

# ANALYZING AFRICA



**Analyzing the potential of Pakistan's value-added textiles for Africa**

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**Research Department  
Pakistan Readymade Garments  
Manufacturers & Exporters Association (PRGMEA)**

## **Highlights & Recommendations:**

- Large markets for garment exports in Africa are South Africa, Tunisia, Egypt & Morocco. Although Pakistan has some presence in South African market but others remain virtually untapped.
- Fabrics exporters should target major garments exporting countries of Africa, such as Morocco, Tunisia & Egypt. These countries, along with South Africa also present a limited opportunity for garment exports as well.
- Other textile categories such as bedlinen and towels have a better chance of making inroads into the African market.
- China remains the undisputed exporting leader in both garments and textiles in the African market.
- India has made some progress in tapping the African market but it is still largely ignored by Bangladesh.
- In order to tap the full potential of African market, manufacturers and suppliers may have to develop low quality products with more emphasis on synthetic and man-made fibers.
- Overall, the African market for textiles and garments presents a limited opportunity for Pakistani suppliers but it should be realized that entering African market may hold all the risks associated with an ‘immature market’.
- Research on appropriate products suited for the African consumers and climate is very important.
- In the first stage, manufacturers and suppliers wishing to enter the African market should focus first on the four large importing economies stated above.
- Identification of distribution channels within the smaller economies of Africa should come at a later stage.

## Export of clothing from Africa:

- Major exporting economies of garments from Africa are Tunisia, Morocco and Egypt with combined exports of \$7.64 billion in 2009 as per WTO. Other leading garment exporters are Mauritius, Lesotho, Madagascar, Botswana & Kenya with combined exports of over \$2 billion.
- While the global exports of garments have grown by 9.6%, exports by leading ten clothing economies of Africa have grown by 13.5%.
- Major garments exporting countries of Africa present an opportunity for Pakistan to enhance its fabric exports.

### **Clothing exports of selected economies, 1990-2009**

(Million dollars and percentage)

	Value					Share in economy's total merchandise exports	
	1990	2000	2007	2008	2009	2000	2009
World	108,129	197,570	347,059	364,914	315,622	3.1	2.6
Botswana	...	30	340	260	196	1.1	5.7
Egypt	144	710	1,330	787	1,442	15.1	6.3
Kenya	9	9	241	255	174	0.5	3.9
Lesotho	...	161	503	457	484	73.1	64.5
Madagascar	11	309	394	531	431	37.4	37.8
Mauritius	607	948	887	845	717	60.9	36.9
Morocco	722	2,401	3,517	3,420	3,079	32.3	22.2
Swaziland	...	124	47	44	63	13.6	4.2
Tunisia	1,126	2,227	3,571	3,766	3,120	38.1	21.6
Pakistan	1,014	2,144	3,806	3,906	3,357	23.8	19.0

Source: WTO

## Imports of clothing in Africa:

- The four leading garment importing countries of Africa are South Africa, Tunisia, Egypt & Morocco with combined imports of \$2.28 billion in 2009.
- These leading importers can be targeted by Pakistan's garment exporters to enhance their share in the African market.

### Clothing imports of selected economies, 1990-2009

(Million dollars and percentage)

	Value					Share in economy's total merchandise imports	
	1990	2000	2007	2008	2009	2000	2009
Egypt	9	404	817	358	408	2.9	0.9
Morocco	8	232	321	356	294	2.0	0.9
South Africa	108	223	994	993	1,054	0.8	1.7
Tunisia	191	438	644	635	532	5.1	2.8

Source: WTO

- Asian countries have the largest share in exports to Africa. While China leads the way with 75% share in all Asian exports to Africa.

