Job Creation in Africa's Second-hand Clothing Sector

Evidence from Angola, Guinea-Bissau, Malawi, Mozambique and Zambia

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Author: Dr Joseph Feyertag, Independent Development Economist
Editor: Professor Patrick Diamond, Queen Mary University of London

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Executive Summary

This research demonstrates that the second-hand clothing (SHC) sector provides millions of people in Africa with accessible and flexible employment. As such the sector acts as an important driver of employment opportunities in African labour markets which otherwise remain almost wholly dependent on non-mechanised agriculture.

Until now, there have been few attempts to more precisely quantify the impact of the SHC sector on employment in African countries. Given the informal nature of the labour market, with 85% of all employment in Sub-Saharan Africa categorised as informal, there are methodological challenges in producing reliable estimates. This report fills that gap in the literature by drawing on case studies from five countries. The countries in this study continue to suffer from high levels of extreme poverty, defined as living below the International Poverty Line of $2.15 a day.

In addition to creating jobs that benefit millions of livelihoods, the SHC trade also provides a valuable and dependable revenue stream for African governments, primarily through charging import duties.

This report advocates for governments and policy makers to examine their approach to used clothing afresh given the demonstrably positive economic, social and environmental impact of the sector:

- **Job creation:** The main finding of this study is that the growth of SHC imports in these five countries has had a positive impact on the labour market. The SHC industry is an employment creation engine in Africa, generating millions of jobs throughout the value and supply chain. We find that over 1.28 million people are employed in the SHC sectors of Angola, Guinea-Bissau, Malawi, Mozambique and Zambia, with each tonne of SHC imported sustaining on average 6.5 jobs. This represents up to 25% of total service sector employment, in countries where a majority of the population relies on non-mechanised agriculture to support their livelihoods.

- **Strengthening livelihoods:** The jobs that the SHC sector creates in turn are likely to support over 2.5 million people, taking account of dependents in households. A recent study of SHC retailers and traders in Ghana found that 88.1% of those surveyed served as primary earners in their households, and that a majority of traders (87.8%) had one or more dependents (GUCDA, 2024), indicating significant contributions to household incomes. Informal trade and SHC retail can therefore provide opportunities to diversify income streams and sustain livelihoods, particularly for those who find themselves stuck in low-productivity, subsistence farming.

- **Tax contributions:** The sector generates vital revenue for hard-pressed governments. The sector provides over $73.5 million annually in tax revenues to countries that are among the poorest in the world. These tax revenues fund public services and infrastructure necessary for economic development. Around two-thirds of the population of Malawi, Mozambique, Guinea-Bissau and Zambia still live in extreme poverty or multidimensional

Over **1.28 million** people are employed in the SHC sectors of Angola, Guinea-Bissau, Malawi, Mozambique and Zambia, with each tonne of SHC imported sustaining on average **6.5 jobs.**

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poverty[1]. In 2022, estimated tax intake from SHC to Angola, Guinea-Bissau, Malawi, Mozambique and Zambia alone was estimated to lie above \$73.5 million when considering average import tariffs, VAT rates as well as Costs & Freight (C&F)[2].

- **Consumption:** The trade enables citizens from low-income households to purchase high-quality and affordable clothing.

- **Industrial opportunity:** The SHC trade offers African governments a sector to champion for further job creation and economic development. Contrary to the views of some economic commentators, our review of the literature indicates that the growth of used clothing imports is not a credible explanation for the erosion of textile manufacturing in Africa. A more plausible reason is that African economies currently face a comparative cost disadvantage relative to Asian producers. Experts largely agree that difficulties in accessing raw materials and the long-term failure to invest in plant and machinery, alongside a shortage of skills and human capital, have driven the inexorable decline of the textile industry in many parts of Africa. This decline was exacerbated by trade liberalisation policies which led to an increased in-flow not only of SHC but more importantly of low-quality imports of new clothes from Asian countries.

- **Green jobs in a circular economy:** It is important to recognise that the used clothing industry is a clear demonstration of a robust circular economy at work which extends the life cycle of used textiles, while also giving access to affordable, good-quality and sustainable clothing to people in the Global South. Reducing waste and harmful environmental effects to combat climate change means maximising circularity, which above all entails increasing the longevity and quality of textiles, and thereby increasing the rate of textile reuse. Supporting the growth of this sector can help create more green jobs.

This report highlights the opportunity for future research to quantify the economic impact of SHC beyond employment, focusing on wages, household income, poverty reduction, fiscal revenues and economic development. There is evidence of a relationship between high skills services - such as education or business - and economic development in Africa (Baccini et al., 2021). Policy interventions should support the SHC sector to enhance socio-economic development, for example by formalising jobs in SHC retail and providing workers with social protection.

With greater support from governments and policy makers around the world, the SHC sector can be enhanced to create many more green jobs and improve the lives of millions of Africans. Limits or bans on the movement of used clothing throughout the global economy will cause harm to millions of livelihoods and the environment. There is a strong argument for a re-evaluation of the approach to the SHC trade to ensure there is greater strategic investment in order to yield greater socio-economic outcomes.

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[1] Levels of extreme poverty are 64.3%, 70.1% and 74.5% in Zambia, Malawi and Mozambique, respectively. In Guinea-Bissau, 64.4% live in multidimensional poverty (Our World in Data, 2023, UNDP, 2023).

[2] Based on the authors' own calculations using data from UN COMTRADE and government sources.

