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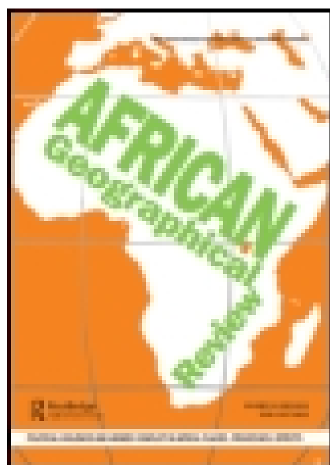

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A Gender Analysis of Small Scale Garment Producers' Response to Market Liberalisation in Kenya

Mary Njeri Kinyanjui

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Creation of an open economy is the main objective enshrined in Structural Adjustment Programmes (SAPs) prescribed to sub-Saharan countries by the World Bank and the IMF. Market liberalisation involves removal of controls, restrictions, and tariffs that protect the domestic market. Begun in 1986, the Kenyan liberalisation process reached its peak in 1993-1994. All prices, including those of petroleum and maize, were deregulated. Price and non-price controls as well as tariff and non-tariff barriers were withdrawn in order to allow the market to determine allocation of resources (Glendy and Ryan 2000). The policy shift did not favour industries that had evolved under the previous import substitution regime. Garment producing firms were particularly hard-hit by an influx of cheap garments imported from Asia and second-hand clothes imported from Europe and North America. Unable to compete with cheap and relatively better quality products that were now available in the market, Kenya's medium and large-size garment firms either closed down or changed their product lines (McCormick et al. 2002). The response of small enterprises to market liberalization has not been analysed despite a marked division of labour that usually exists between men and women in the trade-related activities that typify the informal sector (CBS, ICEG and KREP, 1999). Hence, this paper examines small-scale garment producers' response to policy shifts under structural adjustment and whether female and male entrepreneurs responded differently to market liberalisation.

From Import Substitution to Market Liberalization

Upon independence (1963), the government embarked on an Africanization strategy, which aimed at promoting and increasing Kenyan entrepreneurs in trade and industry (Coughlin and Ikiara, 1991). Infant industries were protected from international competition by duties, tariffs, quotas, and overvalued exchange rates. Initially, these policies spurred growth in industries. The manufacturing sector averaged 9.1 percent growth between 1964 and 1973, aided by tapping neighbouring markets in Uganda and Tanzania, which together with Kenya formed the East African Community.

Import substitution policies generated three tiers of manufacturing. Large, multinational firms were at the top of the hierarchy, followed by state-owned

parastatals owned by Kenyan Asians. At the bottom of the hierarchy were micro and small firms popularly referred to as the informal sector (Himbra 1994; McCormick and Pedersen 1999). Firms produced for a segmented market. Multinational and parastatal firms focused on consumer goods for all income groups and relied on wholesaling agents to distribute their mass-produced consumer goods for all income groups while micro and small firms produced and distributed their products directly to the low-income market.

In 1978, the collapse of the East African Community closed Kenya's access to the larger East African market and threatened the viability of Kenya's import substitution strategy. The manufacturing sector was inefficient, uncompetitive, and dominated by industries that produced consumer goods. Capital goods were undeveloped and most intermediate inputs had to be imported. Apart from two notable exceptions (the textile and food processing industries), import-substituting industries were not linked to the rest of the economy. These problems called for the need of an alternative industrial strategy and the revival of the entire economy (Coughlin and Ikiara 1991). The two major financers of the Kenyan government endeavours – the World Bank and the IMF – prescribed liberalisation of the domestic market.

Multinational firms responded to the shrinking domestic markets by merging, relocating, or selling some of their branded products to competitors. Some firms, which had changed their names during the import substitution era, reverted to their original names. For example, East African Industries reverted to Unilever while Kenya Canners reverted to Delmonte. Johnson and Johnson transferred its production activity to Zimbabwe leaving only a distribution platform in Kenya. Pharmaceutical firms such as Glaxo and Smithkline Beecham merged as part of the firm's global restructuring strategy. Two firms with common interests in the East African Market – East African Breweries and Castle Brewing Kenya Limited – developed a plan of action for sharing the East African market. Castle Lager divested from Kenya while the East African Breweries closed its factory in Tanzania. The firms agreed to split the market – East African Breweries distributing Castle Lager in Kenya and Uganda while Castle Larger marketed East African Breweries products in Tanzania. Medium-sized firms, largely owned by Kenyan Asians, seemed not to have a restructuring strategy. Micro and small-scale enterprises in the informal sector were not directly targeted in the market liberalization process.

