

**Midlands**

**State**

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**Faculty of Social Sciences**

**An analysis of cheap clothing imports as a challenge affecting the revival of textile and clothing manufacturing sector: A case study of Zimbabwe (2000-2014).**

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**DISSERTATION SUBMITTED TO THE FACULTY OF SOCIAL SCIENCES IN PARTIAL FULLFILMENT OF THE REQUIREMENTS OF THE BACHELOR OF SCIENCE IN POLITICS AND PUBLIC MANAGEMENT AT MIDLANDS STATE UNIVERSITY.**

**OCTOBER 2015**

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## APPROVAL FORM

The undersigned certify that they have supervised the student **Learnmore Majoni r121627x** dissertation entitled: **An analysis of cheap clothing imports as a challenge affecting the revival of textile and clothing sector: A case study of Zimbabwe (2000-2014)** submitted in partial fulfilment of the requirements of the Bachelor of Science in Politics and Public Management Honours Degree at Midlands State University.

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## DECLARATION

I Learnmore Majoni, Registration Number R121627x do hereby declare that this entire research is a product of my own work. It is being submitted in partial fulfilment of the requirements for Honours Degree in Politics and Public Management, in the Faculty of Social Sciences at Midlands State University.

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## **DEDICATIONS**

Special dedications are granted to government officials, all the industrialists, and employees in the textile and clothing manufacturing sector. I would also like to dedicate this work to Majoni family, all my brothers and sisters, my father and mother for their encouragement and support which brought me to this end.

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## **ACRONYMS AND ABBREVIATIONS**

BCGA	British Cotton Growing Association
GDP	Gross Domestic Product
IMF	International Monetary Funds
LEDCs	Least Economically Developed Countries
SAPs	Structural Adjustment Programme
ZCMA	Zimbabwe Clothing Manufacturers Association
ZESA	Zimbabwe Electricity Supply Authority
Zim-Asset	Zimbabwe Agenda for Sustainable Socio-Economic Transformation
Zim-Trade	Zimbabwe Trade
ZITMA	Zimbabwe Textile Manufacturers Association

## ABSTRACT

Zimbabwe's clothing and textile sector has been facing a serious challenge from cheap imported clothing as well as second-hand used clothing and there has been no serious concern about this problem from policy makers. The research is titled an analysis of cheap clothing imports as a challenge affecting the revival of the textile and clothing sector. In this regard the research appraised the negative impact that cheap imported clothing and textiles is posing to the local textile and clothing producers. Revival and retooling of clothing and textile sector has been a serious issue of concern in Zimbabwe however, it is failing to materialise. In essence the primary objective of this research is to understand how cheap imports have hindered the revival of Zimbabwe textile and clothing sector, as well as apprehending the factors that has contributed to its downfall, based on the perceptions of stakeholders and representative. Instead of recovering the clothing and textile sector continue to downsize and shrink, therefore, economic benefits such as national employment, value addition, foreign exchange earnings and Gross Domestic Product remain a white elephant to the economy of Zimbabwe. The methodology of the research is largely qualitative and quantitative as the problem understudy requires in depth information on both statistics of the sector, the effect and impact of cheap clothing imports towards the revival of clothing and textile sector in Zimbabwe. The research has been built upon endogenous theory which denotes the modelled simultaneous relationship between imports and protection, high levels of imports intensifies protection. The research concluded that cheap imported clothing imports is the major problem towards revival of clothing and textile sector, as it imposes unfair market competition. However, some factors such as debt, inconsistent government policies and unavailability of working capital also affects the revival of the sector. The research recommended that there should a total ban on trade of imported clothing as well as second-hand clothing; the government should tighten its borders to ensure that there is no smuggling of such products.



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## **1.0 CHAPTER ONE**

### **1.1 Introduction**

The purpose of this chapter is to give an insight and an introductory account of the problem under study. The chapter further provides a background which explains the history of the problem under study. The chapter contains justification of the study, and statement of the problem. In addition, aims of the research are outlined in this chapter in form of research questions, research objectives and sub-objectives. Limitations and delimitations of the study are also incorporated in this chapter.

Zimbabwe experienced a serious deteriorating economic and social environment since 2000. This scenario was characterized by a hyperinflationary environment and low industrial capacity utilization, closure of various manufacturing sectors, leading to decline in Gross Domestic Product (GDP). The textile and clothing manufacturing sector has been affected by such challenges and is still on the brink of collapse, and features a series of revival failure to maximize capacity utilization.

Zimbabwe's textile and clothing sectors have tripartite components which are: cotton production and netting, lint transformation into fabric and yarn, and processing of garments. The textile and clothing sector has a crucial role to the economy of Zimbabwe as a sub manufacturing sector. Textile and clothing manufacturing sector compliments the government's economic blueprint Zimbabwe Agenda for Sustainable Socio-Economic Transformation (Zim-Asset) that calls for empowerment and employment creation.

Since 1920s during its adventure textile and clothing sector has been regarded as the most important economic factor that provided a living for many people through: national employment, value addition, foreign exchange earnings and Gross Domestic Product (GDP) among others. The sector produce need commodities which one cannot survive without and these include all form of wearing that covers the human body.

Zimbabwe has been on a verge of fighting for retooling all the manufacturing sectors that are on its knees including textile and clothing sector. Textiles and clothing Manufactures Associations has cited government's negligence to implement policies and laws that strongly support the revival and growth of the sector. Zimbabwe has porous borders that fail to control smuggling of cheap finished clothing and second-hand clothing that are flooding the market. Consequently, the research is aimed on analyzing how the cheap clothing imports has affected the revival of textile and clothing manufacturing sector of Zimbabwe and how best the sector can be rejuvenated to its full capacity utilization.

## **1.2 Background to the Problem**

The history of clothing and textile sectors in Zimbabwe dates back to 1920s when the second rand failed to materialize in the Southern part of Limpopo in which the establishment of the sector was led by a British Cotton Growing Association (BCGA) which was a counter towards the reliance on American cotton. A Cotton research Industry Board was established and later on constructed three ginneries in Kadoma, Mlambo (2006). Ibid, from 1980 to 1989 the Zimbabwean clothing industry rapidly grew and statistics shows that 61% of the clothing manufacturers commenced their business operations.

However, from 1990 the sector was manifested by many challenges emanating from the radical policy changes from government, through the adoption of the World Bank /

International Monetary Funds (IMF), Structural Adjustment Programme (SAPs) in 1991. The liberalisation of trade, downsized tariffs and the removal of export incentive schemes, severely affected the sector. By the end of 1999 a total of over 100 clothing firms and 6 textile firms had permanently closed. The textile companies alone used to employ 30 000 workers but however the number has declined to 4 000 (The Independent June 27, 2014)

According to the Zimbabwe Clothing Manufacturing Association (2014), the clothing industry at its peak in 1996 used to employ 35 000 people however, now it has declined to 6 800 due to a challenge from influx of cheap clothing imports. The clothing companies were 495 however in 2008, a total of approximately 111 in this sector shuttered and employment declined. In January 2011 the clothing companies operating further declined to 250 and employment to 9 000 (Zimbabwe Clothing Association 2011, Mpofo 2011). This shows a continuous collapse of the sector hence the need for its revival. The industry shrunk since the year 2000 witnessing the closure of many mills and factory. Job losses were recorded, mostly due to harsh economic conditions and failure to implement factors of market success which include product, price and others, Youmans (2011).

The prevailed harsh economic environment exacerbated by hyperinflation, lack of foreign currency, poor funding and high interest rates contributed to the collapse of Zimbabwean textile and clothing sector. Between 2000 and 2008 Zimbabwe experienced a hyperinflationary period which left financial services, and business in general ailing, most businesses were crippled, while some sank and only a few managed to survive Mutopa and Ndhlovu (2012). Zimbabwe had opened an opportunity of free trade specifically to all products because the industries were unable to produce. In this sense, the major contributing factor to the demise of textile and clothing industries in Zimbabwe is second-hand and illegal imports. Government through its economic blue print Zim-Asset 2013- 2018 calls for empowering citizens and employment creation, in which importing and smuggling of cheap

second hand clothing became activity which however, is now a threat to the whole clothing industry.

A rough estimate of about 40% of the total clothing consumption in Zimbabwe is second hand clothing, coming from Malawi, Mozambique and Zambia originating from developed countries as charity. The revival of the industry is seriously facing challenges as the importation of duty free finished clothing continues, on the other hand Zimbabwe has been seen as a dumping ground for substandard , poor quality and cheap products and this has threatened the livelihood of the local manufactures World Bank (2006).

The fact that most clothing manufacturing firms are under liquidation, judicial management and some on the brink of closing shows the need for government intervention to resuscitate the sector and boost its capacity utilization and production level. However there is a serious negligence on the way forward towards rejuvenation of the clothing manufacturing sector by the policy makers due to the fact that most of the solutions are a contradictory to government policies such as empowerment and informal sector tolerance.

### **1.3 Statement of the Problem**

The research is an investigation on how cheap clothing imports are continuously affecting the revival of the Zimbabwean textile and clothing manufacturing sector despite the contribution to national employment and GDP the sector faces serious closure and had not received much attention from policy makers.

### **1.4 Justification of the Study**

The research seeks to reveal how cheap clothing imports, particularly those that are free of duty and those which are smuggled to Zimbabwe is hampering the revival of the textile and clothing sector and fills a knowledge gap on how best the clothing manufacturing sector



companies can be rejuvenated to its full capacity utilization despite being neglected by policy makers for a very long period of time.

## **1.5 Research Objectives**

The objective of this research is to assess how cheap imports have hindered the revival of Zimbabwe textile and clothing sector, as well as scrutinizing the factors that has contributed to its downfall, analyzing the policies and regulatory interventions to be adopted to revamp, particularly the textile and clothing companies.

### **1.5.1 The sub-objectives are as follows:**

1. To assess the role of imported clothing as a challenge affecting the revival of the clothing and textile industry.
2. To identify some policy changes that should be adopted to retool the failing clothing industry.
3. To show the impacts of the continual failure of the textile and clothing sector to the Zimbabwean economy.
4. To proffer solutions to the problem of cheap clothing imports, that has affected the revival, growth and development of local textiles and clothing manufacturers.

