

The Role of National Textile Policies to Develop a Globally Competitive Textiles

The Case of Cameroon

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I- INTRODUCTION



The textile sector has traditionally been a major provider of jobs and economic value, characterized by fierce competition and complex value chains. For developing economies, the ability to transform this sector into a sustainable growth engine depends heavily on political will and the relevance of strategies implemented.

in this respect, some success stories can be cited; Benin processed 12.79% of local production (2025-2026), overtaking Mali to lead Africa with 647,290 tons of cotton, quite an impressive feat.

Cameroon is endowed with raw cotton potential and a manufacturing history. Despite its potential, the Cameroonian textile industry faces major structural challenges which include low productivity, outdated equipment and pressure of imports.

National institutions in the sector are therefore expected to drive policies that encompass regulation, investment, training, and export incentives to transform a fragmented local chain into a globally competitive sector.

Consolidating the textile sector into an engine for sustainable growth and GDP development.





Market Value & Competitiveness: The challenges?.. How can they be fixed



- **Existence vs. Competitiveness:**

African textiles exist (Egypt, Morocco, Nigeria, Ghana, Ivory Coast, Senegal, Togo etc) they all flourished and were very competitive but later decline in the 1990s due to poor industrialization and lack of policies.

- **The Challenge:**

Traditional artisanal production cannot sustain competition against mechanized global markets. The concentration of revenues amongst few actors. Small producers lack access to credit, improved seeds, mechanization and agricultural services.

- **How can it be fixed ?**

Without a fair or fixed "market value" for African textiles, nations cannot compete in a controlled global market. Lack of specialized technical skills. Weak application of standards. They don't also have access to formal markets.

Case in Point: Cameroon does not exist as a significant trading market in global statistics (export margin under 10%). Massive export of Raw cotton and quasi-absence of local spinning. Low quality, productivity and very high cost.





Statistical Evidence:



The Trade Disparity

World vs. Africa: A Statistical Reality Check



The Disparity:

- World trade is measured in Billions (USD); with significant low numbers for textile in African trade.

Capital Flows:

- Africa earns an insignificant percentage of global capital flows from textiles.

Import Dependency:

- African exports fluctuate between \$12-17 million.
- Imports are permanently on the rise (\$9-\$28 million USD).

Comparison:

Exports from African countries are significantly lower than Asia, Europe, and the USA.

Data Source:

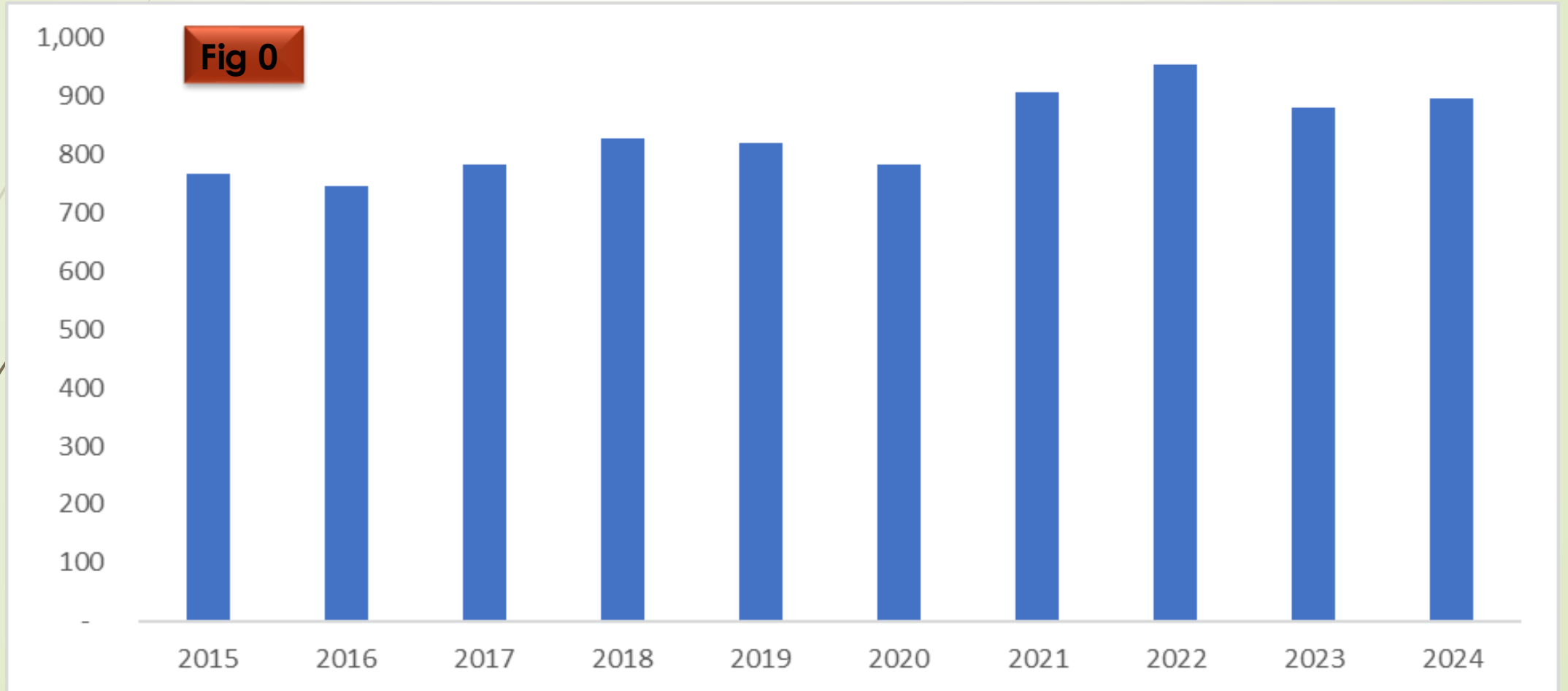
ICAC Publications (Figs 0 -10).