Competing mindsets characterize the analysis of the impact of reforms on the economy. Pro-reform analysts argue that liberalization benefits industry because it improves access to imported inputs. Local industries are ex-

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posed to competition, which challenges them to produce quality goods, improve efficiency, and raise production. Analysts against reforms bemoan the negative and adverse effects the reform packages on the economy (Gibbon 1995). McCormick et al. (2002) have documented the negative effects liberalisation on medium and large enterprises in garment production. Market liberalisation, which involved removal or reduction of duty on consumer goods, created a surge of imported commodities in the domestic market. The majority of the imported products, especially garments, quickly became cheaper than locally made ones. Large retail clothing chains such as Njiris and Deacons changed their sourcing patterns from domestic sources to external ones. Manufacturing firms, which sold products to these chains, closed down, or reoriented to the corporate markets (e.g., T-shirts and Polo shirts for marketing promotions and product advertising by such companies as the East African Breweries, Kodak Limited, and oil companies).

Mid-size and smaller firms serving the local market also face extreme difficulties due to competition from second hand clothes. Second hand products (referred to as "*mitumba*" in Swahili) are cheap, yet of relatively high quality. Garment retail shops in Nairobi's central business district, particularly those along Moi Avenue, Mfangano Street, and River Road, are being replaced by garment exhibition sales, which house several individual garment retailers. (Each *mitumba* retailer operates from a table, the space for which is charged between Ksh 250 and 300 per day.)

The effects of liberalization are not adequately explained for small-scale enterprises, which to a large extent sustain the quality of life for the majority of the poor and serve as a safety net for workers retrenched from the private sector and civil service. To address this gap in the literature, the Institute for Development Studies at the University of Nairobi conducted two surveys of the garment industries. Sampling frames were derived from a census of all garment producers and retailers in the city of Nairobi. The 1989 stratified random sample included 245 firms designated as either micro (less than three employees) or small (four to ten employees). The 2000 sample was comprised of 125 firms. The same questionnaire was used to collect data in both samples.

Character of Garment Producers

The total number of micro and small manufacturers grew dramatically during the 1990s. The 2000 census identified 4,178 as compared to 2,200 firms in 1989. Although the proportion of women entrepreneurs in 1989 and that of 2000 remained basically the same (70 percent), the profile of entrepreneurs in small-scale garment production changed over the eleven-year span in many

different ways. To begin with, industry is demanding higher education levels for women. The proportion of female entrepreneurs with primary education dropped nearly 8 percent while those with secondary education grew nearly 17 percent (Table 1). Meanwhile, however, male entrepreneurs with considerably lower levels of education are still entering this traditionally female-activity. Thus, garment production has become especially competitive for women. While formal education is on the rise, the 2000 survey suggests less technical skills tuned to the garment industry are required than eleven years earlier (Table 2). A substantial decrease in the proportion of entrepreneurs with trade skills (i.e., certificates in tailoring or dressmaking) reflects the lack of jobs and rising cost of living which force teachers, secretaries, and other low wage workers in the formal sector to straddle between formal and informal sectors in order to make ends meet.

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Table 1. Entrepreneurs' Level of Education

	1989				2000			
	Male		Female		Male		Female	
	No.	%	No.	%	No.	%	No.	%
None	2	2.9	4	2.3	0	0.0	0	0.0
Primary	32	45.7	78	44.6	17	48.6	31	36.9
Secondary	27	38.5	77	44.0	16	45.7	51	60.7
Post secondary	9	12.9	16	9.1	2	5.7	2	2.4
Total	70	100.0	175	100.0	35	100.0	84	100.0

