AN ASSESSMENT OF THE EFFECTS OF THE IMPORTATION OF SECOND HAND CLOTHES ON THE GROWTH OF TEXTILE INDUSTRY IN KENYA: A CASE STUDY OF SPINNERS AND SPINNERS FIRM IN RUIRU COUNTY

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ABSTRACT

This study endeavored to investigate the effects of importation of second-hand clothes on the growth of textile industry in Kenya. The theory of the firm states that, firms or corporations exist and make decisions in order to maximize profit. Besides, financial gains satisfaction of creation and self- sufficiency is amongst the key aspects motivating individuals to engage in business. The research relied on descriptive research design, being a scientific method involving observing and describing the behavior of a subject, without influencing it in any way, and it was the research design of choice for this study. The purpose was to observe subjects in a completely natural and unhampered environment. The study also applied the case study approach of Spinners and spinners firm in Ruiru County with 800 staff. The targeted population comprised of 51 textile firms within the textile industry in Kenya. Respondents comprised of 20 from top level management, 100 from middle level management, 680 from operation staff and only 30 customers chosen purposely. The findings were aimed at benefiting various stakeholders including, the top management to realize the weak areas of performance for improvement, enlighten the employees on the need to work as a team in achieving both individual and organizational goals, and also the researchers in the same field of study, acting as a resource material to facilitate the study. This study employed questionnaires as the main tool of data collection in order to target mainly primary data which were collected directly from the respondents and a systematic counterchecking of questionnaires after conclusion of the field work. The information was processed, coded and thereafter, tabulated by use of statistical tools and presented in form of visual and graphical aids, including charts and graphs. Qualitative information was presented in narrative. This enabled establishment of reliability levels, verification of data, editing to allow for effective quantitative analysis and subsequent tabulation of information or data easy to understand including charts, diagrams and tabular presentations. The results indicated strong believe by the respondents, that strain in the local textile industry resulted from imported second-hand clothes. On the same note respondents felt that in order to compete with imported second- hand clothes, the company would need to come up with products that would be affordable to the people of low income bracket. Following the data analysis of the study, it was concluded that the textile industry in Kenya was controlled by the cost of imported second- hand clothes, which are cheap and therefore drew customers from the relatively expensive locally manufactured clothes. Recommendations were proposed to the government to regulate the industry and also allow further research for deep insight into this subject.

Keywords: *Second Hand Clothes, Textile Industry, Ruiru County, Kenya*

Introduction

The textile industry was established in Kenya soon after independence in 1963. According to Ochieng (2002), the first textile mill (KICOMI) commenced operations at Kisumu in 1965, with Indian and Kenyan capital. Two other textile mills were established in Eldoret, and stated as subsidiaries of Indian multinational companies, were Raymond's Woolen Mills in 1969 and Rift Valley Textiles (RIVATEX) in 1977.

The production of textile and clothing expanded only up to early 1980s, after which it underwent various challenges. Some of these challenges included the droughts of 1979-80 and 1984, which required massive food imports and thus diminished government spending on industry. The increase of world oil prices also raised costs of industrial production, particularly in Western Kenya. Ochieng noted that the collapse of East African Community in 1977 may have contributed to reduction of industrial exports to Uganda and Tanzania. This resulted to the closure of KICOMI textile mills which went into receivership in 1983 (Ochieng, 2002).

Later on, the state banks took over the firm and after injecting additional funds, KICOMI was reopened. It followed that, the three textile mills RAYMONDS, RIVATEX and KICOMI all profited from a minimum boom between 1985- 1986, partly resulting from the world economic recovery of that period and later by an increase of local demand brought about by an upsurge of money from export of coffee. At that time, the western firms experienced high sales and profits and a subsequent increase in investments (Ochieng, 2002).

Wilson and Abiola (2003) noted that the local textile manufacturing industry supplied only 45% of the Kenyan textile market while the imported new and used clothes account for 37% of the market. Belda (2006) learnt that an estimated total fabric demand by the Kenyan people is at least 225 Million square meters annually. The mills have a combined installment capacity of 115 million square meters while the garments manufacturing sector has a combined capacity to process fabrics into garments equivalent to 85% of the total national demand. Therefore, the total capacity to make garments in the country is above the demand.

This feature however has not induced the expansion in the weaving sector, due to the importation of large volumes of new and used ready-made garments along with finished fabrics, all of which sell at low prices. The high pricing of locally manufactured garments reduces their demand from the local people. The textile industry is unique in that it has links with farmers, scientists' engineers, chemists, technologists' transporters and many other sectors of development of the economy (Belda, 2006).