(Visual Note: Insert charts comparing World Exports vs. African Exports here).



Fig 0:

World's Total Textiles Exports in USD Billion

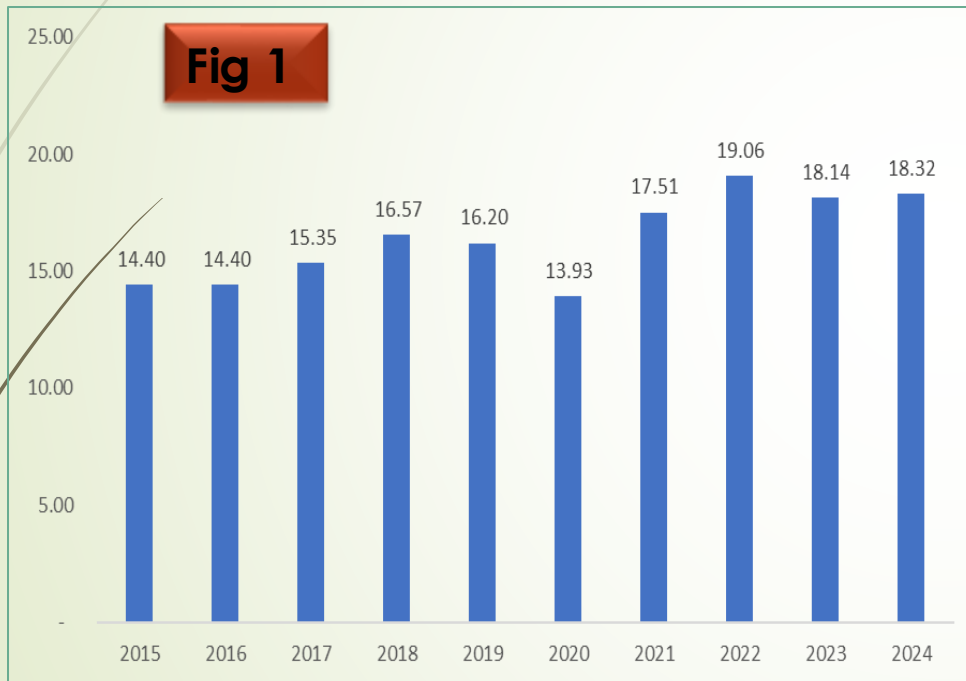




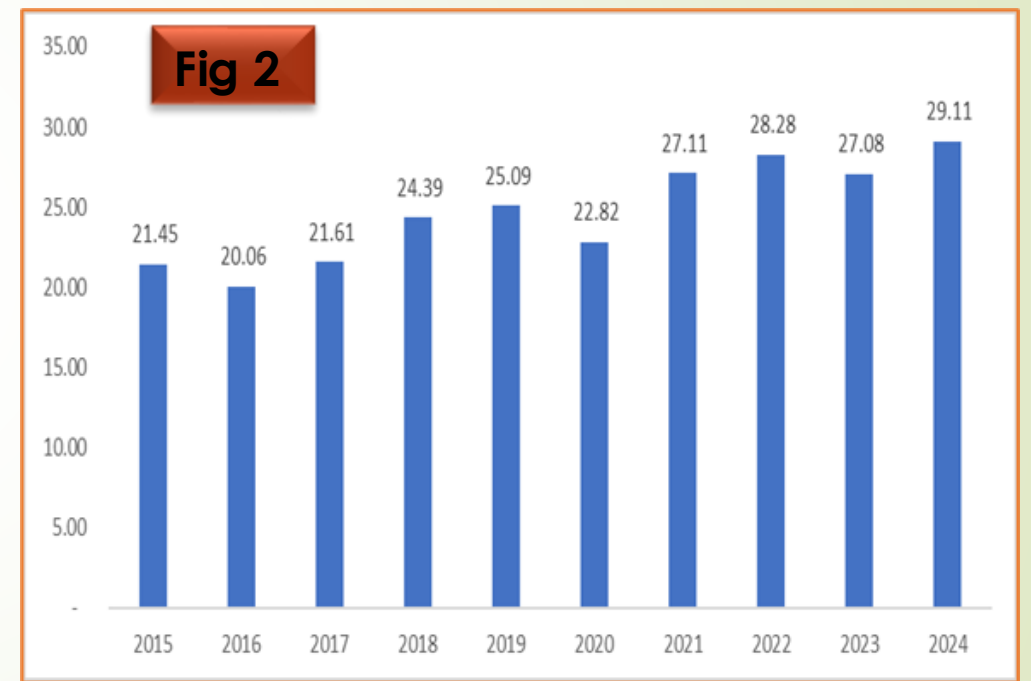
Figs 1 & 2 : Africa's Total Textiles Export vs Import in USD Billions