## **1.6 Research Questions**

1. How do cheap clothing imports affect the revival of the textile and clothing manufacturing sector in Zimbabwe?

2. What is causing importation of clothing on duty free as well as smuggling and why is it that Zimbabwean textile and clothing products are not competent with imported clothing both on local and international markets?
3. What factors contributed to the decline and collapse of the textile and clothing industries in Zimbabwe?
4. What policies, measures and regulatory interventions should be adopted to revive the textile and clothing industry?
5. What impact does the continual closure of textile and clothing industry have to Zimbabwean economy?

### **1.7 Limitations**

- The research was limited because of constraints in resources like time and finance. Inadequacy of these two resources confined the quality and scope of the research. Moreover, the researcher ensured that 5 interviews were done in a day, in the field administration of questionnaires and interviews were randomly done in a bid to save time.
- Misinformation, various stakeholders and shareholders doing business in the textiles and clothing sector provided inaccurate information arguing that information about influx imports effects on reviving textile and clothing industry is somewhat political basing on the empowerment and employment through informal sector that is being supported by government.
- The research was carried out at a period when there was an outcry from clothing and textile manufacturers associations calling for government's intervention in reviving the industry, therefore a lot of biased information was given in support

of clothing and textile sector's views. The research was regarded as a trap for both the textile and clothing dealers in both informal and formal sectors. Therefore, researcher changed some of incorrect views of the respondents and also persuaded them to provide necessary and valid information for the research.

- Most of the interviews and questionnaires were on targeted individuals and representatives of various textile and clothing companies such as textiles and clothing manufacturers associations, general managers and sole traders in which there was a need for appointments for interviews, hence the research took much time longer and too much resource than programmed by the researcher.

### **1.8 Delimitations**

- The frame and basis of the research only focus on textile and clothing manufacturing sector in Zimbabwe. Specifically the research is a target of ailing textiles and clothing industries that once employed 1000 employees and above, in order to show the impact of cheap imports to the clothing and textile sector through retrenchments and closure.
- The research also targeted textile and clothing traders in the informal sector which includes boutiques, second-hand clothing sole traders and individuals who earn a living through buying and selling clothing.
- The research also takes cognizance of various clothing and textile stakeholders such as Textile and Clothing Manufacturing Associations, and Portfolio Committee on Industry and Commerce since they play an oversight over this manufacturing sector.

### **1.9 Chapter Summary**

The chapter presented an introductory account of the clothing and textile sector in Zimbabwe. Moreover, it explained the historical background on the developments and origins of the textile and clothing industry. Fundamental objectives of the research, justification of study research questions, limitations and delimitations have been captured in this chapter.

## **2.0 CHAPTER TWO: LITERATURE REVIEW AND THEORITICAL FRAMEWORK**

### **2.1 Introduction**

The main thrust of this chapter is to give a review of how cheap clothing imports is hindering the revival of the textile and clothing sector specifically in Zimbabwe taking considerations of related existing literatures. The chapter also provides an overview account of the nurture of textile and clothing in Sub-Sahara. In this chapter the researcher included secondary data and views from other related researches in the same field of study to support how import from developing world has affected the revival of textile and clothing sector.

### **2.2 Definition of Key Terms**

**Imports** in general this refers to finished or semi-finished products that are manufactured in a foreign country and are being consumed by both the government, business sector, and the general populace of any other different country.

**Revival** means a restoration period of any activity that has not been active for a reasonable period of time. This is done to allow the failed or collapsing activity to be resuscitated or rejuvenated to its position and the same extent, way or manner in which it used to be operating.

**Clothing** simply understood as any form of wear that is usually put on by people as a way of covering their bodies. The examples include jeans, dresses, overalls, shirts, suits and many more.

**Manufacturing sector** according to Macmillan English dictionary this refers to a group of industries, firms or factories that are involved in physical, and or chemical processing of raw materials, unprocessed substances into finished or semi-fished consumed or usable products.

**Textiles** according to yarns and fibres.com, defined textile as any converted filament, fibre, or yarn processed to become fabric or cloth. In simpler terms textile refers to woven fabrics or cloth manufactured from artificial or natural fibres. Originally the term referred woven fabrics but now it has been broadened to encompass, knitted, bonded, felted, and tufted fabrics as well. Of omnipotence the raw materials used for textile production are fibers that come from natural sources (e.g. wool) or produced from chemical substances (e.g. nylon and polyester). The end products of textiles save for the following purposes: wearing apparel, household linens and bedding, upholstery, draperies and curtains, wall coverings, rugs and carpets. Classification of textiles is according to their components that involve fibers which include silk, wool, linen, cotton. Moreover, the other component is synthetic fiber which constitute of rayon, nylon, and polyesters, and some are from inorganic fibers, such as gold cloth, glass fiber, and asbestos cloth.

When valuing and making quality of textile the following factors are to be considered raw material, quality used, texture character of the textile i.e. smooth, fine, course, hard, or soft.

### **2.3 Nature of textile and clothing manufacturing sector in Southern Africa.**

For Muradzikwa (2001) textile and clothing manufacturing is the only sector in Southern Africa that has showcased its potential for future growth. Meanwhile, the sector had some characteristics of drowning backward and sailing forward. Southern Africa as a region constitutes all the activities that formulate the chain of textile and clothing. In essence these include, cotton farming, lint production, yarn spinning, weaving and knitting and also garment manufacturing amongst member countries of the region.

Textile and clothing sector is an intensive huge industry which directly employs an estimated 260 000 people and can contribute to around 6% towards the Southern African region's national outputs Muradzikwa (2001). Based on the post research made by Muradzikwa, the most and

well known dominants of the sector was South Africa that constituted 52% of formal employment in the regional industry. Mauritius is the second largest with 28%, followed by Zimbabwe and Malawi that contributed 7% and 4% respectively of the total employment in the formal clothing and textile (Sibanda1999). However, there are some new changes that had took place, which this research filled a gap in relation to the fall of the industry in the region.

The table below shows the distribution of the textile and clothing industries statistics in the Sub-Saharan Africa (2000).

**Table 1**

<b>No of Firms</b>	<b>Malawi</b>	<b>Mauritius</b>	<b>Zimbabwe</b>	<b>total</b>
<b>Clothing</b>	11	293	128	432
<b>Textile</b>	19	41	39	99
<b>Total</b>	30	334	167	531

**Source:** DuMhango, 2000, Jhamna, 2000, Muradzikwa, 2000

From the given above statistics, the number of firms in Mauritius and Zimbabwe have declined over the decade. In Mauritius, it has been attributed to high labour costs forcing relocation of some of larger firms to other comfortable destinations. In Zimbabwe, the industry has been affected by effects of free trade and the general economic meltdown and political upheavals. It is not clear enough to distinguish whether the post decade has been a fortune for the growth of textile and clothing in the region or has been a period for decline of the industry. In this decade other member states of the region experienced growth in the industry e.g. South Africa whilst others experienced collapse in the sector for example Zimbabwe. However, this literature is now full of outdated information some of the information date back to the period when all the economies in the region were performing. In this regard, this research is going to feel knowledge on the new era of cheap imports as a challenge affecting the revival of textile and industries in particular to Zimbabwe not the whole region as the above literature propound.

## **2.4 General causes for the collapse of Zimbabwean textile and clothing manufacturing sector.**

Before dwelling on cheap clothing imports as a challenge on reviving the textile and clothing sector the research intends to give a review from other scholars on what particularly downsized the sector. The textile and clothing industry has been affected by various factors which collaborated for its collapse. However, the literature has accounted for causes of collapse of the industry, there is now a missing link on what is now affecting or challenging the revival of the textile and clothing industry which this research has fulfilled.

Mlambo (2006) cited the loss of value of the Zimbabwe dollar since 1997 as a cause for decline of the sector. Ibid, the production in the clothing and textile industry, similar to many other firms was heavily affected due to the depreciation of the country's currency. The exchange rate for the Zimbabwean dollar had higher interest rates which affected business confidence. Exports could be taken as a resort but the prevailing economic plunge prevented firms, because of weaker currency. From 1997 onwards, the clothing and textile industry have been adopting strategies aimed at surviving rather than growth and in most cases it became preoccupied with reducing debt.

Mutopa and Ndlovu, (2012) are of the view that, for the period between 2000-2008 the collapse of the textile and clothing was caused by the macro-economic environment that existed during that time which manifested in extreme inflation, unavailability of raw materials, unavailability of utilities such as water and electricity in the industry. For the purpose of this research this has been a cause for collapse but however, the new arising problem of cheap imports affecting the resuscitation of the industry is missing therefore this research intends to fill in that existing gap.



Zim-Trade (2012) articulates that textile and clothing sector had been highly affected by the issue of financial constrains, that was not easy to access from banks, the available loans were obtained on a short-term basis and where as the interest rates were extremely high.

The duties levied on some of these raw materials (dyes, chemicals, machinery and parts) are too high there-by making the final product expensive than the imported one. This has led to preference of importing than buying from the local textile and clothing supplies.

The utilities are not always available and this has also contributed to the collapse of the textile and clothing sector as the charges on electricity, water and rates charged by ZESA and the city council were too expensive.

Much of the literature available is awash with information on how the clothing and textile sector collapsed paying a blind eye on problems that is now hindering the course of reviving and retooling the industry to its full capacity utilization.

## **2.5 Consequences of cheap clothing imports on revival of textile and clothing sector in Zimbabwe.**

ICAZ ( 2013), and Zim-Trade, (2012) reports are the closest contribution that touches on some important issues which this study aims to address. The literature gives an overview on de-industrialization of the national economy which led to closure of companies that produce secondary goods. Furthermore, reasons such as low priced imports from Far East (Asian countries) is affecting the clothing and textile market in Zimbabwe taking into considerations the high production costs in this country. Moreover, the reports articulate on the standard and unqualified of such products under the certificates of origin. Meanwhile, the literature does not provide the reasons why Zimbabwe has accepted free importation of cheap finished clothing that affected its textile and clothing industry market which this research is going to address. The research filled a knowledge gap on Zimbabwe's acceptance of the informal

sectors on its economy as a way of redressing its economic collapse which however, this informal sector brought in trade in second hands and other cheap imported clothes that is now hampering the revival of the textile and clothing industries.