Wilson and Abiola (2003) observed that the focus today is to revive the industry, in order to exploit emerging export market opportunities, such as those offered by the United States through African Growth and Opportunity Act (AGOA). This could be done by providing quality cotton seeds to farmers with the expectation of getting quality cotton harvests, use of inputs like fertilizer and use of new technology of machinery and equipment. Good pest control methods could also be put in place and prevention of sustainable diseases can be applied.

Wilson and Abiola (2003) suggested that it was also important, to have a strong legislation to control importation of sub-standard textiles. Kenya has the basic infrastructure for implementation of standards to facilitate international trade in agricultural commodities and agro-industrial products. Robertson (1997) in his study, noted that in 1991 market liberalization policies opened doors to flooding of imported clothing, whereby most of them were second-hand clothes replacing the traditional fabrics. Meanwhile, some African textiles came from Tanzania and India, thus killing the local industry. Shockingly, many heaps of clothes came as donations from charitable organizations and they were found in the Kenyan markets. For these reasons, factory after factory closed their doors in Kenya, and in 2001, there were no traditional garments manufacturers left save for micro garment producers and tailors who operated in small scale in the informal sectors.

In the year 2000 according to Robertson (1977), United Sates instituted the African Growth and Opportunity Act (AGOA), to eliminate import duties on textiles from Africa. This resulted in many traditional textile manufactures attracting investment from India, shifting their focus to producing of trousers, shirts, and dresses for the American market and revitalization of the industry. Ladrianidis (2008) observed that Kenya surpassed Mauritius in 2003 and South Africa in 2004, to become second to Lesotho for exports to USA under AGOA measured as Small and Medium Enterprise (SME) in 2007.

Since the end of Multi-Fibre Agreement (MFA), factory closures contributed to the reduction of apparel manufacturers from 34-22, reversing the years of AGOA gains, a devastation Kenya refer to as "Chinese Tsunami" (Mulama, 2005). By 1st May the International Labour Day and four months beyond the end of MFA, Kenya had lost 6,000 jobs in apparel for export (Ladrianidis, 2008). The textile industry in Kenya experiences a lower market share compared with that of the second-hand clothes (SHC). Mulama (2005) noted that, the SHC market is one of the most successful in Kenya because, over the years Import liberalization saw an influx of second hand clothes into the Kenyan market at an alarming rate. The industry is said to offer employment, both direct and indirect to about 5 million people in both rural and urban areas.

The "Gikomba" market in Nairobi is one of the largest second hand clothes markets in East Africa employing over 100,000 people. The traders of second hand clothes make an average of US$ 96 per month (Kshs. 6,720) which is double the monthly income received by a machinist in Export Processing Zone (EPZ) garment factory who receives an average of US$ 65.3 (Kshs. 4,571), thus it is perceived by most as a profitable business (Mulama, 2005).

In view of Wilson and Abiola (2003), reduced levels of textile production is mainly attributed to low quality of cotton seeds supplied to the farmers, use of poor technology whereby, many ginneries were operating outdated roller mills that consumed huge amounts of electricity. The infrastructure was very poor thereby posing major problems of accessing the farms, and therefore all these factors increasing costs of production. Mulama, (2005) stated that over the years, the ginners interviewed cited reduced capacity as the major factor impeding production, and hence they were forced to lay off workers resulting in loss of employment and livelihoods.

The study revealed that, uncontrolled importation of second hand clothes may be one of the factors of increased level of competition among others, which have prevented the growth of textile industry in Kenya. Theroux (2004) stated that one of the contributions to the success of SHC business could be attributed to the fact that most of the stocks are made up of charity donations made by people in North America and Europe, who assume that they are sending their used clothing to the poor for free distribution. To the contrary, the clothes are sold by traders who do not incur the cost of manufacturing, raw material and processing.

Statement of the Problem

The primary objectives of starting any business is making profit and growing the business into a large enterprise. In Kenya, the textile industry started soon after independence in 1963 and only expanded until 1980s. Majtenyi (2010) noted that the importation of cheaper second-hand clothes had brought competition in the textile market. The traders of second-hand clothes according to Mulama (2005) made an average of US$ 96 per month (Kshs. 6,720) which was almost double the monthly income received by a machinist in Export Processing Zone (EPZ) garment factory, who received an average of US$ 65.3 (Kshs. 4,571). Thus, it was perceived by most people as a more profitable business. The investors together with cotton farmers, blame the used clothes sector for leading to closure and relocation of factories leading to job losses over the years.