Chapter 1
Introduction

1. Introduction

The second-hand clothing (SHC) sector, which imports clothes that have been sorted and categorised as suitable for reuse, provides a variety of benefits to African economies, including millions of jobs, access to affordable and relatively high-quality clothing for low-income households, as well as fiscal revenue through higher than average tariffs on SHC imports (Sumo et al., 2023). The use of SHC is widespread, as for many African households it represents the only viable option for affordable clothing (Hansen, 2000). Around two-thirds (67 percent) of Africa's population purchase a proportion of their clothes from the SHC market (USAID, 2017).

Despite the importance of SHC in Africa's clothing, apparel and textile value chain, its economic, social and environmental impact has so far not been adequately quantified. This is especially true of the labour market impacts of SHC throughout its value chain, which remains poorly understood. While qualitative studies have documented employment opportunities in a variety of related roles - notably retail, ancillary services such as tailoring, as well as transport and logistics – calculating the number of workers employed in the SHC value chain has been challenging due to the informal nature of labour markets in many African countries. Existing survey methodologies often struggle to capture the extent to which Africa's workers are involved in the informal trade and other services associated with the SHC value chain, resulting in potential underestimation of the sector's impact on African labour markets and the wider economy.

The aim of this paper is to provide an estimate of employment throughout the value chain of the SHC sector in five African countries: Angola, Guinea-Bissau, Malawi, Mozambique and Zambia[3]. The first section provides an overview of the literature on the African SHC sector, focusing in particular on the structure of its labour force. The second section offers a brief overview of the key findings of the limited studies so far carried out on employment in the SHC sectors in each of the five countries. In the final section, the paper provides an estimate of employment figures across the five countries, as well as elaborating the methodology that was used to calculate estimates, drawing on official data from labour force and enterprise surveys.

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[3]   This research was commissioned by the international development network of Humana People to People to support their understanding of the employment market created by second-hand clothes imports to Angola, Guinea-Bissau, Malawi, Mozambique, and Zambia. Humana People to People organisations in these countries operate a combination of second-hand clothing sorting centres, wholesale outlets and retail shops that are run as social enterprises. The proceeds from the sale of clothes and shoes are invested in social development projects in each country, including education, health, community development and sustainable agriculture projects.

Chapter 2
Overview of literature

2. Overview of literature

Existing evidence on the impact of SHC on employment needs to be understood within the context of the highly informal labour market that tends to predominate in African countries. The vast majority of African workers adopt a mix of livelihood strategies that often involve becoming engaged in several varieties of informal employment. Such jobs include subsistence farming and contributing family work or own-account work, particularly in an informal-sector enterprise. Waged informal jobs are also provided by enterprises (both formal and informal), as well as by households. Informal employment differs from formal employment in that the employment relationship is not subject to national labour legislation, income tax or a written employment contract (ILO, 2018). In Sub-Saharan Africa, around 85% of employment is categorised as informal (ILO, 2022).

Africa's clothing, apparel and textile value chain involves all forms of formal and informal employment, although it is heavily skewed towards self-employment, alongside domestic and waged informal work. Notable examples include:

- Domestic manufacture of traditional clothes, either in the form of self-employment or as part of unpaid work within the family
- Selling new clothes or SHC by the piece on the side of roads ('hawking') as a lone trader, or as a waged informal employee of an enterprise located at a fixed stall in a market
- Subsistence farmers who plant cash crops such as cotton alongside their main harvest of food crops
- Formal jobs in retail outlets selling high-end SHC or new clothes.

Relatively few jobs are available in the formal sector, most of which are located further up the value chain, either in domestic manufacturing of new clothes in factories, in the handling and distribution of imported items, both second-hand and new, or in formal retail (Figure A).

Figure A: Overview of employment in the clothing, apparel and textile value chain

Clothing sector	Formal jobs	Informal jobs
Industrial manufacturing	• Industrial crop production and processing • Textile production • Manufacturing of garments • Wholesale and distribution • Formal retail • Export • Business administration	• Smallholder cotton production • Informal retail
Traditional manufacturing	• Formal retail (e.g. design)	• Smallholder cotton production • Informal tailoring • Informal retail
Second-hand clothes	• Importers • Sorters • Wholesale and distribution • Formal retail	• Ancillary services: informal tailoring for alterations and repair, washing, cleaning, ironing • Distribution and sorting • Informal retail

In Sub-Saharan Africa, **around 85% of employment** is categorised as informal (ILO, 2022).

SHC and the decline of Africa's textile manufacturing sector

Much of the literature on the relationship between SHC and employment is framed around the impact of increasing SHC imports on formal jobs in domestic textile and clothing production. The clothing manufacturing sector of many African countries experienced serious decline in the 1980s and 1990s, leading to the apparent loss of hundreds of thousands of jobs across the continent. The extent of lost employment in textile manufacturing is well-documented in numerous empirical studies[4] analysing the effects of deindustrialisation on formal manufacturing employment in Africa.

These arguments resulted in a vibrant debate among economists about the extent to which the decline in textile manufacturing employment was caused by the increasing liberalisation of SHC imports, which occurred during the same time period; or whether SHC imports were merely a contributing factor to a long-term trend of deindustrialisation in African countries. An influential Oxfam study concluded that it was not clear that local textile and garment production would have survived, even in the absence of SHC imports (Baden and Barber, 2005). The evidence suggests that domestic textile manufacturing lost comparative advantage to Asian producers as a result of several factors: unreliable and expensive infrastructure; relatively high costs; the limited availability of raw materials (e.g. ITC, 2016; Krishnan et al., 2019); alongside outdated capital stock and lack of access to finance. The authors assert that these structural weaknesses would have prompted the decline of Africa's textile manufacturing base in the face of increasingly cost-competitive imports of new clothes (Ibid.), regardless of whether SHC imports had been liberalised or not.