The Sub-Saharan Africa has been on the record of facing collapse in textile and clothing industry. This has been attributed to the importation of used clothing to Africa, which has increased over the last decade (Frazer, 2008). In support of this the Zimbabwe Clothing Manufacturing Association (2014) report postulates that the influx of cheap imported clothing from China, and second-hand clothes (**mabhero**) that are being sold in open spaces like Mupedzanhamo in Mbare lowers demand for locally produced clothing. In this case, the revival of Zimbabwean clothing industry remains a futile exercise since there is poor local market and poor demand for the products due to pricing disparities. However, the above mentioned review has a weakness on the state and level of harm that the cheap imports and second-hand clothing caused to the textile and clothing industry which this research seeks to address.

Mutopa and Ndlovu (2012) expressed that the consumer preference of imports at the expense of Zimbabwe textile products is attributed to differences in prices. In addition, Hwengwere, (2011) explained that importers or the informal clothing trades have discovered a market principle where they attributed the buying behaviour to short term needs and low cost as a way for manipulation of the market on the expense of other competitors. The research added a new dichotomy on comparison between prices of imports and locally produced clothes and added in another factor of quality of the products as another contribution for high consumption of second hand imported clothes than locally produced.

The Mid Term Fiscal Policy Review (2015) is of the view that government should ban the importation of cheap used clothing. Zimbabwe's textile and leather industry since adoption of multicurrency has been heavily overburdened by influx of imports, especially finished second-hand clothes, shoes and leather products which forced some of them to close down. This trade in second hand and cheap clothing according to Finance and Economic Development Minister Patrick Chinamasa is accounting for collapse of the local textile manufacturing industry. Furthermore, the minister cited emergence of vending of cheap low quality and smuggled import as further choking both the local producers and retailers. The research has filled a knowledge gap on the largely affected local producers such as David White Head, Paramount Garment Works and Waverly Blankets.

Clothing and textile manufacturers associations (2014) postulates, that there is a rampant tax invasion by importers, fogging of duties by regulatory authorities as well as general culture to prefer import over local products. In addition, Trade Industrial Policy 2012-2014 support this view by holding that there is lack of adequate control of incoming goods at border posts and this is allowing a lot of imports to be brought in without any duty paid. Moreover, this affect the country in two fronts first one denying the government much needed revenue and also pose unfair market competition on locally manufactured goods. For Zimbabwe the major challenge remains the ability to control the imports of clothing and ensure that the correct duties are paid. The research filled a gap by prompting the issue of duty on importation of raw materials by local textile producers and duty on finished imported clothing by informal traders and gave an analysis on the impact and disparities between the duties.

The South Centre, (2010) research is of the view that the manufacturing sectors especially the textile and clothing of Least Developed Countries (LDCs) is fragile because of its infancy

and deindustrialization that has resulted from trade liberalization. Furthermore, the sector has been asserted as lacking supply capacity and competitiveness in both internal and international markets where there are some changes on the rules of the game. According to the South Centre, (2012) changes in global economy including trade liberalization, a shift to the new methods of production and also the rise of developing economies as major exporters of labour intensive products have increased competition pressure on the manufacturing sector of Least Developed Countries (LDCs). This has particularly affected the textile and clothing industries which accounts for over thousand of their exports of manufactured goods has suffered the consequences trade liberalization. This literature however, does not give an analysis on how the depreciating economies of the LDCs has led to imports which is generally affecting its own manufacturing sectors including the textile and clothing which this research has addressed taking Zimbabwe as a case study. In addition, the South Center (2012) research provided an overview account of global causes of failure of textile and clothing manufacturing emanating from global changes in trade and production. However, there is a missing link on failed economies of the LDCs which failed to adopt to these global changes in order for having high production level at low cost and competition competency on both local and international markets which this research has accounted for.

Youmans, (2012) postulates, that Zimbabwe's currently plunged economy does not support the growth and revival of textile and clothing manufacturing industries. Moreover, in Zimbabwe interests rates are high, which reflects shortage of funds as well as high risks on doing business. These contribute to high cost of production particularly for the manufacturing sectors that uses fixed capital and variable capital. In this regard, the research has prompted how the cost of production is promoting importing and smuggling of cheap clothing into the local market in which case have affected the revival of the industry.

The World Bank research (2006), observed that an in-deficiency of liberalization made Zimbabwean government to prohibit the import of second hand clothes in February 1993, which however are still widely available because large quantities are smuggled from Zimbabwe's neighbouring countries. The World Bank research also mentioned an estimate of 40% of all clothes sold in Zimbabwe being second hand imports. Furthermore, the report gave effects of imports to clothing and textile sector, the cheap imports exert a downward pressure on prices of new clothes, and second hand replaces new ones, creating surplus capacity which then leads to higher production costs. This research added in a missing link on the reasons for consumption of second hand imports in Zimbabwe and also brought in new perceptions of government towards the issue of second hand clothing as imports affecting the revival of clothing and textile industry.

The World Bank (1996) reviewed that a decline in textile and clothing sector would not mean the loss of thousands of jobs but it represent a severe setback for Zimbabwe to strengthen its manufacturing base making it dependent on raw materials. Moreover, Word Bank suggested and demanded a cease in uncontrolled second hand clothing which is cheap since they are collected at zero prices from developing countries. In this regard, the literature postulates that Zimbabwean government should develop a policy and regulation to avoid unfair competition in the market and protect its domestic enterprises from this murderous trade practices. However, there is a gap on what policies to be implemented and what regulations should be imposed in order to curb the problem of cheap importing of textile and clothes that are affecting the revival of textile and clothing sector which this research has intended to fill in.

Influx of cheap fabrics imported from Asian markets and smuggled second hand have been taken as a chief challenge to the clothing and textile sector. The impact of these imports and second hand clothing is on the decline of demand for locally produced clothes. In addition, Youmans (2014) propounded that importation of cheap textile products and second hand clothes that flooded the flea markets, has resulted in lowering demand for locally produced textile and clothing products. However, this literature only dwells on issues to do with effects on the local market, but the research is going to show the impact the imports on reviving the sector in terms of boosting its production level and capacity utilization.

Frazer (2001) is of the view that a general observation can reach an assumption that the relationship between cheap imported clothing would undercut local production of garments when there is a continuation of flooding the market. However, this literature is an assumption of what can happen there is no empirical research to showcase the facts. Therefore, the research will fill this knowledge gap through empirical evidence collected directly from the targeted areas.

A liberalised economy open up an entry point of second hand clothing market and the already deteriorating clothing industry was severely affected Kandiero (2002). Furthermore, garment production in countries such as Malawi, Zimbabwe and Zambia are inherently priced higher than imported second- hand clothing due to the cost of materials, labour payments, electricity and maintenance payment.

Bloch and Robertson (1996) are of the view that there is a weak intra-regional trade and investment linkages among the Southern African Region. Generally the clothing and the textile industries in SADC has been under protection through tariffs for a long-time.

However, the advent of globalization and trade liberalization has brought fierce competition through cheap imports particularly from Asia and other developing economies. Trade liberalisation has opened to an influx of low cost textile and clothing products entering into the country competing with high cost locally produced textile and clothing products. The research compliments how the influx of low cost textile and clothing products competing on the market has affected ailing clothing and textile industry of Zimbabwe.

## **2.6 Theoretical Framework**

### **2.6.1 Definition**

A theoretical framework can be defined as a collection of interrelated concepts such as theory, which guide a research by determining those things that a researcher measure and the statistical relationships that the researcher will be looking for. A theoretical framework of a research relates to the philosophical basis on which research place and forms the link between aspects and practical components of the investigation undertaken. A theoretical framework therefore, assures the readers that the type of investigation proposed is not based solely on researcher's personal instincts or guesses but rather informed by established theory and empirical facts obtained from credible studies.

Endogenous theory holds that higher levels of import penetration will lead to greater protection. Broke and Merge (1984) predicts the respond to increased import competition as an alert for intensifying lobbying activities for protection. Imports and protection are two modelled simultaneous variables which measure the impact of trade liberalization. The already existing literature has ignored this simultaneous which is a deficiency this research

attempted to be a remedy. The research observed an interrelated match between imports restrictions impact when the trade protection is modelled endogenously. In line to clothing and textile the theory can be put into practice since the importation has affected the local production therefore a remedy solution is needed and this solution is in form of protection.

The globalization of industry, according to Hatzichronoglou, (1999) holds that, there is an unprecedented increase in competition between firms in different markets, and the internationalization of production in which various elements that enter into the manufacture of a product (capital, labour, technology, raw materials, intermediate goods, distribution) may come from many sources which can boost the production. The research has brought in new implications of the theory in terms of market. The theory ignored the market flow of finished products to the third world countries which are only the receiving channel thereby being over flooded by imports and affect the production of the third world manufacturers. In line to the above the research under study closed a knowledge gap on the development, capabilities and also competency of acquiring the factors of production for developing industries such as textiles and clothing in Zimbabwe.

## **2.7 Chapter Summary**

The chapter revealed the important contributions on the already existing related literature and filled a gap existed between the literature and the research. The chapter presented the nurture of the clothing and textile in Sub-Saharan Africa, causes for collapse of Zimbabwe textile and clothing sector. Moreover, the chapter also incorporated two theories that are related to the study problem and filled a knowledge gap between the theory and actual practice.



### **3.0 CHAPTER THREE: METHODOLOGY**

#### **3.1 Introduction**

The chapter focuses on scrutinizing the methodology used in this study. The chapter presents a research design, in particular qualitative and quantitative research design. The research instruments that were used have been discussed in detail including giving the merits and demerits of each instrument used. The prior concern of this chapter is to demonstrate how this research has been conducted.