Kenya Association of Manufacturers CEO Betty Maina said, “Efforts must be put in place to ensure that all second-hand clothes and new garments coming into the country are properly levied in order to reduce unfair competition,” (Ng’ang’a, 2012, p.1). She also said that 41 textile making firms had closed shops in the last three years partly due to an influx of cheap second-hand clothes.

Lefton (2010) noted that importation second hand clothes could pose direct threats to national security and therefore may lead to closure of the textile factories, affect the small scale cotton farmers who supported livelihoods of over 200,000 people and manufactures who accounted for 20% of formal employment and the country’s export due to closure of Multi-fibre Arrangement in 2004.

This study observed that, since textile industry contributed in a big way to the economic development of Kenya, the closure would adversely affect the economy at large in the desire to achieve vision 2030. This study was therefore aimed at uncovering important information, on effects of the importation of second hand clothes on the growth of textile industry in Kenya which became the key to resolving the problems facing the textile industry. The following were the objectives of the study.

Literature Review

Literature review involved locating, reading and evaluating reports of previous studies, observations and opinions related to the planned study. It therefore led to appreciating and understanding the research that others had done, in one's area of interest (Mugenda and Mugenda, 2003). This chapter covered selected literature, as it examined the general and specific theories presented in the field of textile industry, pointing at the research gaps that emphasized the need for this study. Various variables were also discussed, which explained the effects or causes between various areas covered alongside the objectives of this study.

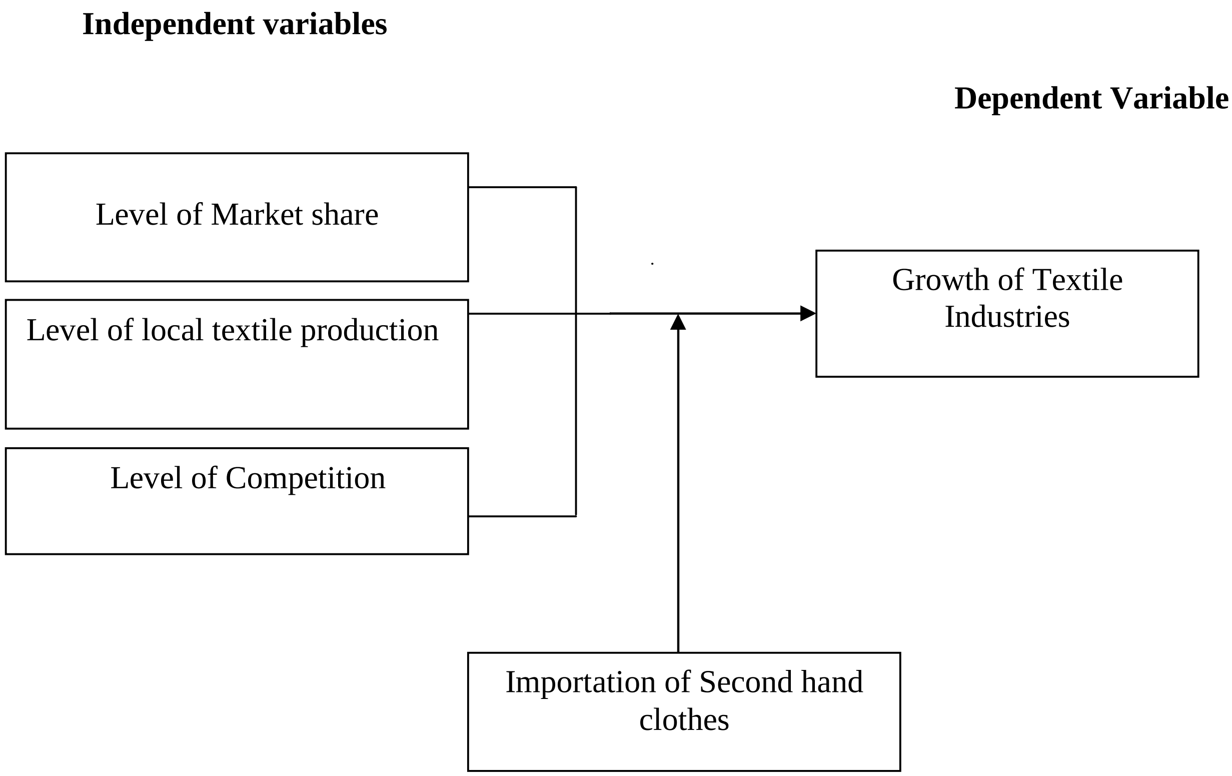
Bourner (1996) noted the importance of doing literature review before embarking on a research project included among others; to identify the gaps in literature, to carry on from where others had already reached, to build on the platform of existing knowledge and ideas. It was helpful in identifying a study network, which was a valuable resource of increasing ones breadth of knowledge in the subject area. Besides, it provided intellectual context for the study work, enabling the positioning of the study relative to other people's work. The study was able to identify opposing views, and therefore put the work into perspective. It also made it easy for the intellectual to identify information and methods that were relevant to the project.