Such findings are supported by various authoritative experts in the field, in particular Karen Tranberg Hansen (1993, 1995, 1999, 2000), Simone Field (2000) and Andrew Brooks (e.g. Brooks, 2012; Brooks and Simon, 2012). Hansen (2000) and Field (2000) argue that the decline of textile and clothing manufacturing in Zambia and Zimbabwe was primarily caused by structural adjustment policies, notably cuts in government subsidies, removing restrictions on imports more generally, alongside the depreciation of their national currencies. These factors meant that with increasing globalisation, African textile manufacturing could no longer compete with fierce international competition, not just from SHC imports but from increasingly low-cost imports of new clothes, predominantly from Asian countries such as China or Bangladesh.

The argument that the drivers of domestic textile manufacturing decline in African countries are multifaceted, and not solely caused by SHC imports, is increasingly widely accepted among experts (e.g. Brooks, 2012; Brooks and Simon, 2012; Rivoli, 2014; Calabrese et al., 2016; Watson et al., 2016). For instance, Brooks and Simon (2012) attest that while the decline of the African textile sector and the increase in SHC imports appeared to occur simultaneously, no specific causal relationship can be discerned between the two. Amankwah-Amoah (2015) argues that domestic garment industries, such as Ghana's, were simply not equipped to deal with the emergence of the modern buyer-dominated garment value chain with an emphasis on low cost production.

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4   See Brooks and Simon (2012) and Sumo et al. (2023) for excellent overviews.

There are a few notable exceptions where African countries have bucked the trend by developing competitive textile manufacturing industries, often relying on active state intervention. The key example is Ethiopia, where an ambitious, government-led industrial policy created industrial parks, put in place strong incentives for private sector investment, and ensured effective investment promotion led to significant Foreign Direct Investment (FDI) inflows into the country's export-oriented garment producers. However, even Ethiopia struggled subsequently to encourage backward linkages between export-oriented firms and domestic suppliers. It continues to rely on foreign inputs and imports, including of yarns and fabrics, due to the low quality and volume of domestically grown cotton (Balchin and Calabrese, 2019). The relatively high cost of these inputs in the global economy makes it far harder for African countries to sustain competitive domestic textile manufacturing firms.

Employment effects of SHC imports

The decline of employment that has occurred in African textile manufacturing in recent decades therefore needs to be analysed as a distinctive process rather than conflated with the growth of SHC imports. As they occupy different segments of the clothing, apparel and textile industry supply chain, it cannot be proven that SHC jobs "displace" textile manufacturing jobs. In practice, most jobs in the SHC value chain are in retail, where both SHC and new clothing (both domestically manufactured and imported) are sold through informal markets. In addition, rising SHC imports create new and often unique employment opportunities for tailors and repairers in the Global South and in the distribution (e.g. wholesale, transport) of clothing and footwear. However, unlike the decline of formal manufacturing jobs, the employment impact of the SHC sector is rarely analysed because of the absence of reliable data on informal employment.

However, there are qualitative studies that have provided clues, for example on the linkages between jobs created by SHC imports and those that exist in informal tailoring. Several decades ago, Stephen Haggblade's (1990) study of Rwanda indicated that although informal jobs in tailoring had been lost, they were compensated for by the creation of higher-paid jobs in handling, repairing and restyling SHC[5]. Field (2000) goes further, claiming that SHC imports may even complement informal domestic production of clothing. According to her study in Zimbabwe, a majority of tailors and garment makers take a neutral view of competition from SHC trade, largely because the market for traditional textiles is separate to that of more casual, Western-style SHC. Another way in which SHC imports complement traditional tailoring is by enabling them to learn innovative designs (see e.g. Krishnan et al., 2019), and as previously mentioned, by creating demand for additional services related to SHCs, notably altering clothes, cleaning and repair.

A recent systematic review of evidence relating to Africa's second-hand clothing supply chain found that SHC is crucial for creating employment in trade, distribution, repairs, laundry services and upcycling (Sumo et al., 2023). Among others, Baden and Barber (2005) in Senegal, Brooks (2012) in Mozambique, and Mhango and Niehm (2005) in Malawi have concluded that SHC offers African economies substantial benefits in relation to job creation. Others have documented that the SHC sector supports livelihoods and provides employment (e.g. Wetengere, 2018; Sumo et al., 2022); moreover, this industry is able to create job opportunities and raise household incomes for younger populations in Africa who are often at greatest risk of economic disadvantage (e.g. Khurana and Tadesse, 2019).

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[5]   Note that the Rwandan Government banned the import of SHC in 2016, and has since struggled to provide affordable clothing to its population (Rwanda Today, 2021).

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Structure of the SHC labour force

Employment in the used clothing sector can be divided into five main categories:

1. **Importers:** importers will invariably employ casual labour to unload, sort, and repack clothes into smaller bales for onward sale to wholesalers. Formal jobs related to business administration such as customs, legal, human resources, marketing and insurance services are created by importers, wholesalers and retailers.

2. **Wholesalers:** wholesalers and semi-wholesalers sell bales to retailers, who may then sell and distribute them in bales or by the piece to retailers. Transport jobs are created by importers and wholesalers.

3. **Formal retailers:** SHC is sold in retail shops as well as stands (or "cameras") in weekly markets and fixed sales points, many of which specialise in particular clothing products (e.g. jeans).

4. **Informal retailers:** "hawkers" and street peddlers will purchase SHC from retailers and wholesalers either by the bale or by the piece and circulate around fixed and weekly markets in towns, cities and rural areas.

5. **Ancillary services:** jobs in ancillary services, such as making repairs or alterations to SHC, or washing and ironing garments.

