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Research Report

A Scoping Report of the South African Fashion Design Sector

Submitted to:

Department of Sport, Arts and Culture

Submitted by:

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South African Cultural Observatory

Report

A Scoping Report of the South African Fashion Design Sector

March 2024

Executive Summary

The global fashion industry is worth US$2.4 trillion in total value and has great potential for sustainable growth and job creation (McKinsey, 2017). There is also growing recognition that fashion design is an important growth area for the African continent. The Department of Trade, Industry and Competition (DTIC, 2020) estimated the contribution of the fashion design sector to the South African economy to be R1 billion. Fashion also has important non-market cultural values: Cultural goods and services carry strong messages of heritage, identity, and style. Although it has great potential, the fashion design industry has received less research attention than other parts of the creative industries.

National data shows that, as in many African countries, international competition, along with global production outsourcing trends, dramatically reduced the size of the South African wearing apparel sector in the post-apartheid era. Internationally, the fashion sector has also been criticised for its role in the generation of environmentally damaging waste. Another important issue in the sector is copyright and intellectual property, which are essential if fashion designers are to monetise their content sufficiently to remain in the market.

The main goal of this report is to provide a scoping study of the state of the South African fashion design sector, with a special focus on issues of environmental sustainability, innovation, and intellectual property. Using web searches, business directories, and industry networks, a database of 400 South African fashion designers and related associations was constructed. The data was then analysed in terms of location (city and province) and patterns identified using GIS mapping techniques. Eight case studies were used to provide more detailed context on the business trajectories and career development paths of South African fashion designers.

The results showed that the South African, and African, fashion design sector has great potential for growth. While the sector is clustered in Johannesburg and Cape Town, fashion designers are present even in smaller cities, which suggests the potential for their role in more balanced regional development.

South Africa already has a series of national policies that recognize and seek to develop the creative industries, at national and regional level. The next important step, also identified by UNCTAD in their analysis of the African fashion sector (2023), is the coordinated and effective implementation of these policies.

Case study analysis showed high levels of concern for the environment and a focus on implementing more sustainable practices in design, manufacture and retail of their products. However, a lack of consumer awareness and limited buying-power in many parts of Africa

Key Findings

- The South African fashion design industry is estimated to contribute R1b to the economy.
- The sector has a strong entrepreneurial drive and high levels of innovation, which helped it to recover from COVID-19.
- Access to education & business training are important for increasing sector productivity.
- Sourcing materials & access to infrastructure, finance & equipment are challenges for micro-enterprises.
- E-commerce platforms & social media offer important opportunities for designers to grow their markets.
- The largest fashion design cluster is in the Western Cape (33%), mostly concentrated in Cape Town.
- Gauteng is the next most important hub (29%), centered around

means that the demand for such products is still low. The report concludes with policy suggestions and directions for future research.

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Our thanks for Dr Nyasha Grace Gatawa, who was the external reviewer on the report and provided valuable feedback and suggestions.

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1. Introduction and Report Objectives

The global fashion industry is worth US$2.4 trillion in total value and has great potential for sustainable growth and job creation (McKinsey, 2017). There is also growing recognition that fashion design is an *important growth area for the African continent*: A report by the African Development Bank showed that the apparel and footwear market in sub-Saharan Africa was worth US $31 billion (AfDB, 2019).

The South African Revised White Paper on Arts, Culture and Heritage (DSAC, 2017) recognises fashion design as being part of the cultural and creative industries. The Design and Creative Services domain is one of the largest parts of the South African cultural and creative industries (CCIs), contributing 32% (R51 billion) of creative economy output in 2020, and making up 13.4% of all cultural occupations. Despite this, the *domain overall is under-researched*, although it is part of the SACO research agenda.

The Department of Trade, Industry and Competition (DTIC, 2020) estimated the contribution of the fashion design sector to the South African economy to be R1 billion, and that designer fashion grew faster between 2009 and 2014 than the clothing and footwear sector in general. In South Africa, Fashion Weeks have also grown (including Sowetan Fashion Week, Cape Town Fashion Week, and SA Fashion Week), and include a greater proportion of South African designers in their shows.

Fashion also has important non-market cultural values: Cultural goods and services carry strong messages of heritage, identity, and style, and can be a powerful way to showcase the culture of the country and build up “soft power” through cultural diplomacy (UNESCO, 2022). As the African Fashion Futures project (2022) puts it: “Fashion is not only a sector of the world economy, it is also a lens through which we can explore cultural expression, memory politics, making traditions as well as the broader economic and social impact of the creative economy”.

Although it has great potential, the fashion design industry has received less research attention than other parts of the creative industries (England et al., 2021) and also faces some challenges. National data shows that, as in many African countries, international competition, along with global production outsourcing trends, dramatically reduced the size of the South African wearing apparel sector in the post-apartheid era. The DTIC report (2020) showed that South African fashion design firms share many of the characteristics of production in other CCI domains, which makes them vulnerable to disruptions like COVID-19: they are mostly small, and their markets are mostly local, despite international market ambitions.

Internationally, the fashion sector has also been *criticised for its role in the generation of environmentally damaging waste* (Dissanayake and Weerasinghe, 2021; Njeru, 2023; Pather, 2015). In South Africa, there has been a rise in concern amongst young designers who aim to address these issues through social activism (DTIC, 2020). However, a recent large-scale quantitative study (Muposhi et al., 2023) showed that most fashion designers in South Africa, “are yet to fully accept responsibility related to adoption of sustainable fashion”.

Another important issue in the sector is copyright and intellectual property, which are essential if fashion designers are to monetise their content sufficiently to remain in the market. In a study based in Lagos and Nairobi, England et al. (2021) identify fashion designers as “micro-entrepreneurs” who can be drivers of economic development in their own cities and regions.

Chang et al. (2021) reflect on how creative industries create value through the combination of traditional iconography (which could be based on *traditional heritage*) with modern design elements to create a "market for meaning".

A study of CCIs in Cape Town (Snowball et al, 2021) however, showed that very few firms used formal copyright instruments to protect their intellectual property. This is especially the case as more SMME South African fashion design businesses begin to use digital platforms for online sales and promotion (Nhuvira and Dorasamy, 2020).

Other important issues in fashion design research include what McRobbie et al. (2023) refer to as the "milieu of labour" in the fashion design sector, such as exclusivity and privilege (who can become a designer), and the *precarity of many of the jobs* associated with fashion design.

Issues of location, networks and value chains are also important to consider. Clusters can offer benefits in terms of knowledge spillovers and shared equipment, and can be both physical, or digital or virtual in nature (Salvador et al., 2013). Global Value Chains and Global Production Networks play an important role in the financial and environmental sustainability of the sector (England et al., 2021). African firms are often disadvantaged by uneven power relationships within global networks, that constrain their ability to source inputs and access international markets. The impact of regional trade agreements or disruptions, like the African Continental Free Trade Area, African Growth Opportunities Act (AGOA), Brexit and African-China trade relationships are also important factors.

Objectives:

The main goal of the report is to provide a scoping study of the state of the South African fashion design sector, with a special focus on issues of environmental sustainability, innovation, and intellectual property

The report will aim to achieve the following objectives:

- To demonstrate the importance of the fashion design sector in South Africa, and more broadly, in Africa.
- To identify the most pressing issues and challenges facing the sector (with a special focus on environmental sustainability, innovation, and intellectual property)
- To determine the spatial distribution of the sector through the construction of a database of fashion designers (and other stakeholders), and the use of GIS mapping.
- To determine what fashion designers in South Africa need to be able to develop and how cultural and industrial policy could better support the sector.
- To suggest directions for future research in the sector.

The report is structured as follows: Section 2 describes the research methods and data sources; Section 3 synthesises research on the importance of the sector globally, in Africa and in South Africa, and discusses some of the challenges facing the sector, including environmental sustainability, and the protection and development of intellectual property; Section 4 presents the finding of the database mapping and the case study analysis; and Section 5 concludes with a discussion of some of the key factors needed to develop and support the sector.

2. Research methods and data

Although there is some macro-level data on the fashion design sector, detailed micro-level data that is publicly available is rare. This section describes the research methods and data sources used for the construction and mapping of the South African fashion design sector, as well as the methods and data used for the case study analysis.

Fashion Design Database and GIS Mapping

Using web searches, business directories, and industry networks, a database of 450 South African fashion designers and related associations was constructed[1]. The criteria for inclusion for fashion designers were:

- They have a business presence in South Africa
- They have a label or design brand that is being sold commercially (online or in traditional retail)
- The focus was on clothing designers, rather than accessories. While both are part of fashions design, they have somewhat different value chains.

Web searches included Industry portals and marketing sites (for example, SA Fashion Week; Craft and Design Institute; Conscious Fashion Collective, Iqoqo; Peek), the online yellow pages, media reports (from online sources like Culture Trip, Twyg), retail portals (Young Designers' Emporium; Orphan Street Clothing Shop; and DuckDuckGoose store) and exhibition catalogues (such as the *Fashions of Southern Africa exhibition,* Kent State University Museum).

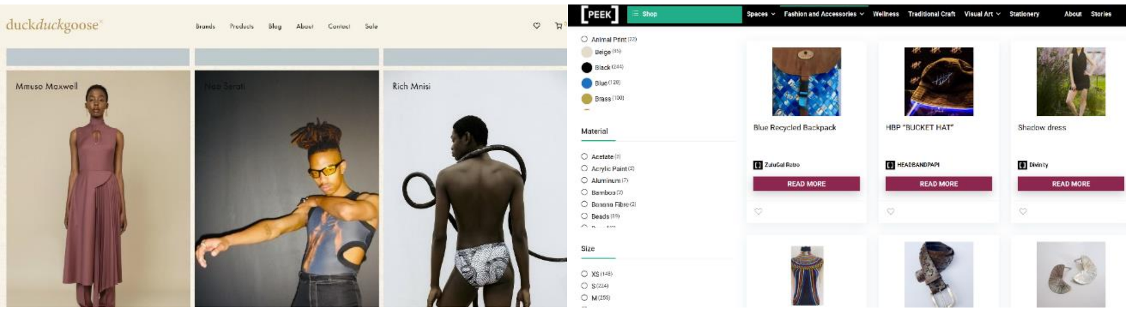


Figure 1. Screenshots of online website searched to construct the fashion design database

(Sources: DuckDuckGoose[2]; Peek.co.za[3])

Table 1. Categories included in the fashion ecosystem database

Category	Frequency	Percentage
Fashion Designer	384	85.3%
Education & Training	37	8.2%
Industry organisation	10	2.2%
Fashion media	9	2.0%
Manufacturing	3	0.7%

[1] The minimum number required for the report was 200.
[2] https://duckduckgoosestore.com/
[3] https://peek.org.za/product-category/fashion-and-accessories/

Designer & Manufacturer	2	0.4%
Other	5	1.1%
Total	450	100%

The database consisted of 85.3% fashion designers, but it also includes a small number of fashion design-related institutions, such as those involved in Education and Training (fashion schools and colleges, sometimes linked to universities), Fashion media (fashion blogger, magazines, fashion photographers), Industry organisations (such as fashion and design councils; fashion industry event organisers; fashion industry institutes), and specialist manufacturers, specifically offering production services for designers (Table 1). These were included in order to give an indication of the fashion design ecosystem in South Africa, although fashion designers are mapped separately in the analysis.

There is some missing information from the database, specifically relating to the physical address of the designer, and sometimes the telephone number. This may be because these designers do not have a physical retail outlet, and/or have not made their telephone numbers public.

Fashion Designer Case Studies

Eight South African fashion designers were selected as case studies. They were selected for variety, and based on their special focus, for example Loxion Kulca is an established designer; Thando Ntuli is a successful young designer; Lukhanyo Mdingi has a special focus on ethical and sustainable fashion, and Nkhensani Nkosi is an example of an initially successful designer label (Black Cherrie), but whose label lost ground later on. Since the research method was based on publicly available secondary sources, designers with some media presence were chosen.

A template was developed and complete for each designer chosen for the case study section. This included information on:

- **Identification**: The Name of the Designer and their label or company, where they are located, when they were established, and indicators of business size and success.
- **Their Brand**: A brief description of their work (type of fashion, which market is targeted, special features)
- **The designer –** their history and philosophy: Biographical information (age, home and culture); education (where they studied, what influenced their decision to become a designer); influence of their heritage or culture; views on environmental sustainability etc.
- **The business**:
    - History: How the business started up (sources of funding, location, studio space, brand development)
    - Successes: Markets found, website and social media used; exports; sales; copyright, collaborations, innovations, brand recognition etc.
    - Challenges: Funding; finding markets; protecting copyright; competition; inputs; reaching international markets; space etc.
- **Future Plans**: If indicated: aspirations for the future; plans to expand markets; design innovations etc.

Information included in the template for each designer, and the sources it is based on, can be found in Appendix 1

3. Fashion Design Scoping Study Literature Review

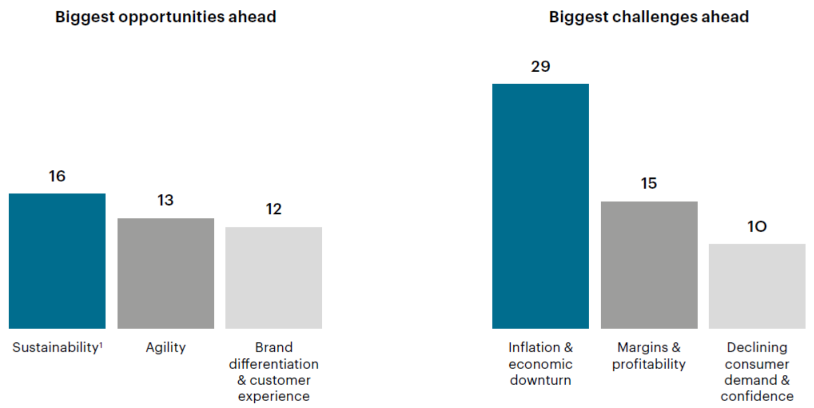
This section of the report sets the context for the South African fashion design scoping study. It starts with a discussion of the growing importance of the fashion design sector in Africa and South Africa, showing the recent growth of the sector and its potential in contributing to GDP and development. Section 3.2 narrows the scope to provide an overview of fashion design in South Africa, including examples of national, regional and local policies and support.

