes uncarded cotton and cotton thread. The bulk of textiles, clothing and footwear exports for the starred countries consists in exports of such cotton.*

Burundi

Cameroon

Central African Republic

Chad

Congo

Democratic Republic of the Congo

Equatorial Guinea

Gabon

Sao Tome and Principe

The fashion industry in Central Africa finds itself t a crucial juncture, yearning for more structured and comprehensive support to unlock its vast potential. Notably, cotton-producing nations like Burundi, Cameroon, and Chad have taken important steps to breathe new life into their textile production sectors. In recent years, Burundi and Chad have successfully reintroduced locally made wax prints, a testament to the region's creativity and unique textile heritage. Meanwhile, Cameroon is poised to further bolster its fashion landscape by including a textile and fashion school within the industrial park under construction in the bustling port town of Kribi.

The palpable undercurrent of creativity within Central Africa, particularly in countries like the Democratic Republic of the Congo and Cameroon, hints at an immense potential that awaits harnessing. Designers showcasing their works at the Kinshasa Fashion Week are gaining international recognition for their unique and avant-garde creations, drawing inspiration from Congolese traditions and contemporary global trends. There is also a significant appetite fo traditional clothing forms and fabric. Every year, on 8 March, women fill the st eets of Equatorial Guinea wearing el popó de la mujer, colourful dresses cut from officia cloth produced specifically for th celebration.

However, the regulatory frameworks currently in place in the region remains generally fragmented and are characterized by sporadic and isolated initiatives, often driven by non-governmental actors. This fragmented landscape has led to a situation where many of the region's prominent fashion designers have been compelled to operate from outside the region due to limited local resources and opportunities.

MAJOR FASHION EVENTS

- Cameroon Fashion Week (Yaoundé)
- Forum of Fashion and Design Professions (Yaoundé)
- Kinshasa Fashion Week
- Liputa Fashion Show (Goma)

Additionally, while regional designers are enthusiastic about promoting heritage textiles, their efforts face substantial hurdles in the form of low productivity and a lack of adequate training opportunities for the next generation of artisans. This challenge is particularly pronounced in the case of raffia fabrics, which a e prevalent throughout the region, and which can require years of apprenticeship and training to achieve elaborate patterns and textures. Furthermore, Cameroon harbours significant untapped potential in its leather products sector, waiting to be explored.

One of the primary impediments to policy development in the Central African fashion sector is the significant ack of targeted data and comprehensive studies. The dearth of such information hampers effective policymaking and strategic planning, posing a critical obstacle to the industry's growth. While industry insiders have not highlighted prominent gender barriers in the sector, the limited availability of data on this aspect within Central Africa underscores the need for a more inclusive approach to ensure that the fashion sector in the region can truly thrive and embrace its potential as a dynamic and diverse industry.

SNAPSHOT

Cameroon

Textiles, clothing, and leather GDP in 2019:

US$519 million[1]

Number of permanent employees in textile industry formal enterprises in 2018:

1,767 of whom **22% are women**[1]

1. Cameroon, Ministry of Mines, Industry and Technological Development. "Statistical Yearbook of the Mining, Industry and Technological Development Sector." *MINMDT*, 2020, *www.minmidt.cm/wp-content/uploads/2022/05/Annuaire-statistique-en-EN_final-09.11.2021.pdf.*

EASTERN AFRICA

- Comoros
- Djibouti
- Eritrea
- Ethiopia
- Kenya
- Madagascar
- Mauritius
- Rwanda
- Seychelles
- Somalia
- South Sudan
- Sudan
- Uganda
- United Republic of Tanzania

THE REGION IN NUMBERS

	Exports of textiles, clothing and footwear, US$	**Imports** of textiles, clothing and footwear, US$
Comoros (2020)	68,490	5,514,020
Djibouti	n.a.	n.a.
Eritrea	n.a.	n.a.
Ethiopia (2020)	164,171,740	764,633,920
Kenya (2020)	457,860,590	829,685,720
Madagascar (2020)	426,704,880	509,188,450
Mauritius (2020)	518,685,630	308,282,170
Rwanda (2019)	32,211,040	161,244,720
Seychelles (2020)	336,440	22,837,570
Somalia	n.a	n.a.
South Sudan	n.a.	n.a.
Sudan (2018)	158,860,960	520,938,650
Uganda (2020)	68,358,910	384,233,070
United Rep. of Tanzania (2020)	238,759,820	366,920,430