This wide variety of jobs highlights the diversity of direct and indirect employment in SHC importing, processing and trade, as well as the opportunities for professionalisation and upskilling of the labour market. The structure of employment varies according to the dynamics of the industry in each country. Broadly speaking, employment in the first three categories tends to be in the formal sector; jobs in the final two categories are more often found in the informal sector. However, the precise structure of the labour market will vary by country. For example, many cameras and retailers (category 3) in less-developed African countries are unlicensed, informal businesses, even if they have a fixed presence at a local market or by the side of a street. In more developed African economies, most ancillary services are carried out by formal, licensed micro-, small- and medium-sized enterprises (MSMEs).

Employment figures cited in the literature

Several previous empirical studies offer rough quantitative estimates of employment in the SHC trade of individual countries, including Ghana, Kenya, Malawi, Senegal and Rwanda. These are listed in Table 1, along with analysis that helps us to understand how they can be compared between countries.

Table 1: Figures from existing studies of employment in the SHC sector

Source	Country	Estimate	Notes and methods
Baden and Barber (2005)	Senegal	This Oxfam (2005) study on the impact of the second-hand clothing trade on developing countries offers a key reference point for calculating SHC-sector employment in African countries. The study estimates that 25,380 workers are engaged in Senegal's SHC sector. These workers are divided between 8,456 trading entrepreneurs who employ a further 15,724 people, alongside 50 importers with 1,150 employees.	The figures are calculated drawing on a detailed case study, which uses market analysis and consumption data from household surveys. Since the study is nearly two decades old, the figures may not apply to today's SHC value chain.
Haggblade (1990)	Rwanda	Haggblade (1990) estimates the number of jobs associated with $10,000 of clothing expenditure in Rwanda. The study finds that every $10,000 of consumer expenditure on SHC creates an additional 4.8 full-time workers in the local SHC industry. Haggblade demonstrates that the used clothing trade provides earnings that are 10 to 50 percent higher than for those employed in tailoring. This finding is supported by Field's (2000) observation that SHC traders appear in Zimbabwe to earn a relatively high income compared to the average population.	These figures are based on consumer expenditure, which needs to be differentiated from import volumes and values (often the only data point available in African countries). This study is nearly 35 years old, so the figures need to be significantly adjusted for inflation if they are to be applied today.
IEA (2021)	Kenya	The study cites evidence from the Kenya National Bureau of Statistics (KNBS) Manpower Survey (2010-11), which demonstrates that approximately 10% of Kenya's extended labour force is engaged in the second-hand-clothing industry. Based on the size of the extended labour force being an estimated 20 million, this figure equates to roughly 2 million people employed by the SHC sector, largely as informal mitumba traders.	A manpower survey by Kenya's official National Statistics Office (NCO) would provide the most robust and accurate measure of employment in the SHC sector. However, while there is a link to the 2010-11 Manpower Survey on the KNBS website, it is not possible to access the original PDF file (KNBS, 2013).
SAD (1997)	Ghana	The study estimates that 150,000 Ghanaians worked in the SHC sector.	Although this study (and number) is frequently cited, it has not been possible to gain access to the original source which is not available online. Furthermore, the study is considerably out-of-date, having been completed over 25 years ago.

Source	Country	Estimate	Notes and methods
USAID (2017)	Kenya	The USAID (2017) review of the SHC distribution chain in Kenya finds that the sector sustains 121,000 distributors of used clothing, divided between 200 importers, 300 brokers, 8,000 retailers and 112,500 cameras. The study provides an estimate of ancillary jobs, i.e. jobs created by additional demand for SHC services, notably washing, cleaning, repair and alterations. In total, the SHC sector is estimated to sustain 27,000 ancillary jobs in Kenya alone. Total employment in Kenya's SHC trade is therefore estimated to be 148,000. Average per capita spending on SHC amounts to $1.69 on average per year, although the figure is higher among the lowest two income quintiles, where spending is US$3.50 (USAID, 2017).	The study does not account for informal employment at the level below camera retailers, notably itinerant traders who buy and sell SHC by the piece, or satellite cameras located in rural markets or outposts. This omission might help to explain the discrepancy with the IEA (2021) study which estimates that 2 million people are employed in the SHC sector. 148,000 jobs to process, distribute and sell 184,000 tonnes of imported SHC appear to be a very low figure. It is not realistic for one worker to sell more than one tonne of SHC per year. However, as noted above, the low ratio of SHC imports to workers can be partly explained since the study does not account for informal mobile traders. Unlike KNBS (2013), these numbers are not calculated using a labour survey, but are estimated using a value chain mapping exercise combined with qualitative data.
Watson et al. (2016)	Malawi	A case study of the charity DAPP Malawi shows that the organisation employs around 280 staff in the processing and sale of used textile products. In addition, around 3,000 market sellers regularly purchase SHC for re-sale from DAPP, each of which have around 2-3 workers per seller. This would equate to 9,280-12,280 workers sustained from DAPP's imports alone, which totalled around 4,000 tonnes in 2014/2015 (4,790 in 2014 and 3,370 in 2015). The study showed that consumer prices are reported to be between US$2-3 per kilogram of SHC (Watson et al., 2016).	The study contains inconsistent calculations of the number of workers in Malawi's SHC sector. While the authors estimate a figure of 20,000 informal workers in the entire Malawian SHC sector, it is not clear how the study arrived at these figures. The estimate appears to be based on DAPP's imports of SHC, which is then applied to total imports, creating a discrepancy. The authors of the study also point out that their calculations do not include workers in the transport and logistics sector involved in the SHC trade.

Along with the employment figures already noted, there are studies of African countries that provide estimates of SHC consumption within the population:

- SAD (1997) estimates that 95% of Ghanaians and 60 percent of Tunisians consume SHC (SAD, 1997).