The second part of section 3 (3.3, 3.4 and 3.5) reviews international and South African research on specific issues and challenges facing the sector, with a focus on environmental sustainability and fast fashion, and innovation and copyright.

3.1 The importance of the fashion design sector Globally, in Africa and South Africa

A pre-COVID McKinsey (2017) report on global fashion pointed out that fashion is one of the world's most important industries, worth US$2.4 trillion in total value – equivalent to the GDP of the 7th largest county. The industry is also quite resilient: The 2023 McKinsey report comments on how well the sector has recovered since the COVID-19 pandemic. However, their survey also found that a more difficult business environment is expected: 85% of fashion executives identified inflation as a challenge in the coming year. Other potentially negative influences may come from geopolitical uncertainty (such as the war in the Ukraine and Middle East) and resultant supply chain disruptions.

While luxury fashion sales are expected to grow, especially in the US and China, the rest of the market is expected to achieve slow to negative growth rates as the global economy slows down. Executives polled for the McKinsey (2023) survey said they were focusing on reducing costs and expanding markets, which is likely to make the sector even more competitive for African fashion designers. Cost reduction strategies include moving production closer to their home markets and re-negotiating supplier agreements.



(Source: McKinsey 2023:15)

There is also growing recognition that fashion design is an important growth area for the African continent: A report by the African Development Bank showed that the apparel and footwear market in sub-Saharan Africa was worth US $31 billion (AfDB, 2019). Afreximbank has launched the Creative Africa Nexus (CANEX) programme, which aims to facilitate investments in Africa's creative and cultural economy, including large programmes in the fashion and textile industries. The Economist (2021) identified the African fashion industry as one the "five big stories to watch out for in 2022".

A recent UNCTAD Report on African Fashion (2023) found that the market value for clothing and footwear in sub-Saharan Africa was word US$31 billion in 2020. Much of this merchandise is imported, and could be substituted by local production, which would increase the economic growth and job creation of the sector.

Fashionomics Africa is an initiative of the African Development Bank provides a platform for marketing fashion and textile designs from Africa[4]. The African Development Bank (ADB) sees the creative industries as important for diversifying African economies and encouraging regional integration. The fashion and textiles sectors also have the advantage of being fairly labour-intensive, and already provides jobs for women and young people, who are often under-represented in other parts of the economy. Although currently a small proportion of the global apparel export market, African countries like Mauritius, South Africa, Lesotho and Madagascar are growing their local and international exports in the sector (Figure 2).

*Figure 2: **The top 10 apparel exporting countries in Africa***

Country	Apparel exports 2013; US$ million	Percentage of world exports	Approx. no. of apparel factories
Mauritius	761.3	0.17%	174
South Africa	502.9	0.11%	450
Lesotho	417.9	0.11%	43
Madagascar	381.1	0.08%	71
Kenya	279.3	0.06%	22
Botswana	72.4	0.02%	≈10
Swaziland	52.8	0.01%	≈18
Ethiopia	36.5	0.01%	66
Tanzania	17	0.004%	22
Malawi	10.6	0.002%	<10
Total	**2,531.5**	**0.55%**	

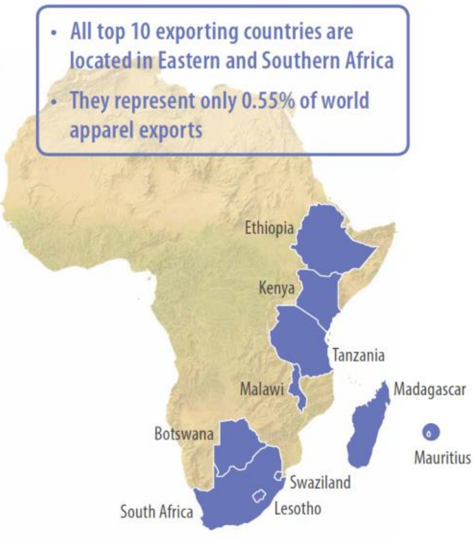


Figure 2. Top 10 African Apparel Exporting Countries

(Source: Fashionomics Africa, 2017:3)

The fashion design sector, like other parts of the creative industries, could thus play an important role in contributing to job creation and economic development through both production for the growing middle-class African market and internationally (Abisuga Oyekunle and Sirayi 2018). Adinolfi et al. (2018) also point to fashion events as important contributors to local and international tourism. Fashion events, like fashion weeks, not only serve as important platforms for fashion branding and marketing, but are also part of the "meetings, incentives, conventions and exhibitions" (MICE) industry, which attracts tourists to host cities and regions, contributing to broader local economic development initiatives (Pather 2015).

Fashion also has important non-market cultural values: Cultural goods and services carry strong messages of heritage, identity, and style, and can be a powerful way to showcase the culture of the country and build up "soft power" through cultural diplomacy (UNESCO, 2022).

[4] https://fashionomicsafrica.org/

Although it has great potential, the fashion design industry in Africa has received less research attention than other parts of the creative industries generally (England et al., 2021) and also faces some challenges. This is also true of the South African context.

The 2022 South African Cultural Observatory Creative Economy Mapping Study (SACO, 2022) used the UNESCO Framework for Cultural Statistics (2009) to measure the contribution of each domain to the creative economy. Figure 2 shows that the “Design and Creative Services” domain, which includes fashion design, is one of the largest parts of the South African cultural and creative industries (CCIs), contributing 32% (R51 billion) of creative economy output in 2020, and making up 13.4% of all cultural occupations.

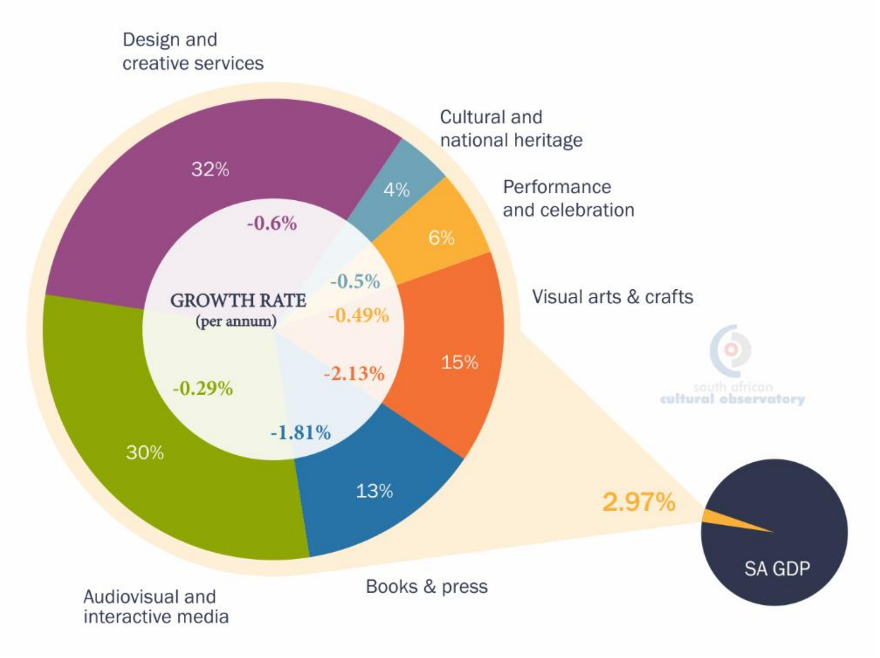


Figure 3. The contribution of the cultural and creative industries to the GDP of South Africa in 2020

(Source: South African Cultural Observatory Mapping Study, 2022)

Despite setbacks during COVID-19, Design and Creative Services has steadily increased its share of GDP contribution to the creative economy between 2016 and 2020 (SACO, 2022).

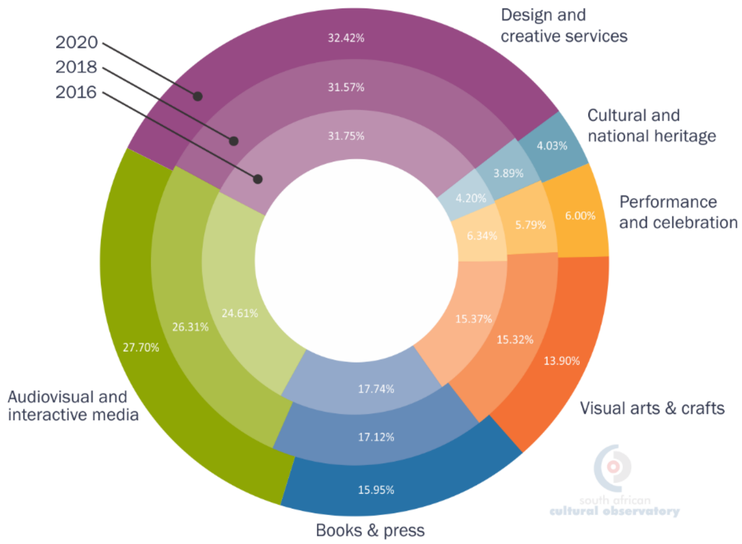


Figure 4. Changes in the shares of CCI domain contributions to GDP 2016 – 2020

(Source: South African Cultural Observatory Mapping Study, 2022)

3.2 An overview of the fashion design sector in South Africa

The Department of Trade Industry and Competition (DTIC, 2020) commissioned a research report on the fashion design sector in South Africa. The report estimated that the sector contributed R1billion a year to the South African economy; and that there was a faster growth in designer fashion from 2009 to 2014 than in clothing and footwear in general. In South Africa, Fashion Weeks have also grown (including Sowetan Fashion Week, Cape Town Fashion Week, and SA Fashion Week), and include a greater proportion of South African designers in their shows.

This is good news, as national data shows that, as in many African countries, international competition has dramatically reduced the size of the South African wearing apparel sector since 1996 (Figure 5).

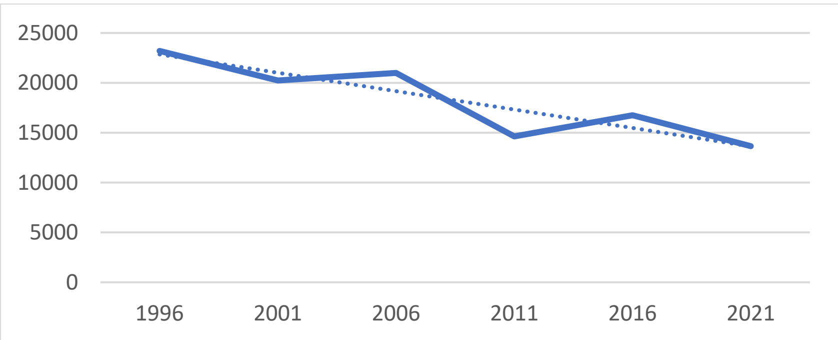


Figure 5. Value of contribution of Wearing Apparel to South African GDP (R million) 1996 – 2021

(Source: Quantec, Industry structure: Wearing apparel [QSIC 313-314] 1996 – 2021; Author's own analysis)

Trade liberalisation post-apartheid, along with global production outsourcing trends, were a shock for SA clothing and textile producers (who had previously had protection via tariff and non-tariff barriers). Exposed to international competition, there was a rapid decline in output and employment in the sector (Figure 5). The Department of Sport, Arts and Culture (DSAC) National Design Strategy (2019) also notes that after the reduction of protective tariffs and limits on imports in the post-apartheid era, South African textile producers were unable to compete in international markets. Clothing and textile imports from India and China increased dramatically, and local producers could not match the lower price of imports which were produced with cheaper labour and more capital-intensive (mechanised) production processes.

However, as formal employment in the sector declined, informal employment increased (Figure 6), perhaps indicating that trained designers exiting formal-sector manufacturing were using their skills to start their own fashion design businesses. As early as 2006, Rogerson's work on the fashion design sector in Johannesburg concluded that:

> "It is thus recognised at the future prosperity of the local clothing economy lies in value-added design and manufacturing around certain niche products and markets which are viewed as having a long-term potential to penetrate specialist local, regional and international markets" (Rogerson, 2006:220).

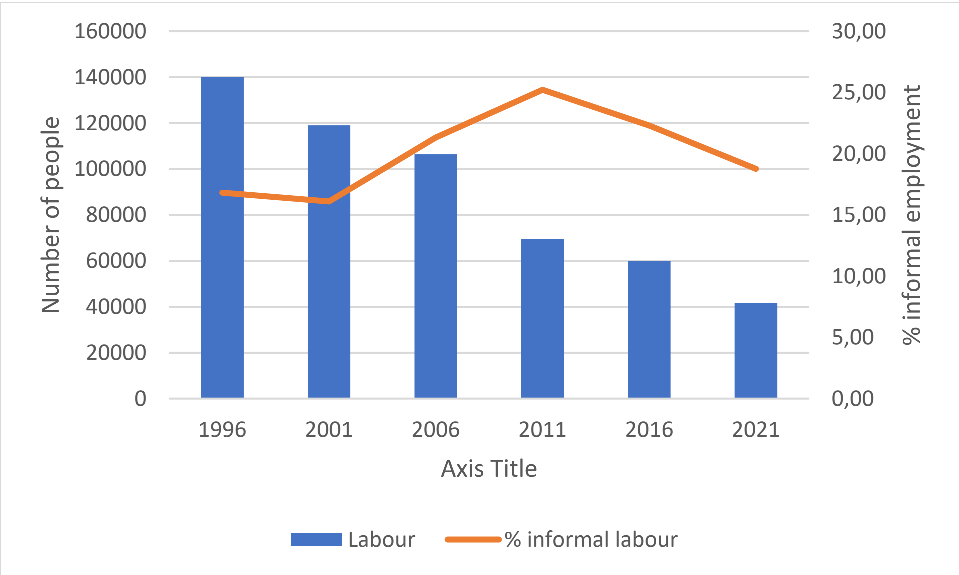


Figure 6. Changes in the number of formal and informal sector jobs in the South African wearing apparel industry 1996 – 2021

(Source: Information from Quantec, Industry structure: Wearing apparel [QSIC 313-314] 1996 – 2021; Author's own analysis)

The DTIC (2020) surveyed 300 fashion designers (sourced from the South African Fashion Week database) in 2019, before the COVID-19 pandemic. Their findings showed that South African fashion design firms share many of the characteristics of production in other CCI domains, which makes them vulnerable to disruptions like COVID-19: Most fashion design labels in SA are young firms (24% are less than 3 years old; 32% are between 4 and 6 years old); and smaller (92% had turnover of less than R5m p/a; and employed an average of 6 people); nearly 30% of designers do their own manufacturing. Markets are mostly local (52% only sell locally; another 47% sell at least 50% locally); mostly retail (51% retail, including online; 28% made-to-measure; 15% wholesale). The report also notes problems in competing with cheap "illegal" imports.

