



Hindrances to the growth of apparel industry in Kenya: A review

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Abstract

Kenya's textile sector is one of the most significant contributors of the country's economic growth. However, the liberalization of Kenya's economy at the beginning of the 1990s ushered in great competition from imported clothing. The purpose of the study was to evaluate the challenges that hinder the growth of apparel industry in Kenya so as to make recommendations for improving the performance of the sector. The study's main approach entailed an analysis of secondary data, mainly a review of past studies that addressed the impact of the various challenges on the Kenyan textile sectors. The reviewed studies included published review and research papers in journals, university level dissertations and theses and published books. The search words used to search for the literature included apparel, apparel industry, apparel sector, development, Kenya, Kenya cotton farming, impact on apparel industry, apparel import and exports. From the review of literature, it was established that the challenge for Africa and Kenya is to address issues such as inadequate supply of skilled labour and availability of local raw materials, that bars the industry from flourishing in the global market. If spinning, weaving, knitting, dyeing and finishing can be done locally, the production process becomes cheaper. The prospect of the industry relying on local sourcing of cotton fabric is dim unless urgent interventions are made. Therefore, there is need for intervention by the government in reducing electricity costs, improved transport and communication system, interest rates, taxes and levies, appropriate standards for imports and proper tackling of corruption.

Keywords: challenges, growth, apparel industry, Kenya, review

Introduction

The manufacturing sector in Kenya accounts for over 20 percent of the country's Gross Domestic Product (GDP), providing employment opportunities to about 300,000 people in the formal and 3.7 million persons in the informal sectors of the economy. The textile sub-sector constitutes an important component of the manufacturing sector in the country. It is one of the key sub-sectors targeted under the country's strategy for economic recovery, dubbed Vision 2030 (Republic of Kenya, 2007). The Kenyan textile industry is one of the most important contributors to industrial manufacturing sector.

According to a report by the Kenya Institute of Public Policy Research and Analysis (KIPPRA), the textile sector recorded its peak performance in 1984, when cotton production was over 70,000 bales supplying the domestic textile industry, which comprised 52 textiles mills and employed over 42,000 people (African Cotton and Textile Industries Federation [ACTIF], 2013) [2]. According to ACTIF, textile and clothing industry was at that time the second largest employer after the civil service. Since then, however, domestic spinning and weaving capacities have drastically reduced from approximately 52 mills in 1984 to only 15 main textile mills that are currently in operation, but under capacity (ACTIF, 2013) [2]. The key reason attributed to the collapse of the industry is the Global Economic Reforms under the Structural Adjustment Programme's (SAP) and Trade Liberalization of the 1980s/1990s. Corruption and mismanagement at the defunct Board of Kenya also contributed to the collapse of the industry. When market liberalization was introduced in the 1990s, it created increased importation of cheap textiles and apparel products that affected the local industry. Firms that had been

exporting under the African Growth and Opportunity Act (AGOA) were threatened by increased volume in exports from Asia. Though rated 3rd after Madagascar and Lesotho, with 20.7% of total African apparel exports to the USA, Kenya's textile industry's development was hampered by high cost of production, high taxation, competition both in the local and international markets, manpower under development, consumer preference for imported textiles, natural calamities e.g. drought and what happened in Hola Cotton Irrigation Scheme when river Tana changed its course, human population pressure that led to large scale farms that had high potential of wool production to be sub-divided into small farms lowering wool production and corruption among others (Maiyo & Imo, 2012) [9]. The purpose of this seminar paper is to address challenges that hinder the Kenyan fashion, textile and design industry from flourishing globally.