- Hansen (1995) estimates that 80% of Zambians consume SHC.

- A World Bank (2015) study estimates that 63% of footwear (26.5 million pairs) sold in Kenya per year is mitumba (SHC).

- In Angola, Malawi and Mozambique, a survey of 3,485 respondents demonstrated that the majority (between 51% and 77%) of respondents purchased both new and second-hand clothing (Nørup et al., 2019).

Limitations of previous studies

Sumo et al.'s (2023) systematic review revealed that there are relatively few empirical studies of the economic impact of the SHC trade in Africa, largely as a result of the limited data available on Africa's SHC sector. Consequently, estimating precise employment figures remains challenging. Most studies rely on data from literature reviews and secondary sources, much of which is outdated and does not reflect the reality of the SHC sector as it is today in African countries. Without reliable data, it is difficult to employ robust methodologies; most studies rely on simple qualitative approaches (Ibid.). Furthermore, existing evidence is largely limited to the East African countries, and has been produced by researchers from the US and Europe.

The environmental impact of the SHC trade in Africa is also under-researched (Ibid.). Based on local anecdotal evidence, claims have been made that a large share of SHC imported to countries such as Kenya is of such poor quality that it cannot be sold, leading to dumping and incineration with harmful consequences for the environment (Greenpeace, 2022). However, more recent scientific survey evidence suggests the proportion of SHC imports that become waste is just 2-5% (GUCDA, 2024 and MCAK, 2023).

Nonetheless, there is an increased volume of new fast fashion items that generally have shorter life cycles because they are of poorer quality. Much of this is discarded directly (either as industrial or household waste) without entering the SHC value chain, which tends to sort unusable items early in the process. 8 million tonnes of clothing is already landfilled or incinerated in Europe each year alone[6]. This issue can best be tackled by promoting longer-lasting, durable and repairable clothing to maximise circularity[7], or by recycling fibres where possible.

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[7]   https://www.euwid-recycling.com/news/policy/jrc-study-explores-options-for-managing-used-and-waste-textiles-in-the-eu-191223/

[8]   Greenpeace also calls for a ban on textile waste, although not of second-hand clothes.

Chapter 3
Qualitative country-level data

3. Qualitative country-level data

There is as yet no systematic, quantitative employment data on the SHC sector in Angola, Guinea-Bissau, Malawi, Mozambique and Zambia. The only country for which employment data is available is Malawi and this is based on qualitative estimates (Watson et al., 2016). The next section of the paper offers an overview of qualitative studies that highlight evidence of the structure of the SHC labour market.

Angola

There is very limited literature on the Angolan SHC sector[8]. However, two studies provide some useful background. The first is a SIDA (Swedish Development Agency) study by Peck and Pinto (2003). The research finds that between 80-90 percent of Angolans dress in SHC. Assuming that the minimum clothing requirement is 7 pieces per year (corresponding to 2 kilograms), the authors calculate that this would equate to demand for 24,000 tonnes of SHC (Ibid.). The second is a study of reuse rates in Angola, as well as Malawi and Mozambique. This reports on a survey of 3,485 respondents, a majority of whom purchased both new and second-hand clothes (Nørup et al., 2019).

Guinea-Bissau

To date, there are no studies of the SHC sector in Guinea-Bissau. According to UN-COMTRADE data, the country imports around 2,000 tonnes of SHC per year (around 1 kilogram per person). The charity ADPP Guinea Bissau operates in the country, and is engaged in the distribution of second-hand clothes. According to its own accounts, the organisation hired 38 people in formal jobs in the country in 2023[9]. ADPP also states that informal jobs are provided in the logistics, sorting and retail sectors.

Malawian 'kaunjika'

Watson et al. (2016) provide a useful case study of the SHC market in Malawi based on the operations of the organisation DAPP Malawi, which uses clothing imports from Nordic countries. Interview sources estimate that around 90% of Malawi's population are only able to afford second-hand clothes.

The structure of Malawi's SHC sector is similar to that of other African economies. Shipping containers of bales wrapped in plastic film and weighing up to 20 tonnes are imported, with each bale weighing between 50 and 400 kg. Depending on the size of the bales, wholesalers and charity organisations typically sort, fold, grade, pack and sell bales of SHC to micro-entrepreneurs, who in turn distribute them primarily in rural areas and townships targeting vendors, petty traders and ultimately, consumers (Mhango and Niehm, 2005). SHC is primarily sold through informal retail outlets, often in open-air markets, along streets, by hawkers, and through private homes (Dacombe, 2000; Johns, 1999; McGarry, 2002). Almost all imports are judged to be suitable for reuse, with the amount of rejected material estimated to be around 1%. Rejects are sold to companies that can refurbish, repair or repurpose the SHC for rags and other textile products.

[Guinea Bissau] imports around 2,000 tonnes of SHC per year (around 1 kilogram per person).

Around **90% of Malawi's population** are only able to afford second-hand clothes.

80-90% of Angolans dress in SHC.

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[9]   Angola used to have domestic textile and clothing manufacturing industries, which declined as a result of the downfall of the country's cotton production, as well as poor sectoral industrial policies and an overvalued exchange rate (Peck and Pinto, 2003).

[10]   This information was provided directly by Humana People to People.