### Clothing exports of selected regions and economies by destination, 2009

(Billion dollars and percentage)

	Value	Share in region's exports		Share in world exports		Annual percentage change		
	2009	2000	2009	2000	2009	2000-09	2008	2009
<b>World</b>	<b>316</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>5</b>	<b>5</b>	<b>-14</b>
<b>Asia</b>								
Africa	4	1.2	2.3	0.5	1.2	15	-24	1
<b>China</b>								
Africa	3	1.6	2.9	0.3	1.0	21	-29	3
<b>Other economies in Asia</b>								
Africa	1	0.9	1.2	0.2	0.2	4	6	-4
<b>Europe</b>								
Africa	1	1.7	1.3	0.6	0.5	3	11	-2
<b>South and Central America</b>								
Africa	0	0.0	0.1	0.0	0.0	35	75	-25

Source: WTO

## Export of textiles from Africa:

- As per WTO figures of 2009, the six leading African textile exporting countries shipped goods worth \$1.93 billion.

### Textile exports of selected economies, 1990-2009

(Million dollars and percentage)

	Value					Share in economy's total merchandise exports	
	1990	2000	2007	2008	2009	2000	2009
World	104,354	157,400	241,335	253,359	211,054	2.5	1.7
Egypt	554	412	726	844	813	8.8	3.5
Mauritius	35	81	88	80	66	5.2	3.4
Morocco	203	123	326	330	305	1.7	2.2
South Africa	167	240	332	301	226	0.8	0.4
Tanzania	...	11	56	111	122	1.7	3.9
Tunisia	112	154	495	478	395	2.6	2.7
Pakistan	2,663	4,532	7,371	7,186	6,510	50.2	36.8

Source: WTO

## Imports of textiles in Africa:

- The seven leading textile importers of Africa imported merchandise worth \$7.1 billion in 2009. Leading among them are Morocco, Tunisia & Egypt.

### Textile imports of selected economies, 1990-2009

(Million dollars and percentage)

	Value					Share in economy's total merchandise imports	
	1990	2000	2007	2008	2009	2000	2009
Egypt	210.7	526.0	1,279.0	1,800.4	1,799.7	3.8	4.0
Kenya	17.2	47.2	250.2	251.5	190.2	1.5	1.9
Madagascar	20.3	199.8	417.4	535.8	299.0	18.2	9.2
Mauritius	336.0	411.1	289.7	263.9	194.8	19.6	5.2
Morocco	360.7	1,364.2	2,305.6	2,363.6	1,984.3	11.8	6.0
South Africa	561.0	569.9	1,015.4	1,019.1	905.8	2.1	1.4
Tunisia	790.4	1,206.9	1,997.5	2,087.6	1,749.0	14.1	9.2
Pakistan	126.5	129.6	579.0	588.6	590.8	1.2	1.9

Source: WTO

- Asia & Europe are the leading exporting regions to Africa for textile products. China remains the dominant textile exporting country to Africa with 75% share from Asia.

### Textile exports of selected regions and economies by destination, 2009

(Billion dollars and percentage)

	Value	Share in region's exports		Share in world exports		Annual percentage change		
	2009	2000	2009	2000	2009	2000-09	2008	2009
<b>World</b>	<b>211</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>3</b>	<b>5</b>	<b>-17</b>
Asia								
Africa	8	4.0	7.3	1.8	3.9	13	19	-7
China								
Africa	6	5.3	9.5	0.5	2.7	23	27	-7
Other economies in Asia								
Africa	2	3.6	4.8	1.2	1.2	3	5	-8
Europe								
Africa	5	5.4	6.7	2.1	2.3	4	9	-16
North America								
Africa	0	0.5	0.6	0.0	0.0	0	50	-38

Source: WTO

## Pakistan's exports to African region:

- South Africa was the leading exporting partner of Pakistan in the African region. Pakistan's total exports to South Africa in FY 2009-10 was \$221 million (1%) with textile exports amounting to just \$128 million.
- Highest exporting categories were fabrics followed by bedlinen and towels. Exports of knitted and woven garment to South Africa were just below \$18 million.

