

A Future Look at the Apparel and Footwear Industry in Kenya (2022-2037)

Kenya has a dual market: home grown manufacturing of apparel for domestic consumption and export; and the Mitumba (used footwear and clothing) trade.



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Kenya Vision 2030, the long-term development blueprint for the country, seeks to transform Kenya into “a newly-industrialising, middle-income country providing a high quality of life to all its citizens in a clean and secure environment”.

The blueprint assumes that Kenya’s manufacturing sector will lead employment creation and provide a link to agriculture by producing natural fibre for textile production. Kenya Vision 2030 also assumes that employment will result from services, manufacturing and other sectors and that new industries will emerge and expand existing ones.

Kenya is one of the founding members of the East African Community (EAC). A major policy question that confronts the member countries of the EAC is whether the trade in used clothing and other goods is an impediment to the development of domestic manufacturing of textiles. Some policy makers strongly support the restraint of trade and imports on used clothing and shoes within the Eastern Africa region.

The African Union’s Agenda 2063 sets an aspiration to transform the continent’s economies and jobs, using Africa’s natural resources, manufacturing, industrialization and value addition, as well as raising productivity and competitiveness. Questions about the potential for future coexistence between domestic manufacturing of textiles and the second hand clothes trade have also arisen in the context of Agenda 2063.

In 2022, Kenya imported 177,664 tonnes of SHC. Mitumba delivers wide-ranging benefits to the country. These include:



Providing jobs for approximately 2 million people, particularly for vulnerable groups including women.



Contributing Ksh 12 billion per year in tax revenue in the form of import duty.



Providing affordable wear for a broad section of the population.

Kenya could also become a place where used second hand clothes are sorted and processed, then sold as a commodity to generate government revenue and create job opportunities.

Mitumba & Locally Manufactured Apparel

The clothing and footwear supplied by the Mitumba industry are supplements rather than substitutes for apparel manufactured in Kenya. The two sectors complement each other in important ways.

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Many Kenyan households purchase both new and used clothing. New clothing and footwear are purchased across the income spectrum, as indicated by the wide range in prices.

Used clothes are sensitive to pricing. As incomes increase, Kenyans tend to buy fewer used clothes, especially when there are more expensive alternatives. The widespread use of secondhand clothing reflects lower income levels in Kenya.

New and used clothes follow separate value chains, have different supply and demand patterns, and vary significantly in price sensitivity. Intellectual property and product design are unique to specific firms or individuals, indicating that they have distinct markets. Consequently, it is essential to regulate these two markets separately.

The Way Forward

The Mitumba trade is compatible with domestic manufacturing and industrialisation, and therefore is not a hindrance to achieving the goals of Kenya 2030 or Agenda 2063. Further, the Mitumba trade will help to deliver Agenda 2063 goals by contributing to sustainable economic growth and empowering women and younger people through job opportunities, sustainable dignified incomes, and affordable clothing options freeing up disposable income for other necessities.

Kenya should use regulatory strategies to encourage coexistence between the Mitumba and textile manufacturing sectors. Such an approach recognises their distinct roles in serving diverse market segments and their different contributions to the economy. Encouraging coexistence can help create a balanced and sustainable ecosystem within Kenya's apparel and footwear industry, fostering job creation, sustainable economic growth, and market diversification. Specific policy measures include implementing a harmonised set of import regulations, establishing quality standards for both used clothing and locally manufactured textiles, offering incentives and support to Kenya's textile manufacturers and enforcing eco-friendly practices in both sectors.

The Mitumba trade will help to deliver Agenda 2063 goals by contributing to sustainable economic growth and empowering women and younger people through job opportunities.

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