Prices are reported to be between US$2-3 per kilogram of SHC (Watson et al., 2016). This study also provides employment estimates for Malawi's SHC sector. Specifically, DAPP formally employed around 280 staff in the processing and sale of textiles. In addition, around 3,000 market sellers regularly purchased SHC for resale from DAPP, each of which generally have 2-3 workers per seller, largely in the informal sector. This would equate to 9,280-12,280 workers that are sustained from DAPP's imports alone, which totalled around 4,000 tonnes in 2014/2015 (4,790 in 2014 and 3,370 in 2015)[11] (Watson et al., 2016). DAPP has provided up to date data to show that as at 2023 it is employing 426 workers in formal jobs distributing and selling second-hand clothes and footwear in Malawi.

Mozambique's 'calamidades'

The most wide-ranging analysis of Mozambique's SHC sector is provided by Andrew Brooks (Brooks, 2012; Brooks and Simon, 2012). Drawing on extensive field research, Brooks examines vendors' ability to profit from SHC. He considers second-hand clothing stalls as part of an international trade network. Brooks finds there are considerable difficulties for vendors located further down the value chain, for which opportunities for value-add sales and profitability remain limited. The study primarily focuses on the capital city, Maputo, and highlights the difficulties that SHC vendors there face.

The study references the fact that Mozambican SHC is predominantly imported by Indian traders, except for those imported by the Mozambican-run charity ADPP Mozambique. Indian traders sell bales of between 45-55 kilograms, and then sort and categorise them into different types of used clothing, including jeans, blouses or shoes. Intact bales are also purchased by Mozambican vendors from Indian-owned warehouses. Vendors sell SHC at fixed market stalls. Brooks's study is focused on Xipamanin market in Maputo, which has 2,500 market stalls, 1,000 of which sell SHC. Bales are opened, a process which is referred to as a "toda bola" (lottery) by vendors, as certain bales contain clothes that are of lower quality. Specific items are purchased by specialist vendors, who then resell them outside the main market area (Brooks, 2012).

Brooks notes that the charity ADPP Mozambique operates a different model, primarily importing to the central city of Beira and serving the surrounding areas. The study interviewed ADPP customers, who attested that the clothing was of high quality. Local people interviewed noted that the ADPP social enterprise model aimed to help local people rather than profiteer from them (Brooks, 2012). ADPP Mozambique describes its imports as being clothes and shoes from Europe, which are sorted and selected for the Mozambican market and fitting for the climate. The clothes arrive packed in bales of 400-450 kg. The bales are then further sorted into 136 different categories in ADPP Mozambique's industrial sorting centre in Beira, where they are pressed, packed and branded into bales of 15 kg or 45 kg. These bales are randomly checked for quality control and sold from wholesale outlets. A smaller proportion of the imported clothes are sorted for sale in ADPP Mozambique's retail shops in Maputo. The funds raised from the sale of clothes give ADPP Mozambique a stable income for its social development projects, with a primary focus on the area of education.

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[11] Note that the authors estimate a figure of 20,000 informal workers for the entire Malawian SHC sector. However, it is not clear how they arrive at these figures, as they appear to estimate the calculation based on DAPP's imports of SHC, but apply it to total imports, which creates a discrepancy.

Zambian 'salaula'

Much of the literature on Zambia's – and indeed Africa's – SHC sector has been shaped by the work of Karen Tranberg Hansen. As an anthropologist, her work documents the importance of salaula in Zambia's economy and culture, and the evolutions in clothing consumption that have arisen since the mid to late 1980s as a result of the growth of SHC imports (e.g. Hansen, 1993; 1999; 2000; 2004; 2014). Although Hansen does not provide quantitative estimates, her work offers context and background that enables us to better understand employment patterns associated with the SHC sector.

Salaula ('to select from a pile in the manner of rummaging') is primarily imported by container ships into Tanzania, South Africa and Mozambique, before being trucked to wholesale markets in Lusaka. At the warehouses, bales are sold to marketeers, vendors and private individuals, who in turn distribute and sell the goods in urban and rural markets, hawk them in the countryside, and exchange them in return for produce (Hansen, 2000). Hansen (1994) states that Zambian SHC traders are highly heterogeneous, consisting of workers from different age groups, genders, ethnicities and socio-economic backgrounds.

Hansen highlights the value that the SHC trade provides to Zambian households. It creates income not only for traders, but for ancillary activities in repair, alteration, cleaning and other support services (Hansen, 2004). Rather than displacing tailors (see Haggblade, 1990), she argues that salaula has kept tailors busy with more repairs and alterations, including the transformation of salaula into re-styled garments. Overall, it is clear that SHC is an important sector in Zambia. Three-quarters of Zambia's population shop from salaula; it represents the single largest market segment across the country (Hansen, 2004).

Three-quarters of Zambia's population shop from salaula.

Chapter 4
Quantitative methodology

4. Quantitative methodology

In the absence of detailed employment figures for the five countries included in this study, the following four-step methodology is adopted to more reliably estimate employment figures:

1. SHC net imports: as one of the few consistent data points available on SHC, trade data is collected for the five countries covered in this study, as well as other African countries for which SHC employment data is available.[12] Note that this data does not include used fibres listed under HS-code 6310, such as used rags and textile scraps, which are primarily intended for recycling.

2. For Ghana, Kenya and Senegal, for which employment data is available, SHC net imports are used to calculate the ratio of imports to the number of jobs created in the SHC sector. This ratio is estimated to lie between 3.0 and 10.9 jobs per tonne of SHC imported based on existing literature (Table 2).

3. For all five countries covered in this study, an average ratio is applied based on the calculations for Ghana, Kenya and Senegal. This average ratio is 6.5 jobs per tonnes of SHC imported. The calculations are outlined in Table 2.

4. Finally, formal versus informal employment in the SHC sector is calculated using known figures for Senegal (Baden and Barber, 2005) and Malawi (Watson et al., 2016). To our knowledge, these are the only studies that offer an estimate of formal versus informal employment in the SHC sector, demonstrating that 3.4% of total SHC employment is formal (i.e. out of 100 SHC jobs, 3.4 are formal and 96.6 are informal). This ratio is applied to other countries in the study (Table 3).