Thus, while the fashion design sector has potential, it is in need of support and developmental intervention to grow to its full potential. South Africa has a range of creative economy policy in place, including national-level policies (White Paper on Arts and Culture, 2017; Creative Industry Masterplan, 2022), industry specific policy (National Design Strategy, 2019) and regional bodies (Provincial Fashion Councils).

National-Level Policies

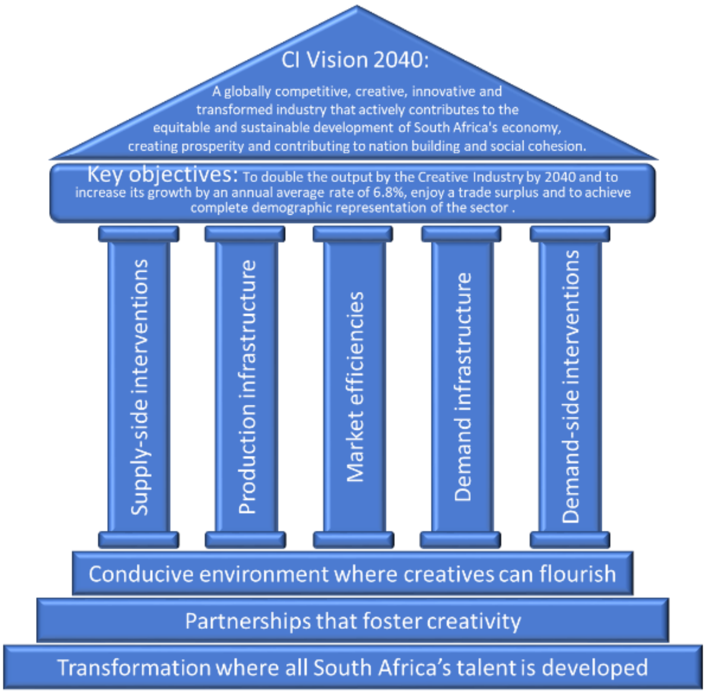


Figure 7. Creative Industry Masterplan Vision and Key Objectives

(Source: DTIC, 2022)

The South African Revised White Paper on Arts, Culture and Heritage (DSAC, 2017) seeks to develop both the "core" cultural sector (those parts of the cultural economy with high levels of cultural content, and which may be non-profit) as well as the creative industries (more commercial applications of cultural content that can be sold in the for-profit market). Fashion is recognised as being part of the creative industries under the larger category of "Visual Art, Crafts and Design". The Revised While Paper (DSAC, 2017) seeks to broaden the scope of traditional cultural policy, which tended to focus on performing arts, to include sectors like design. The Revised White Paper identifies some challenges faced by this part of the sector, some of them (such as precarious employment, lack of working space and difficulty in accessing international markets) which also apply to the fashion industry. Policy support, such as investigating a system of Artistic and Reproduction Rights (ARR), may also benefit fashion designers.

The Creative Industry Masterplan (DTIC, 2022) was developed as part of South Africa's "Reimagined Industrial Policy Strategy". The approach was to develop the creative industries as an industrial sector of the economy in its own right with a focus on job creation, transformation, exports, and GDP contribution. The Masterplan articulated a vision for the Creative Industries in South Africa (Figure 7) as well as targets and policies for specific sub-sectors. For the Visual Arts and Crafts sector (which included design) policies to enhance productivity and market access, which would also benefit the fashion design sector, were proposed. Policies included: improving access to finance, especially for microenterprises, and to new technologies and equipment to improve productivity and competitiveness; the use of craft hubs to improve business management skills; effective protection and management of intellectual property; and incentivising local content.

Industry-Specific Policy: The National Design Strategy

Design plays an important part in the value chain of textiles, and textiles themselves are of course a vital input for the fashion design industry. The Department of Sport, Arts and Culture (DSAC) National Design Strategy (2019) identifies a number areas of policy intervention for the textiles, ceramics, jewellery, and graphic design sectors (Figure 8). These include (i) supply side policies, aimed at increasing productivity and competitiveness through interventions like skills training, (ii) demand side policies, such as improving market access, sector promotion and import substitution, and (iii) market efficiency strategies, such as improving copyright legislation and enforcement and coordination between national government department and local-level initiatives, like the Community Arts Centres.

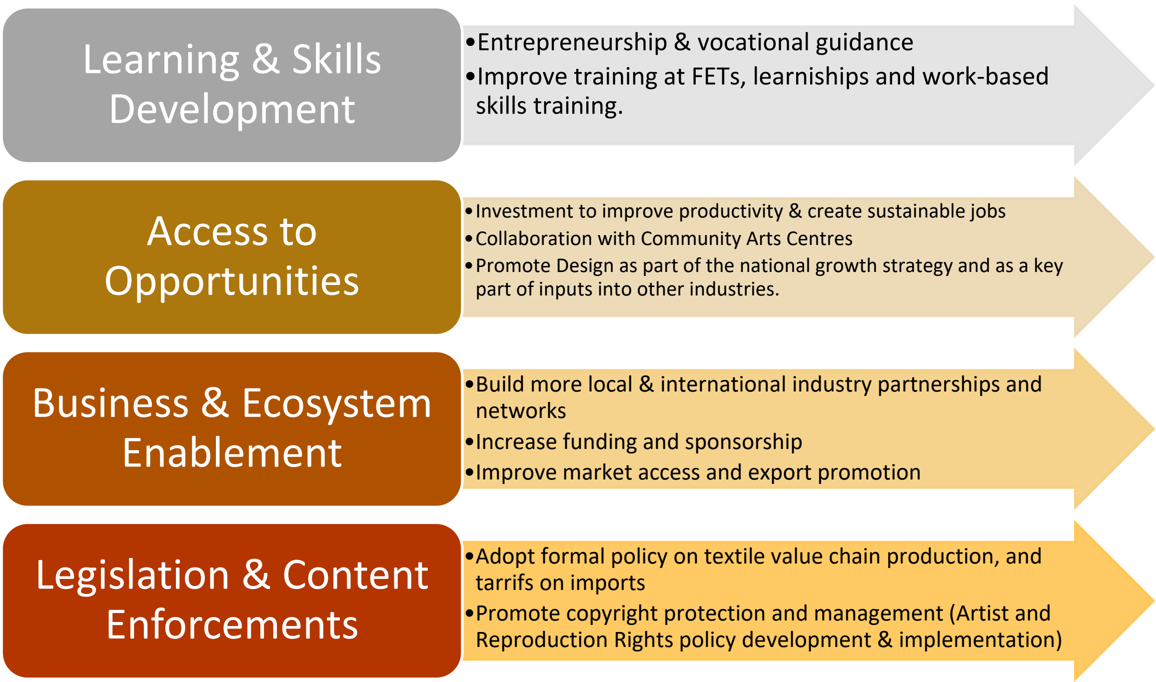


Figure 8. Key interventions proposed by the National Design Strategy

(Source: Information from the National Design Strategy, Department of Sport, Arts and Culture, 2019; Author's own adaptation).

The report concludes with a range of specific interventions across the value chain for each sector (the textiles sector being most relevant to fashion design). The interventions aim to address the challenges identified for each sector, and the next step is coordinated and effective implementation.

Regional Development: Provincial Fashion Councils

At a regional level, there are Fashion Councils, including the Cape Town Fashion Council, the KwaZulu-Natal Fashion Council, and the Gauteng Fashion Council. They all have specific mandates but are registered NGOs and aim to provide a coordinating platform for the development and promotion of the fashion design sector in the province. Some act as a funding channel for various industry interventions, as well as assisting with marketing (locally and internationally).

The e-Thekwini Municipality identified the fashion sector as an opportunity for the expansion of the local economy, and a way to build on the manufacturing base of the metropolitan area using the cluster model (already successfully implemented in areas like the Automotive Cluster). The purpose of the KwaZulu-Natal Fashion Council was to support the Clothing and Textile cluster through providing much-needed coordination in the industry. Activities include lobbying for national funding to recapitalise the industry, lobbying larger clothing retailers on behalf of local designers, and creating linkages between small, medium and microenterprises (SMMEs) and other parts of the production value chain, such as “Cut, Make and Trim” (CMT) firms and textile manufacturers. As part of the marketing and promotion of the sector, the Fashion Council also organises events, like Fashion Weeks. However, Pather (2015) describes how external players with vested interests began to present other fashion events on a stand-alone basis, not as part of a coordinated attempt to develop the industry, but simply to capitalise on the glamour of fashion and to make a profit from the event itself:

> “Small, stand-alone events and conflicting City-supported fashion related events that do not connect to the seasonal trends in fashion or have long term integrated sectorial benefit, have sought to further fragment and confuse the industry without having any positive impact” (Pather 2015).

Pather (2015) argues strongly for the need for an integrated industry development strategy, that can effectively organise and coordinate the sector for longer term development. This is a role that regional bodies, like provincial fashion councils, can play more effectively than private sector, or city-level, event organisers operating on their own.

Indeed, coordinated approaches that integrate support for different parts of the fashion value chain can be effective, but also have their own business model sustainability challenges.

Clustering within fashion cities can also be part of local economic development (LED) strategies and industry development. The Johannesburg Development Agency (JDA, 2004) initiated the process of developing a Fashion District, to be located in the central business district of the city. The Fashion District was envisaged as a key location for design, manufacturing, sales and supply components of the sector. It was part of larger plan of urban regeneration for the Johannesburg inner city. The location was also chosen because it was historically (since the 1930’s) occupied by the garment industries, and the industrial nature of many of building were well suited to this use.

> “The goal of the Fashion District Development is to build a sustainable, viable, fashionable and functional Fashion District as a hub of economic growth and jobs in the emerging fashion cluster” (JDA, 2004:5).

The development of the Fashion District was seen as being driven by a combination of city (public sector) provision of infrastructure and private sector investment. The City of Johannesburg would contribute through things like by-law enforcement, elimination of illegal property use, increased policing to reduce criminal activities, improved service delivery and maintenance of the public environment, developing a consumer guide to the district (marketing), and setting up a Fashion District Institution, which would promote the cluster as an ideal investment location.

"SewAfrica" was establish in inner-city Johannesburg in 2001 as an incubator for the emerging fashion industry in the city and was part of the Fashion District: "The Mission of SEWAFRICA is to provide the opportunity for development and training in the fashion industry that will enable individuals in the informal fashion sector to receive training that will facilitate the generation of income through self-employment and formal employment as a major contributor to the revitalization of the Inner City and the clothing industry[5]". SewAfrica was linked to retail space (Fashion Shakc), where designers could market their collections to the public. However, it had financial challenges, exacerbated by COVID-19 lockdowns, and was permanently closed in May 2020.

Although the Johannesburg Fashion District did not perform as well as expected, a recent study (Mpati, 2022) estimated that it was home to more than 1000 enterprises related to fashion designers, fashion design education, and fashion retail. Mpati's study (2022) concluded that the Johannesburg Fashion District had great potential for economic development and job creation, but study participants felt that the city had not supported and engaged with businesses adequately. Challenges identified by the SMEs in the District align with those identified at a national level, such as difficulty in sourcing materials and the relatively high cost of labour. The study also found that, while the government supported SME training, which also benefitted fashion businesses, there were limited budgets for creative economy development (which seemed mostly to focus on tourism), while textiles and clothing were seen as part of manufacturing (rather than as part of the creative economy). This fragmentation of creative industries support is one of the factors that may be holding the sector back. The UNESCO report on African Fashion (2023) identifies comprehensive and inclusive support for the whole fashion ecosystem as an important way of growing the sector in Africa.

Having set the context, the remainder of the section discusses some of the main issues facing the sector, both internationally and in South Africa. These include environmental sustainability, innovation and intellectual property, labour market issues (such as access to appropriate training, and the precarity of employment), market demand issues (volatile demand and high levels of competition); and supply side issues (such as value chains and access to finance).