Source: World Bank World Integrated Trade Statistics Database

Eastern Africa is a contrasted region; it is home both to historic and strongly emerging global garment producers as to countries with stagnant or declining fashion sectors. Mauritius was the fi st African country to successfully integrate its garment production into global value chains from the 1980s; Madagascar soon after followed suit. Today, the emergence of Ethiopia and Kenya, has led to the speculation of whether the region may become the next hub for global garment outsourcing. Many of the region's countries grow cotton (Ethiopia, Kenya, South Sudan, Sudan, United Republic of Tanzania and Uganda) and efforts are underway in many of these countries to increase processing of raw cotton into textiles, as well as to increase cotton cultivation in line with textile production ambitions.

In the drive for industrialization of the textile and garments sector, small-scale artisanal manufacturing sometimes lacks policy attention and is insufficiently inte rated with larger scale production. Nonetheless, handwoven fabrics remain quite strongly relevant in Ethiopia and Eritrea, while in Uganda there is a revived, but still small, interest in revitalizing bark cloth fabric. Industrial production of textiles such as wax prints (kitenge), kangas and kikoys is quite strong in the region, although industry insiders note that the quality is not always optimal for clothing design. Production of designer leather accessories is fast growing in Ethiopia and Kenya, while South Sudan shows nascent signs of a leather sector with the brand Mayo Leather releasing the fi st made-in-South-Sudan leather collection in 2022.

MAJOR FASHION EVENTS

- Africa Sourcing and Fashion Week (Addis Ababa)
- East Africa Textile and Leather Week (Nairobi)
- Hub of Africa Addis Fashion Week
- Rwanda Fashion Week (Kigali)
- Swahili Fashion Week (Dar es Salam)

The region has many high-profile fashion designers with a concentration of these emerging from three countries – Ethiopia, Kenya and Rwanda. Somalia, for its part, has several emerging designers in the diaspora, catering particularly to a taste for modest women's fashion.

Industry insiders interviewed from the region did not mention any strong gender barriers in the sector, and the perception is that generally there is a strong participation of women within the sector. Figures for formal sector employment in textiles and clothing manufacturing in Kenya, show however low levels of women's employment. ILO data for Ethiopia shows that 80% of garment workers are women, but they are often constrained to the lower responsibility tasks.

SNAPSHOT

Kenya

Employment in textile, clothing and leather sectors in 2018: **78,252** of whom **15% are women**[1]

•

Manufacturing production value of textile, clothing and leather sectors in 2018: **US$667 million**, of which **50%** from clothing **27%** from textiles **22%** from leather articles[1]

•

Kenya imported second-hand clothing worth **US$173 million** 2021 corresponding to **183,500 tonnes**[2]

1. Kenya, National Bureau of Statistics. *Census of Industrial Production and Construction Report 2018*. KNBStats, 2019.

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NORTHERN AFRICA

- **Algeria**
- **Egypt**
- **Libya**
- **Mauritania**
- **Morocco**
- **Tunisia**

THE REGION IN NUMBERS

	Exports of textiles, clothing and footwear, US$	**Imports** of textiles, clothing and footwear, US$
Algeria (2017)	4,113,010	1,378,597,970
Egypt (2020)	2,812,683,140	3,266,145,430
Libya (2018)	4,062,770	786,016,750
Mauritania (2020)	841,650	52,491,170
Morocco (2020)	3,277,392,900	3,356,244,150
Tunisia (2019)	3,079,460,840	2,287,868,310