Africa's Total Textiles Exports in USD Billion



Africa's Total Textiles Imports in USD Billion

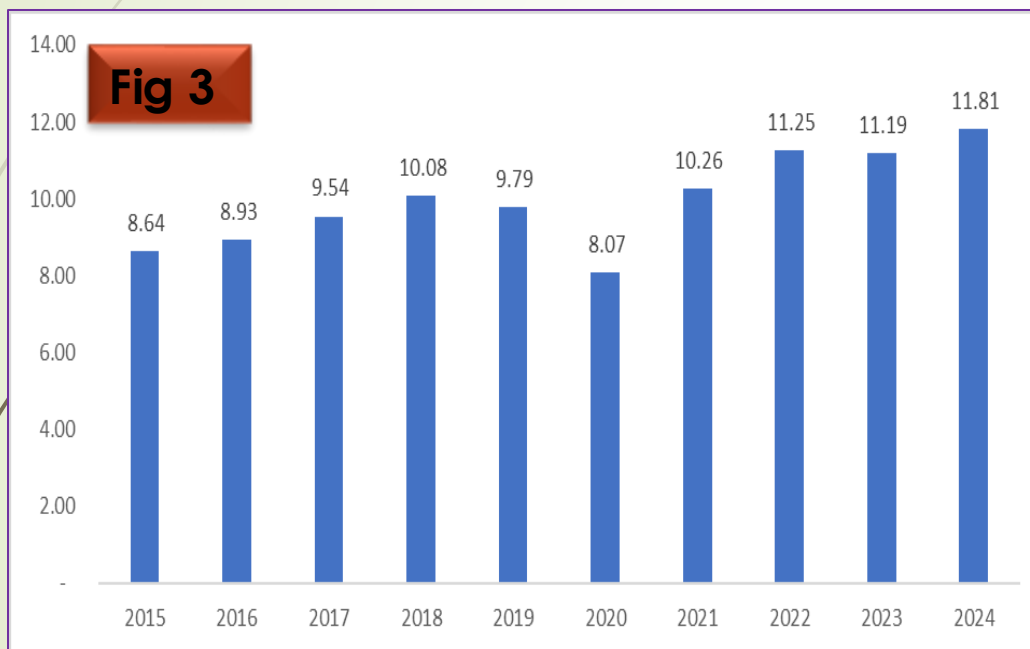




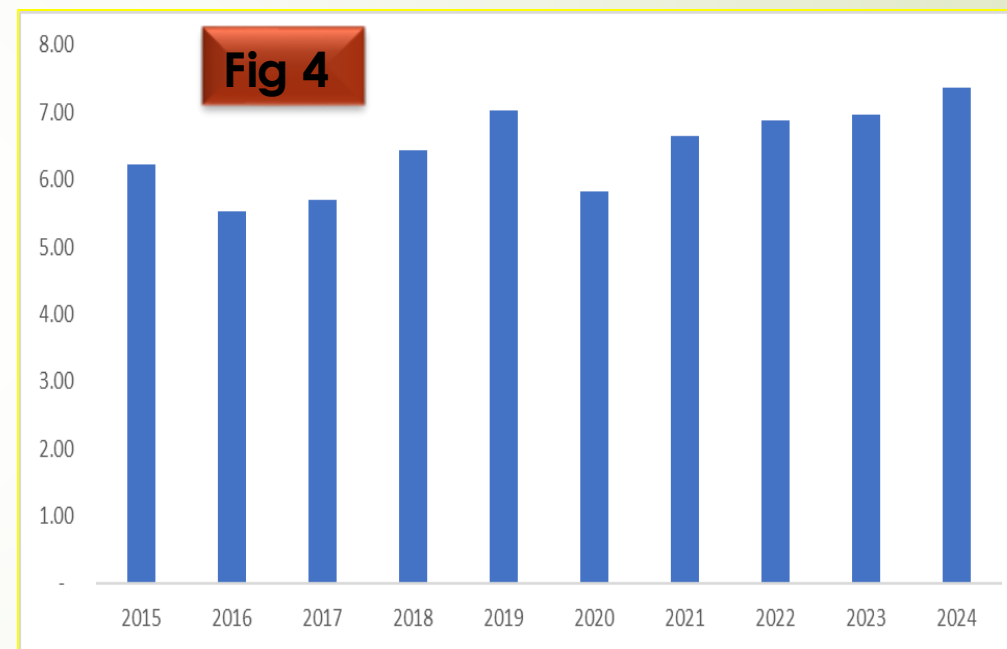
Figs 3 & 4: Africa's Garment Export vs Imports in USD Billions