3.3 Environmental sustainability, fast fashion, and the circular economy

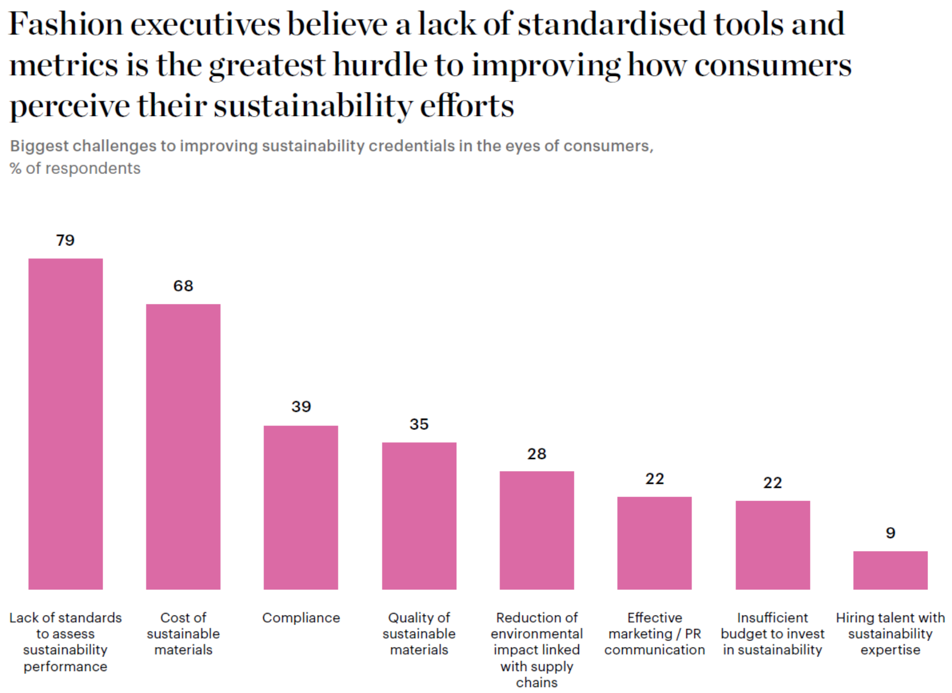
The fashion industry's shift towards fast fashion and the linear model of take-make-dispose has led to significant environmental challenges. The increased production and lower costs associated with fast fashion have resulted in higher volumes of solid waste, particularly textile waste, which is not always managed sustainably. The use of synthetics in textile production, especially synthetic polymers, has grown exponentially, further contributing to environmental concerns. To address these issues, there is a growing interest in applying circular economy principles in the fashion and textile industries. Extending the life of products and reducing

[5] https://sewafrica.co.za/about-us/

waste can contribute to a more sustainable society. However, the transition to a circular economy in fashion and textiles faces dilemmas and social issues throughout the value chain, from design to distribution to recycling.

The McKinsey (2023) report on global fashion identifies sustainability as one of the key opportunities for the sector, although only a minority of fashion executives polled would prioritize sustainability initiatives, given the difficult business environment. The report also notes that brands need to avoid “greenwashing,” that is, they must prove to consumers and investors that they are making “meaningful and credible” changes to address environmental and sustainability concerns (McKinsey, 2023:21).

Challenges to improving how consumers regard the sustainability efforts of the industry are a lack of universally accepted measures or standards by which to assess sustainability performance, and the cost of sustainable materials.



(Source: McKinsey, 2023:80)

“Fast fashion” is a relatively recent phenomenon and describes a production and consumption process that is designed to produce clothing with as short and cheap a production cycle as possible. Examples of fast fashion firms with global reach are Zara, Primark and Topshop (Zanjirani Farahani, Asgari, and Van Wassenhove 2022), and more recently, online retailers like Shein. The assumption is that consumers will frequently discard fast fashion items (early disposal) in favour of the purchase of new styles. Producers thus do not prioritise quality or durability of such items (Abbate et al. 2023; Dissanayake and Weerasinghe 2022; Zanjirani Farahani, Asgari, and Van Wassenhove 2022). In the European Union, clothing consumption increased by 40% between 1996 and 2012, and the average number of times that each garment was worn has fallen (Zanjirani Farahani, Asgari, and Van Wassenhove 2022).

The fast fashion industry has generated a huge amount of waste, and production processes are also particularly polluting because of textile production and fabric colouring processes, which use more than 8000 chemicals (Dissanayake and Weerasinghe 2022). Global material (fabric) consumption is expected to increase to 167 Gt in 2060, from 79 Gt in 2011 (Dissanayake and Weerasinghe 2022), causing an increasingly large negative environmental impact from the industry if current supply chain, production methods, and consumption trends continue. Globally, at present, less than 1% of all textiles are recycled back into clothes; and 75% are disposed of in landfill sites (Abbate et al. 2023).

The idea of the “circular economy”, as opposed to the “linear economy”, is that resources are re-used and recycled through the production and consumption process, thus reducing both pollution and resource use:

> “Fundamental to a circular economics is that the resource flows are optimised, and resources are circulate in a closed loop over and over again, thereby reducing the virgin material and resource requirements” (Dissanayake and Weerasinghe 2022).

The circular economy requires a change in business models, so that they include the recovery and reuse of materials used in production and consumption when the product reaches end-of-life (and is no longer wanted by the original consumer). Circular fashion involves changing each stage of production, from the materials used, the way items are designed, and the way they are consumed (Figure 8).

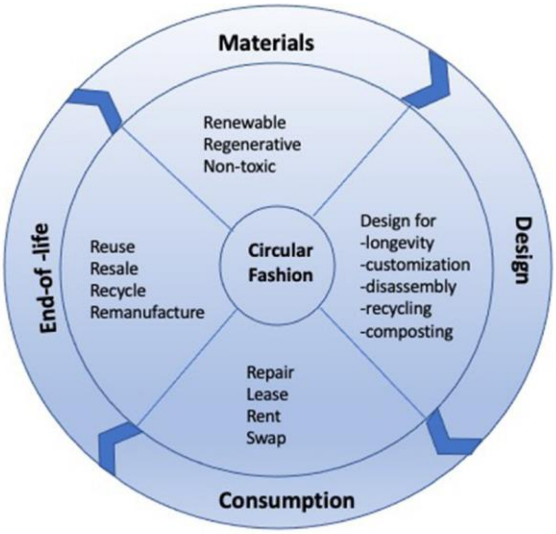


Figure 9. Circular Economy in the Fashion system

(Dissanayake and Weerasinghe 2022)

Drivers for adopting more sustainable production methods in fashion can come from both the supply and demand-sides. On the supply side, firms (producers and individual designers) may regard it as part of their corporate social responsibility (CSR) to reduce resource use and pollution that are linked to climate change. On the demand-side, customers and other stakeholders are becoming more environmentally aware, and may increasingly demand that firms take into account the environmental impact of their products (Abbate et al. 2023; Grace Gatawa 2022). Njeru (2023) describes the eco-fashion, or slow fashion, movement as a shift from quantity to quality.

An example of an international fashion brand that has invested in a sustainable fashion supply chain is H&M, a Swedish fashion brand and manufacturer. H&M has branches in 53 countries, and launched the “Conscious Action” sustainability programme, which aims to improve both environmental and social sustainability. Key part of the programme include generating more job opportunities in developing countries, using more recycled and recyclable resources, and educating consumers about ethical and sustainable fashion. They consider each phase of the supply chain, including how materials are produced and where they are sourced from (green production), how to reduce carbon emissions in transportation (green distribution), and sharing more information about sustainability with consumers (green retail). They also have a garment collection programme, where customers are encouraged to return garments they no longer want to H&M garment collection points (Shen, 2014).

Dissanayake and Weerasinghe (2022) argue that more than 80% of the environmental impact of fashion depends on the design process.

> “Designers have the power to select materials, trims, silhouette, colours, quality, and their choices significantly determine the environmental impact of the product”

By designing clothing for longevity (using durable, good quality materials), designing for disassembly (which allows the deconstruction of the component parts of the item for other uses), and designing using materials that can be recycled or composted, are all ways in which the design stage of the process can reduce environmental impact. Designers can also extend the life of garments by offering repair services, or garment renting (rather than sale), such as the “Rent the Runway” initiative (Dissanayake and Weerasinghe 2022).

However, there are challenges in implementing circular economy initiatives in the fashion sector. One of the most commonly mentioned is the long and complex supply chains associated with clothing production, so that tracing production processes (and environmental impact) at each stage is difficult. Firms often do not have the infrastructure, expertise and resources to manage recycling processes. Additionally, while fashion designers may have great interest in producing more responsibly sourced and durable “slow fashion”, consumers may not have the resources, or interest in, paying for such items (Table 2).

Table 2. Drivers and Barriers to Circular Economy and CSR initiatives in the global fashion industry

	Drivers	**Barriers**
Corporate Social Responsibility (CSR)	• Competitive context • Social influences • Knowledge of CSR • Internal culture • Business promotion • Reputation with stakeholders and government • Customer environmental awareness	• Cost of CSR initiatives • Difficulties in internal and external communication Difficulties in implementation • Lack of resources in expertise, information, finance, and training • Complexity of CSR • Supply chain lacking transparency
Circular Economy	• Development of new types of fabrics • Clothing unique design • Increased apparel collection	• Divergent perspectives of value • Undefined performance metrics • Weak alignment with the current strategy

	- Corporate awareness - Legislation - Consumers' environmental consciousness - Customer distance from consumption models	- Lack of internal skills and competences - Lack of customer interest - Restricted technology - High research and development costs - Supply chain complexity

(Abbate et al. 2023)

In South Africa, research by Gatawa (2022) showed that some fashion design firms were interested in incorporating sustainability into their business models. Such sustainable practices included using textiles that minimise water use and chemical dyes, reducing fabric waste, and recycling or upcycling used fabrics. However, a recent large-scale quantitative study (Muposhi et al., 2023) showed that fashion designers in South Africa, "are yet to fully accept responsibility related to adoption of sustainable fashion". Reasons for their reluctance to adopt more sustainable methods of production are related to the high cost of inputs and the difficulty in accessing more environmentally friendly technologies (Muposhi et al, 2023).

Gatawa (2022) concludes that there is a "discernible mismatch" between the levels of importance that some South African designers place on environmentally sustainable, ethical fashion, and the views of many South African consumers. Dissanayake and Weerasinghe (2022) concur, arguing that globally, the rise in fast fashion is being driven by the increasing number of middle-class consumers who have (small) disposable income to spend on clothing, but who may not yet be willing, or able, to pay higher prices for sustainably produced garments. Gatawa (2022) asserts that the mismatch may also be because of a lack of awareness about the importance of environmental issues amongst South Africans:

> "My assertion is that there remains a gap in the awareness and knowledge of environmental issues in South Africa and the decision to base clothing decisions on environmental protection…The awareness of environmental issues has also not translated into visible action across all demographic profiles, and especially the lower end of the LSM [Living Standard Measures] groupings in South Africa" (Gatawa, 2022:97).

One of the ways in which the fashion circular economy business model can be achieved is through the second-hand clothing market. In the global north, clothing is collected, often via donations to charities, and then redistributed via charity shops or through export to African countries. However, only higher quality clothing is resalable in global north countries, while lower quality, often fast fashion, clothing is sent to developing countries in the global south.

Unwanted clothing is donated via various channels to charities, who then sort it into garments that are reusable in developed or developing country contexts, and those that can be recycled in some way, or can be disposed of in landfill or by incineration (Figure 9). Through this part of the supply chain, the "end of life" of at least some garments is extended (Dissanayake and Weerasinghe 2022), and the amount of fabric waste that ends up in landfills is reduced (Farahani, Asgari, and Van Wassenhove 2022).

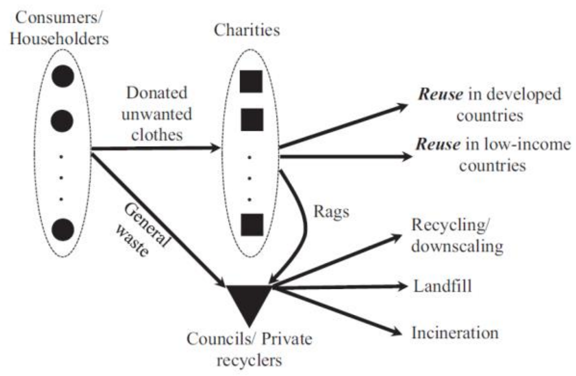


Figure 10. Garment flow in the charity supply chain

(Source: Farahani, Asgari, and Van Wassenhove 2022:1097)

Farahani, Asgari, and Van Wassenhove (2022) argue that fashion designers and clothing producers can partner with both charities, who receive clothing donations, as well as the increasing number of for-profit, second-hand clothing retailers, to achieve circular economy aims. In this model, sustainable fashion (SF) and fast fashion (FF) originally bought by consumers, are then donated to charities or for-profit collectors, sorted, and then at least some of the garments sold back to consumers (Figure 10).

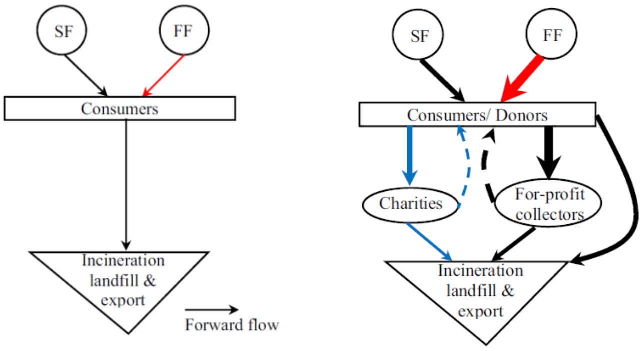


Figure 11. The linear fashion economy (left) and the circular economy model (right)

(Source: Farahani, Asgari, and Van Wassenhove 2022:1097-8)

However, while clothing donations contribute towards the environmental sustainability of the sector, they can have a damaging effect on the fashion design sector of African countries. A recent UNCTAD report on the African Fashion sector (2023) noted that in 2019 Africa accounted for a third of the global imports of second-hand clothes (worth US$5 billion).

Potentially seen as "dumping" (Farahani et al, 2022), clothing donations, sold cheaply in local markets, can make it very difficult for African fashion designers to compete and establish their own businesses. In addition, African fashion designers are already following sustainable practices, since they are used to, for example, using local textiles, upcycling and reusing garments and trimmings, and reducing waste.

The DTIC (2020) report on "Assessing the Economic Value of the Designer Fashion Sector in South Africa" concludes that sustainable environmental and business practices in the fashion design sector need to take into account interlinked objectives including the economic, social and environmental dimensions (Figure 11).