Source: World Bank World Integrated Trade Statistics Database

Northern Africa hosts some of Africa's most dynamic industrial textile and mass garment producing countries: Egypt, Morocco and Tunisia. The textile and garments sectors of these countries are strongly integrated into global fashion value chains, with many international fashion brands sourcing their production from them. Local firms ave also been able to develop fashion brands and in this realm Morocco's policy environment appears particularly supportive: many local Moroccan brands have grown over the years and some have flourished and ex anded globally. For example, Diamantine has over 130 stores around the world in France, Netherlands, Canada, Côte d'Ivoire, Saudi Arabia, Qatar, Kuwait, Bahrain, Oman, Lebanon and more with an offering that includes garments linked to the region's heritage, such as gandouras and djellabas.[1] High fashion designers in Morocco are also appreciative of the policy environment, whereas industry insiders in Tunisia and Egypt remark that local creativity sometimes struggles to find its p ace in their respective fashion ecosystems. A robust education and training system for textiles and clothing has helped consolidate fashion sector developments in the three countries, despite insiders noting room for improvement in teaching of business aspects and technological developments.

The enabling environment in Northern Africa's other countries is much less favourable, with interviews in Algeria and Libya indicating a notable decline of their sectors compared to decades ago.

Policy attention is not yet forthcoming to the fashion sector in Mauritania, but the country boasts a vibrant production of jewellery accessories and leather products.

Overall, heritage finds st ongest expression in the region's contemporary fashion mainly through accessories, notably leather accessories, jewellery and home accessories. Heritage textiles and modes of dress, sometimes protected under national or UNESCO heritage lists, remain present but are often now the reserve of ceremonial wear.

Second-hand clothing imports are more limited in the region than elsewhere in Africa. However, it could not be ascertained for this report whether this was due to policies that limited such imports or due to other factors.

MAJOR FASHION EVENTS

- Casablanca Fashion Week
- Egypt Fashion Week (launched in 2023)
- Marrakesh Fashion Week
- Morocco Yarn and Fabric Sourcing Show (Casablanca)
- Tunis Fashion Week

Gender barriers are a constraint for women in some countries, due to low acceptance of work outside the home; whereas male designers may face challenges working in women's fashion and need to call on female interlocutors to facilitate interactions. In addition, most industrial production is organized by male-led businesses.

With large industrial textile and garment sectors, particularly in Egypt, Morocco, and Tunisia, negative environmental impacts of fashion production are both a reality and a concern that industry players are striving to address.

SNAPSHOT

Egypt

Employment in textiles, clothing, leather and footwear sectors in 2017:
644,500 of whom **26% are women**[2]

Morocco

Employment in textiles, clothing, leather and footwear sectors in 2020:
417,000 of whom **45% are women**[3]

Tunisia

Employment in textiles, clothing, leather and footwear sectors in 2023:
183,000 of which **91%** in totally exporting enterprises[4]

1. Diamantine. *https://uk.diamantine.com/en-it*

2. Egypt, Central Agency for Public Mobilization and Statistics (CAPMAS). "The Results of the Fifth Economic Census 2017-2018 for Egypt by Economic Activity and Governorates." *Egypt Statistics,* 2018, *https://censusinfo.capmas.gov.eg/Metadata-en-v4.2/index.php/catalog/405.*

3. Morocco, Haut Commissariat au Plan. "Annuaire Statistique Du Maroc 2021." *Haut Commissariat au Plan*, 2021, *www.hcp.ma/downloads/?tag=Annuaires+statistiques+du+Maroc.*

4. Tunisia, Agency for the Promotion of Industry and Innovation. "Tunisian Industry Portal." *Agency for the Promotion of Industry and Innovation*, *www.tunisieindustrie.nat.tn/en/tissu.asp.*

SOUTHERN AFRICA

THE REGION IN NUMBERS	**Exports** of textiles, clothing and footwear, US$	**Imports** of textiles, clothing and footwear, US$
Angola (2019)	8,664,950	407,947,080
Botswana (2020)	15,393,000	135,758,610
Eswatini (2020)	199,632,290	165,194,290
Lesotho (2020)	461,061,070	289,594,500
Malawi (2020)	10,902,460	145,767,120
Mozambique (2020)	69,961,130	229,864,310
Namibia (2020)	5,187,340	194,411,410
South Africa (2020)	1,254,604,070	3,899,560,990
Zambia (2020)	25,173,880	205,389,440
Zimbabwe (2020)	44,098,350	114,307,450