Africa's Garments Exports in USD Billion



Africa's Garments Imports in USD Billion



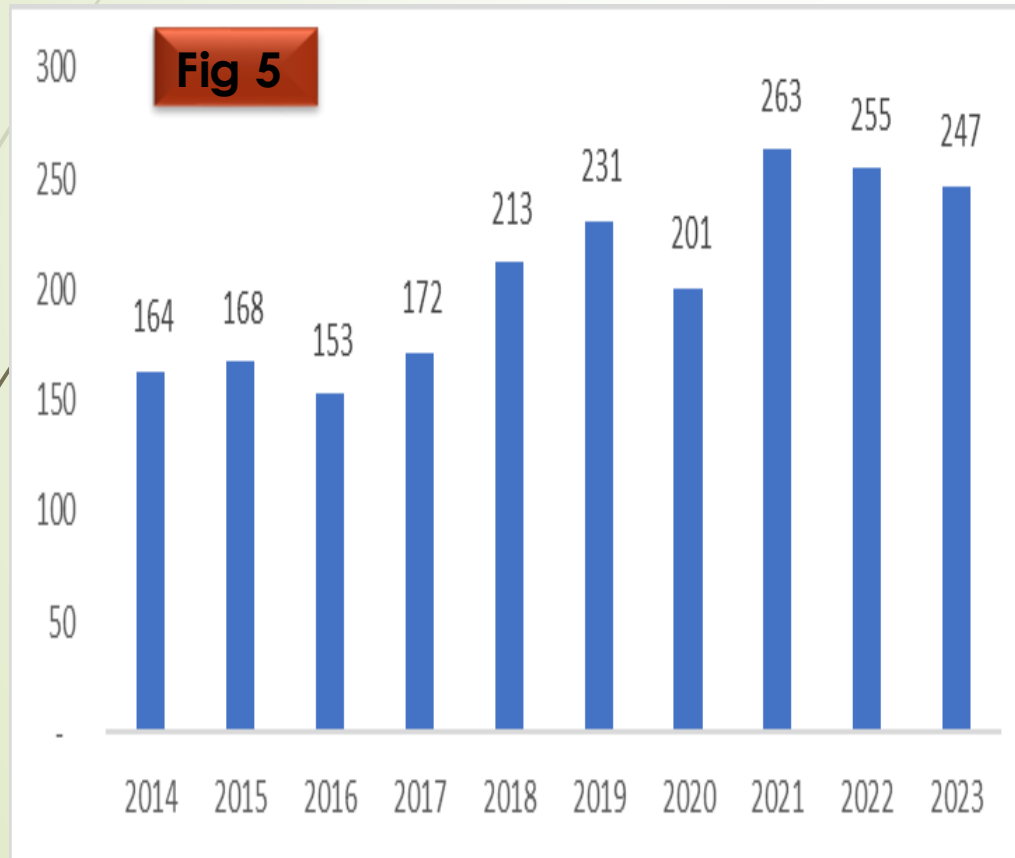


Figs 5 & 6:

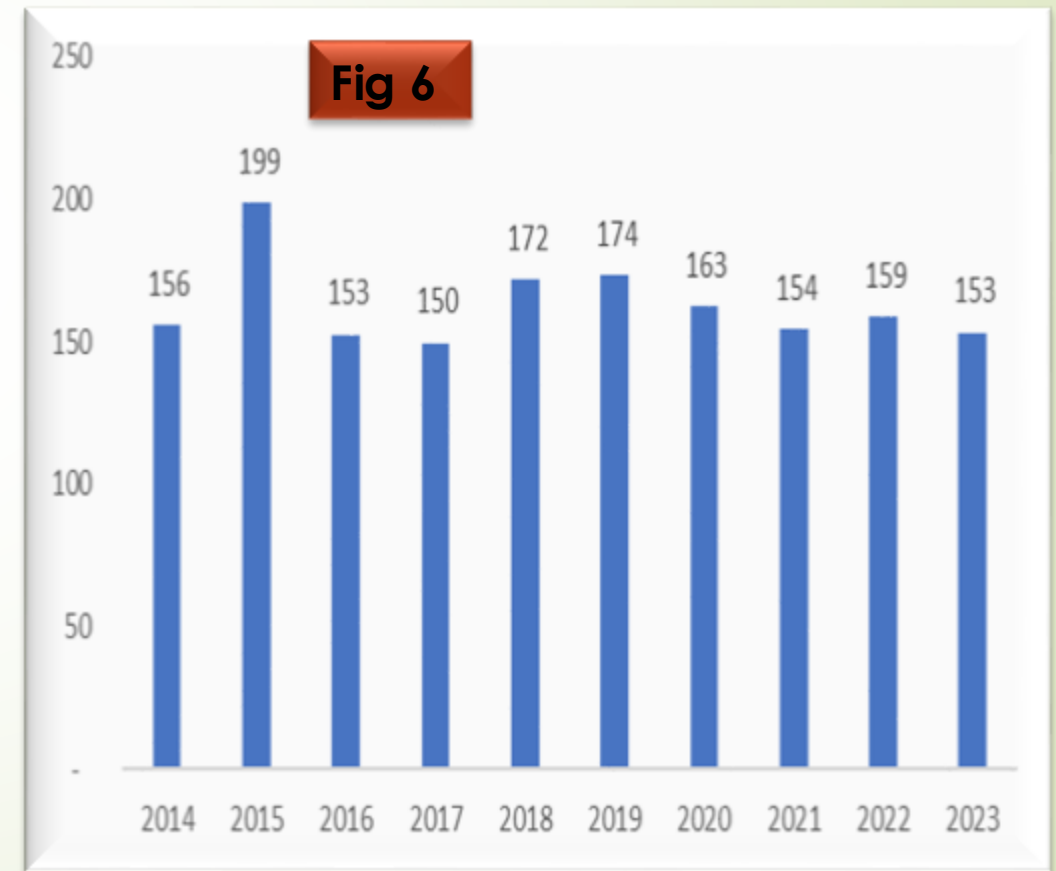
Cameroon's Total Textiles Exports vs Imports in USD Millions