Table 1: Textile and apparel export from Africa to USA

	Country	US \$ Million		% Growth
		Jan-Nov 2008	Jan-Nov 2009	
1	Botswana	14.675	11.962	-18.49
2	Ethiopia	9.020	6.126	-32.08
3	Kenya	221.385	177.002	-20.05
4	Lesotho	310.491	258.669	-16.69
5	Madagascar	257.371	194.022	-24.61
6	Malawi	11.517	9.015	-21.72
7	Mauritius	93.429	91.348	-2.23
8	South Africa	16.913	10.040	-40.64
9	Swaziland	114.603	87.654	-23.52

Source: Export Processing Zones Authority (EPZA) (2012)

From the table above, it is clear that between 2008 and 2009, textile and apparel exports from Africa to the USA decreased by various margins depending on the country. Kenya particularly saw a 20.05% decrease in its US exports of textile and apparel products. This was a big margin considering that approximately 70 percent of Kenyan apparel firms have a US-dominant market orientation, meaning that at least 80 percent of their output is sold to US markets as indicated (World Bank, 2017) [17]. What are some of the challenges that have precipitated this increasing drop in textile and apparel exports in Kenya?

Statement of the Problem

Kenya’s textile sector is one of the most significant contributors of the country’s economic growth. However, the liberalization of Kenya’s economy at the beginning of the 1990s ushered in great competition from imported clothing. Subsequently, a good number of Kenya’s textile industries were forced to close down. Similarly, firms that had been exporting under the African Growth and Opportunity Act (AGOA) were threatened by increased volume in exports from Asia.

The purpose of the study was to evaluate the challenges the hinder the growth of apparel industry in Kenya so as to make recommendations for improving the performance of the sector.

Materials and Methods

The study’s main approach entailed an analysis of secondary data, mainly a review of past studies that addressed the impact of the various challenges on the Kenyan textile sectors. The reviewed studies included published review and research Papers in journals, university level dissertations and theses

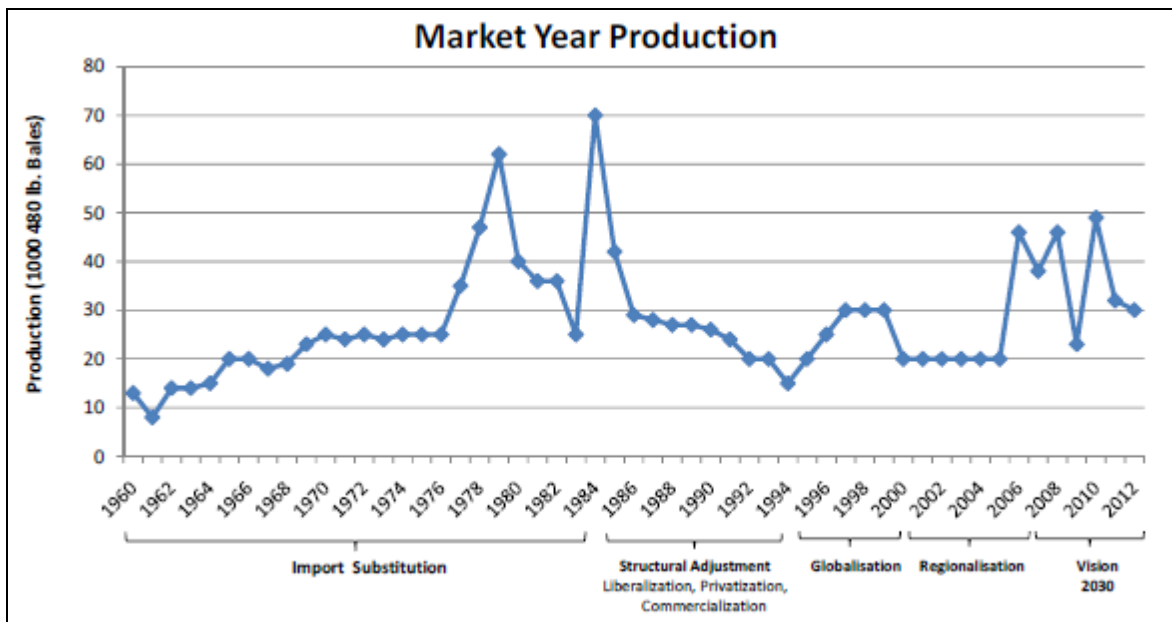
and published books. The search words used to search for the literature included apparel, apparel industry, apparel sector, development, Kenya, Kenya cotton farming, impact on apparel industry, apparel import and exports.