Table 2. Professional Background of Entrepreneurs

	1989				2000			
	Male		Female		Male		Female	
	No.	%	No.	%	No.	%	No.	%
None	31	45.5	74	42.8	26	72.2	45	50.5
Business related courses								
Government trade test	11	16.2	51	29.5	7	19.4	18	20.2
Certified Public Account	5	7.4	1	0.6	0	0.0	0	0.0
Clothing design	16	23.5	26	15.0	0	0.0	3	3.4
Sales and marketing	0	0.0	0	0.0	2	5.6	1	1.1
No business-related skills								
Primary Teacher	0	0.0	3	1.7	0	0.0	5	5.6
Catering and Photography	4	5.8	16	9.2	1	2.8	3	3.4
Nursing	0	0.0	0	0.0	0	0.0	3	3.4
Secretary	1	1.5	2	1.2	0	0.0	11	12.4
Total	68	100.0	173	100.0	36	100.0	89	100.0

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Data for previous occupation illustrates that the days of small-scale enterprises, characterized by ease of entry, are coming to an end. The proportion of male entrepreneurs starting garment firms without a previous occupation declined from 39.6 percent to only 8.8 percent in 2000. The trend, however, was different for female entrepreneurs whereby the proportion of female entrepreneurs without previous occupation rose from 18.3 percent in 1989 to 33.0 percent in 2000 (Table 3). A greater proportion of female entrepreneurs starting businesses without previous occupation suggest the difficulties women face in the extremely competitive job market. The decline in the proportion of male entrepreneurs is due to the effect of retrenchments and job losses occurring as a result of large and medium firms restructuring and rationalization of production in the wake of liberalized markets. In fact, the proportion of male entrepreneurs who worked in similar work (garment making) as regular or casuals rose from 9.4 percent in 1989 to 41.2 percent in 2000. This increase is greater than that of female entrepreneurs who increased from 9.2 percent in 1989 to 18.2 percent in 2000. A negligible proportion of the 2000 respondents originate in farming. Clearly, urban migrants cannot shift easily from farming to garment making.

Entrepreneurs, whose previous occupation was other business, are moving into garment production. Male entrepreneurs coming from other businesses rose from 3.8 percent in 1989 to 29.4 percent in 2000. Female entrepreneurs originating from other businesses increased from 10.7 percent in 1989 to 36.6 percent in 2000. Male entrepreneurs mobility is reflected by the fact that 5.7 percent of the male entrepreneurs moved into garment making from formal employment in 1989 while in 2000 the proportion of male entrepre-

Table 3. Entrepreneurs' Previous Occupation

	1989				2000			
	Male		Female		Male		Female	
	No.	%	No.	%	No.	%	No.	%
None	21	39.6	24	18.3	3	8.8	29	33.0
Similar work regular or casual	5	9.4	12	9.2	14	41.2	16	18.2
Farming	15	28.3	22	16.8	0	0.0	2	2.3
Other business	2	3.8	14	10.7	10	29.4	12	13.6
Formal employment	3	5.7	0	0.0	7	20.6	15	17.0
Housewife	0	0.0	14	10.7	0	0.0	6	6.8
Teacher	6	11.3	32	24.4	0	0.0	4	4.5
Secretary	1	1.9	13	9.8	0	0.0	4	4.5
Total	53	100.0	131	100.0	34	100.0	88	100.0

neurs coming from formal employment was 20.6 percent. The proportion of these female entrepreneurs rose from none in 1989 to 17.0 percent in 2000. These trends reflect reduced employment opportunities in the public and private sector.

Character of Garment Production

No change was experienced in the proportion of firms producing specialised wear in both male and female owned firms. Although the market for specialised products (African dresses, school uniforms, and industrial workers' uniforms) remains quite stable, the traditional gender-based division of labour is eroding in the face of liberalization. One of the striking changes between 1989 and 2000 is a substantial increase in the proportion of firms – both male and female-owned ones – producing men's wear (Table 4). This reflects the exist-

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Table 4. Main Product Lines

	1989				2000			
	Male		Female		Male		Female	
	No.	%	No.	%	No.	%	No.	%
Men's wear	39	55.7	14	8.0	24	66.7	31	34.8
Women's wear	22	31.4	150	85.7	7	19.5	44	49.4
Cardigans/Pullovers	1	1.4	5	2.9	1	2.8	11	12.4
Specialised wear	8	11.5	6	3.4	4	11.2	3	3.4
Total	70	100.0	175	100.0	36	100.0	89	100.0