Cameroon's Total Textiles Exports in USD Million



Cameroon's Total Textiles Imports in USD Million





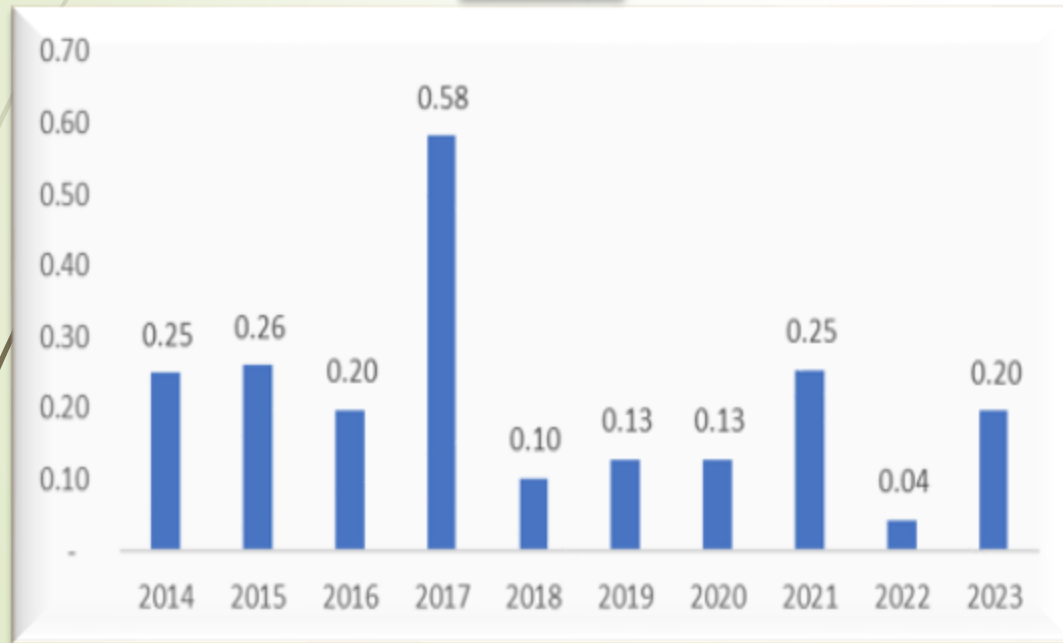
Figs 7 & 8:

Cameroon's Garment Export vs Imports in USD Billions



Cameroon's Garments Exports in USD Million

Fig 7



Cameroon's Garments Imports in USD Million

Fig 8





Fig 9: Africa's Leading Textiles Exporters in USD Million



USD Million	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Egypt	2,942	2,674	2,922	3,181	3,227	2,886	3,903	4,511	4,365	4,824
Morocco	3,205	3,491	3,663	3,839	3,644	3,019	3,792	4,095	4,421	4,462
Tunisia	2,545	2,519	2,596	2,817	2,651	2,433	2,685	2,946	3,121	2,947
South Africa	1,171	1,109	1,310	1,393	1,251	1,083	1,414	1,276	1,257	1,289
Benin	274	187	365	461	468	475	641	597	520	532
Madagascar	418	491	553	514	513	424	525	609	548	531
Kenya	399	403	399	428	429	406	488	505	412	527
Mauritius	846	762	722	727	676	515	550	556	459	435
Lesotho	298	478	525	448	434	446	574	513	423	419
Ethiopia	99	77	99	126	182	156	176	158	128	415