Results and Discussion

According to Otiso (2004) [13], among the major factors behind the success of Asian, Caribbean, and South American exporters to the USA are abundant low and high-skilled labour, high quality products, good marketing or management and availability of raw materials. The study sought to identify the challenges faced by Kenya’s apparel industry. Among the challenges identified from a review of secondary data were: shortage of raw materials; machinery technological; fabric sourcing from foreign countries; high cost of production; low productivity of labour; competition from foreign market; competition from the decentralized sector; government controls and heavy excise duties; delays caused by congestion at the port of Mombasa and poor road conditions; lack of government support and corruption, and manpower under development.

Shortage of Raw Materials

Raw material determines 35 percent of the total production cost. Currently, Kenya is short of cotton, particularly long-staple cotton which is imported from Uganda, Sudan, Egypt and Tanzania. Despite having the largest area under cotton (26 percent of the world acreage), the country accounts for only 9 percent of the world output of cotton (EPZA, 2012) [3]. Fluctuating prices and uncertainties in the availability of raw material cause low production to the mills. The figure below presents the trend of fluctuations of cotton production in Kenya between the years 1960 and 2012.



Source: Index mundi (n.d)

Fig 1: Cotton production in Kenya (1960-2012), in 000 Bales

Table 2 below presents the findings on the ginning factories available in Kenya and the trends of changes in ownership and

operations as a result of the challenges facing the industry.

Table 2: Installed Ginning Capacity in Kenya

Ginnery	Year Established	District	Original Owner	Present Owner/ Operator	No. of Gins Installed	No. of Gins Operational	Bales at Full Capacity	Ginning Costs/Kg
Mwea	1969	Kirinyaga	CBK	Private	20	7	3600	30
Hola		Tana River	CBK	Private	20	0	3600	-
Lamu	1960s	Lamu			11	0	1980	-
Malindi		Malindi	Private	Private	37	37	6660	35
Mpeketoni		Lamu			16	16	2850	30
Voi	1969	Taita	Private	Private	8	8	1440	-
Kitui	1935	Kitui	Private	Private	16	16	2850	25
Makueni	1980	Makueni	CBK	Private	20	8	3600	30
Tharaka	1992	Tharaka	Private	Private	15	11	2700	-
Meru (1994)	1970	Imenti North	CBK	Private	30	10	5400	-
Meru Farmers	1996	Imenti North		Private	6	0	1880	-
Homa bay	1937	Homa Bay	CBK	Private	12	0	2160	-
Kendu Bay	1935	Homa Bay	CBK	Private	12	0	2160	-
Kibos	1935	Miwani	CBK	Private	7	7	1260	-
Nyanza	1971	Miwani	Private	Private	10	10	1800	30
Ndere	1937	Siaya	Private	Cooperative	8	2	1440	-
Algenya	1964	Siaya	Private	Private	5	4	900	-
Salawa	1985	Baringo	CBK	Private	10	7	1800	70
Isimbu	1992	Teso	Private	Private	20	0	3600	-
Luanda	1922	Busia	Private	Cooperative	20	14	3600	-
Malaba Makakisi	1921	Bungoma West	Private	Cooperative	10	0	1800	-
Angurai	1992	Teso	Private	Private	0	0	0	-
Nambale	1922	Busia	Private	Cooperative	12	6	2160	

Source: ACTIF (2013)

Machinery Technological Challenges

In Kenya, most of the cotton textile mills are still operational, but with old and obsolete machinery. Though new technologies appropriate for processing are critically important in the sector, Ikiara and Ndirangu (2004) ^[5] observe that garment producers have newer machinery hence newer technology than yarn fibre manufacturers. According to estimates, in Kenya, over 60 percent of the spindles are more than 25 years old. The automatic looms account for only 18 percent of the total number of looms in the country against the world average of 62 percent and 100 percent in the United States (Ikiara & Ndirangu, 2004) ^[5]. Obsolete machinery leads to low output and poor quality of goods as a result of which Kenyan textile goods are not able to face competition in the international market.