VALUE IN 000 \$					
Rank	Country	Jul-Jun 2009-10 Exports	Jul-Jun 2008-09 Exports	Variation	% Share in 2009-10
19	<b>SOUTH AFRICA (Total Exports)</b>	<b>220,567</b>	<b>193,742</b>	<b>26,825</b>	<b>1.14%</b>
	<b><u>Selected Textile Exports:</u></b>	<b>128,265</b>	<b>137,033</b>	<b>(8,768)</b>	<b>0.66%</b>
	ART SILK & SYNT. TEX.	25,039	14,395	10,644	
	COTTON YARN	621	472	149	
	Y. OTH. THAN C. YARN	175	23	152	
	KINTTED OR CROCH. FAB.	141	80	61	
	TULE, LACE, EMBR. ETC	87	32	55	
	TEX.FABR.WOVEN(OTHER	61	-	61	
	COTTON CLOTH	37,153	44,504	(7,351)	
	BED WEAR	25,389	29,902	(4,513)	
	TOWELS	14,632	15,524	(892)	
	APPAREL & CLOTHING	13,732	19,584	(5,852)	
	TEX.MADE UPS EXC.T.& BED.	6,262	6,593	(331)	
	KNITWEARS	2,648	2,827	(179)	
	READY MADE GARMENTS	1,567	1,649	(82)	
	GLOVES (SPORTS)	581	854	(273)	
	TENTS & OTH.CANVAS GOOD	156	401	(245)	
	COTTON THREAD	14	64	(50)	
	COTTON WASTE	7	117	(110)	
	COTTON BAGS/SACKS	-	3	(3)	
	RAW COTTON	-	9	(9)	

Source: TDAP

## Other important exporting partners in African region:

VALUE IN 000 \$					
Rank	Country	Jul-Jun 2009-10 Export	Jul-Jun 2008-09 Export	Variation	% Share in 2009-10
23	<b>KENYA</b>	<b>160,184</b>	<b>119,939</b>	<b>40,245</b>	<b>0.83%</b>
	<b><u>Selected Textile Exports:</u></b>	<b>20,598</b>	<b>33,332</b>	<b>(12,734)</b>	<b>0.11%</b>
	ART SILK & SYNT. TEX.	1,749	1,213	536	
	TOWELS	1,551	1,484	67	
	READY MADE GARMENTS	594	335	259	
	TEX.MADE UPS EXC.T.& BED.	248	109	139	
	COTTON YARN	120	111	9	
	GLOVES (SPORTS)	15	4	11	
	TEX.FABR.WOVEN(OTHER	12	2	10	
	COTTON CLOTH	7,831	13,411	(5,580)	
	BED WEAR	6,523	14,080	(7,557)	
	TENTS & OTH.CANVAS GOOD	1,592	1,677	(85)	
	KNITWEARS	179	254	(75)	
	WASTE MATERIAL OF TEX.	141	310	(169)	
	Y. OTH. THAN C. YARN	31	303	(272)	
	COTTON WASTE	8	12	(4)	
	APPAREL & CLOTHING	3	22	(19)	
	COTTON BAGS/SACKS	1	5	(4)	

Source: TDAP

VALUE IN 000 \$					
Rank	Country	Jul-Jun 2009-10 Export	Jul-Jun 2008-09 Export	Variation	% Share in 2009-10
33	<b>EGYPT (U.A.R.)</b>	<b>100,155</b>	<b>101,685</b>	<b>(1,530)</b>	<b>0.52%</b>
	<b><u>Selected Textile Exports:</u></b>	<b>60,984</b>	<b>69,103</b>	<b>(8,119)</b>	<b>0.32%</b>
	ART SILK & SYNT. TEX.	5,969	4,016	1,953	
	KINTTED OR CROCH. FAB.	1,820	858	962	
	TEX.FABR.WOVEN(OTHER	858	73	785	
	WASTE MATERIAL OF TEX.	836	377	459	
	TOWELS	822	599	223	
	READY MADE GARMENTS	322	177	145	
	COTTON WASTE	139	39	100	
	APPAREL & CLOTHING	138	91	47	
	TEX.MADE UPS EXC.T.& BED.	88	30	58	
	Y. OTH. THAN C. YARN	66	-	66	
	COTTON BAGS/SACKS	17	4	13	
	COTTON CLOTH	43,094	43,720	(626)	
	COTTON YARN	6,566	17,505	(10,939)	
	KNITWEARS	119	173	(54)	
	GLOVES (SPORTS)	101	151	(50)	
	TULE, LACE, EMBR. ETC	29	41	(12)	
	TEXTILE FOR MACHINERY	-	6	(6)	
	BED WEAR	-	1,243	(1,243)	