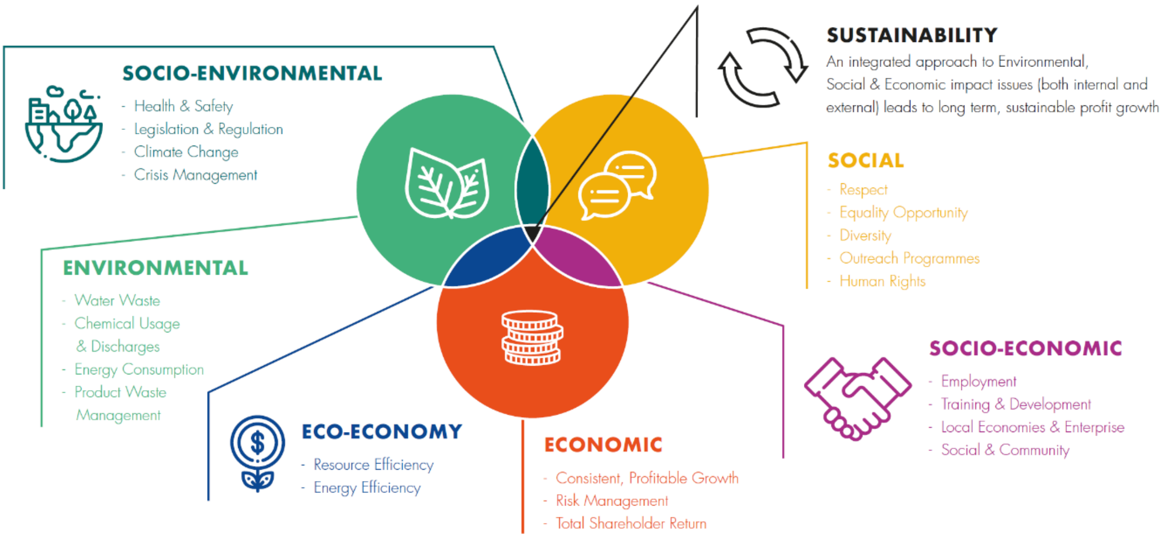


Figure 12. Economic, Environmental and Social Aspects of Sustainability in Fashion

(Source: DTIC, 2020)

This way of thinking about sustainability in the fashion design sector is linked to the emergence of “slow fashion” and the circular economy, repositioning fashion as less focused on an exclusive luxury for the wealthy few. As McRobbie et al. (2023) put it:

> “…make the case for fashion to be even more socially engaged and for it to become less of a hierarchical glamour industry and more of a popular aesthetic of everyday life, which also has the ability to create meaningful jobs for people in non-exploitative environments” (McRobbie et al., 2023: 147).

3.4 Entrepreneurship, Innovation, and intellectual property

Textile design and clothing have long been part of African creativity and entrepreneurship. As such, many countries have a rich history of textile and clothing production, often by tailors and seamstresses who work in informal ways, training through apprenticeships and vocational schools to produce bespoke garments for individual consumers. This contrasts with the more formal western fashion design sector, which relies on formal training, sketched patterns, designer labels, fashion shows and other institutional support (Langevang 2017).

Nevertheless, African fashion producers are being recognized as important cultural entrepreneurs, who can also contribute to economic development and job creation, especially for young people (England et al. 2021; Langevang 2017). The first-generation African fashion designers who have become famous in the West are being succeeded by a young group of post-independence era fashion designers building on African cultural heritage while combining it with ideas from international markets. Faster economic growth rates and increasing economic welfare in many African countries has provided these young designers with growing local markets, and digital technologies, like social media sites and e-commerce platforms, are also opening up international markets (England et al. 2021).

There is also growing formal market infrastructure, such as Fashion Weeks, educational institutions with a focus on fashion and design, and business support as part of growing creative industries policy. Research in Accra, Kampala and Lusaka (Langevang 2017) found that fashion designers were passionate about their work and associated it with cultural significance, heritage and identity, drawing on indigenous designs and styles for inspiration. They emphasized their role in contributing to a positive narrative about Africa ("Africa rising") and in providing an alternative to Western clothing practices. However, they do not necessarily see themselves as producing African clothing, but try to bypass these labels, taking inspiration from fusing African and Western styles that have global appeal. In this sense, African designers are also innovators who seek to develop new fashion styles with an African cultural content, but that can compete with designers internationally. These young designers are seeking to frame their work in a more ambitious way, rather than as "necessity entrepreneurship" when no other work opportunities are available.

Early research by Rogerson (2006) tracked ways in which black South African fashion designers with their own labels began to emerge post-apartheid, offering an exciting mix of traditional and modern designs. In discussing innovation in the CCIs, (Chang, Potts, and Shih 2021) reflect on how creative industries create value through the combination of traditional iconography (which could be based on traditional heritage) with modern design elements to create a "market for meaning". Cultural intermediaries who play these important intercultural "translation" and marketing roles are also an important part of creative industries entrepreneurship and innovation.

(England et al. 2021) reflect on ways in which small-scale African design firms, although not globally recognized as lead firms, and often excluded from Global Value Chains, can still play a role as "lead firms from below" in specific contexts. In a study based in Lagos and Nairobi, England et al. (2021) identify fashion designers as "micro-entrepreneurs" who can be drivers of economic development in their own cities and regions.

However, in order to monetise their innovations, fashion designers need to be able to protect their intellectual property through copyright. A study of CCIs in Cape Town, which was designated a World Design Capital by the International Council of Societies of Industrial Design in 2014, however, showed that very few creative firms used formal copyright instruments to protect their intellectual property (Snowball, Tarentaal, and Sapsed 2021a). One of the survey questions to CCI firms, which included a large proportion of designers, was the extent to which businesses combined "ideas from creative arts" and "technology". 62% of firms regarding the fusion of creative arts and technology as either important (rating of 4, 22%) or very important (rating of 5, 40%) for their business.

The survey also showed high levels of innovation (defined as product and process innovation, as well as marketing and organizational innovations) – 82% of creative firms surveyed reported being involved in some form of innovation in the three years prior to the survey. However, only a very small proportion of respondents from the Cape Town survey reported intellectual property (IP) or royalties from copyright as important sources of direct income (Figure 13). Only a third of firms used copyright, trademarks, or patents to protect their work. The majority relied on branding, lead-times and non-disclosure agreements for some form of IP protection.

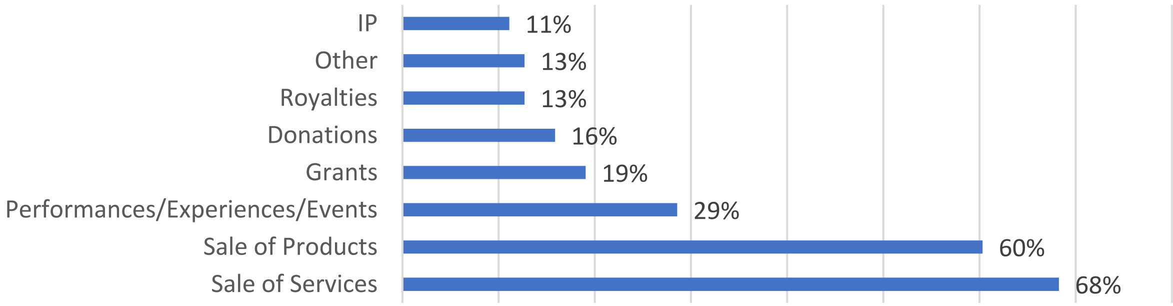


Figure 13. Sources of income for Creative Firms in Cape Town

(Source: Snowball et al., 2021)

E-commerce and social media have played an important role in the development of the sector, speeded up by COVID-19. A study of how fashion brands used social media in sub-Saharan Africa during the pandemic showed that online sales and social media platforms (like Instagram, which increased in users by 40% during COVID-19) became a vital part of growing brand awareness, reaching local markets for business continuity, and in reaching new markets (Mahmoud et al. 2022).

The UNCTAD report (2023) on African fashion noted a new player in the sector: fashion fintech entrepreneurs. These intermediaries developed many of the online platforms that allowed fashion designers to reach the market, partnering with global logistics firms to make deliveries of products reliable and feasible. Another important enabler of e-commerce is secure and reliable online payment facilities, like mobile money. The development of the African Continental Free Trade Area, with the associated Pan-African Payment and Settlement System should also help to improve the efficiency and security of international payments (UNCTAD, 2023).

An important question for the long-term development of the fashion design industry in South Africa is thus how emerging designers can monetize and protect their designs in local and international markets, and what drives and supports innovation in the sector. This is especially the case as more SMME South African fashion design businesses begin to use digital platforms for online sales and promotion (Nhuvira and Dorasamy, 2011).

3.5 Other Issues and challenges facing the sector

There are several other challenges facing the African fashion design sector, although these are beginning to be offset by opportunities. While an exhaustive list is beyond the scope of this study, Table 2 summarises some of the main areas.

Table 3. Other challenges and opportunities for African fashion designers

	Challenges	**Opportunities**
Labour and Work	Limited access to relevant education & business training	Scope to increase productivity through training
	Precarious and informal employment	Lower cost labour than in global north
Markets and Demand	Sudden shifts in global preferences	Growing local and regional markets

	Resource constrained consumers in local markets	Growing African brand (Africa Rising) for new designs & designers
	High levels of local and international competition	Weaker exchange rates improve competitiveness
	Fluctuating exchange rates	Potential of African Continental FTA
		Marketing on Social Media and online sales.
Production and Supply	Large proportion of informal and/or microenterprises	Growing government support for creative industries.
	Limited access to capital for start-up and scaling up	Improvements in copyright legislation
	Limited industrial capability and access to equipment	Better access to global value chains through improved productivity
	High cost of registering and protecting IP	
	Difficulty in sourcing inputs (trade barriers)	
	Limited government support and promotion	
	High costs of local manufacturing	

Sources: (England et al. 2021; Pather 2015; Langevang 2017); Fashionomics Africa, (2017); DSAC National Design Strategy (2019).

Labour and work

Many commentators agree that improving the productivity and quality of the fashion design sector is vital for growing both local and international markets. However, in many African countries there is limited access to good quality (accredited) training, and it is not always easy to access. Research on higher education for fashion designers in Nairobi (England et al. 2020) showed that courses are often not available across African universities or not providing the right skills and links to industry to enable young graduates to successfully enter the labour market. The DSAC National Design Strategy (2019) also points to the lack of business and marketing skills in the sector, so that designers struggle to identify target markets and set realistic prices for these markets.

Some of these challenges can be found in European countries as well, where fashion design training has become expensive and exclusive, and studio space and financing for start-up businesses, especially in big cities, is scarce. McRobbie et al. (2023) refer to this as the “milieu of labour” in the fashion design sector, which is increasingly characterised by exclusivity and privilege. As found in some other parts of the creative industries, this means that who can become a fashion designer depends more on resources and networks than on talent (Hracs, Comunian, and England 2022; McRobbie 2016).

Markets and Demand

Fashion, by its nature, changes often and sometimes in unpredictable ways. This means that, for fashion designers, market demand is fluctuating and volatile, which requires them to take risks. Moloi (2014) conducted a study of the entrepreneurial traits of fashion designers in the Vaal region of South Africa. The findings showed that successful fashion entrepreneurs shared important traits such as: risk taking, self-confidence, ambition, motivation, positive attitude, creativity, opportunity recognition and commitment. More than 90% of fashion designers in the survey agreed that the ability to take calculated business risk to drive business success was important. Moloi (2014) concludes that fashion entrepreneurs are an important sector for the economy because of their ability to grow from small businesses, and to increase job creation.

While local (African) markets are growing with increasingly high proportions of middle-class consumers, they are also income constrained. At an international level, competition is very intense, and breaking into established international markets is difficult. Online platforms and social media marketing, however, can provide designers with important gateways to consumers in other countries. These techniques have been used very effectively in creative industries marketing in other emerging economies. For example, the Republic of Korea has grown their creative industry exports globally through the use of online platforms and social media marketing (Chang, Potts, and Shih 2021).

The impact of regional trade agreements or disruptions, like the African Continental Free Trade Area, African Growth Opportunities Act (AGOA), Brexit and African-China trade relationships are also important factors to consider and will affect the ability of African fashion designers to reach international markets. The DSAC National Design Strategy (2019) notes that import duties on textiles protect local manufacturers, but also make it more costly for designers to source inputs from international markets.

Production and Supply

On the supply side, the development of an efficient "ecosystem" across the fashion value chain is important. Clusters can offer benefits in terms of knowledge spill-overs and shared equipment, and can be both physical, or digital or virtual in nature (Salvador et al., 2013). Physical clusters of indigenous fashion designers with their own labels began to emerge in Johannesburg in the post-apartheid period, offering a mix of traditional and modern designs, encouraged by South African Fashion Week which started in 1997 (Rogerson, 2006).

Global Value Chains and Global Production Networks play an important role in the financial and environmental sustainability of the sector (England et al., 2021). African firms are often disadvantaged by uneven power relationships within global networks, that constrain their ability to source inputs and access international markets.

One of the most important parts of the fashion design value chain is textiles. However, despite have climates that are favourable to fibre production (nearly 10% of the global supply of cotton comes from Africa with 37 out of 54 countries producing the crop), most of it is exported to Asia for manufacturing and then imported back into African countries (Fashionomics Africa, 2017). This is also identified as a constraint in the DSAC National Design Strategy (2019). Some specialist fabrics are not available in South Africa and have to be imported. Local textile manufacturers require designers to bulk-order any specialist colours or designs, prices for such fabrics are high, and production times are long, compared to what Eastern countries can supply.

In writing about fashion and textiles in Nigeria, Kamara (2023) points out that "identity fabrics" have important roles to play in job creation, local development, and in preserving local cultural identities. However, in Nigeria and, to some extent, in South Africa, unlike in India, traditional design fabrics are now largely imported.