Conceptual Framework

A conceptual Framework is a framework of ideas, concepts and a design of the study that can be put into action and yield interesting useful and achievable results. A concept is an image or symbolic representation of an abstract idea (Wisher, Gina 2008). Miles and Huberman (1994) define a conceptual framework as a visual or written product, one that "explains, either graphically or in narrative form, the main things to be studied—the key factors, concepts, or variables—and the presumed relationships among them".

A clearly articulated conceptual framework has potential usefulness as a tool to scaffold research and assist a study to make meaning of subsequent findings. The framework is a research tool intended to assist a study to develop awareness and understanding of the situation under scrutiny and to communicate this. As with all investigations in the social world, the framework itself forms part of the agenda for negotiation to be scrutinized and tested, reviewed and reformed as a result of investigation (Guba and Lincoln, 1989).

Conceptual Framework



Theory of the Firm

The theory of the firm studies, the supply of goods and services by profit-maximizing agents or businesses**.** It consists of a number of economic theories that describe the nature of the firm, company or corporation, including the perspectives of its existence, behavior, structure, and most importantly, its relationship to the market. Simply put, the theory of the firm states that firms or corporations exist and make decisions in order to maximize profit. Gupta also observed that business interacts with the markets in order to determine pricing and demand, and then allocate resources according to models that look to maximize net profits (Gupta, 2004).

Gupta (2004) noted that every individual firm is mindful of the prices that other firms set before setting its own. This is because of the input and output relationship among firms. Besides, a garment firm cannot set the price of its garments, until it is sure of the price the textile firm would charge on its textiles, because textiles are inputs of the garment firms.

Mann, Harte and Ponting (1973) noted that textile manufacturing provides, the supreme example of the pre-industrial revolution multi- product of a consumer oriented industry, affecting little or no change for centuries in the basic technique of its main production processes, but frequently changing in an almost infinite variety of small ways, the combination of inputs which determine the look, feel, finish colour, pattern or weight of the final product and by this route sometimes though not necessarily also affecting its cost and profitability.

Carrizosa (2006) revealed that firm growth is related very closely to firm survival, and there is a positive correlation with the likelihood of survival. Hence, firms that experience continuous growth will have a higher probability of surviving in the market. A positive rate of growth implies a net creation of new jobs, while a negative rate implies the net destruction of jobs. Job creation and job destruction are closely related to the ability of incumbents and new entrants to grow. The evolution of employment therefore has obvious impacts on Government budgets.

He also noted that firm growth, is a way of introducing innovation and a necessity of technological change. For example, if a firm wants to grow and survive in a competitive industry, it needs to incorporate new technologies in order to become more efficient. Therefore, growth is a challenge that a firm must meet when introducing innovation (Carrizosa, 2006).

Jedlicka, W. (2009) observed that evolution of the size of incumbents and new entrants, determines market concentration in that if small firms grow at a high rate, market competitiveness will increase. The regulation of market concentration to avoid the creation of monopolies and oligopolies has been one of the main interests of governments. Hill, M.T. (2010) observed that once a firm enters a market, a selection process takes place, whereby less efficient firms decrease in size and disappear and more efficient ones survive and grow.

Another important characteristic is that firm growth has practical consequences for policy-makers' decisions. Firm growth can increase employment and economic activity and policymakers can control these macroeconomic variables using firm growth policies. However, as the growth is heterogeneous between firms, it is crucial to know the internal and external characteristics of firms that affect their performance in the market (Carrizosa, 2006).

Research Methodology

Research methodology is a systematic and controlled sequence of events, needed to plan what data are to be collected, from whom, and how they are to be analyzed. This chapter therefore analyzed the overall research process consisting of research design, target population, sample size, sampling design and procedure, data collection instruments and procedures, data analysis and ethical considerations. This chapter provided an accurate and detailed description of how the research was done. It enabled the readers and future researchers to understand the exact conditions of this study.