#### **3.2 Research Methodology**

Rajasekar et al (2013) defined research methodology as an organised way of dealing with a problem. Research methodology can also be deduced as a scientific approach of scrutinizing how the research is going to be carried out. In essence, research methodology encompasses how the researchers proceed and go about their works of describing, explaining and predicting phenomena. Consequently, research methodology involves the study of research methods by which knowledge is gained.

#### **3.2 Research Design**

According to Churchill (1987) research design is a tool used for data collection purposes and it works as a guideline in gathering and examining data. Basically research design has a responsibility of establishing data collection methods, research tools to be used, the way in which the research instruments is going to be used and provide systematic way of presenting, organizing and analysing obtained data. In this regard, research design can regarded as framework of a research that controls the way the research is to be conducted. The research design should master three purposes which are to plan, structure and execute the research so as to maximize the validity of research results. Methods of data collection in this research

include questionnaires and interviews and direct observations. Major role of the research design is to give certainty that the research questions goals and objectives are addressed.

### **3.3.1 Qualitative Research Design**

Creswell (2003) holds that qualitative research is characterized with the collection and analysis of textual data. Moreover, qualitative data sources include surveys, interviews, questionnaires, documents and participant observation (field work). In qualitative research there is well planning of research design to encompass all study aspects that involves research questions, sampling, data collection and analysis. Qualitative research is easier and less rigorous as compared to quantitative which require the use of numerical data. It involves its own set of data collection and analysis methods that ensure the trustworthiness of findings. More so, Creswell (2003) supported this view by articulating that this typical research design needs the researcher to be on ground thus the natural setting meaning, it allows the researcher to have direct contact with the site and organizations or institution. In this context qualitative research allows the researcher to provide a detailed description of scenes, events, interactions observed behaviours, it also encompasses direct quotations from people about their experience, attitudes beliefs and thoughts as well as experts or entire passages from documents, correspondence, records and case histories. In line, to this study the researcher had to conduct in person a questionnaire survey and interview as well as direct observations to the following: Zimbabwe Clothing and Textiles Associations, Portfolio Committee on Industry and Commerce, as well as clothing companies in Harare, the informal clothing traders (boutiques and mupedzanhamo).

The method can allow an in-depth understanding of the study for instance this research should provide an in depth on how the cheap clothing imports are hindering the revival of Zimbabwean textile and clothing sector. Knowledge gained through qualitative investigations

is more informative, richer and offers enhanced understandings compared to that which can be obtained via quantitative research. However, qualitative research method differs with quantitative in the manner in which the data is gathered.

### **3.3.2 Quantitative Research Design**

In simpler terms quantitative research can be understood as a method of explaining phenomena by means of collecting numerical data that can be examined using mathematical methods that is statistical in particular Creswell (2003). Cohen (1980) is of the view that quantitative research is a social research that employs empirical methods and empirical statements. This perspective brings in genuine of research by accommodating empirical statements which are descriptive in reality based on what is rather than what ought to be. More so there is a room for empirical evaluation, which is a way of determining the degree and extent of phenomena under study.

### **3.3 Sampling**

Sampling can be understood as a process of selecting a sub-section of a population that represents the entire population for the purpose of obtaining information regarding phenomenon of interest. In essence, a sample is a smaller portion of a population that is selected for participation in a study.

There are two methods of sampling which are probability and none probability sampling. Probability sampling entails a technique that gives an assurance to equal chance of selection for each respondent in a population. On the other hand non-probability sampling is a technique where the samples are gathered in a process that does not give the entire respondents in population equal chances of being selected.

Pertaining to this study a convenience sampling method of non-probability technique has been employed, in selecting the clothing and textile companies, as well as organization responsible for Industry and Commerce in Zimbabwe.

### **3.4.1 Convenient Sample**

Convenient sample is a non-probability sampling technique that is much more effective and efficient since it is made up of respondents that are easy to reach because of their accessibility, proximity availability according, to Cohen et al (2000). The method was preferred because it provided easy access to respondents. In this case, the researcher applied the convenient sampling technique for interviewing the established Clothing and Textile Manufacturers Associations. In particular there are only two associations in Zimbabwe namely the ZCMA and ZTMA located in the capital city Harare. The technique was simple, practical and economical.

### **3.4.2 Purposive sampling**

Purposive sampling is a non-probability research technique. The technique implies the selection of respondents on the basis of a good reason in connection to purpose of research. The reason for conducting a purposive sampling technique was to include those who have know-how and experience in clothing business. In particular the research applied the technique to clothing manufacturing industries Waverly Blanket, Paramount Garment Works and David White Head, which are involved in the day to day trade in clothing. The researcher took a sample of 5 employees per each company including the management and subordinates. This had an advantage that, relevant information on the competition between locally made clothing and imported and the cost of production met by local clothing manufacturers was easily availed.

### 3.4.3 Simple Radom Sampling

The researcher also utilized a simple random sampling which is a probability sampling technique. Random sampling technique was used for selecting respondents from the informal clothing traders in Harare in particular second- hand clothes (**mabhero**) venders operating at Mupedzanhamo Mbare and boutiques. Random sampling was employed in this research because of high probabilities of giving accurate information from the population since all respondents had an equal and independent chance of selection.

Table2 below illustrates how the researcher applied the sampling techniques to gather information from different groups of respondents. In addition, the table shows the number of the sample sizes that were taken from each group of the participants under study.

**Table 2**

Target Group	Sample size	Data collection technique	Sampling technique
Zimbabwe Clothing Manufacturers Association	3 clothing manufacturing association members	In-depth interviews	Convenient sampling
Zimbabwe Textiles Manufacturers Association	3 textile manufacturing association members	In-depth interviews	Convenient sampling
Portfolio Committee on Industry and Commerce	7committee members	Self administered questionnaires	Simple random sampling
Informal clothing Traders	5 boutiques and 5 clothing vendors	interviews and self administered questionnaires	Simple random sampling
Clothing and Textile Companies.	1 textile and 2 clothing companies	In-depth interviews and self administered questionnaires	Purposive sampling

**Source: primary source**

### 3.5 Data Collection

Data collection can be generalized as a process of gathering information from different source that is primary and secondary, using different methods and techniques. For the purpose of this research primary and secondary data were used.

### **3.5.1 Primary Data**

According to Kumar (2011) he defines primary data as original data thus firsthand approach. In essence primary data denotes the information that is obtained by the researcher directly from the respondents. With reference to this study primary data was collected from clothing companies (David White Head, Paramount Garment Works, and Waverly Blankets), textile and clothing manufacturers association, informal clothing traders (boutiques and mupedzanhamo). The primary data covered the aspects such as capacity utilization of the industry, market competition between the locally produced clothing and imports. More so, the primary data filled a knowledge gap on the reasons for continual trade and business in imported clothing which is not available in existing literature.

Information obtained from primary data source is original and relevant to the research problem; in this case there is very high level in degree of accuracy. Moreover, information from primary data can be collected using various methods and they are diverse in nature. The information collected from primary data is highly reliable since conducted by the concerned and reliable party that is the researcher. However, there primary data method has a limited time frame since it requires more formal way of approaching the respondents.

Primary data can be collected through various ways; however, for the purpose of this study the researcher used in-depth interviews and self administered questionnaires.

### 3.5.2 In-depth Interviews

In-depth interview can be understood as a method of collecting data where the researcher personally meets the respondents and ask necessary questions regarding the subject matter. In other words an in-depth interview is a method of gathering information through oral quiz using a set of pre-planned core questions. The main task in interviewing is to understand the meaning of what the interviewees say as attributed by Kvale (1996). Interviews give accurate information since the interviewer can pursue specific issues of concern. One of the key concepts to a successful data gathering through in-depth interviewing is choosing the right person to interview. The researcher must know who should be interviewed and who should not. In an interview it is very crucial to explain to the respondents the objectives and aims for interview. Direct interviews were conducted between the researcher and the following groups; clothing and textile manufacturing associations, management and employees at (David White Head, Paramount Garment works and Waverly Blanket), informal traders (boutiques and **mupedzanhamo**).

#### 3.5.2.1 Advantages of In-depth Interviews

The in-depth interview has got the following merits

- Interviews are good at obtaining detailed information;
- few participants are needed to gather rich and detailed data
- language can be adjusted basing on the status and educational level of interviewees.
- the method has a room for getting supplementary information from the informants for further clarifications.
- there are no chances of non-response as the interviewer personally collects data

### 3.5.2.2 Disadvantages of In-depth Interviews

Unexceptional from any other data collection method the in-depth interview has got its own disadvantages which are as follows:

- the method is prone to personal bias due to prejudices between the informants and interviewer
- the method is time consuming since it require scheduling appointments for doing it at convenience of informants
- Sensitivity effect, informants can give fallacy information due to suspiciousness and fear of leaking confidential information.
- The informants may not answer some personal questions

### 3.5.3 Self administered Questionnaires

A general understanding of a questionnaire is that it's a series of questions or statements to which respondents are asked so as to provide their opinions. With particular reference to research a questionnaire is a set of questions asked to individuals to obtain statistical useful information about a specific study. For Kumar (2011) respondents in a questionnaire are entitled to read, understand and interpret the questions and produce answers on the space provided. Moreover, responds can be in form of a tick or a statement or alternative on the provided space.

Particularly, a questionnaire technique serve the following purposes: to collect appropriate data, make data comparable and amenable to analysis, minimize bias in formulating and asking question. For the purpose of this study the researcher used questionnaire targeting the following respondents: General Managers of clothing companies (David White Head, Waverly Blankets, and Paramount Garment Works), Chairpersons and Board members of



Clothing and Textiles Manufacturers Association and five members of portfolio committee on Industry and Commerce. Furthermore, the study used structured questions both closed and open ended.