Fabric Sourcing from Foreign Countries

As of December 2016, Kenya sold \$394 million worth of textiles and clothing on the US market, compared to the total \$43 million sum of AGOA trade for Rwanda, Tanzania and Uganda. In fact, the Kenyan embassy in Washington says that 66,000 jobs in Kenya are linked to AGOA's textile-export provisions (Trade Mark East Africa, 2017) ^[16]. Unfortunately, the success of the garment industry which to a large extent has a foreign affiliation has had practically no direct effect on the existing textile mills in Kenya. The local mills have not recorded a correlated growth, the main reason being that they do not supply fabric to the garment factories that export to US under AGOA (Trade Mark East Africa, 2014). Fabric sourcing as raw material is a critical factor in textile manufacturing for export. Without local sourcing of fabric for export manufacturing, the value chain remains seriously broken and disjointed between garment/ made ups, and other sections of

the chain. As a case in point, there has not been any trickle effect to the cotton growing in the country.

High Cost of Production

The major factor inhibiting the growth of a textile industry in Kenya is the high cost of electricity and its reliability, which accounts for about 35 percent of the cost of fabric production in Kenya. Notably, the cost of electricity in Kenya is five times higher than in South Africa and nearly three times more than in China (Irungu, 2005) ^[7]. Textile mills are facing acute shortage of power. Supplies of coal are difficult to obtain and frequent cuts in electricity and load shedding affect the industry badly. This leads to loss of man-hours, low production and loss in the mills.

Low Productivity of Labour

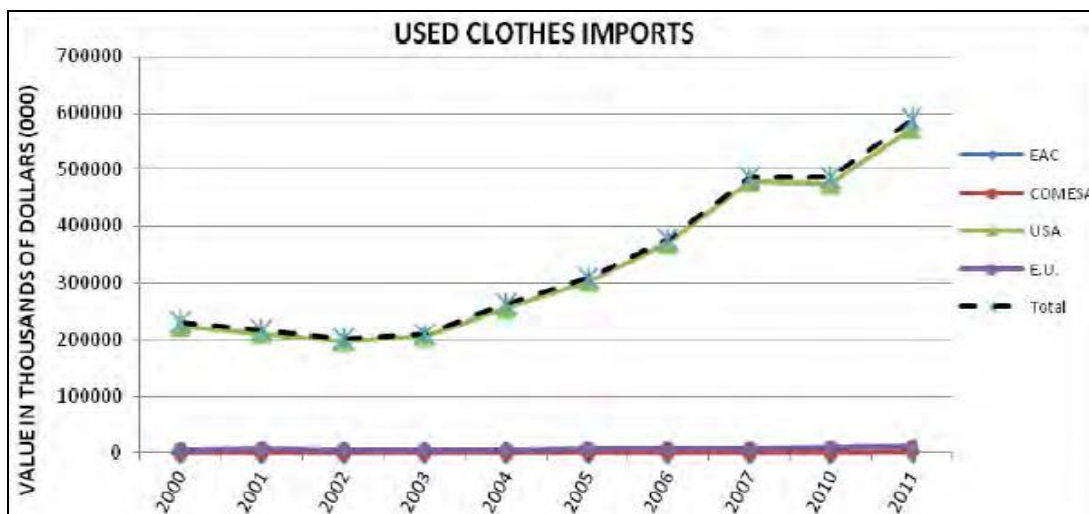
Low productivity is another major problem of cotton textile industry. On average, one Kenyan factory worker handles 380 spindles and 2 looms compared to 1,500-2,000 spindles and 30 looms in Japan (Manishankar & Nithilan, 2018) ^[10]. If the productivity of an American worker is taken as 100, the corresponding figure for UK is 51 and for Kenya only 13. Moreover, industrial relations are not very conducive for productivity in the country. Strikes, layoffs, retrenchments are the common features of many cotton mills in the country.