To our knowledge, these are the only studies that offer an estimate of formal versus informal employment in the SHC sector, demonstrating that **3.4% of total SHC employment is formal** (i.e. out of 100 SHC jobs, **3.4 are formal and 96.6 are informal).**

Table 2: Calculations underpinning total employment in the SHC sector

Country	SHC net imports (tonnes)	Total SHC employment	Import/ employment ratio
Ghana	35,000 (1997)	150,000 (SAD, 1997)	4.3
Kenya	184,000 (2019)	2,000,000 (IEA, 2021)	10.9[13]
Senegal	5,990 (2005)	25,380 (Baden and Barber, 2005)	4.2
5-year averages (2018-2022)			
Angola	104,358	674,582	
Guinea-Bissau	1,888	12,206	
Malawi	44,102	285,079	6.5
Mozambique	29,567	191,124	
Zambia	18,110	117,063	

Sources: UN COMTRADE and the Government of Angola's Ministry of Finance

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[12] SHC import data can be downloaded from UN COMTRADE using the HS-code 6309 to calculate the total volume of net imports (i.e. imports subtracted by exports and re-exports)

Table 3: Calculations underpinning formal versus informal employment in the SHC sector

Country	Informal employment	Formal employment	Formal jobs (%)
Senegal	24,180 (Baden and Barber, 2005)	1,150 (Baden and Barber, 2005)	4.5%
Malawi	12,000 (Watson et al., 2016)	280 (Watson et al., 2016)	2.3%
Average			
Angola	651,578	23,004	3.4%
Guinea-Bissau	11,789	416	
Malawi	275,358	9,721	
Mozambique	184,607	6,518	
Zambia	113,071	3,992	

In total, the calculations suggest that over 1.28 million people are employed in the SHC sectors of Angola, Guinea-Bissau, Malawi, Mozambique and Zambia. A vast majority (1.23 million) are in informal employment, reflecting the nature of the wider labour market across Sub-Saharan Africa.

Application of the assumptions

We argue these assumptions can indeed be applied across different countries. This is because imported textiles essentially require the same amount of sorting, and go through the same process, when arriving in recipient countries. While it is likely that the process involves more mechanisation (and is therefore less labour-intensive) in developed economies, the process is less likely to involve sophisticated technologies in African countries. Even in western countries, the processing of SHC predominantly relies on manual labour and experience. As documented using qualitative evidence in Chapter 3, the SHC value chains across the five countries covered in this study operate in similar ways.

However, differences can emerge when considering the ratio of formal to informal employment between countries under the fourth step of the methodology. The level of informality in the labour market varies, and in more developed countries, the extent of formal employment may be higher. As described in Chapter 2, this means that more retailers and ancillary services are likely to be formalised, providing a higher share of formal jobs in the SHC sector than in other countries.

Assessment of the results

Without detailed data from national household-level labour force surveys (LFS), it is not possible to provide a detailed estimate of employment across the SHC sector. As described in Chapter 2, the different occupations involved in the sector are distributed between several occupational (ISCO) and industrial (ISIC) classifications used in most survey instruments. Where it is possible to distinguish a vendor (e.g. ISCO code 1420 – Retail and Wholesale Trade), it will not be possible to distinguish between retailers of new versus used clothes and other products unrelated to textiles and garments.

However, existing empirical data from LFS can provide an indication of where the upper boundaries lie. Almost all SHC jobs are located in the service sector, which represents between 20% and 39% of total employment in the five countries. These figures represent the upper

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[13]   See Table 1 for an explanation for this outlier. While the ratio is based on Kenya's national manpower survey, which should make this an accurate source, it has not been possible to access the underlying data.

bound for SHC job numbers, but the estimates of SHC employment in this study represent 5-25% of total service sector employment in each country. Remaining service sector employment is typically provided by food services, education, health, transportation, wholesaling or the retail of products other than SHC (see e.g. Baulch et al. 2019 for Malawi).

Table 4: Headline labour market statistics and levels of informality (2022)

Measure	Angola	Guinea-Bissau	Malawi	Mozambique	Zambia
Total labour force	15,042,940	705,130	7,992,750	14,614,370	6,939,000
Total employment	13,507,124	679,871	7,477,997	14,043,428	6,720,684
Employment in services (%)	34%	39%	30%	20%	33%
Total employment in services	4,592,422	265,150	2,243,399	2,808,686	2,217,826
Estimated SHC employment (2018-2022 average)	1,164,425	12,206	285,079	191,124	117,063
SHC employment as % of services	25.4%	4.6%	12.7%	6.8%	5.3%

It is possible to corroborate these figures using data from enterprise surveys, as informal micro-, small- and medium-sized enterprises (MSMEs) provide most services in African economies. There are some data points from these surveys that correspond to the estimates provided in this study. For example, a War on Want (2006) study cites evidence from a survey conducted by the National Statistical Office of Malawi, which shows that MSMEs outside the agricultural sector – which are involved in the trading and vending of second-hand clothes, among other goods and services - contribute income to 25 percent of Malawian households while employing 1.7 million people. A World Bank Jobs Diagnostic for Mozambique (Lachler and Walker, 2018) shows that 12 percent (1.28 million) of the country's jobs are in private wage-based activities and non-farm self-employment, mainly in the retail trade, including the operation of kiosks that sell SHC among other goods. Both of these estimates are considerably higher than the estimates of SHC employment, which are 285,000 and 191,000 for Malawi and Mozambique, respectively (Table 4).