### **3.5.3.1 Advantages of Questionnaire**

In using this technique, the researcher considered the following advantages of questionnaire:

- The technique had a room for collection of large amounts of information, from a large population in a short space of time at low cost.
- Respondents have discretion to answer questions in any order since there is no pre-established answering format.
- The respondents are given enough time to read, digest and understand the subject matter before answering hence there is independent thinking for informants.
- Informants are at freedom to consult their colleagues and others on the subject at hand unless instructed otherwise.
- Respondents have time to consider their responses carefully without interference
- They allow room for anonymity, in which case it increases the rate of response and may increase the likelihood that information availed reflect genuine opinions.

### **3.5.3.2 Disadvantages of Questionnaire**

The technique has the following demerits

- A questionnaire is a complex instrument and, if badly designed, misinterpreted by respondents can be misleading therefore reduces the accuracy of the information gathered.

- It is difficult to determine the turn up level for the respondents. Since there is no any expectation of motivation for respondents to respond.
- The technique can not reveal the context and meaning behind the responds to the researcher.

### 3.6 Chapter Summary

The chapter has elaborated the research methods which were employed by the researcher in gathering data in relation to effects of cheap imported clothing abhorring the revival of clothing and textile sector. The chapter also highlighted the research design employed to the research. Both quantitative and qualitative methods were used to collect, explain and analyze data. The chapter highlighted, two sampling techniques used to gather information which are convenient sampling, simple random sampling. Self administered questionnaire and in-depth interviews were also tools employed together information from the clothing and textile manufacturers associations, portfolio committee on industry and commerce, informal clothing traders (boutiques and **mupedzanhamo**) and clothing companies (David White Head , Paramount Garment Works and Waverly Blankets). The next chapter is going to dwell much on analysing and presenting the obtained data.

## 4.0 CHAPTER FOUR: DATA ANALYSIS, PRESANTATION AND DISCUSSION

### 4.1 Introduction

This chapter is mainly focused on data presentation, data analysis and the data interpretation obtained from various respondents. Respondents from clothing and textiles manufacturing association, parliament, and also clothing and textile industry provided useful information concerning how the cheap clothing imports is affecting the revival of the clothing and textile sector. The respondents included the chairpersons and board members of the clothing and

textile associations, the Parliamentarians from industry and commerce committee, managerial employees from David White Head, Paramount Garment and Waverly Blanket and also clothing trades in boutiques and mupedzanhamo. The data being presented is concerned with meeting the study objectives.

## 4.2 Data Presentation

Data was collected through direct interviews and questionnaires which sought to reveal the situation on the ground. These data collecting instruments were regarded as suitable in collecting data since qualitative research method was being used to present the data from the respondents. The data collected through interviews, questionnaires, discussions and observation was then further analysed in words. The researcher used the qualitative sampling technique that is purposive in which the researcher handpicked the respondents who are directly involved in the day today manufacturing and trade in clothing industry. The key informants were officials from Zimbabwe Textiles and Clothing Associations, parliamentarians, and managerial employees from different clothing and textile industries and informal sector traders.

## 4.3 Questionnaire Response Rate

The response rate for different groups that are involved in clothing and textiles manufacturing sector as well as business and trade in clothing and textile is presented in table 2 below.

**Table 3**

Target Group	Questionnaires administered	Total Response	Response percentage %
Clothing and Textiles Associations	14	6	43

<b>Clothing and textile companies</b>	<b>21</b>	<b>12</b>	<b>57</b>
<b>Informal Sector Clothing Traders</b>	<b>7</b>	<b>4</b>	<b>57</b>
<b>Committee on Industry and Commerce</b>	<b>7</b>	<b>5</b>	<b>71</b>
<b>TOTAL</b>	<b>49</b>	<b>27</b>	<b>55</b>

Source primary data

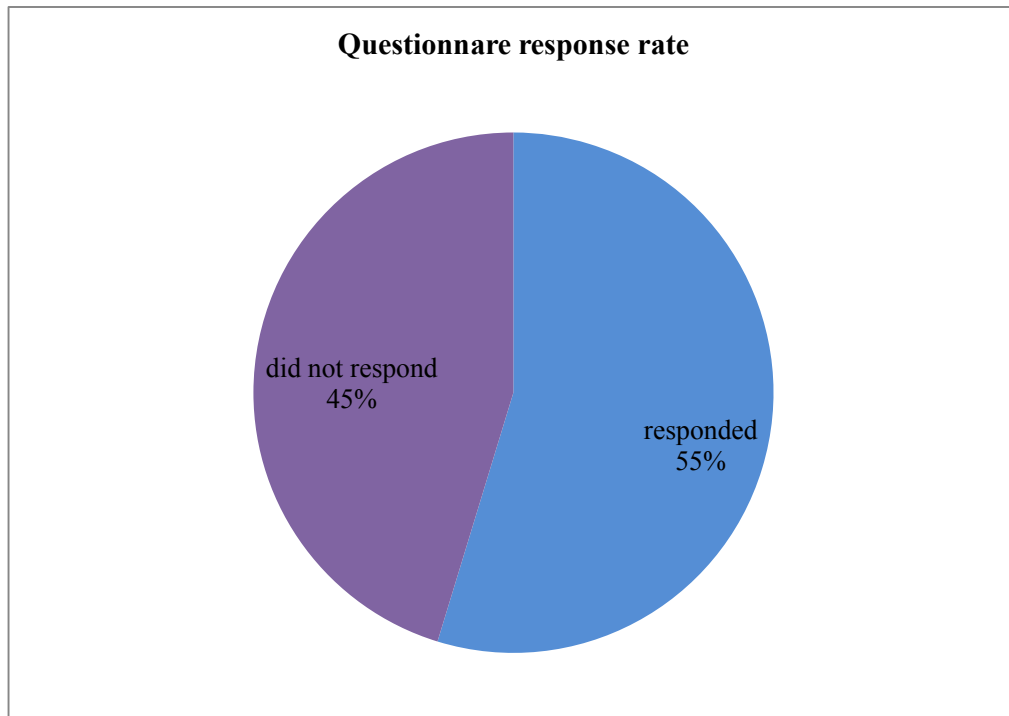
The table 2 above shows how the researcher administered questionnaires to various groups that are involved in clothing and textiles. As shown in the table each group has a certain number of questionnaires, a total response for each and a percentage response for each surveyed group. Furthermore, an overall total of questionnaires administered to the whole sample population are also highlighted in the above table.

The table presents that out of 14 questionnaires randomly given to the clothing and textiles manufacturers associations (ZITMA and ZCMA) only 6 were successfully completed giving a percentage response of 43%. As shown in the table 21 questionnaires was administered to clothing companies (David White Head, Paramount Garment and Waverly Blanket) and only 12 were successfully completed giving percentage response of 57%. Of the 7 questionnaires for the informal sector clothing traders (boutiques and mupedzanhamo) only 4 were completed giving a 57% response rate. As illustrated by the table 7 questionnaires were administered to the Portfolio Committee on Industry and Commerce and 5 were successfully completed giving 71% response. The table also highlights the total number of questionnaires administered to the whole survey. The survey had 49 questionnaire and 27 were successfully completed giving 55% as the total percentage response.

A conclusion can be drawn from the data shows that a total of 55% of the questionnaires sample were responded and a remainder of 45% had no response.

The total response respond rate can be presented on a pie chart as shown below in fig 1.

**Fig1**



Source primary data

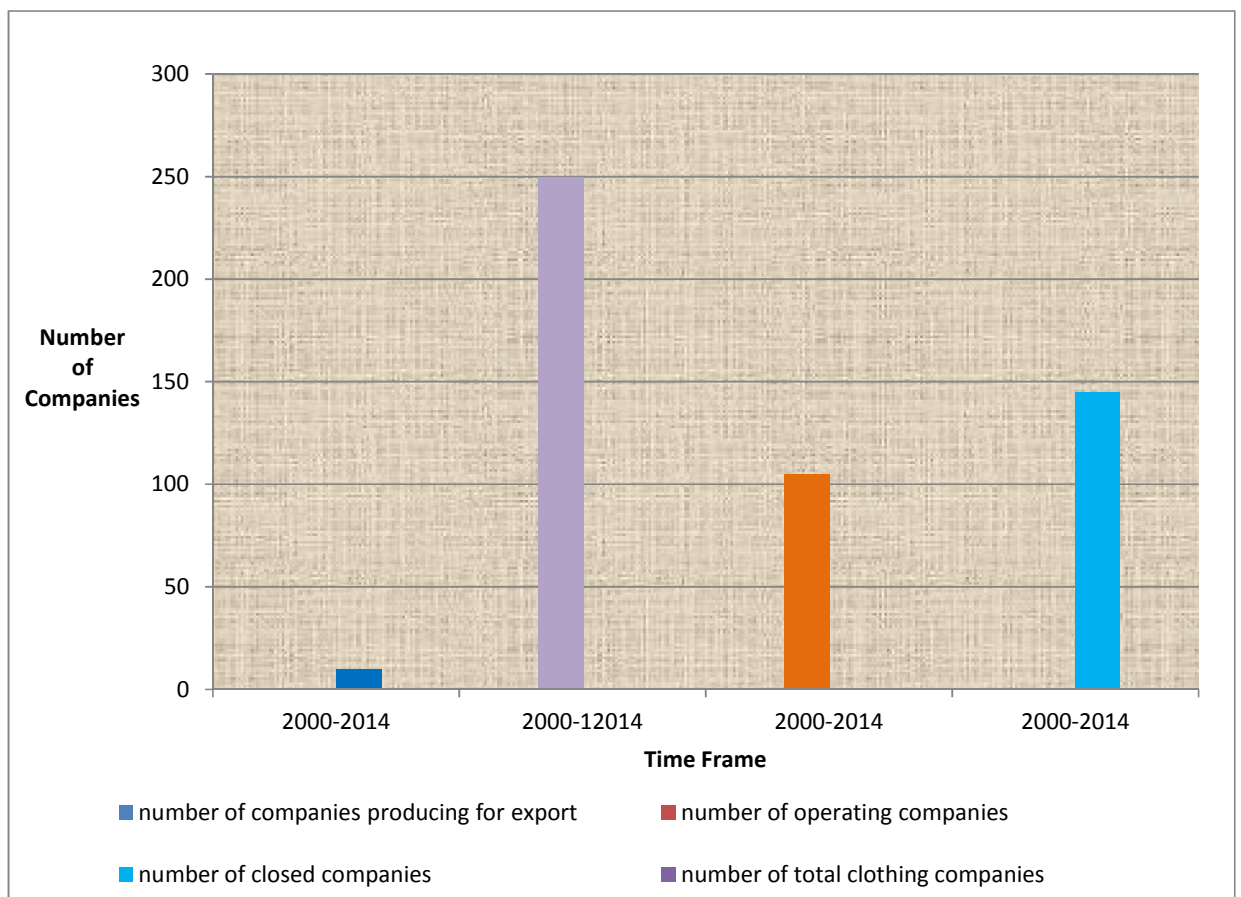
#### **4.4 Statistics on registered clothing companies since 2000 to 2014**