Source: TDAP



VALUE IN 000 \$

Rank	Country	Jul-Jun 2009-10 Export	Jul-Jun 2008-09 Export	Variation	% Share in 2009-10
<b>35</b>	<b>BENIN</b>	<b>91,306</b>	<b>58,327</b>	<b>32,979</b>	<b>0.47%</b>
	<b><u>Selected Textile Exports:</u></b>	<b>44,213</b>	<b>36,562</b>	<b>7,651</b>	<b>0.23%</b>
	ART SILK & SYNT. TEX.	27,806	10,272	17,534	
	TOWELS	302	4	298	
	WASTE MATERIAL OF TEX.	63	-	63	
	COTTON CLOTH	7,565	12,722	(5,157)	
	READY MADE GARMENTS	3,031	3,782	(751)	
	KNITWEARS	2,918	4,736	(1,818)	
	BED WEAR	2,360	3,932	(1,572)	
	KINTTED OR CROCH. FAB.	148	189	(41)	
	TEX.MADE UPS EXC.T.& BED.	19	189	(170)	
	Y. OTH. THAN C. YARN	1	708	(707)	
	APPAREL & CLOTHING	-	28	(28)	

Source: TDAP

VALUE IN 000 \$

Rank	Country	Jul-Jun 2009-10 Export	Jul-Jun 2008-09 Export	Variation	% Share in 2009-10
<b>36</b>	<b>SUDAN</b>	<b>87,551</b>	<b>60,595</b>	<b>26,956</b>	<b>0.45%</b>
	<b><u>Selected Textile Exports:</u></b>	<b>6,874</b>	<b>7,276</b>	<b>(402)</b>	<b>0.04%</b>
	ART SILK & SYNT. TEX.	3,557	716	2,841	
	TEX.FABR.WOVEN(OTHER	415	-	415	
	KNITWEARS	196	153	43	
	COTTON YARN	62	11	51	
	COTTON THREAD	56	35	21	
	TEX.MADE UPS EXC.T.& BED.	41	2	39	
	TOWELS	13	7	6	
	COTTON CLOTH	1,123	2,800	(1,677)	
	TENTS & OTH.CANVAS GOOD	753	2,379	(1,626)	
	BED WEAR	381	555	(174)	
	READY MADE GARMENTS	199	233	(34)	
	Y. OTH. THAN C. YARN	78	357	(279)	
	KINTTED OR CROCH. FAB.	-	1	(1)	
	TULE, LACE, EMBR. ETC	-	27	(27)	

Source: TDAP

## Pakistan, India & Bangladesh: a comparison

### Woven Garments:

HS Code	Description	Importer	Exporter	Quantity	Value	AUP
62034200	TROUSERS BIB & BRACE OVERALLS BREECHES & SHORTS OF COTTON FOR MEN'S & BOYS' (PCS)	South Africa	Pakistan	24,000	81,806	3.41
			India	188,640	650,000	3.45
			Bangladesh	469,266	4,619,182	9.84
		Egypt	Pakistan	7,332	50,705	6.92
			India	2,300	30,000	13.04
			Bangladesh	200	5,377	26.89
		Morocco	Pakistan	4,248	19,406	4.57
			India	30,040	70,000	2.33
			Bangladesh	3,605	39,501	10.96
		Kenya	Pakistan	4,992	36,133	7.24
			India	20,780	160,000	7.70
		62045200	SKIRTS AND DIVIDED SKIRTS OF COTTON (PCS)	South Africa	Pakistan	2,352
India	2,470,000				546,690	4.52
Bangladesh	26,146				340,527	13.02
Egypt	Pakistan			2,436	10,612	4.36
	India			21,770	190,000	8.73
Kenya	Pakistan			24	70	2.91
	India			65,380	590,000	9.02
62113200	OTHR GARMENTS OF COTTON FOR MEN'S OR BOYS' (PCS)			South Africa	Pakistan	26,616
		India	35,070		170,000	4.85
		Egypt	Pakistan	21,288	70,367	3.31
			India	6,620	50,000	7.55
		62160010	GLOVES OF TEXTILE FABRICS (INDIA: GLOVES, MITTERS & MITTS OF COTTON) (PCS)	South Africa	Pakistan	161,568
India	307,400				140,000	0.46
Kenya	Pakistan			50,628	11,695	0.23
	India			35,120	10,000	0.28