Source: World Bank World Integrated Trade Statistics Database

Angola
Botswana
Eswatini
Lesotho
Malawi
Mozambique
Namibia
South Africa
Zambia
Zimbabwe

Southern Africa's most populated countries, Angola, Mozambique and South Africa, may have the region's most dynamic fashion sectors, but many of its countries have also long been active in global fashion value chains as garment outsourcers, notably Eswatini (the only country in the region to register a trade surplus) and Lesotho. Malawi and Zimbabwe in the past had significant   arment outsourcing sectors, and efforts are underway to revive these. South Africa, for its part, has strong mass garment and footwear production relative to other countries, and outsources production to some of its neighbours, as well as exporting mass garments to various African countries. From the domestic viewpoint however, South Africa's industrial output has seen a significant decline foll wed by stagnation in the past decade. South Africa's policy on local content is part of efforts to boost use of local textiles and other inputs in its garment manufacturing and retailing sector.

In terms of textile fib es, South Africa, in addition to cotton, produces significant   mounts of wool and mohair; while both South Africa and Namibia also produce silk fabrics.

Most of the other countries in the region have a modest industrial textile production base, and many textiles associated with local aesthetics (SiSweshwe, letoitse, odelela, chitenge) are, at least, partially produced domestically.

Zambia is also supporting handwoven textile production. South Africa is a major player in leather accessories both for the mass market as for the high-fashion design sectors, while there are emerging leather accessories sectors in Botswana and Zambia.

Many high-profile designe s have emerged from South Africa, which also has one of Africa's strongest fashion training ecosystems. High fashion designers are also emerging from Angola and Mozambique whose fashion weeks are commanding increasing international attention.

MAJOR FASHION EVENTS

- Angola Fashion Week (Luanda)
- Design Indaba (Cape Town)
- Mozambique Fashion Week (Maputo)
- SA Fashion Week (Johannesburg)

In the region's smaller countries, while fashion is not yet a major focus for policy, there is a small but upward trend in the supportive environment. All countries in the region organise at least one fashion week each year, and many have more than one such event annually. Namibia has an active Fashion Council that recently released a study on the sector. South Africa's Department of Trade, Industry and Competition has also commissioned a study specifically on the econo y of the designer fashion sector. However, policymaking and advocacy is hampered in many countries in the region, including in South Africa, by the lack of visibility of the textiles, clothing and footwear sectors in publicly released statistics.

Industry insiders do not perceive any specific ba riers against women's participation in the sector, and in some countries, support initiatives tend to be targeted at women as fashion has traditionally been viewed as a feminine sector. This perception of the sector, which may make entry for men more difficul , is but increasingly being challenged. The leather sector tends to attract greater male participation.

SNAPSHOT

Lesotho

Textiles, clothing, shoes and leather GDP in 2021:

US$358 million[1]

Namibia

Textiles, clothing and leather GDP in 2021:

US$60 million[2]

1. Lesotho, National Bureau of Statistics. "Annual National Accounts of Lesotho 2021." *Lesotho Ministry of Development and Planning*, 2022.

2. Namibia, Statistics Agency. "Annual National Accounts 2021." *Namibia Statistic Agency*, 2021, https://nsa.nsa.org.na/wp-content/uploads/2022/08/Annual-National-Accounts-2021.pdf.

WESTERN AFRICA

Benin
Burkina Faso
Cabo Verde
Côte d'Ivoire
Gambia
Ghana
Guinea
Guinea-Bissau
Liberia
Mali
Niger
Nigeria
Senegal
Sierra Leone
Togo

THE REGION IN NUMBERS

	Exports of textiles, clothing and footwear, US$	**Imports** of textiles, clothing and footwear, US$
Benin (2020)*	475,217,680	98,413,260
Burkina Faso (2020)*	267,431,230	95,900,810
Cabo Verde (2020)	6,654,170	24,101,370
Côte d'Ivoire (2019)*	486,007,720	246,944,500
Gambia (2020)	1,445,020	15,154,360
Ghana (2019)	160,465,270	293,924,610
Guinea (2016)	7,435,280	79,441,010
Guinea-Bissau	n.a	n.a.
Liberia	n.a	n.a.
Mali (2019)*	426,156,210	124,600,140
Niger (2020)	8,495,410	82,639,920
Nigeria (2020)	21,849,370	1,033,716,910
Senegal (2020)	126,060,150	199,708,420
Sierra Leone (2018)	368,320	31,012,630
Togo (2020)*	132,701,720	199,981,640

Source: World Bank World Integrated Trade Statistics Database.