Research Design

A research design is the structure of research. It is the glue that holds all the elements in a research process project together. A design is used to structure the research, to show how all of the major parts of the research project work together to try and address the central research questions. Orodho (2003) defines it as the scheme outline or plan that is used to generate answers to research problems. It is the arrangement of conditions for collection and analysis of data in a manner that aims to combine relevance with research purpose. It constitutes the blueprint for the collection, measurement and analysis of data (Kothari, 2003).

This study used descriptive survey research design. According to Sekaran and Bougie (2011) descriptive study is undertaken in order to ascertain and be able to describe the characteristics of the variable of interest in a situation. Frequently, descriptive studies are undertaken in organizations to learn and describe the characteristics of a group of research respondents or organizations in understanding relevant aspects. Descriptive studies thus become essential in many situations, especially when using qualitative data in understanding phenomena. Descriptive research design has been used in various other studies like in analysis of sociological youth inactivity in the Philippine while Saeed (2010) used it for study of supply chain as well as risk management concepts on the oil industry. Moodley (2007) also used it to investigate the impact of employee satisfaction levels on customer service in the service utility at Telkom South Africa. In view of the above descriptions and strengths, descriptive survey was the most appropriate design for this study.

Target Population

Target population refers to the group for which representative information was desired. Rather, this was the group where the findings of this study were generalized (Reyes, 2004). The target population of interest in this study was 51 textile firms found in the Textile Industry in Kenya. The case study was based on 800 stakeholders of Spinners and Spinners Limited. The total population of respondents was 104, comprising of 20 members in top level management, 20 in middle level management, 34 from operation staff and only 30 customers selected purposely.

Sampling Procedure

This study used simple random sampling approach. This method of sampling involved, giving a number to every subject or member of the accessible population; placing the numbers in a container and then picking any number at random (Mugenda and Mugenda, 2003). According DeFusco, Mcleavey, Pinto and Runkle (2011), simple random sample is a subset of a larger population created in such a way that each element of the population has an equal probability of being selected. Another strategy involves the use of a table of random numbers which are usually included in the statistics books. Alternatively, random numbers can be generated by use of computer programmers.

Castillo (2009) noted one of the benefits of simple random sampling, as the ease of assembling the sample. It was also considered as a fair way of selecting a sample from a given population, since every member was given equal opportunities of being selected. Another key feature of simple random sampling was that it was a representative of the total population. In this study of a population of 800 staff, the researcher preferred to issue questionnaires to all the 20 top management members, 20% of 200 middle management, 5% of the 680 operation staff and only 30 customers. The 30 customers were chosen purposely, due to the fact that Spinners and Spinners had a huge number of customers, but who the organization was not sure of their active loyalty.

Sample Size

Sample size meant, the chosen number of observations that were included in a statistical sample. According to Mugenda and Mugenda (2003), the sample size should be as large as possible so as to produce the salient characteristics of the accessible population to an acceptable degree. Sample sizes were judged based on the quality of the resulting estimates. The sample size was in such a way that it was within plus or minus 0.05 of the population proportion with a 95 percent level of condense. Alternatively, sample size was assessed based on the power of a hypothesis test.

Table 3.1: Sampling Frame

Category	Total Population	Sample Percentage	Actual Sample Population
Top Management	20	100%	20
Middle Management	100	20%	20
Operation staff	680	5%	34
Customers	-	-	30
Total	**800**		**104**

Results

The study established the effects of the importation of second – hand clothes on the growth of textile industry in Kenya. This was assessed in three major variables which included- Level of Market Share, Level of Local Textile Production and Level of Competition. In addition, Importation of Second- Hand Clothes was an intervening variable that surfaced as an influence of independent variable on the dependent variable.

This study was descriptive in nature and employed questionnaires as the main tool of data collection in order to target mainly, primary data which were collected directly from the respondents and a systematic counterchecking of questionnaires after conclusion of the field work was done. Respondents comprised of twenty from top level management, one hundred from middle level management, six hundred from operation staff and only thirty customers chosen purposely. Content analysis method was used to analyse the collected data.

This method was chosen because of its strength in compressing lengthy interviews and conversations. Data was classified into various themes for ease of analysis. The data was then analysed using statistical package for the social sciences (SPSS) version 19 to generate descriptive statistics, inferential statistics, graphs and diagrams. Qualitative data was presented using statistical techniques, which included frequency distribution tables, measures of central tendency and graphical techniques, which included pie charts, histograms, bar graphs and the qualitative data was presented using content notes.