### Knit Garments:

HS Code	Description	Importer	Exporter	Quantity	Value	AUP
61034200	TROUSERS,ETC .MEN/BOYS COT/KNIT (PCS)	South Africa	Pakistan	9,432	25,801	2.74
			India	27,450	60,000	2.19
			Bangladesh	12,356	126,122	10.21
61051000	SHIRTS MEN/BOYS COTT KNIT/CRO (PCS)	South Africa	Pakistan	79,560	192,255	2.42
			Bangladesh	55,121	300,209	5.45
61091000	T- SHIRT,SINGLET S,WAISTCOT K/CR (PCS)	South Africa	Pakistan	325,824	444,162	1.36
			Bangladesh	55,121	300,209	5.45
		Egypt	Pakistan	360	2,749	7.64
			Bangladesh	2,008	8,352	4.16
61099090	O-T- SHIRTS,OTH TXT MATE KN/CR (PCS)	South Africa	Pakistan	55,428	101,562	1.83
			India	1,214,620	6,760,000	5.57
		Kenya	Pakistan	1,512	4,729	3.13
			India	17,130	80,000	4.67
61171010	SHAWLS, KNITTED OR CROCHETED (PCS)	South Africa	Pakistan	684	1,223	1.79
			India	4,480	30,000	6.70

### **Note:**

All the comparative figures for Pakistan and Bangladesh are for July-June 2009-10, while India's figures are based on April-March 2009-10.

Unit of quantity (pieces, square meters, kilograms, etc) for Bangladesh may differ as EPB Bangladesh does not indicate these units in their statistics.

### Home Textiles:

HS Code	Description	Importer	Exporter	Quantity	Value	AUP
63021010	BED SHEETS, KNITTED / CROCHETED (KGS)	South Africa	Pakistan	660,828	4,946,825	7.49
			India	310,030	1,080,000	3.48
		Kenya	Pakistan	468,034	3,530,904	7.54
			India	12,070	30,000	2.49
		Morocco	Pakistan	7,891	35,551	4.51
			India	4,320	20,000	4.63
63021090	OTH BED LINEN,KNITTED/CROCH (KGS)	Kenya	Pakistan	145,383	832,900	5.73
			India	11,120	40,000	3.60
63026010	TOWELS OF COTTON MILL-MADE (KGS)	South Africa	Pakistan	4,256,843	13,965,642	3.28
			India	339,000	360,000	1.06
63026090	OTH TABLE LINEN (KGS)	Kenya	Pakistan	3,120	13,710	4.39
			India	30,670	130,000	4.24
		South Africa	Pakistan	95,313	250,858	2.63
			India	146,010	880,000	6.03

### Cotton Fabrics:

HS Code	Description	Importer	Exporter	Quantity	Value	AUP
52121500	OTH W-FAB COT PRNTD W 200G/SQM (SQM)	South Africa	Pakistan	592,686	622,683	1.05
			India	38,130	40,000	1.05
		Egypt	Pakistan	138,593	149,599	1.08
			India	4,610	10,000	2.17
52122300	OTH COT WOV FAB DYED>200G/S QM (SQM)	South Africa	Pakistan	159,707	192,943	1.21
			India	17,590	50,000	2.84
		Egypt	Pakistan	72,799	85,999	1.18
			India	67,150	90,000	1.34

Source: TDAP/Federal Bureau of Statistics, Ministry of Commerce; India & EPB; Bangladesh



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