** NB: the definition of textiles in the source database includes uncarded cotton and cotton thread. The bulk of textiles, clothing and footwear exports for the starred countries consists in exports of such cotton.*

Western Africa is home to some of the continent's most creative high fashion activity; many high-profile designers have emerged in recent decades, particularly from Ghana, Nigeria and Senegal, despite the region largely lacking a supportive industrial production base to supply its industry with quality and cost-effective textiles. Heritage-based textiles and textiles with aesthetics associated with Africa maintain a particularly strong presence both in everyday and ceremonial wear in almost all countries of the region. Countries like Burkina Faso, Côte d'Ivoire and Ghana have policies in place to promote specifically consumption of handwoven heritage textiles. However more structured support for artisanal textile training and production capacity remains to be implemented on a large-scale. Côte d'Ivoire and Ghana produce wax-prints that sell well in the region despite stiff competition from cheaper wax print imports. However overall, industrial textile production remains the Achilles heel of the region's fashion sector. With the region hosting some of Africa's biggest cotton producers (Benin, Burkina Faso, Côte d'Ivoire and Mali) the potential benefits to be reaped from increased textile production are enormous.

Garment production is vibrant and creative, but a very high proportion of such production consists of bespoke tailoring and small-scale production. Investment to enable upscaling of garment production is one of the most frequent needs expressed by industry players in the region.

MAJOR FASHION EVENTS

- Arise Fashion Week (Lagos)
- Dakar Fashion Week
- Glitz Africa Fashion Week (Accra)
- International African Textiles Fair – SITA (Lomé)
- International Festival of African Fashion – FIMA (launched in Niamey, some editions take place in other African countries)
- Lagos Fashion Week

The large quantities of second-hand clothing imports present in the region also impede the profitability f garment producers, and in countries like Ghana, such imports have reached unmanageable levels and are creating significant envi onmental hazards. In the accessories sector, luxury handbag production and semi-artisanal shoe production has shown particularly dynamism in recent years.

An uneven training and education ecosystem supports the emergence of the fashion sector. Countries like Ghana and Nigeria boast around 100 fashion training institutions (although many do not offer curricula well-geared to current technical and business needs of the sector); whereas other countries have very sparse offering of professional fashion training.

Industry insiders do not perceive any specific gender ba riers, noting that as the potential of the sector becomes clear, stereotypes against men's involvement in fashion are fading away.

SNAPSHOT

Senegal

Textiles, clothing and leather GDP in 2021:
US$560 million[1]

And is composed of:
Production of ginned cotton **1%**
Spinning, weaving and finishing **28%**
Confection of clothing **66%**
Leather articles **4%**

Senegalese household spending on clothing and footwear in 2021:
US$858 million[1]

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The AFRICAN FASHION Sector

Trends, Challenges & Opportunities for Growth

The contemporary African fashion sector is a hothouse of remarkable talent and brims with potential, with established and emerging creators and designers combining traditional know-how with innovation and creativity to create products that run the gamut between exquisite high fashion and mass-produced affordable garments and accessories. Thanks to their unique heritage, unreplicable technical skills, and distinctive creative vision, contemporary African fashion designers connect the dots between the past and present, tapping into their cultural roots to create clothes and accessories that help to shape ever-renewed visual narratives about the identity and aspirations of the continent.

This UNESCO publication on the African fashion sector gives a snapshot of the trends shaping the sector, the challenges hindering its growth, and its opportunities for growth. As a tool for reflection and action, it is an open invitation to African policymakers and fashion sector professionals to come together for further dialogue and for reinforced and concerted action in favour of the fashion sector.

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