> "In the specific context of Nigeria, the failure to have capitalised on and upgraded traditional textile skills and technologies resulted in a lost opportunity to capture the naturally protected market of identity fabrics. The Indian experience shows how small-scale producers were instrumental in satisfying demand for identity fabrics shielded from import competition by local preferences" (Kamara, 2023:38).

The DTIC (2020) survey of South African fashion designers found that the majority imported their fabrics from Asia (67%) and Europe (24%). Only 7% of the designers interviewed reported using only locally produced fabric.

Section Conclusion

This section of the report has provided a broad overview of the fashion design sector in Africa and, more specifically, in South Africa. The historical context, and some of the main policies supporting he South African fashion design industry were summarised. Using an international review of research in the fashion design sector, issues and challenges faced by the sector were discussed, with a focus environmental sustainability, innovation and entrepreneurship in the sector, and the importance of intellectual property and copyrights. The following section presents the results of a mapping study of the South African fashion design study, and an analysis of eight selected South African fashion designers.

4. Findings and discussion of results: Analysis of Fashion designers and related institutions in South Africa

An aim of this scoping report was to construct a database of South African fashion designers (and related institutions) that can be used to analyze their special distribution, and which could potentially be used for future industry research. To provide some context and more detailed description of the career development of South African fashion designers, case studies are also included. Section 4 presents the results of this analysis.

4.1 Analysis of the Database and Spatial Distribution of the sector

It is a generally observed phenomenon that creative industries tend to cluster in urban areas and cities. Cities give access to markets, but also to specialist creatives who are needed to produce complex, project-based work typical of the creative industries. The fashion design sector also has advantages for cities, as it is seen as a way to build city brands and identity, based on cultural heritage, and to contribute to cultural tourism through events like fashion weeks (Zhang et al. 2022).

Spatial analysis done as part of the SACO Mapping Study (2022) showed that provinces with larger metropolitan areas (Western Cape, KwaZulu-Natal, and Gauteng) hosted more cultural and creative industries activity and contributed more in terms of Gross Value Added than provinces in more rural areas and with smaller cities and towns. Gauteng-based CCIs, for example, produced nearly half (46.5%) of the creative economy's contribution to the GDP of South Africa. Cultural employment follows the same spatial pattern.

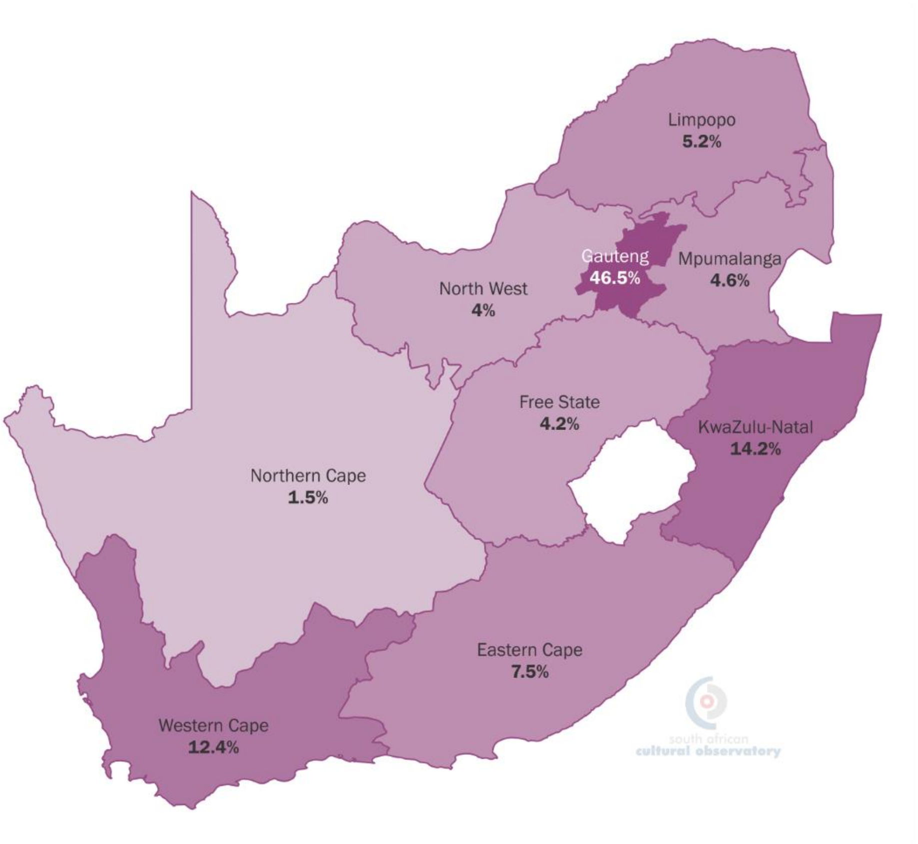


Figure 14. Cultural and Creative Industries GVA contribution by Province

Source: SACO Mapping Study, 2022

However, some authors have argued that the creative industries can also be important to small-town development (Drummond and Snowball 2019; Abisuga Oyekunle and Sirayi 2018) and (Zhang et al. 2022) note that the global dominance of a few large fashion cities or "fashion capitals" is shifting to include more second-tier cities. As online work makes creatives more flexible in terms of location, creative producers may choose smaller cities and towns because of lifestyle attributes, "soft" infrastructure and important cultural heritage links to identity (Kunda, Tjarve, and Eglite 2021).

Langevang (2017) confirms that the fashion industry clustering is a global phenomenon, and its Africa, fashion hubs are located mostly in large urban areas including Lagos, Johannesburg and Cape Town. However, he also notes that other large cities on the continents can still host fashion clusters.

In a study of Canadian fashion designers' decisions of where to locate Brydges and Hracs (2019) suggest three forms of mobility that could mean that designers do not need to be permanently based in large cities. (i) Temporary mobility refers to designers moving between smaller towns and larger cities for special events, such as fashion weeks, and industry meetings; (ii) Mediated mobility is when designers are based in smaller centers, but work with intermediaries (such as marketing and sales managers) who are based in larger cities; and (iii) Virtual mobility which uses the internet and social media to allow designers based outside large centers to interact with clients and suppliers, and promote and sell their products without having to be physically based in the city. In the Canadian study, some fashion designers deliberately opted out of large cities, and make mid-sized cities, which were more livable and less competitive, their home base (Brydges and Hracs, 2019).

Analysis of the fashion ecosystem in South Africa constructed for this study showed that, as expected, fashion designers and related institutions were clustered in provinces with the largest cities (Gauteng, 29%; and the Western Cape, 33%) (Table 4; Figure 15). These provinces were surprisingly dominant, while KwaZulu-Natal, which hosts a Fashion Design Council and where there has been some regional policy intervention for the sector, was home to a much smaller cluster than expected. While this may be due to the way in which the database was constructed (as described in the Methods), it would be an interesting are for future research.

Johannesburg has a population of 5.6 million and is acknowledged as the economic hub of the country, and indeed in sub-Saharan Africa. It hosts a number of high profile fashion events: South African Fashion Week was started in Johannesburg in 1997 by Lucilla Booyzen, described as an "intrepid fashion maverick" (Tischhauser et al., 2018). It is privately funded and positions itself as a powerful way to market and brand African fashion[6]. Johannesburg Fashion Week (which will take place in November of 2023[7]), is a "celebration of Pan-African fashion, featuring talented designers and fashion creatives from the African continent and the African diaspora". Soweto Fashion Week, usually hosted in December, was founded by Stephen Manzini in 2011, with a focus on showcasing fashion from Soweto. It has increasingly attracted international press attention and some high-profile guests. As already discussed, it is also the location of the Johannesburg Fashion District. As interest in African fashion cities increased, authors like Davis (2012) and Jennings (2011) note the growing importance of Johannesburg, along with Lagos and Dakar. Originally considered a poor inner-city area with a higher crime rate, the Johannesburg inner city was reimagined in the post-apartheid era as a vibrant space for culture, including fashion. The rise of successful black African designer labels, like Stoned Cherrie and Loxion Kulcha, brought South African designers to local and international prominence.

CAPE TOWN FASHION COUNCIL

Cape Town has a population 4.7 million and was recognised as a World Design Capital by the International Council of Societies of Industrial Design in 2014. Cape Town has a variety of events and institutions that support the fashion design sector: Cape Town Fashion Week, organised by African Fashion International (AFI) has been taking place for 15 years. The Cape Town Fashion Council also plays an important role in coordinating the supporting the sector through graduate workshops and young designers' competitions[8]. The Craft and Design Institute (CDI) is also based in Cape Town. The CDI is a non-profit company whose aim is to develop the sector, especially small and microenterprises, and it currently supports over 6 000 businesses and individuals in various ways, including providing business support and training, export promotion and marketing, and the use of digital platforms.[9] They have recently launched an online platform that showcases South African craft and design called "Peek[10]".

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[6] https://www.safashionweek.co.za/

[7] https://africanfashioninternational.com/blogs/insider/joburg-fashion-week-2023-everything-you-need-to-know

[8] https://ctfcdigital.co.za/

[9] https://www.thecdi.org.za/page/about_us

[10] https://peek.org.za

Durban has a population of 3.4 million and Creative City of Literature and is part of the UNESCO Creative Cities Network.[11] As mentioned earlier, the KwaZulu-Natal Fashion Council is active in the province, playing a coordination and development role for the sector. The city hosts a number of fashion events, such as the Durban Fashion Fair (DFF) which was started in 2010. In addition to running a showcase event, DFF also focuses on emerging designers and supply chain development, with events happening throughout the year[12]

Table 4. Fashion Designers and related institutions by province.

Province	Frequency	Percentage
Eastern Cape	39	8.67%
Free State	22	4.89%
Gauteng	131	29.11%
Kwazulu-Natal	37	8.22%
Limpopo	36	8.00%
Mpumalanga	16	3.56%
North West	13	2.89%
Northern Cape	8	1.78%
Western Cape	148	32.89%
Total	450	100.00%

(Source: Database and Authors' own analysis)

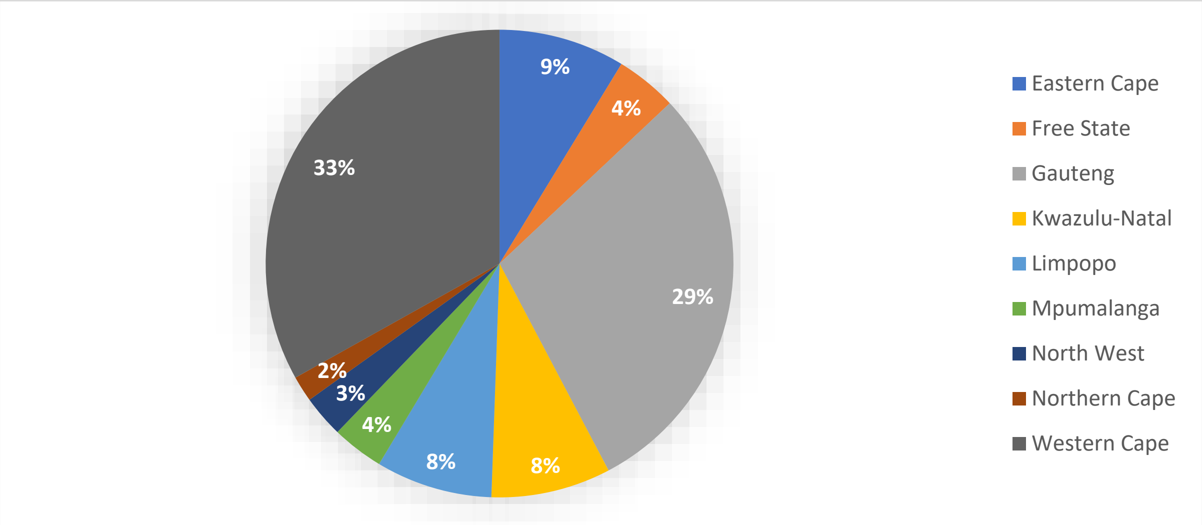

Figure 15. Fashion Designers and related institutions by province

(Source: Database and Authors' own analysis)

The heat map shown in Figure 16 (which includes fashion designers and related part of the ecosystem) clearly shows that fashion designers are clustered in two main provinces: Gauteng and the Western Cape, both of which have large metropolitan areas.