The numbers also tally with anecdotal evidence from the everyday economy in these countries. For example, Hansen (2004) documents that she encountered "workers and helpers everywhere" when she conducted a snap survey of Lusaka's largest SHC market. Similarly, Calabrese cites evidence from interviews with traders' associations that indicate around 200,000 informal SHC retailers operated in Dar es Salaam alone (Calabrese et al., 2016). Given that a high share of African workers rely on informal trade – including of SHC - to support their livelihoods, a total of 1.28 million people employed in the sector across the five countries appears to be a relatively conservative estimate, given this represents just 1.19% of the total population of those countries[14].

Given that a high share of African workers rely on informal trade – including of SHC – to support their livelihoods, a total of **1.28 million people** employed in the sector across the five countries appears to be a relatively conservative estimate.

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[14] Based on the total population of Angola (34.5 million), Guinea-Bissau (2.06 million), Malawi (19.89 million), Mozambique (32.08 million) and Zambia (19.47 million) in 2021, which totals 108 million people compared to 1.28 million workers in the SHC sector across these countries.

Chapter 5
Future avenues of research

5. Future avenues of research

While this paper provides a conservative estimate of the number of jobs linked to the SHC trade in five African countries, further research efforts are required on four fronts to provide more accurate figures.

The first should focus on representative enterprise surveys of vendors in markets, where the share of jobs in the SHC sector is highest. To distinguish jobs reliant on the SHC sector compared to other retail, these surveys could determine the share that SHC trade occupies compared to other products, as well as asking fixed stall vendors how many hawkers or satellite vendors they employ. A recent survey suggested that up to 91.9% of SHC vendors at Kantamanto Market in Accra identified SHC as their primary source of income (GUDA & MREB, 2024).

Secondly, future research should investigate the environmental impact of SHC trade. At present, assessment of the employment impact of SHC trade relies on import figures, but the share of official (and unofficial) imports that end up being sent to landfill is uncertain. All clothes reach the end of their life at some point. It is uncertain how much textile waste found in dump sites is freshly imported SHC or clothes that have reached the end of their useful life. Research should be undertaken to distinguish channels of waste. In addition, the environmental impacts of replacing SHC with newly produced clothing - most likely imported from cheap production in Asia - are under researched. Greater understanding of these issues can help guide responses to reducing clothing waste.

Third, future research should consider ways in which SHC employment can drive the structural economic transformation that is required in poorer countries. All five countries in this study continue to suffer from high levels of extreme poverty, defined as living below the International Poverty Line of $2.15 a day (Table 5). A majority of the population of these countries relies on non-mechanised agriculture to support their livelihoods. While structural transformation can be achieved by increasing productivity in agriculture, informal services such as retail can act as a first stepping stone to diversify incomes and livelihood strategies. Additional income and savings can be used to make productive investments, such as in education, which unlock economic opportunities over time. There is evidence of a relationship between high skills services - such as education or business - and economic development in Africa (see e.g. Baccini et al., 2021). Future research could further explore the evolution of services (e.g. from informal to formal or from low- to high-skills) and the impact this has on economic development and transformation. This could also be used to formulate policy responses that support that process, for example by formalising jobs in SHC retail and providing them with social protection.

A recent survey suggested that up to **91.9% of SHC vendors** at Kantamanto Market in Accra identified SHC as their primary source of income.

Table 5: Poverty statistics in Angola, Guinea-Bissau, Malawi, Mozambique and Zambia

Measure	Angola	Guinea-Bissau	Malawi	Mozambique	Zambia
Share of population living in extreme poverty	31.1% (2018)	26% (2021)	70.1% (2019)	74.5% (2019)	64.3% (2022)
Share of labour force employed in agriculture	51% (2019)	60% (2019)	76% (2019)	70% (2019)	50% (2019)
Average household size	6.4 (2016)	6.81 (2019)	4.28 (2020)	5.76 (2011)	6.49 (2018)

Source: OurWorldInData (2024) and Global Data Lab (2024)

Finally, and related to the above, research should quantify the economic impact of SHC beyond providing employment, such as in terms of wages, household income, poverty reduction or fiscal revenues. In 2022, estimated tax intake from SHC to Angola, Guinea-Bissau, Malawi, Mozambique and Zambia alone is estimated to lie above $73.5 million when considering average import tariffs, VAT rates as well as Costs & Freight (C&F)[15]. A recent study of retailers found that 88.1% of SHC traders served as primary earners of their households, and that a majority of these traders (87.8%) had one or more dependents, suggesting significant contributions to household incomes (GUCDA, 2024). If these same assumptions were applied to the five African countries in this study it would suggest over 2.5 million people relying on SHC jobs, which is likely to be a low estimate given different average household sizes across the different countries.

A recent study of retailers found that **88.1% of SHC traders served as primary earners of their households**, and that a majority of these traders **(87.8%)** had one or more dfependents.

Conclusion

Overall, this paper discusses the impact of SHC on employment in five African countries. Quantifying the precise effect of the SHC sector on the labour market is challenging, not least because many jobs lie in the informal segment of the labour market and are rarely captured in official employment statistics. Nonetheless, this study has drawn on previous empirical work and used a range of methodologies to produce more reliable estimates of the number of jobs, both formal and informal, attributable to the operation of the SHC clothes trade. The conclusion is that the SHC sector in these five African countries is likely to support a significant number of jobs, especially in the informal sector. We find that over 1.28 million people are employed in the SHC sectors of Angola, Guinea-Bissau, Malawi, Mozambique and Zambia, and the vast majority of these workers are in informal employment. The trade also had a positive impact in increasing government revenues and reducing poverty rates by supporting household incomes.

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