The starting point in collecting information was to gather data from the clothing and textile manufacturers associations on the statistics pertaining registered clothing industries. Through observations and questionnaires since 2000 to 2014 there were 250 clothing companies registered with ZCMA. From the field research it was observed that 145 clothing companies entirely closed their operations. At the present moment 105 clothing companies are producing at 45% capacity utilization according to the information from the ZCMA and samples from clothing companies like Paramount Garment Works. Information from the respondents shows that since 2001- 2014 there was no any industry in the clothing manufacturing sector which operated at 100% capacity utilization. From the 105 companies that are operating only ten produce for export. Based on the responses from the association

ZCMA the major causes for the collapse of the sector can be attributed to rapid growth of the informal trading in cheap imports clothing and textile, which has caused unfair market competition.

Fig 2 below illustrates collected data on total registered clothing companies, the number of entirely closed clothing companies, the number of currently producing clothing companies, the number of clothing companies producing for exporting for the period 2000 – 2014. The data is presented on a graph so that changes can be easily identified that is in terms of decrease in number of companies over the specific period.

**Fig 2**



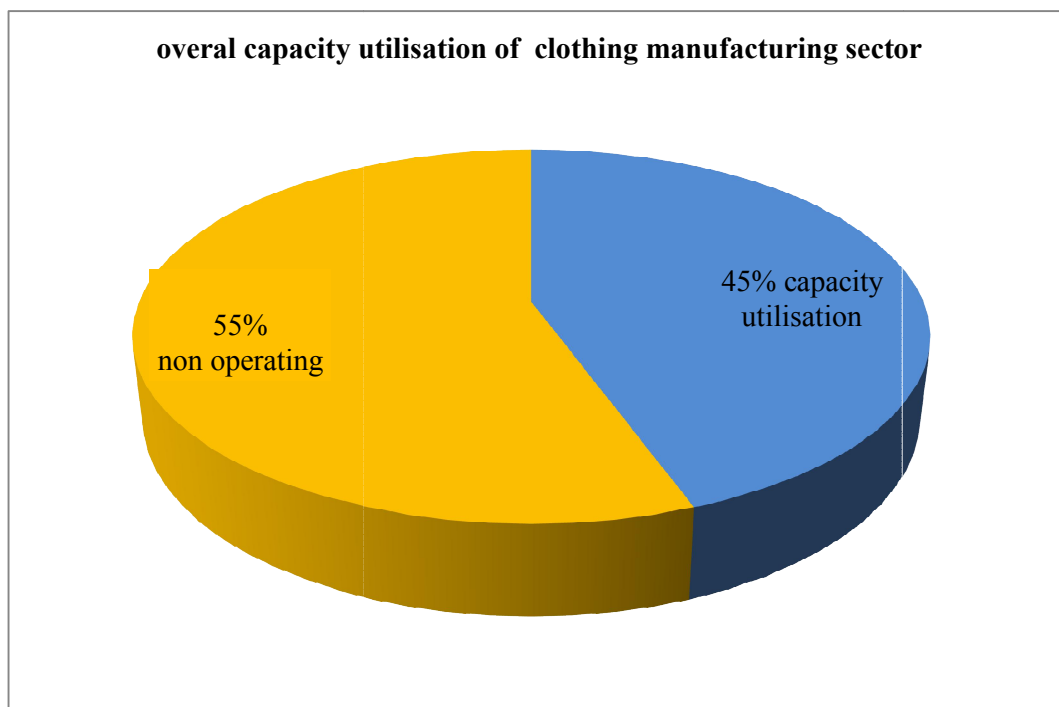
Source Primary data

As highlighted by fig 2 above from 2000 to 2014 the total number of clothing companies registered by ZCMA was 250 and from that number 105 are those that are currently producing which showed that a total of 145 had permanently shuttered. From the gathered data only 10 companies are producing for exporting. The respondents attributed this to the flooding of the market by cheap imports.

#### 4.4.1 Capacity utilization of clothing companies in Zimbabwe

The pie chart below reviews the capacity utilization of the clothing manufacturing sector.

**Fig3**

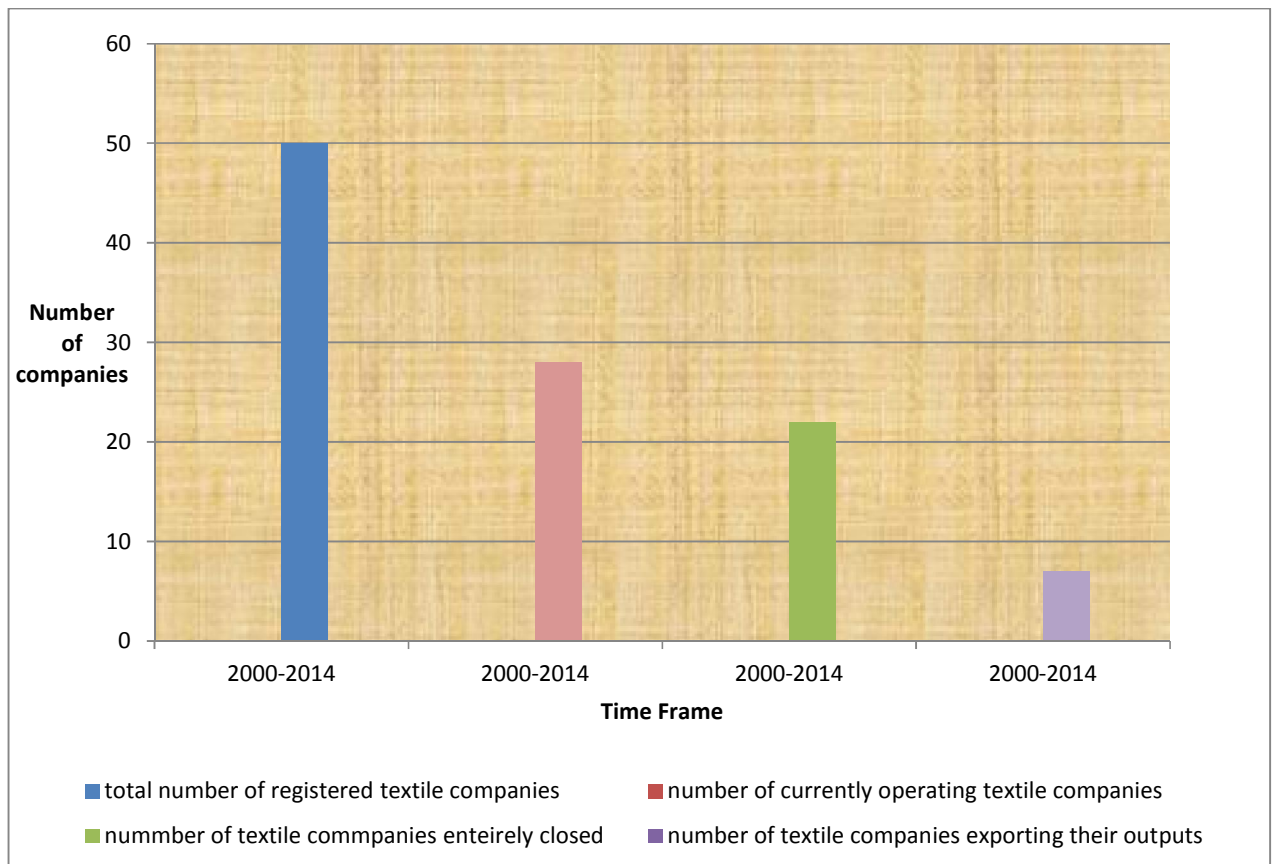


Source primary data

The capacity utilization of the clothing manufacturing industry is represented in the pie chart above basing on the data gathered from officials from, ZCMA, Parliament, and Paramount Garment Works. The questionnaires and interviews concluded that the current capacity utilization of clothing sector is at 45% and the remainder 55% is a non operational percentage of nil production within the sector. This distribution is true as it reflects out that no any clothing industry in Zimbabwe is operating at 100% capacity and is showing the need to revive the industry. This distribution is attributed to the fact that clothing manufacturing companies face high cost of production including utility and also stiff market competition from imports which are a way cheaper than locally produced therefore; there is a poor profit return to sustain the industry.

#### 4.4.2 Statistics of registered textile companies from 2000-2014

Fig 4.





Source primary data

Fig 4 above illustrates the statistics gathered on total number of registered textile companies, the number of textile companies operating; number of textile companies entirely closed their operations and the total number of textile companies producing for export. The gathered data on the statics of total registered textile companies from the Zimbabwe Textiles Manufacturers Association (ZITMA) shows that there are 50 textile manufacturing industries which are registered with ZITMA for the period 2000-2014. Furthermore, 28 textile companies from the total 50 are still producing. In relation to production for export the researcher observed that only 7 companies from the active 28 are producing for exporting their products. 22 companies from the registered 50 had permanently shattered their production. Table 4 below also illustrates the statics on textile companies giving a percentage proportion of each category that is, number of textile companies' active, entirely closed, those producing for export.