Level of Market Share

Study findings on the level of satisfaction of the market share at Spinners and Spinners indicated that thirty two percent were neutral and did not comment while forty two percent majorities were happy with the current status. Sebhatu (2007) established that it was important for companies to participate in the global market, in order to gain a market share of the huge international market place. As the company diversified its business, it would spread its risks widely instead of being tied only to changes within the domestic market or in one specific country. It was agreed by majority that the company had not optimized its offering to the market and therefore there was room for improvement.
Among those respondents interviewed, eighty one percent felt that importation of second- hand clothes had a major implication on the straining of market share. To cub this threat, they suggested that Spinners and Spinners should come up with products which specifically suited the low income bracket and also ensure high quality and taste/fashion sensitive products. In addition, the respondents felt that Spinners and Spinners needed to enhance their distribution network.

Level of Textile Production

According to Grynberg (2004) unlike in garment manufacturing, textile manufacturing was very capital intensive and required abundant water, cheap electricity and highly skilled technical staff. Fifty eight percent majority respondents felt that the company had attained the recommended textile production levels. Gupta (2009) noted that Total Quality Management required that all members of an organization to participate in improving processes, products, services and the culture in which they work. From the findings, most respondents felt that Spinners and Spinners had bench marked her production with the world standards. Also sixty five percent interviewed on effect of increased level of production, agreed that it positively affected profitability made by the company. Most people agreed that Spinners and Spinners employed the best production technology and facilities which had given the company a competitive edge.

Level of Competition

Assessment on the level of competition indicated from fifty five percent majorities that there was high competition in the textile industry. Findings from fifty two percent majorities further revealed that, competition emanated from foreign textile manufacturers especially in high end market. However, thirty nine percent felt that the completion was moderate.

Eighty six per cent respondents agreed that importation of second-hand clothes was impacting heavily in the company and that it was the major cause of competition. The study established that if a firm wanted to grow and survive in a competitive industry, it needed to incorporate new technologies in order to become more efficient (Carrizosa, 2006). Sixty four percent majorities agreed that there was substantial growth in the textile industry but banning the importation of second- hand clothes were necessary. According to Peters (2009), the most important aspect of game theory was in its application in economics competition and therefore every company was concerned about what other companies were doing.

Conclusions

Sebhatu (2007) observed that exportation, contributed to enhanced domestic competitiveness because; most companies had to become competitive in the domestic market from which they acquired some strategies that helped them in venturing into the international markets. From the study, majority respondents believed that the status of the textile industry in Kenya was determined by cost of imported second- hand clothes. There was an overwhelming signal that imported second- hand clothes which were cheaply bought and sold at lower price, were the main problem source in the textile industry.

However, some other people felt that there should be fair competition between the second-hand clothes and the textile industry. The textile industry depended on cotton produced by local farmers, who were not able to produce adequate capacity raw materials. The Organization for Economic cooperation and development, (2004) established that, relative to other industry processes, barrier to entry and exit in the clothing industry were low; as a result the industry was characterized by a large number of producers, typically with a very large number of SMEs that concentrated production on just a few product categories.

Recommendations

From the outcome of the findings, the government should create an environment that would enable fair competition between the local textiles and second –hand clothes instead of banning the importation of the latter because they have contributed to job creation for the local people and increased revenue to the government.

Study by Wilson and Abiola (2003) revealed that reduced levels of textile production were mainly attributed to low quality cotton seeds supplied to the farmers, use of poor technology whereby many ginneries were operating outdated roller mills, that consumed huge amounts of electricity. It is therefore recommendable for the government to provide quality cotton seeds and fertilizer in expectation of getting quality cotton harvests. Application of new technology should be introduced, whereby outdated roller mills will be replaced with quality machinery and equipment. The government should also address infrastructure issues by constructing all weather roads to replace the current poor ones that pose problems of accessing the farms. When these issues are addressed, the local companies will be able to incur lower production costs that will lower the sales price of their products to attract the citizens.

The study revealed that, uncontrolled importation of second hand clothes was one of the factors that contributed to increased level of competition among others and prevented the growth of textile industry in Kenya. In view of Theroux (2004) most of the stocks were made up of charity donations made by people in North America and Europe, who assumed that they were sending their used clothing for free distribution to the poor. To the contrary, the clothes were sold by traders who did not incur the cost of manufacturing, raw material and processing. The government should impose stringent measures to avoid such unlawful practices and furthermore, there should be a strong legislation to control importation of sub-standard textiles.

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