Competition from Foreign Market

According to Ikiara and Ndirangu (2004) ^[5], there is competition both in the import and export markets for yarn, fabric and garment manufacturers. In the import market, the competition is unfair because of uncontrolled imports of second-hand clothes, counterfeit textile products and imports that evade duty. Kenyan cotton textile goods also face stiff

competition in foreign markets from Taiwan, India, South Korea and Japan, whose goods are cheaper and better in quality (Manishankar & Nithilan, 2018) ^[10]. It is really paradoxical that in a country where wages are low and cotton is internally available, production costs should be so high. While certain traditional buyers of Indian textile goods like

Myanmar, Indonesia, Sri Lanka, Ethiopia, Aden etc. are facing severe balance of trade problem, some European countries like France, Germany, UK and Austria etc. have imposed quota limitations over the Kenyan textile imports (Manishankar & Nithilan, 2018) ^[10]. Acute world recession has thus badly affected the export prospects.



Source: USDA

Fig 2: Imports of second hand clothing (2000-2012)

Competition from the Decentralized Sector

An important factor for the increasingly poor performance of the mill sector is the growth of the decentralized sector. Being a small-scale sector, the Kenya government allowed excise concessions and other privileges. These, accompanied by low wages, have led to low cost of production in the decentralized sector (Ikiara & Ndirangu, 2004) ^[5]. As a result, the share of mill sector is decreasing, while the share of decentralized sector is increasing, so that the share of mill sector in the production of cotton fabrics has gone down from 7.9 per cent in 1994-95 (cf. power looms 69% and handlooms 21.6%) to 4.4 per cent in 1999-2000 (cf. power looms 76.3% and handlooms 19.3%) (Ikiara & Ndirangu, 2004) ^[5].

Government Controls and Heavy Excise Duties

In particular, the lack of a favourable policy environment to stimulate farmers and other stakeholders and promote production, processing, utilization and marketing makes Kenya cotton/textile products uncompetitive in both local and international markets. The cotton textile industry has greatly suffered due to wrong and faulty policies of the government. In the past the government has sought control of price, distribution of yarn, pattern of production, etc. At one time, the government fixed the price of the cloth below the cost of production.

Similarly, under the yarn distribution scheme of 1972, the government made it obligatory on all mills to supply 50 percent of the production of yarn to the decentralized sector at reduced rates. The high import duty on imported cotton, upward revision of the price of the indigenous cotton and heavy excise duty on cotton cloths are other detrimental factors. A related challenge is also that of delays caused by congestion at the port of Mombasa and poor road conditions.

These have also been blamed for cancelled orders from apparel buyers or other penalties incurred by the Kenyan Producers (Ngunjiri, 2005) ^[12].

Lack of Government Support and Corruption

These firms receive little support from the government due to trade policies such as payment of import declaration fee which do not exist in other competing countries and taxation of second-hand items based on weight rather than value. Corruption and delays by Kenya Revenue Authority at entry points are also cited as key challenges. KRA has introduced compulsory verification of imported raw materials and capital goods to check abuse of the duty-free incentive allowed for EPZA firms (Ikiara & Ndirangu, 2004; Ngunjiri, 2005) ^[5]. These problems have all contributed to making the Kenyan textile products both in the import and export markets uncompetitive.

Manpower Under-development

In addition to cheap and low skilled labour, sufficient numbers of high-skilled workers are needed to spearhead apparel design, equipment maintenance and production and marketing. Such high-skilled workers are lacking in Kenya unlike Asian producers that have special training programs which ensure steady supply of middle and high-level management for their textiles and clothing. China, for instance, has the Textiles University of Shanghai (Maiyo & Imo, 2012) ^[9]. Nevertheless, the level and quality of production and technical training in Kenya is low. This may be in part because the current training incentive system does not encourage firms to invest in enhancing production skills. Firms appear to invest more heavily in managerial and professional training than in developing production skills.

Training deficiencies can be traced, at least in part, to structural problems in the technical and vocational training system. The current training levy system is financially troubled and appears to be inadequate to firms' needs, as it

does not support in-house training in production skills. There is sufficient international evidence to indicate that incentives to firms to increase in-house training are vastly superior to public provision of training (ACTIF, 2010)^[1].