**Table 4**

<b>Category</b>	<b>Number Companies</b>	<b>% proportional</b>
Entirely closed	22	44
Currently operating	28	56
Producing Exports	7	25
<b>Total</b>	50	

Source: primary data

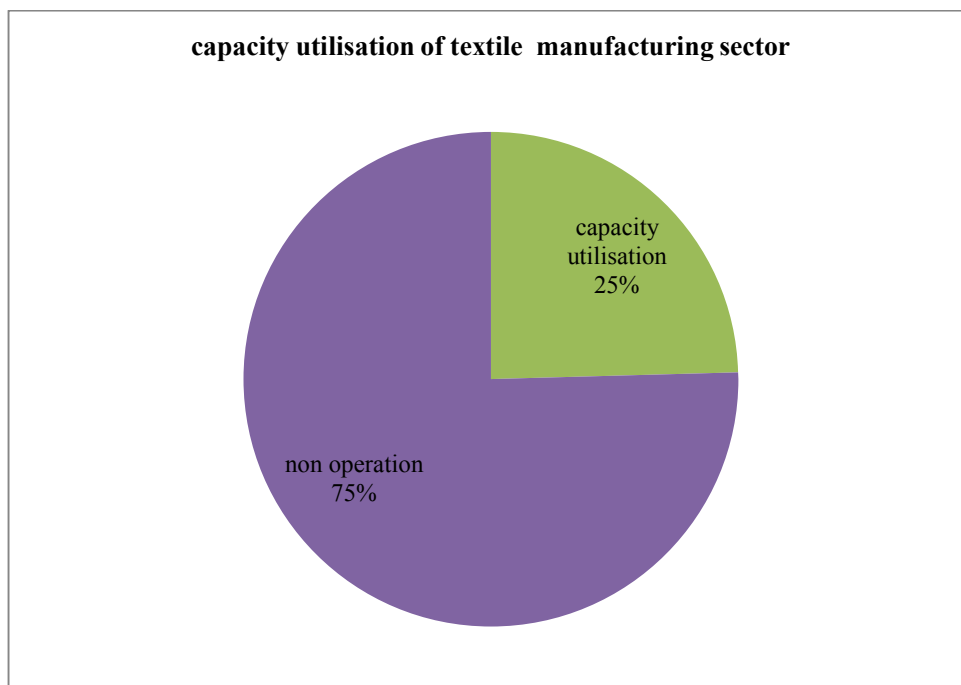
As shown in the table 4 above 22 of the total 50 companies has entirely closed their operations giving a proportion 44 %. The data also shows that 56% is a proportion of companies that are currently operating in Zimbabwe. On the other hand, 7 companies out of the 28 operating are producing for exporting therefore has a 25% proportion. The information from ZITMA board shows that most of the textile industries have been affected by influx of

cheap imports that has an unfair market competition as the local producers are facing high production costs which force them to offer expensive but few products. In this regard there is no business sustainability in the industry therefore, the sector remain stunted without any new development or growth.

#### 4.4.3 Capacity utilization of textile manufacturing sector.

Information gathered from the ZITMA, Committee on Industry and Commerce and textile companies shows that there is no any textile industry operating at 100% capacity. The current maximum overall capacity utilization of the textile industry is 25%. The remainder 75 % is a proportion of none production in the sector. This has been attributed to several factors which includes high costs of production that is capital, labour and utilities, financial constrains, competition from external producers. The capacity utilization of the textile industry can be presented in form of a pie chart.

Fig 5



Source: primary data

Fig5 above illustrates the current capacity utilization of the textile industry. The data shows that there is a need to resuscitate those textile industries that are not operating and also to revive those that constitute the 25% to its full capacity productions.

#### **4.5 Effects of cheap clothing imports on revival of Zimbabwe clothing and textiles manufacturing sector.**

Information from the interviews and questionnaires brought in various dimensions in which the trade in second-hand (**mabhero**) and cheap imported clothing is affecting the revival of clothing and textile sector in Zimbabwe. Moreover, the respondents provided information that informal and formal trade in clothing and textiles affect the local manufacturers negatively. Trade in cheap imports affects the textile and clothing sector revival in different dimensions as mentioned below.

##### **4.5.1 Unfair market competition**

The local clothing and textile manufacturers associations that is (ZITMA and ZCMA), Committee on Industry and Commerce as well as some sample industries like (David White Head, Paramount Garment and Waverly Blanket) concluded that imported clothing especially those smuggled at border posts are flooding the Zimbabwean market. The imported clothing and textile products are much cheaper than the locally manufactured. Local manufacturers consider that they face higher costs of production which include utilities, labour and rents. Based on information gathered from the textiles and clothing manufacturing associations customers prefer to consume second-hand (**mabhero**) and other cheap Asian products in boutiques at order prices that is \$1 for 2. With reference to productions that yield profit for further developing or reviving the industries, local producers cannot compete with imports. Trade in imported clothing aims for a small profit mark up from each products sold where as

those locally manufacturer needs high profits returns to sustain the industry on it welfares. In essence, pricing disparities between locally produced textile and clothing and imported on second-hand has set the revival of the Zimbabwean textile and clothing manufacturing sector on the spot light of failure.

#### **4.5.2 Quality Disparities**

Information gathered from the field shows that local textile and clothing producers lack superior quality products in both internal and external markets. In addition, the imports that are in Zimbabwean market are of higher quality than those manufactured by local industries for example brand products such as Hugo Boss, George Armani, Paul Smith, Gucci , Rebook and Quicksilver. Consumers prefer imported quality products and brand than local producers hence lack of support for textile and clothing manufacturing outputs. In this regard clothing and textile imports has become a threat towards revival of local clothing and textile manufacturing sector because of quality and pricing differences. Imports are relatively cheap, affordable and has a higher quality and design than home made. The local producers are failing to have a sustainable market base for their outputs or finished products due to cheap imported clothing and textile.

#### **4.5.3 Production Costs**

Zimbabwean textile and clothing industry faces higher production costs which include utility costs such as power, water, rents, and rates. Zimbabwean textile and clothing industry is depending on raw materials imported from other countries. Information from respondents shows that raw materials imported by Zimbabwean companies have got a high cost on duty. This however, force the local industry to produce products which are more expensive than

imported finished clothing since there is a need for high profit mark-up on finished products to sustain the industry.

Cost of production such as labour costs also makes the local textiles and clothing industry incompetent with the imports. In this regard, the large proportional market share which supposes to promote the welfare of local industry through consumption of locally manufactured products is taken away by the imports. Based on this information textiles and clothing sector has been hindered by cheap imports which are taking away their market therefore cheap imports becomes a challenge on revival of the industry.

#### **4.5.3 Local procurement**

In terms of tenders and procurements most of government institutions prefer to procure tenders from the external textile and clothing manufactures which produce duplicate products. Respondents, articulates that government institutions such as ministry of defense and home affairs prefer to procure tenders outside the country on a cash upfront due to the fact that they are cheaper. In this case the local industries which produce such products suffer from duplication of their products which affects their threshold. Based on this information it is clear that there is lack of intellectual right framework which protect the rights of designers from duplication of their products which cause over flooding same brand products on the market and affect the growth of the industry.

#### **4.6 Origins of cheap imported clothing and textiles.**

Gathered information from the respondents especially the informal clothing traders (boutiques and **mupedzanhamo**) revealed that the largest source of origin for imported clothing in Zimbabwe is Asia. Most of the products are produced by the fast growing economies of Asia namely China, India, Pakistan and Indonesia. According to ZITMA and

ZCMA and other informants' imports from Asia constitutes 75% of the local market. Most of these clothing enter the country through South Africa. Europe also contributes 15% of cheap imports towards Zimbabwean market which are second-hand products (**mabhero**) that enter the country as charity through Malawi and Mozambique. Europe is also responsible high quality products that are in the Zimbabwean market for example formal clothing like suits, shirts. America and Africa they share 10% of imports that are hitting Zimbabwean market and affect the local producers.

#### **4.7 Other challenges affecting the revival of Zimbabwean textile and clothing industry.**

Information gathered from the respondents present that the revival of clothing and textile industry is not hindered by cheap imports only. Through the survey, the researcher observed other factors that are spicing with cheap imports and affect the attempts made to revive the local textiles and clothing manufacturing sector. The factors include the following:

##### **4.7.1 Unavailability of working capital**

Clothing and textiles manufacturers informed that local companies have a challenge of accessing lines of credit. Local banks offer short-term loans at very high interest rates. Furthermore, the respondents showed that the capital problem was being compounded by lack of investor confidence in the country. In this sense, revival of clothing and textile sector in Zimbabwe will remain a futile exercise not because there are cheap import but because of lack of working capital.

##### **4.7.2 Poor infrastructure and outdated machinery**

The information from the clothing and textile companies highlighted that in Zimbabwe the industry has got poor infrastructure, inefficient machinery that require manual labour and produce lower quantity as compared to production that takes place in developed and

developing nations. Zimbabwean clothing and textile industry needs to shift from ancient machinery to the modern and modified mechanization which is competent on production quantity and also competent in production of modern designs. In this regard, respondents showed that not only cheap imports are a bigger challenge towards the revival of textile and clothing sector but issues like mechanization of the industry should be considered.

#### **4.7.3 Inconsistence government policies**

Information from the clothing and textile industrialists shows that instead of government implementing policies that are supportive to the local manufacturers most of the policies are a threat to the industry. Respondents showed that introduction of informal sector through empowerment and employment creation agenda from Zim-Asset has a direct negative impact towards the growth of the clothing sector as it is promoting uncontrollable trade in clothing and textile products. More so, government's economic policies such as indigenization and economic empowerment are shunning away potential investors who can revive the collapsed industries.

#### **4.7.4 Debt**

Respondents from the clothing and textile sector allude that debt is another challenge that collaborates with cheap imports in affecting the revival of textile and clothing industry. In most cases there are bad debtors such as government. Government does not pay its debt or credits that it owes some of the textile and clothing industries. Most of the clothing companies have a fowl cry on Ministry of Defence and Home Affairs Ministry for not honouring its debt that it acquired through armed force uniforms which government is failing to settle the debt.