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[11] https://en.unesco.org/creative-cities/durban
[12] https://www.durbanfashionfair.com/about-dff/

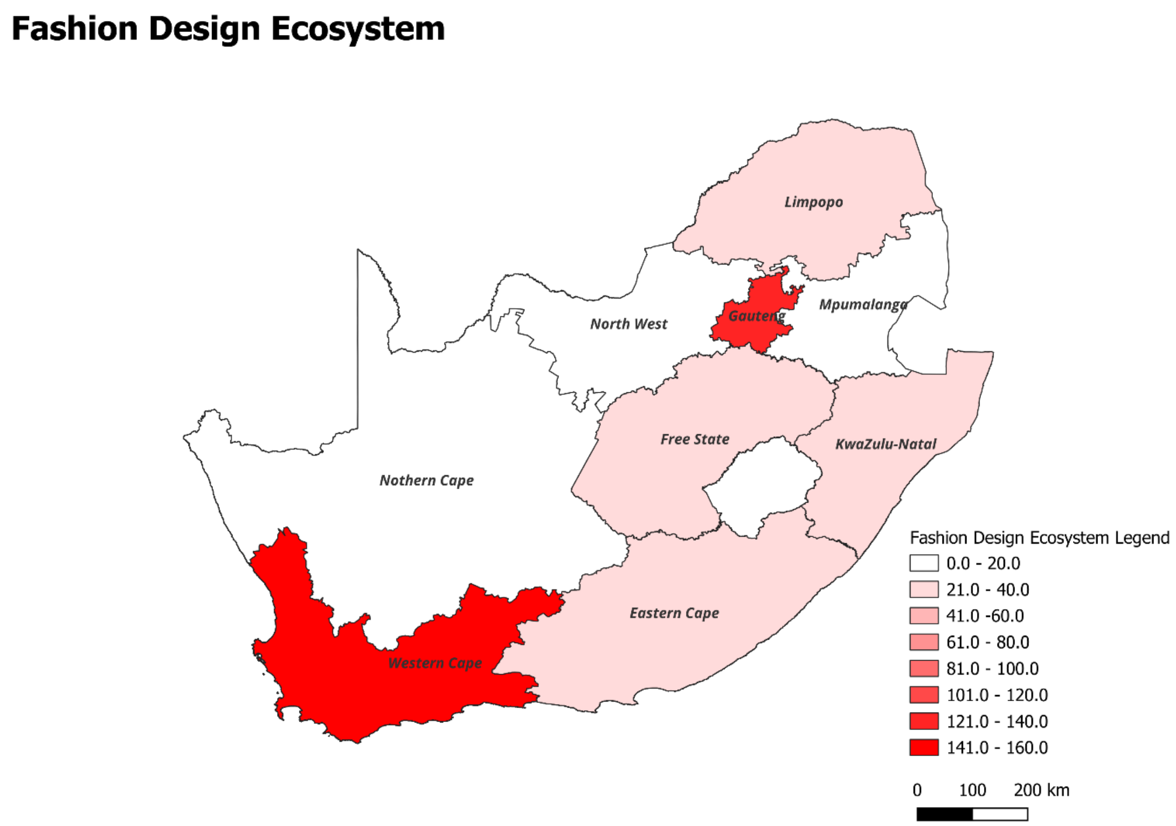

Figure 16. Heat map of the spatial distribution of the fashion design ecosystem in South Africa

(Source: Database and Authors' own analysis)

Analysis of the cities and towns however, showed that while fashion designer businesses were generally concentrated in the two main hubs (Cape Town, 28%; and Johannesburg/Pretoria 24%), second-tier cities in more rural provinces had small clusters (Gqeberha in the Eastern Cape, 5%; Thohoyandou in Limpopo, 4%).

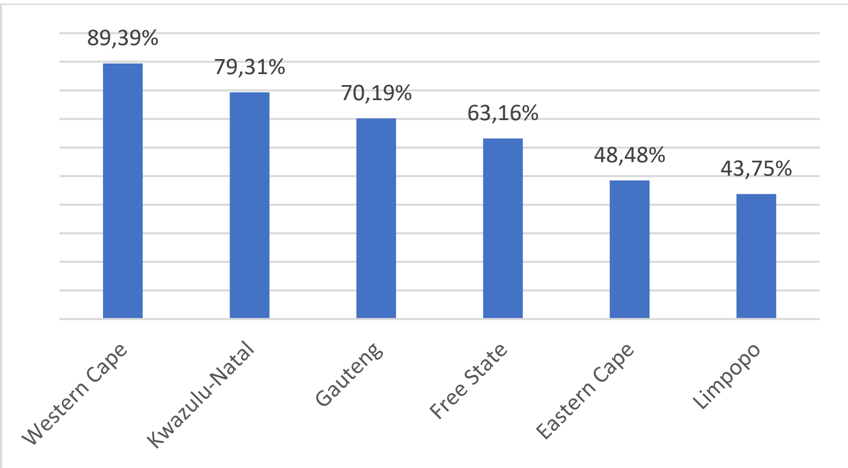

Figure 17. Percentage of fashion designers based in the largest city in each province.

(Source: Database and Authors' own analysis)

Table 5. Percentage of fashion designers based in the largest city in each province.

Metro/City	Cluster by province	Cluster in country
Cape town	89.39%	26.22%
Johannesburg	70.19%	16.22%
Durban	79.31%	5.11%
Pretoria	16.35%	3.78%
Gqeberha	48.48%	3.56%
Polokwane	43.75%	3.11%
Bloemfontein	63.16%	2.67%
Buffalo City	18.18%	1.33%
Kimberly	62.50%	1.11%
Mahikeng	45.45%	1.11%
Mbombela	18.75%	0.67%

(Source: Database and Authors' own analysis)

This spatial distribution is a potentially interesting finding: Provinces with big cities tended to have much higher percentage of fashion designers in that one city (Table 5). For example, 89.4% of fashion designers in the Western Cape are based in the province's largest city (Cape Town), while only 48.5% of fashion designers in the Eastern Cape are based in that province's largest city (Gqeberha), perhaps offering the opportunity for more evenly spread spatial development in these provinces (Figures 18 and 19).

Implications of the findings are that, although the fashion design industry is concentrated in South Africa's largest cities, there may be support for the theories of Kunda et al. (2021) and Zhang et al., (2022) which suggest that smaller towns and secondary cities can provide opportunities for fashions designers to develop and grow their brands.

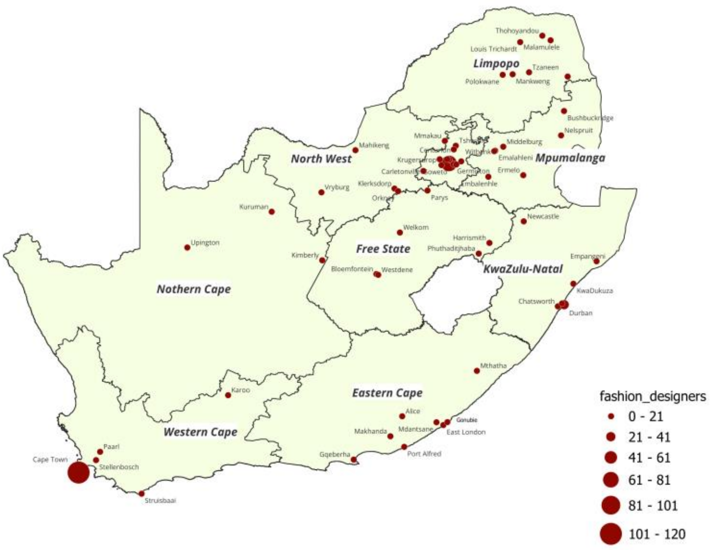

Figure 18. Map of the size of clusters of fashion designers in South Africa by city

(Source: Database and Authors’ own analysis)

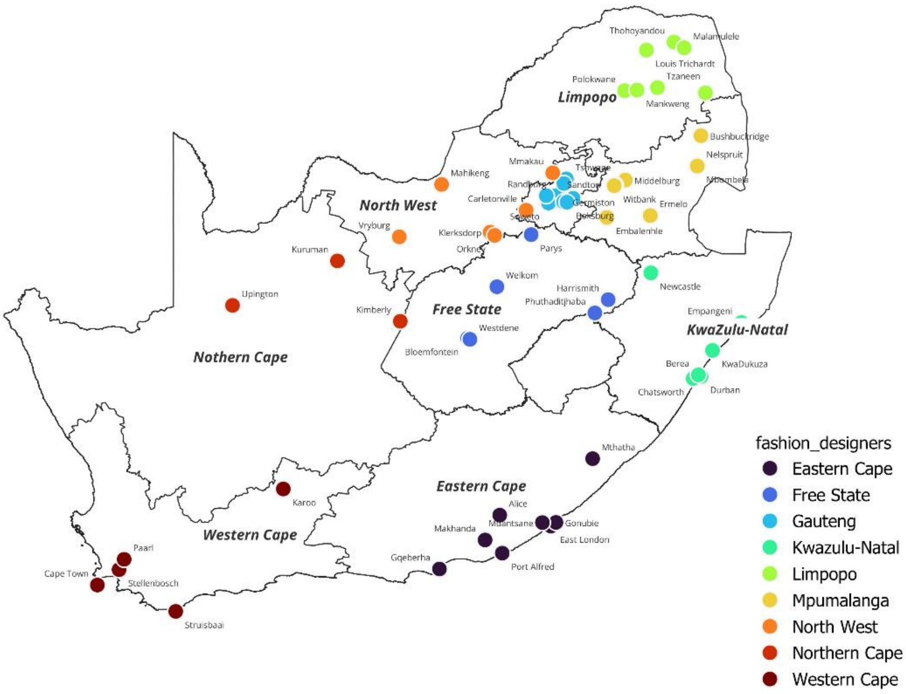

Figure 19. Map of the location of fashion designers by province

(Source: Database and Authors’ own analysis)

Case study analysis of a sample of designers presented in the next section shows that, even when their businesses are based in cities, designers often attributed their inspiration to traditional cultural heritage influences which were often connected to rural areas. There is also some indication that designers are making use of different forms of mobility (temporary, mediated, and virtual), so that they do not have to be based in larger cities fulltime. Results of the case study analysis is presented next.

4.2 Case Studies of selected South African Fashion Designers

Eight South African fashion designers were selected as case studies. They were selected for variety, and on the basis of their special focus. This section of the report analyses the case studies in terms of:

- Designer characteristics
- Funding and Resources
- Environmental Sustainability
- Designer influences and inspiration
- Market access and other challenges

Figure 20. Clothing designed by Rich Mnisi, brand name: RICH MNISI

Source: https://www.richmnisi.com

As described in the Methods, a template was developed and complete for each designer chosen for the case study section. Information included in the template for each designer, and the sources it is based on, can be found in Appendix 1. The rest of this section analyses some of the themes identified in the case studies.

Table 6. Designers chosen for case study analysis

Designer	**Brand (Date Founded)**	**Brand focus**
Wandi Nzimande	Loxion Kulca (1999)	Streetwear for young, casual urban lifestyle with "kazi" (township) inspiration. Use of bright colours, African patterns and slogans and symbols from South African history.
Thando Ntuli	Munkus (2021)	Contemporary women's-wear fashion, targeting the young urban market. Retro-inspired design using bold colours and patterns that celebrate her African identity.
Lukhanyo Mdingi	Lukhanyo Mdingi (2015)	Fusion of traditional fabrics and designs with modern styles, including woven detailing, severe monk-like style. Strong sustainability ethos, using high-quality natural fibres like silk, mohair and wool.
Nkhensani Nkosi	Stoned Cherrie (2000)	Afro-urban fashion combining vibrant colours, prints and patterns. One of the first post-apartheid South African designers to be distributed via a major clothing retailer, and initially very successful, but now discontinued.
Laduma Ngxokolo	Maxhosa Africa (2011)	Knitwear that incorporates elements of Xhosa culture and design. Focus on sustainable production and natural fibres.

Thebe Magugu	Thebe Magugu (2016)	Women's-wear and accessories with an international market focus. Conceptual design with each collection named after an academic subject area. Focus on ethically sourced inputs and environmental sustainability.
Rich Mnisi	Rich Mnisi (2014)	Inspired by African heritage and pop culture. Focus on global markets, and the use of eco-friendly production processes and ethically sourced materials.
Refiloe Mapitso Thaisi	Shweshwekini (2017)	Design influences from Basotho culture and Shweshwe fabric designs. Focus is on swimwear and activewear that celebrates African culture.

Figure 21. Clothing designed by Wandi Nzimande, brand name: Loxion Kulca

Source: https://www.news24.com/fin24/companies/pepkor-deal-breathes-new-life-into-local-streetwear-brand-loxion-kulca-20220205

Designer characteristics

While the designers were chosen for variety, they shared some similarities in terms of how they began their career, their ethos and influences, and their business practices. Many established their brands in major cities in South Africa, predominantly Johannesburg, and some smaller ones such as Gqeberha. All the designers had won awards for their designs, ranging from international awards such as the Africa Fashion International Young Designer of the Year (Rich Mnisi), and local ones such as the South African Style Award (Wandi Nzimande, owner of Loxion Kulca). This demonstrates the importance of industry recognition for showcasing the work of South African designers.

All the designers had higher education from a university or technical college, most commonly in fashion design, but also including unrelated disciplines. Many had completed internships or worked at jobs related to their craft as part of the development of their own business acumen and expertise.

Four of the designers have been through the Department of Sport, Arts and Culture (DSAC) Emerging Creatives programme, which is linked to the Design Indaba. The programme provides support, education, and mentoring to 20 future designers a year who are selected based on the quality and originality of their work. The programme is tailored specifically to the context of South Africa's design and fashion landscape and aims to help the young creatives kickstart their career in the creative economy.

Having access to developed industry infrastructure and support from government and industry organisations is identified as an important success factor by a number of authors (see Table 1).

Funding: From Passion to Prosperity

Figure 22. Clothing designed by Nkenhsani Nkosi, brand name: Stoned Cherrie

Source: https://www.sowetanlive.co.za/good-life/2011-07-21-blow-for-stoned-cherrie/

Access to finance, especially for the start-up phase of the business, is identified in the literature review as a challenge faced by many fashion designers. Many of the designers in the case study sample started their brand through the help of loans from family members, such as Nkenhsani Nkosi, the owner of the label Stoned Cherrie (Figure 22*)*, who started her brand with a loan from her husband, which she used to hire a small team of seamstresses. Thando Ntuli (Figure 23) had a similar start, as she used her savings and some money lent to her by friends and family to rent a studio space in Johannesburg. Other designers turned to their community for help, setting up crowdfunding campaigns which supporters could donate to.

The expansion phase of the business can also be difficult to finance. After establishing their brand identity, some designers went on to win large grants and mentorship programmes, which boosted their careers greatly. Lukhanyo Mdingi (Figure 25) was the joint winner of the

Karl Lagerfeld Prize where he received a year's mentorship at the LVMH Group and €150 000 (more than R2.5 million). Thebe Magugu became the first African to be awarded the 2019 LVMH Young Fashion Designer Prize, which earned him €300 000 (just over R6 million) and a year's worth of mentoring from LVMH. However, this was not the case for most designers, who are nevertheless growing at a steady pace. Due to funding constraints, Shweshwekini (Figure 26) designer Refiloe Mapitso Thaisi only runs her business part-time, as she also needs to maintain a steadier source of income while she funds her Master's degree studies. Laduma Ngxokolo (Figure 27) funded his brand and studies at the Nelson Mandela Metropolitan University through scholarships which he received from Cape Wools and Mohair South Africa.