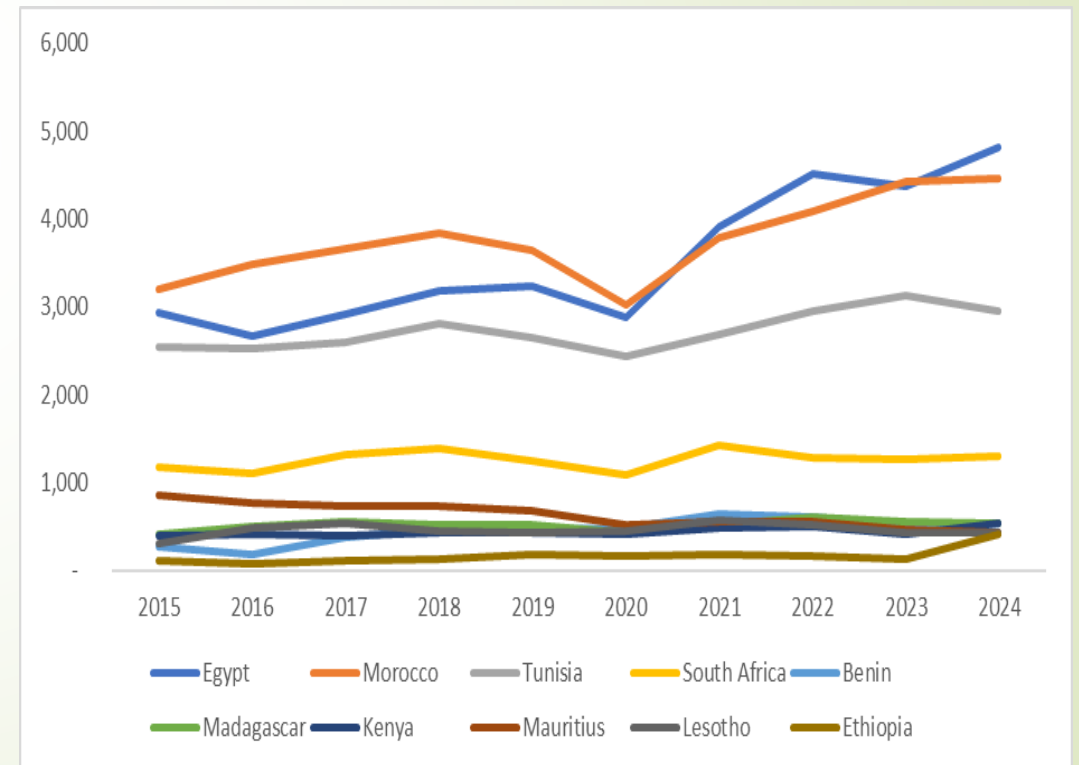


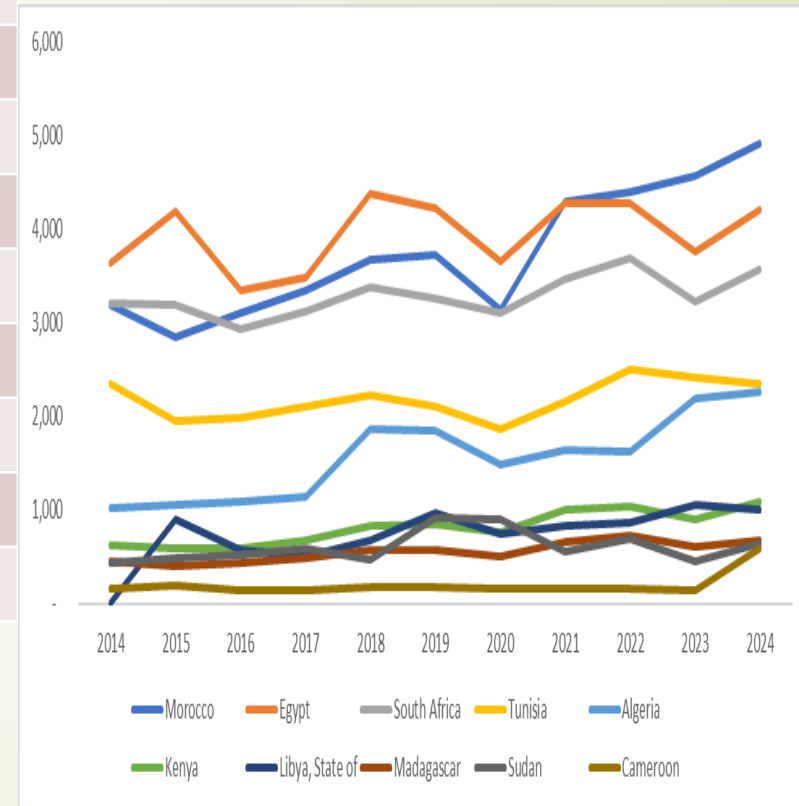


Fig 10

Africa's Leading Textiles Importers in USD Million



USD Million	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Morocco	3,196	2,855	3,108	3,351	3,680	3,726	3,146	4,307	4,399	4,568	4,922
Egypt	3,646	4,198	3,358	3,491	4,382	4,231	3,671	4,286	4,292	3,770	4,219
South Africa	3,214	3,192	2,937	3,124	3,390	3,272	3,114	3,465	3,690	3,234	3,573
Tunisia	2,360	1,948	1,988	2,114	2,234	2,115	1,874	2,159	2,500	2,418	2,355
Algeria	1,031	1,066	1,099	1,149	1,872	1,850	1,495	1,648	1,635	2,201	2,259
Kenya	621	589	592	682	834	861	771	1,004	1,044	909	1,089
Libya, State of	-	908	569	509	680	981	743	833	862	1,051	1,016
Madagascar	453	401	442	493	584	570	502	663	737	616	676
Sudan	438	488	520	595	481	924	912	567	692	462	654
Cameroon	156	199	153	150	172	174	163	154	159	153	591