## **4.8 Effects of continual closure of clothing and textile industries.**

Respondents alluded that the continual collapse of the Zimbabwean textile and clothing sector has got direct impact to the economy and the general people. When the textile and clothing industry continue to collapse the end results are as follows:

### **4.8.1 Loss of employment**

Large number of people earns a living by securing jobs from the textile and clothing sector. Most of qualified women, unqualified personnel have higher opportunities of being employed in the sector. From the field data if there is a continual closure of the sector it means there is also a rise in unemployment rate.

### **4.8.2 Loss of revenue**

Industrialists and legislatures are of the view that all industries in operation are a source of government revenue through tax payment. However, when clothing and textile industry is entirely closed the source of government revenue is also cease.

### **4.8.3 Dependency syndrome**

A complete collapse of clothing and textile industry would lead to a dependency on foreign products and designs. In essence, poor production in clothing and textile industry can promote an open market for foreign imports clothing and textiles in Zimbabwe.

### **4.8.4 Capital plight**

Respondents highlighted that the continual closure or the entire collapsing of the textile and clothing sector in Zimbabwe can lead to capital plight whereby traders will take away the much needed foreign currency to other countries in purchase of clothing and textiles.



#### 4.9 Way forward towards the revival of clothing and textile industry.

- Legislators, clothing and textile manufacturers associations, as well as industrialists highlighted, that for the betterment revival of clothing and textile sector the country should impose high tariffs and duty on all finished clothing and textile imports. This will reduce unfair market competitions in terms of duplication of products and quality from the informal traders. Higher tariffs and duties will also reduce the perception from the developed and the developing world that Zimbabwe is an open market place for their finished clothing imports.
- The respondents also cited that there should be strict ban and penalty measures on all form of trade in second-hand imported clothing. The trade in second-hand (**mabhero**) clothing should be banned the reason being that they bring fierce market competition in terms of pricing disparities.
- Control of market places that is securing all undesignated places that are being used as vending places. However, formal places should be established for registered clothing and textile traders in order to avoid manipulation from the local producers.
- In order to fully improve the revival of textile and clothing sector the industrialists calls for the introduction of export incentives for companies or industries that produce clothing and textiles for exporting

#### 4.10 Chapter Summary

The chapter focused on data presentations and analysis of the research findings. The research noted that cheap clothing imports have a direct negative impact towards the revival of the textile and clothing sector. Information gathered shows that though cheap clothing imports is a major challenge towards the revival of the sector, it is also coupled with some other factors

as highlighted in the chapter. The research observed that instead of registering a growth in the textile and clothing industry perhaps the sector is continually downsizing.

## **5.0 CHAPTER FIVE: CONCLUSIONS, RECOMMENDATIONS AND SUMMARY**

### **5.1 Introduction**

This chapter is going to focus on presentation of research conclusions and findings. The intension of the researcher in this chapter is to reveal conclusive remarks particularly on research objectives, aims and results of the problem under study that is cheap clothing imports as a challenge affecting the revival of the Zimbabwean clothing and textile manufacturing sector. This chapter also captures the researcher's own views on how to curb cheap clothing imports and promote the resuscitation of the local clothing and textile manufacturing sector.

### **5.2 Summary**

The major objective of the research was to assess how cheap imports hinders the revival of Zimbabwe textile and clothing sector, as well as scrutinizing the factors that has contributed to the downfall of the sector, analyzing the policies and regulatory interventions to be adopted to revamp, the textile and clothing companies. The research presented the important contributions of the textile and clothing sector to the country's economy which include employment creation and value addition. The research highlighted the historical background of the textile and clothing in Zimbabwe giving the different stages which it pass through in its development and growth from ancient 1920s to modern day.

Information was reviewed from authenticated existing sources on how cheap imports are affecting the revival of the textile and clothing sector of any nation. Moreso, the research presented nurture of the clothing and textile sector in the Sub-Saharan region and the economic importance of the sector to the region. The research also managed to bring in a new dimension of other factors that are coupled with cheap imports which are leading to revival

failure and downsizing of textile and clothing sector these include: financial constraints, hyperinflation and utility costs. The research observed that at the present moment there is no any clothing and any textile company that is producing at full capacity level in most cases the clothing and textile sector operates at an average of 25% capacity utilisation. In addition, the research showed that very few clothing and textile industries are currently doing production for export.

Data collected through interviews, questionnaires and observations shows that most of the imports that are affecting the Zimbabwean textile and clothing industry mainly originate from the developing economies of Asia namely China, Pakistan, India and Indonesia. The research noted that Europe is responsible for second-hand clothing (**mabhero**) that are bedevilling the local textile and clothing producers.

The research managed to showcase the negative effects that the cheap clothing imports have on revival of the local textile and clothing sector. Cheap clothing imports causes' unfair market completion, quality disparities and high production cost. The research also presented the effects of the continual closure or collapse of the textile and clothing sector to the country's economy which attribute to unemployment, loss of local designs, loss of government revenue and many others. Moreover, based on the informants the research bring way forward towards reviving the local textile and clothing sector.

### 5.3 Conclusions

The major challenge that is affecting the revival of the Zimbabwean textile and clothing sector is the influx of cheap clothing imports in the local and external markets. Cheap clothing imports have both direct and indirect negative effects on the local textile and clothing sector's revival. Consequently, cheap clothing imports have affected the local producers in textiles and clothing due to fierce and intensive market competition which is unfair. In most cases cheap clothing imports have price disparities which accumulate and attract many consumers due to affordability of the products in comparison with locally manufactured products which have higher prices for profit mark-up to sustain their production. Imported clothing and textiles are cheap to such an extent that local producers cannot compete and make returns for their production for instance the second- hand (**mabhero**) which are always selling at less than an order prices of the local manufactures.

Cheap clothing imports have a significant negative impact towards the revival of the Zimbabwe's clothing and textile sector. In most cases traders in clothing and textile business provides new designs, top quality for instance big labels on T- shirts, suits, jackets, sport kits and many others therefore they capture all consumers at the expense of the local producers that are still straggling to raise up standards in good quality products and new fashionable designs. For local manufacturing industries to produce same brands and design it is very costing and need to import personnel and raw materials.

Despite being regarded as cheap, imported clothing and textiles, are always duplicates or copycats of any clothing product that is on demand at the market. More so, that same product will be priced ten times lower than the actual prices that are established by local manufacturers.

However, the research has revealed that in Zimbabwe not only cheap imports are challenge affecting the revival of the clothing and textile sector. Besides cheap imports Zimbabwean textile and clothing sector has been affected by factors such as: poor infrastructure and mechanization, inconsistency government policies, debt and lack of capacity utilization. Most of the clothing and textile companies are on the brink of collapse due to cheap imports and other factors.

## 5.4 Recommendations

This section provides a room for researcher's own perspectives towards what should be done to counter cheap clothing imports as a major challenge affecting the revival of the textile and clothing sector Zimbabwe to its full capacity utilisation

- ❖ With reference to curbing cheap clothing and textile imports the government should tighten border posts and ensure thorough searches and security to ensure that there is no smuggling of finished clothing products or second-hand (**mabhero**) into the country which causes unfair market competition.
- ❖ For the sake of doing away with high volumes of cheap clothing imports, high duties and tariffs should be levied to all finished clothing and textile products which local industries or producers can produce in Zimbabwe for example high duties on uniforms, blankets as well as formal wears. All this will protect the market share of local industries from influx of the cheap clothing and also avoid duplication and copycatted products on the same market.
- ❖ Loosening or suspension of duty or any tariff or tax on imported clothing and textile raw materials and machineries which are not available and cannot be produced in the country. This will enhance easy establishment and growth of modern mechanization and technology that will enable competency in modern designs and fashion.

- ❖ The legislature should impose laws that strictly ban the trade in second-hand clothing (**mabhero**) and also calls for heavy penalty measures to the culprits. This will ensure fair completion on the market.
- ❖ In relation to policing there is need to create conducive policy environment that attracts foreign direct investment. All proposed and implemented policies should be consistency. In addition, the government should open up to foreign direct investment, the clothing and textile sector in since it lacks capital and technology.
- ❖ To avoid sub-standard and copycats products on the market all imports should be inspected and certified by the Standard Association of Zimbabwe (SAZ).

## **5.5 Chapter Conclusion.**

The chapter presented the summary of the research, the conclusion remarks of the research as well as the recommendations. The recommendations given are only proposed course of action that can assist to achieve an attempt to revive the textile and clothing sector in Zimbabwe.

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## APPENDIX

My name is Majoni Learnmore. I am an undergraduate student at the **Midlands State University** studying Bachelor of Science (Honours) Degree in Politics and Public Management. As part of my studies I am carrying out a research study entitled: **An Analysis of cheap clothing imports as a challenge affecting the revival of clothing and textile manufacturing sector: A case study of Zimbabwe 2000-2014**. Your concern about providing the requested information on the subject matter will be greatly appreciated. From your participation this questionnaire remains unanimous for confidentiality purposes.

**Note:** Please write down your response on the spaces provided below each and every question on this paper. Indicate your answer by a tick [✓] where necessary as well as explanations accordingly.

**Question 1. Based on your observations and tours what is the current capacity utilization of the clothing and textile companies that are still operation in Zimbabwe?**

Below 25% [ ]

Between 25 and 50% [ ]

Between 50 and 75% [ ]

Between 75 and 100% [ ]

**Question 2. From your oversight perspective what is generally affecting the revival of the textile and clothing sector in Zimbabwe?**

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**Question 3. What policy measures underway to protect the textile and clothing industries from the cheap imports?**

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**Question 4. Based on your expert and experience in playing oversight role in issues of Industry and Trade; “ Is it not creating market monopoly for local clothing and textile sector when stiffly protected from other external competitors?**

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**Question 5. What impact does the continual closure of the textile and clothing companies pose to the Zimbabwean economy?**

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**Question 6. Why it is that there is a continual importation of clothing and textile products whilst there is production taking place locally?**

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**Question 7. Based on your expert what are the biggest challenges that hinder the revival of the textile and clothing sector?**

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**Question 8. Why it is that Zimbabwe textile and clothing products are less competent to imported and second- hand products both in local and foreign markets?**

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