Table 3: Cotton/ Textile Sector Interventions during Import Substitution Regime

Type of subvention	Incentives	Production intervention	Marketing intervention	Institution
Value chain	Access to Bank loan funds	Extension services	Buy Kenya Build Kenya drive	Strong GoK policy support institutions
Farming	Prompt payments Easy access to inputs Fixed prices	Free seeds Extension services GoK supported R&D	C L & M B support agenda KFA support activities	Vibrant quality control Cooperatives
Ginning	Easy access to Bank loans	Seed cotton available	Booming grey spinning	Strong Ginners Association
Spinning / milling	Easy access to Bank loans	GoK equity investment Private investment	Booming finished apparel demand	I C D C & Development Banks
Garment / made ups	Tax remission	Training arrangement	Wide range advertisement	KNTC , KIPC
Markets	Export compensation	Wide product range	Assured national market New regional market (defunct EAC) GoK procurement	Tender Board

Source: various government policy document

Adverse Effect of Changing Trends on Kenya's Economy

Lack of employment is the key outcome of low performance of Kenya's textile industry. The manufacturing firms appreciated that the textile and clothing industries offers employment opportunities to owners, partners, directors and casual or full-time employment to both skilled and unskilled workers. In 1954, Kenya had a total of 74 enterprises employing 2477 workers, compared to the early 1990's when the garment sector provided approximately 19% of employment in the manufacturing sector (Kinyanjui, Lugulu & McCormic, 2004)^[8]. The decline in performance by the industry leads to massive loss of jobs.

There is also the lack of foreign exchange. Through taxes such as VAT, import duties etc.; the sector is a source of revenue to the government. The industry produces a wide range of products for domestic, regional and international markets, thus decline of the industry leads to loss of revenue and earnings from foreign exchange increasing poverty. Another detrimental outcome is the lowering of prices for new garments. Due to competition with second hand and new imported clothes. Prices of locally made garments have reduced drastically. This affects even the cotton farmers as they are poorly paid and so not motivated to work.

The bad business in the textile sector has also destroyed the creativity of most designers. Most designers tend to copy designs from the second hand clothes rather than using their creative talents to create new garments. The creative ones are not well rewarded for their work due to cheap prices and this demotivates them. Another negative outcome has had to do with health. Some of the second hand clothes are imported without being treated with disinfectants and insecticides and

this brings about skin diseases and poisonous and destructive insects e.g. moth.

This costs the government a lot of money to treat. Lastly, there is the underutilization of semi-arid areas, which Kenya has in abundance. This is where cotton used can be grown thus decreasing the poverty rate.

Why Urgent Interventions Matter

There are a number of reasons Kenya needs to reverse the downward trend in the textile sector. For example, Kenya's climate condition is ideal for cotton growing as cotton does well in semi-arid areas which Kenya has in abundance. The country also has a variety of manufacturing sector resources and opportunities to absorb all the cotton produced which ranges from ginneries up to garments manufacturing. In addition, the Kenya population is currently 45 million and growing, which provides a ready market for apparel textile and design products. This population is relatively well-educated, meaning skilled and unskilled labour is readily available at reasonable rates. Kenya is also politically stable having being one of the very stable countries in Africa since independence. Moreover, exports from Kenya enjoy preferential treatment in world market under a number of special access and duty reduction programmes. This includes EAC, COMESA, EU-ACP, GSP and AGOA. Kenya has also recently revived or rehabilitated some of its old textile mills involved in spinning and weaving for local and export market, e.g. Rivatex EA, Raymond's Mill. It has also made investment in joint venture in areas like modernization of very old ginneries and textile mills.