KEY QUESTIONS



**1) DOES AFRICA
AFRICA HAVE A TEXTILE
MARKET ?**

**2) WHY IS IT NOT
COMPETATIVE ?**

3) WHO IS RESPONSIBLE

- **The Textile Sector in Africa:** “The textile sector in Africa exists in major countries like Ethiopia ,morroco,Egypt ,Nigeria , Cameroon just to name a few but it has no real global competitiveness or market value.”
- **Why is it not completeive ?** Most post-independence textile factories have collapsed around the 1990s,because of poor industrialization and the complete absence of enforceable national textile policies. Traditional artisanal production cannot compete with modern mechanized global markets. Africa exports almost all its raw cotton but has almost no local spinning or processing
- **Who is responsible?** .It is the prerogative role of the government to define textile procedures ,standards and norms



Infrastructure & Logistics Gap



The Hardware Deficit: Spindles and Looms



► Global Capacity:

- Spindles: ~225 million.
- Shuttle Looms: ~1.8 million.

African Capacity:

- Spindles: ~1,200 (Most countries <100).
- Shuttle Looms: ~3,500.

► Cameroon Specifics: 50 spindles.

► Yield Gap:

- Global yields (200-800 kg/Ha) vs. Africa (under 400 kg/Ha).

► Consequence:

Without equipment and logistics for local transformation, Africa remains a raw material exporter with no competitive power.



Case Study:

Cameroon Textiles Industry

The Collapse of CICAM



The CICAM Story



➤ History:

CICAM (lone government-owned spinning company) flourished post-independence but collapsed in the 90s.

➤ Causes of Collapse:

- Low productivity & high cost of raw materials.
- Outdated equipment/technology.
- Pressure from imports & second-hand goods ("Fripperies").
- Insufficient financing and risk capital.

➤ Current Status:

- Under restructuring/liquidation for two decades.

➤ Market Share:

- Local players hold only ~5% of the textile market;
- ~72,600 tonnes of second-hand clothing imported in 2024.



Current National Efforts

Strategic Response: Vision 2035 & SND30



Over the years government ministries and institutions have made efforts, with diverse fortunes, to lead the industry towards optimal functioning

➤ **Target:**

- Achieve 50% local processing of cotton.

➤ **Policy Shifts:**

- Law on cotton production disfranchised (ending SODECOTON monopoly).
- Creation of National Bank for SMEs.
- Loans to revive CICAM and modernize production.

➤ **Key Stakeholders:**

- SODECOTON: Upstream security, inputs, purchasing.
- CICAM: Industrial processing (ginning/spinning).
- ANOR: Standards and certification.
- Partners: UNDP, GIZ, EU, World Bank.



Legal & Regulatory Framework

Governing Instruments: National & Continental



➤ National frameworks:

- Law of 2015 regulating commercial Activity. This however does not specifically address the textiles sector.
- ANOR which approves the textile standards (NC 1816, NC 1817 for loincloths/linens).
- Sectoral policies & Ministerial guides on industrial development, import and export zoning
- Challenge: High cost of compliance/registration for SMEs.

➤ Continental framework:

- AfCFTA: It's protocol on goods ,services ,IP Preferential access to African markets (Rules of Origin).
- OAPI: Protection of industrial designs and trademarks and patents

➤ International:

- EU Economic Partnership Agreement (APE).
- 2015 Paris Convention on climate change (Sustainability/ESG compliance).



Financing & Investment Strategy

Financing the Transformation: A 5-Year Plan



➤ Objective:

- Increase local processing from 1% to 25–50%.
- Modernize ginneries and spinning/weaving mills (quality, traceability, environmental compliance)
- Develop textile SMEs /SMI workshops and accessory chains

➤ Funding Sources:

- Multilateral lenders I: AfDB, World Bank, Afreximbank.
- Bilateral/Technical Corporations: GIZ, EU (Global Gateway), UNIDO.
- Private funds and commercial banks : Equity, Impact Funds, Trade Finance.

➤ Recommended Instruments:

- Blended Finance (Grants + Concessional Loans).
- Guarantees & Credit Lines.
- Technical subsidies
- Equipment Leasing Facilities.



Investment Roadmap (Breakdown)



Indicative Investment Breakdown & Phasing

Modernization (Ginneries/Logistics):	€10–40 million.
Spinning/Weaving Units (3-5 regional):	€30–120 million.
SME/Incubation Clusters:	€2–12 million.
Certification/Marketing:	€1–6 million.
Guarantee/Trade Finance Lines:	€20–60 million.
Phasing:	<ul style="list-style-type: none">➤ Short (0-18 months): Audits & Studies.➤ Med (1-3 yrs): Modernization & Modular Units.➤ Long (3-5 yrs+): Vertical Integration & Exports.