Table 5. Sources of Start-Up Capital

	1989				2000			
	Male		Female		Male		Female	
	No.	%	No.	%	No.	%	No.	%
Own savings	55	82.1	113	65.3	26	72.2	42	47.2
From partners	1	1.5	8	4.6	0	0.0	0	0.0
Gift loan from husband or wife	3	4.5	39	22.5	0	0.0	28	31.5
Gift loan from relatives	1	1.5	10	5.8	4	12.4	16	18.0
Loan from friends	2	3.0	1	0.6	4	12.4	1	1.1
Loan from credit union or cooperative bank	1	1.5	2	1.2	1	2.8	1	1.1
Loan from commercial banks	2	3.0	0	0.0	0	0.0	0	0.0
Grant/loan from development organisation or NGO	2	3.0	0	0.0	0	0.0	0	0.0
"Golden handshake"	0	0.0	0	0.0	0	0.0	1	1.1
Total	67	100.0	173	100.0	35	100.0	89	100.0

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ence of favourable market conditions for male suits, which are not available in second hand clothes' markets or in cheap clothing imports. In contrast, the proportion of male-owned firms producing women's wear fell from 31.4 percent in 1989 to 19.4 percent in 2000, and the proportion of women-owned firms dropped by almost half from 85.7 percent in 1989 to 49.4 percent in 2000. This reflects the impact of competition from second hand clothes and cheap imports in ready-made clothes.

Economic restructuring in Kenya has also affected the financial markets. Banks interest rates have been deregulated and micro finance institutions have opened to serve the banking needs of micro and small enterprise entrepreneurs (e.g., equity and family finance banks as well as other micro finance institutions, saving mobilisation programs, and loan schemes based on the Grameen Bank model). It might be expected that micro and small entrepreneurs draw start-up capital from these institutions, but both men and women are relying more on informal sources of capital than these new financial institutions.

Although personal savings were the primary source of funding for small-scale garment producers, garment makers are investing fewer saving in business start-ups. The use of personal savings declined from 82.1 percent in 1989 to 72.2 percent in 2000 among male owners and from 65.3 percent in 1989 to 47.2 percent in 2000 among female owners. Three types of informal sources are used to offset less personal savings to finance their enterprises (Table 5). The use of gifts and loans from spouses grew 9 percent to 31.5 percent among female entrepreneurs, and 18 percent among men. That more women source capital from their spouses than men suggests that the traditional role of male spouses providing for female spouses still exists. The use of gifts and loans from relatives increased for both male and female entrepreneurs. Male entrepreneurs using this source rose from 1.5 percent in 1989 to 11.1 percent in 2000, while aid from relatives grew from 5.8 percent to 18 percent among their female counterparts. A third, informal source of finance – obtaining funding from friends – is only important for male entrepreneurs. This rose from 3.0 percent in 1989 to 11.1 percent in 2000. The use of this source by female entrepreneurs in 1989 and 2000 was negligible. These data reveal that there is a tendency for male entrepreneurs to use social networks of friends and relatives in financing enterprises. In 1989, the use of commercial banks and development organisations or NGOs to finance small-scale garment producers in 1989 was negligible, but it was non-existent in 2000 despite the changes that have taken place in financial markets.

Small-scale garment producers have a wide range of sources of raw materials (Table 6). Wholesalers and retailers are the only significant sources of

Table 6. Sources of Raw Materials

	1989				2000			
	Male		Female		Male		Female	
	No	%	No	%	No	%	No	%
Factory	3	4.4	3	1.7	0	0.0	3	3.4
Wholesaler	50	73.6	120	69.8	23	63.9	48	53.9
Retailers	12	17.6	33	19.2	11	30.6	37	41.6
Mitumba dealer	3	4.4	14	8.1	0	0.0	0	0.0
Customer/contractor	0	0.0	0	1.2	2	5.5	1	1.1
Total	68	100.0	170	100.0	36	100.0	89	100.0