To achieve the objectives of reviving the textile industry, the

Kenya government is addressing many issues. For instance, the government, through the Ministry of Agriculture, has prepared a bill which is currently before parliament. The bill will replace the Cotton Act and with one that is more dynamic and responsible to the current market that will address matters of production and marketing (FAO, 2013). Operators of cotton ginneries have also established the Kenya Ginneries Association (KGA) in a bid to consolidate effort in cotton production and imported marketing (Panafrican News Agency, 2000) ^[14]. Lastly, the government significantly influences the clothing and textile industry through formulating trade policies that influence the performance of the industry. For example, the Import Substitution Strategy (ISS), which protected the local industries from competition, enables the industry to flourish in the local markets. Other policy environments in which the textile industry through the government continued to perform include:

At the national level, the government has initiated industrial-oriented policies through: the Export Promotion Council, Manufacturing under Bond (MUB), Export Processing Zone Authority (EPZA), etc.; launch of Kenya's Vision 2030 (Textile Sector identified as flagship and key contributor to the central economic pillar), the Kenyan Government Policy directives on Second hand clothing, Domestic Sourcing etc. At the global level, the preferential market access provision entrenched into the: African Growth Opportunity Act (AGOA 2000) – An initiative by the US Congress to provide among other economic activities, opportunity to revive the textile industry in sub-Saharan Africa (SSA); European Partnership Agreements (EPAs) - Provisional status, and bilateral agreements.

At regional level, the Kenya government participation under various regional integration initiatives incorporating industrial and trade liberalization policies. These include: the Common Market for Eastern and Southern African Region (COMESA); Common Market Protocol under the East African Community (EAC), and the EAC-COMESA-SADC Tripartite – still under discussion. The government is also offering training in the industry through the National Industrial Training Authority and technical institutes. Through the Kenya Bureau of Standards (KEBS), the government ensures that the clothing and textile products meet the required standards. Therefore it controls the quality of imports and also locally produced ones.

Conclusion

The full revival of the Kenyan apparel industry in the global market depends on its access to the European Union (EU), United States of America (USA), and COMESA as well as East African Community (EAC) markets. The challenge for Africa and Kenya is to address issues such as inadequate supply of skilled labour and availability of local raw materials, that bars the industry from flourishing in the global market. If spinning, weaving, knitting, dyeing and finishing can be done locally, the production process becomes cheaper. The prospect of the industry relying on local sourcing of cotton fabric is dim unless urgent interventions are made.

There is insufficient supply of seed cotton, poor quality operation and slow investment in the yarn spinning, fabric manufacturing and fabric finishing due to poor infrastructure, unskilled labour and market and policy constraints. Locally

produced fabrics are therefore of low quality, expensive and lack market because of competition from new and second hand clothes. There is need for an operational cotton textile-apparel chain to enable co-ordination and consultation. AGOA protected the SSA countries from competition by Asian countries until year 2004 when quotas were lifted posing threats to African producers. In order to counter the effects of competition from Asian countries following the expiry of MFA, the SSA textile and garment manufacturers sought to form a regional body to address key issues in the industry. The success of the regional body formed by the African garment makers is yet to be seen. The local industry in Kenya can improve its performance through human power development as the key to innovation if trade in textile and apparel has to meet the capacity in the current market competition.

Appropriate training programmes for textile and apparel studies that entail design, production and marketing should be designed by the relevant stakeholders. Textile incubator units targeting textile engineering and related fields of study should be established. These should be fully equipped small-scale textile production units to enable fresh graduates develop their skills through collaboration efforts by the government and the private sector to provide adequate training. There is also need for a strong regional alliance by SSA countries in sharing of expertise, information, marketing and training. The Kenyan textile industry has a great potential in boosting the country's economy, especially under AGOA. In order for the country to compete effectively, and enjoy the advantages of the act, the discussed challenges must be addressed.

Recommendations

Following the discussion and conclusion, the following recommends are offered.

- Intervention by the government in reducing electricity costs, improved transport and communication system, interest rates, taxes and levies, appropriate standards for imports and proper tackling of corruption.
- Adequate provision of manpower through training in textile production, apparel design and marketing. This calls for collaboration efforts by the government and the private sector to provide adequate training in textile and apparel design.
- Small-scale garment producers need to be strengthened, as majority have potential to export.
- There is need for a strong regional alliance by SSA countries in sharing of expertise, information, marketing and training.
- Kenya being an agricultural country, there is need to carry out an in-depth evaluation of the value chain to identify segments of potential economic growth with highest returns with a view to strengthening the backward and forward integration linkages.
- Cotton farmers, yarn and fibre manufacturers and garment producers need proper coordination and consultation.

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