Economic & Environmental Outlook

Towards a Green & Circular Textile Economy



➤ Economic Shift:

- Moving from raw cotton export to integrated value chains (yarns, fabrics, garments).
- Job Creation: Over 60% of the potential workforce is female.

➤ Environmental Sustainability:

- Compliance with 2015 Paris Convention.

➤ Carbon Credits:

- Biochar production from cotton stalks (Bizpando/ACC partnership).
- Renewable energy (Solar/Biomass) and Natural Dyes.

➤ The African Advantage:

- With low industrial toxics currently, Africa is positioned for "Green Textiles."



Growing Market Potential: The boom awaiting actors of the Industry



- ▶ It is important to factor in the influence of the forecasted growing population of Africa as waiting consumers of products from the cotton and textiles industry, and this involves the entire supply and value chain. With such abundance of raw material, strategies and policies must be crafted to harness efforts to optimize the benefits not only to the actors but to the entire population in the general standard of living.
- ▶ According to the forecast, Africa's total population would reach nearly 2.5 billion by 2050. In 2025, the continent had around 1.55 billion inhabitants, with Nigeria, Ethiopia, and Egypt as the most populous countries. 26 Jan 2026. This one billion addition represents almost unimaginable potential.
- ▶ With a population of 1.3 billion, and markets at 15-18 %, a population of 2.5 billion by 2050 with a high youth concentration would be higher dynamic if national textiles policies are enacted to address infrastructural needs with appropriate ecosystems to develop a globally competitive textiles industry.



ACC – FICOTA

**FACING THE CONTINENTAL CHALLENGES OF
THE VALUE AND SUPPLY CHAIN**



ACC – FICOTA'S PROPOSAL: DEVELOPING THE SECTOR'S VALUE CHAIN IN AFRICA .



The International Forum on Cotton, Textiles, Accessories and Fashion (FICOTA) is an initiative of The African Chamber of Trade & Commerce (ACC) dedicated to improving the performance of the cotton-textile-accessories-fashion value chain in Africa.

Since its creation in 2018, this platform offers networking opportunities with industry actors and the chance to discover innovations and solutions for the sector.

It also aims to increase the potential of young people in the cotton textiles chain. In February 2021, the platform enabled the creation of an incubator called African Fashion Project (AFP) to strengthen the capacities of young Africans in the textile-clothing-fashion value chain and give them a new horizon.





THE ACC & FICOTA INITIATIVES: Structuring the sector from seed to Fashion



➤ • Initiative:

The African Chamber of Trade & Commerce (ACC) created the International Forum for Cotton, Textiles, Accessories, and Fashion (FICOTA) in 2018.

➤ • Theme:

“Cotton from Seed to Fashion” / “Cotton from the Farm to the Market.”

➤ • Mission:

An international platform for subject matter experts to address sustainability and resilience in African cotton/textile value chains.

➤ • Approach:

- Sector-oriented Bottom-Top business model.
- Public Private Partnerships (PPPs).
- Building adapted ecosystems for livelihoods.

➤ • Upcoming Event:

4th Edition scheduled for Nov 16-19, 2026, in Cairo, Egypt



Key Recommendations

The Way Forward: Recommendations



➤ Policy:

- Enact a "Cotton and Textiles Act" to regulate the sector.

➤ Incentives:

- Introduce temporary tax breaks/energy subsidies for local processors.
- Introduces temporary tax breaks
- National SME modernization programs on equipment, maintenance and technical training

➤ Standards:

- Government subvention to subsidize certification costs for SMEs.
- Carry out a lot ANOR campaigns

➤ Structure:

- Create integrated regional clusters (Garoua, Maroua, Douala).
- Create other small spinning units

➤ Market:

- Develop a national brand for cottons "Made in Cameroon – Sustainable" label.
- Support creativity & designs and subsidies designers and fashion incubators



Conclusion

Policy is Prerequisite



➤ The Imperative:

- Enforceable national policies aligned with SND30 are mandatory.

➤ Global Pressure:

- EU "Omnibus I" Directive requires strict ESG compliance (traceability, labor safeguards). Compliance is a de facto condition for market access.

➤ The Stakes:

- In a global market where rules are set, African suppliers must comply or be excluded.

➤ Call to Action:

- Synergy is required between Government, Private Sector, and Partners (ICAC, WTO, FICOTA) to define the market value of African textiles.

Faced with these significant challenges and considering the intra-governmental role of ICAC, she could undertake the role of advocacy and follow up with member countries to put in place a national or regional initiative to harmonize and address enforceable Textiles policies in Africa. A committee of experts from Public, private and partner organizations could be created for the purpose.



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Join Us for the 4th Edition of FICOTA



**THE AFRICAN CHAMBER OF TRADE & COMMERCE (ACC) invites
you to
the 4th Edition of FICOTA.**

Dates:

November 16 – 19, 2026

Location:

Cairo, Egypt

Theme:

***“African Cotton Industrialization/Optimization:
The Game-Changer for Global Textiles”***



THANK YOU