raw materials for both male and female entrepreneurs. Male entrepreneurs using this source dropped from 73.6 percent in 1989 to 63.9 percent in 2000 while female entrepreneurs using this source declined from 69.8 percent in 1989 to 53.9 percent in 2000. Male and female entrepreneurs increased their use of retailers as sources of raw materials. Male entrepreneurs using this source rose from 17.6 percent in 1989 to 30.6 percent in 2000. Female entrepreneurs using this source nearly doubled from 19.2 percent in 1989 to 41.6 percent in 2000. The shift from the use of wholesalers and factories to retailers may reflect the changes in garment industry whereby large firms supplying wholesalers have closed down. This is related to the shift from locally produced to imported fabric. It may also reflect the fact that entrepreneurs no longer have enough money to make bulk purchases.

Small-scale garment producers have seven platforms to distribute their products (Table 7). Two platforms, namely individuals and businesses, are direct to consumers while the other five are intermediaries – wholesalers/traders, retail shops and markets in Nairobi, retail shops and markets in other parts of the country, retail chains (Uchumi, Nakumat and Y-Fashions), and exporters and foreign buyers. The pattern of distribution changed gradually between 1989 and 2000. In 1989, 66.3 percent of male-owned enterprises distributed their products to individuals while in 2000 half the male entrepreneurs sold their product to individuals. The pattern was similar for female entrepreneurs (i.e., 64.2 percent in 1989 and 49.7 percent in 2000). The proportion of male entrepreneurs distributing products to businesses rose from none in 1989 to 15.3 percent in 2000, while that for female entrepreneurs rose from none in 1989 to 10.1 percent in 2000. Firms distributing products to wholesalers or traders declined from 21.7 percent to 9.7 percent among men and from 21.2 percent to 13.4 percent among women. Female entrepreneurs supplying products to retail shops and markets in other parts of the country

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Table 7. Product Distribution in Male and Female-Owned Firms

	1989				2000			
	Male		Female		Male		Female	
	No.	%	No.	%	No.	%	No.	%
Individuals	55	66.3	136	64.2	36	50.0	89	49.7
Businesses	0	0.0	0	0.0	11	15.3	18	10.1
Wholesalers/traders	18	21.7	45	21.2	7	9.7	24	13.4
Retail shops and markets in Nairobi	7	8.4	20	9.4	7	9.7	14	7.8
Retail shops and markets in other parts of Kenya	3	3.6	11	5.2	3	4.2	26	14.5
Retail chains Uchumi, Nakumatt, Y-fashons	0	0.0	0	0.0	1	1.4	3	1.7
Exporters/foreign buyers	0	0.0	0	0.0	7	9.7	5	2.8
Total	83	100.0	212	100.0	72	100.0	179	100.0

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increased from 5.2 percent in 1989 to 14.5 percent in 2000. Trade liberalization has promoted sales to larger entities like retail chains, exporters, and foreign buyers, but male entrepreneurs are moving faster than female entrepreneurs into this market niche (11.1 percent versus 4.5 percent).

Conclusions

This paper has examined the impact of liberalization on small-scale garment producers in Nairobi, Kenya, based on a sample obtained before liberalization and another after liberalisation. Garment production is one area where women have made significant in roads. More than 70 percent are owned and run by women entrepreneurs. Women, however, are responding differently to liberalisation than men in the same employment niche. Differences are manifest in terms of level of education, professional background, previous occupation, product lines, sources of start up capital, and sales distribution patterns. Gender does not play a significant role with respect to raw material sources.

The percentage of male and female entrepreneurs has remained relatively constant but male entrepreneurs appear to be moving faster into potentially lucrative niches such as exporting to Uganda and Tanzania as well as direct sales to large retailers in Kenya. The benefits of liberalised financial system are yet to trickle down as fully to female entrepreneurs in the garment industry. In order for female entrepreneurs to capture the benefits of the liberalised economy they will need to diversify markets for their products, engage in production lines that are competitive, and improve their sourcing patterns. Business development services offered by NGOs should be diversified to include marketing, branding, quality control, and sourcing

of raw materials and capital. Government policies should be configured in a manner that will encourage female entrepreneurs to source and distribute products to platforms that purchase products in bulk. This will help small-scale female garment producers upgrade from being poor performers competing for a shrinking domestic market.

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