Initial success also does not guarantee longer term business sustainability. Nkenhsani Nkosi and launched Stoned Cherrie in 2000, and it quickly became one of the largest Black-owned clothing brands in the post-apartheid period. However, in 2011 they ended their partnership with one of their largest stockists, Foschini, due to "brand differences" (Madikwa, 2011, Sowetan Live). Once a revolutionary brand that saw massive success in its hay-day, Stoned Cherrie seemed to become somewhat disconnected from the wants of their customer base. Currently, Stoned Cherrie eyewear is still available on some internet sites for purchase, but the brand has not been active since 2013/14.

Environmental Sustainability in the Local Fashion Industry

Figure 23. Clothing designed by Thando Ntuli, brand name: MUNKUS

Source: https://www.notjustalabel.com/munkus-0

Figure 24. Clothing designed by Thebe Magugu, brand name: Thebe Magugu

Source: https://www.vogue.com/slideshow/thebe-magugu-south-africa-dresses-collection

Most of the designers mentioned their commitment to becoming more sustainable and outlined some of the methods they currently utilise or plan on utilising in the future. The designers had varying approaches to sustainability, for example, Thebe Magugu created his Spring/Summer 2023 collection by sourcing garments from Dunusa, a site in Johannesburg where people rummage through discarded clothing that often comes from Western countries. He believes that through repurposing these discarded garments, he is not only reducing the amount of textile waste in landfills, but also repurposing old garments to be used again.

Rich Mnisi emphasises his commitment to environmentally sustainable practices that also uplift the local community. Some of the materials he uses are sourced from local mills, and he often uses surplus fabrics from local suppliers. While he does work with a few small factories, he states that he only works with those that are transparent about their practices and ensure fair working conditions. Mnisi states that he is committed to achieving the 2030 Sustainable Development Goals, which are a set of goals set out by the United Nations with the aim to create a more sustainable future.

Lukhanyo Mdingi goes to great lengths to ensure that the fabrics used in the production of his designs are as sustainable as possible. His collection entitled “Perennial” used high quality materials such as pure Angora Kid Mohair and Merino wool, all sourced locally, as well as other natural fibres such as silks and linen. He stated that throughout the creation of the garments for this collection, he worked closely with his sources and the local artisans in the Eastern Cape.

It is not only through the careful selection of fabrics that some of the designers contributed to sustainability, but also through community-outreach programmes. For example, Mdingi collaborated with the Ethical Fashion Initiative and mentored young designers on sustainable fashion practices as part of the “Try on Green” programme. However, a focus on environmental sustainability comes with a cost, and some smaller designers commented that sourcing high-quality local materials is often more challenging and expensive than the lower quality imports. They may not always have the time or money to donate to sustainability-focussed foundations yet, as they are still trying to get their brand off the ground. As (Grace Gatawa 2022) notes, there is certainly interest from some South African fashion designers in adopting various environmentally friendly design and production processes linked to the philosophy of the Circular Economy. However, it may also be that some designers are focused on establishing their brand as a priority, and are not yet in a position to incorporate sustainability concerns.

Influences and Inspirations

The main motivator for the majority of the designers is their desire to create garments that take influence from and celebrate African culture and heritage, but which are also modern and appealing to international markets. Many draw inspiration from African designs, such as Shweshwe fabrics or Xhosa beadwork, and incorporate these elements to create a modernized garment that still expresses their connection to their African roots.

Figure 25. Clothing designed by Lukhanyo Mdingi, brand name: Lukhanyo Mdingi

Source: https://www.dailymaverick.co.za/article/2019-02-08-fashion-news-in-new-york-lukhanyo-mdingi-presents-his-collection-at-mens-fashion-week/

Shweshwekini, whose designer is of Sotho origin, uses bold, bright colours coupled with Shweshwe patterns in their swimwear and activewear lines. As well as this, each Shweshwekini piece has a Sesotho name with a meaning attached to it as a way of educating people about the Sotho culture. Loxion Kulca, which predominantly produces streetwear, aims to connect with the youth market, especially those who identify with the post-apartheid generation and kasi (township) culture. This label also uses vibrant colours, African patterns and slogans and symbols that represent South Africa's history and identity. The brand Stoned Cherrie sought to reach a similar market, as Nkosi produced clothing with depictions of South African anti-apartheid activists, such as Steve Biko, printed on them. Thebe Magugu takes a somewhat different approach to the use of bright colours and African patterns and chooses to explore local social issues through his designs. For example, he explored domestic violence through his "Home Economics" collection, which combined mid-century tropes of domesticity with the typical colours of household cleaner uniforms. Despite these differing approaches to showcasing their African identity, all the designers expressed their desire to showcase their

African heritage through their clothing and to create modern garments that speak to the youth market without losing their African identity.

The designers' passion for African identities and culture is reflected in their efforts to connect with the community through outreach programmes. Some brands chose to give back to the community in ways other than those relating to suitability practices discussed earlier, such as Stoned Cherrie, which supported the community through women empowerment and education as well as raising awareness around HIV/AIDS. As well as running the Loxion Kulca Green Campaign, the brand also gave back to the community through initiatives such as the Loxion Kulca Bursary Fund, and the Loxion Kulca Foundation. All of the designers emphasized their commitment to giving back to their communities in an effort to create a better South Africa.

Market Access and Challenges

Almost all the designers in the case study sample were interested in expanding their brand across the globe, while still focussing on the wants of their South African customer base. Laduma Ngxokolo and Lukhanyo Mdingi were invited to attend and exhibit their work at prestigious international events, such as New York Fashion Week. Some have also dressed high-profile international customers, such as Naomi Campbell, Beyonce (Rich Mnisi), and Alicia Keyes (Laduma Ngxokolo), which boosted their brand's global visibility. Others have also collaborated with big international brands such as Dior, Coca-Cola, Adidas, Jonnie Walker, and Volvo. Thebe Magugu and Rich Mnisi have stated that they tailor their garments for global audiences and aim to target the high-end market. As a result of this, their garments are at a higher price point than those of brands such as Loxion Kulca. While they do aim to expand globally, they are primarily focussed on the South African consumer base and are more affordable.

Figure 26. Swimwear designed by Refiloe Mapitso Thaisi, brand name: Shweshwekini

Source: https://www.iol.co.za/lifestyle/style-beauty/beauty/shweshwekini-active-wear-and-swimsuits-for-all-sizes-12697835

Challenges

Despite their different focus and stage of career, designers in the case study sample mentions several similar concerns and challenges that they businesses face. These include:

- The costs associated with reaching global markets,
- Finding funding/investors,

- Competing with other brands,
- Sourcing quality materials, and
- Protecting their intellectual property.

Although half of the designers in the sample are on record as expressing their concerns around their designs being stolen, only one designer, Thando Ntuli of the brand Munkus, stated that she had registered her brand name and logo as trademarks to protect her intellectual property rights. This resonates with finding discussed in the literature review, which found that few South African creatives used formal copyright or trademark legislation to protect their work (Snowball, Tarentaal, and Sapsed 2021b).

Thebe Magugu mentioned that a challenge he faced was the lack of documentation on subject matters he is interested in, such as his tribe and Tswana culture. This made it difficult for him to incorporate these elements of his heritage into his designs.

In terms of solutions, many designers stated that they tackle these problems through coming up with creative solutions, persevering, and being socially responsible. This is supported by an earlier study of South African fashion designers which showed that important attributes of successful fashion entrepreneurs included being able to take business risks and being highly creative and motivated (Moloi, 2014).

Figure 27. Clothing designed by Laduma Ngxokolo, brand name: MaXhosa

Source: https://visi.co.za/new-collection-maxhosa-by-laduma/

5. Conclusions and Directions for future research

This report set out to provide a scoping study of the South African fashion design sector in international context (sections 3.1 and 3.2), and to identify some of the most pressing challenges facing the sector, with a focus on environmental sustainability (section 3.3), innovation and intellectual property (section 3.4). Using a constructed database of more than 400 fashion designers and other industry stakeholders, Geographic Information Systems (GIS) mapping was used to determine the spatial distribution of the sector (section 4.1). Case studies of eight fashion designers were included to better understand the development trajectories of fashion design businesses in South Africa (section 4.2).

The results showed that the South African, and African, fashion design sector has great potential for growth, even in smaller cities, but that it also faces significant challenges.

One of the challenges is that data and research on the sector, especially in Africa, has tended to be scarce. This is changing, but there is an urgent need for a more systematic approach to tracking and developing the whole fashion ecosystem, rather than the somewhat *ad hoc* and fragmented research and policy interventions that have taken place in the past. While snapshots of the industry produced through ad hoc research are useful, it would be better to have more regular data on key indicators in order to better track the development and needs of the fashion design industry in South Africa. A "Fashion Barometer" could provide such information to both those in the industry and policymakers. It could include both key statistics (some of which are highlighted in this report) and qualitative data on the business environment. Table 7 summarises some of the directions for future research that could be part of the Barometer.

Table 7. Summary Table of Directions for future research

Business environment	The impact of and potential of ecommerce and digitization, including copyright and intellectual property concerns.
	The rising role of intermediaries, such as influencers and tech-entrepreneurs
	The cost implications of, and demand for, sustainably produced fashion (as opposed to "fast fashion")
Fashion Ecosystem	The economics and potential development of complementary sectors, such as jewelry and footwear
	The development and potential of the textile value chain
	The role of large retailers in the marketing and sale of fashion designer brands
	Drivers for, and challenges faced by, the fashion clusters identified in Gauteng and the Western Cape.

This scoping study has shown clearly that the fashion industry in South Africa is already thriving (despite significant challenges) and has great potential for future development as a lead sector in Africa and beyond. It is time that it is placed higher up on the policy agenda, rather than being regarded as a peripheral industry.

A positive sign is that, in South Africa, the creative economy in general, and the fashion design sector is receiving more attending in both research and policy. Work such as the DSAC

National Design Strategy (2019) provides some well-motivated key interventions proposed for the development of the sector (summarised in Figure 8).

South Africa already has a series of national policies that recognize and seek to develop the creative industries, including the Revised White Paper on Arts, Culture and Heritage, and the Creative Industry Masterplan. Augmented by the National Design Strategy, there are thus already policy initiatives and ideas in place. Some municipalities (such as e-Thekwini) and cities (Johannesburg and Cape Town) also have local policies aimed at supporting the fashion design sector. The next important step, also identified by UNCTAD in their analysis of the African fashion sector, is the coordinated and effective implementation of these policies. For this to happen, partnerships with all level of government and with the private sector is needed, as are resources – both in terms of expertise (human capital) and financial capital and infrastructure investment.

The growing concern about the environmental damage that the fashion and textile industries cause can be seen as both a challenge and an opportunity (McKinsey, 2023). Many fashion designers (as also found in the case study analysis presented in this report) are concerned about the environment and are implementing more sustainable practices in their design, manufacture and retail of their products. However, more sustainable fashion is invariably more expensive, and a lack of consumer awareness and limited buying-power in many parts of Africa means that the demand for such products is low.

The fashion design sector in Africa has a strong entrepreneurial drive and high levels of innovation, which helped the sector to recover quickly from COVID-19 and respond to changing market demand. The growing international interest in African fashion designers, and their increasing aspirations to reach global markets, is being strongly supported by the increasing use of e-commerce and social media platforms.

The online environment also opens up possibilities for South African designers, who do not have to be physically based in larger cities but can use virtual mobility to run their businesses. Example of this from the case study analysis is Laduma Ngxokolo (Maxhosa Africa) who established his brand in a smaller city (Gqeberha) before branding out into Cape Town and Johannesburg; and Refiloe Thaisi (Shweshwekini) who is based in a medium sized town in the Free State Province (Welkom), but who sells online.

Challenges for designers moving online is the enforcement of their copyrights, as well as the technical expertise needed to maintain a secure and attractive website. The technical skill required to set up online payment systems and manage logistics is significant, and many in the sector struggle with this aspect. Improvements in copyright legislation (and enforcement) will help to improve monetization, as will the emergence of financial technology (fintech) entrepreneurs as intermediaries in the sector. However, business support for designers wishing to move online will be a crucial part of developing sector competitiveness.

Education and skills development, including technical skills and business entrepreneurship acumen, is another important area for development. All the successful designers in the case study analysis had post-school education, some specifically related to fashion design or related areas, and other in unrelated areas. A frequently identified challenge for the sector in South Africa, and Africa more broadly, is the need for sector specific education in both design and in business. This may not take the form of fulltime tertiary education but could include accredited short courses. Support for business start-ups, like the Creative Industries

Incubator, and the Department of Sport, Arts and Culture Emerging Creative Programme, can also be instrumental in increasing productivity and growing South African fashion brands.

For young designers, sometimes working in the informal sector, access to capital and equipment for start-up and for scaling up, and sourcing materials is important. The high cost of locally produced fabrics (compared to imported materials from Eastern countries) also constrains the development and impact of the sector. The development of the AfCFTA, and the uptake of mobile money payment systems could help to facilitate market access for the sector, but the National Design Strategy (2019) suggests, a formal policy on textile tariffs and imports will need to be adopted to facilitate this, as well as specific support for business development for export promotion for the sector.

This scoping study set out to draw a picture of the fashion design sector in South Africa in the post-COVID landscape. To augment the current information, the database of 400 fashion designers and related institutions could be used as the basis for a survey of the industry, to hear from fashion designers themselves what challenges and opportunities they face, and to get their ideas on how some of these challenges could be overcome through both improved government support, legislation on things like copyright and import tariffs, and industry partnerships to develop, for example, a standardised reporting strategy for environmentally sustainable fashion.

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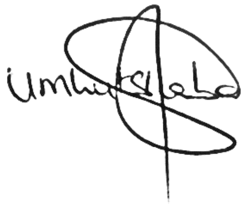
APPROVALS FOR THE SOUTH AFRICAN CULTURAL OBSERVATORY – A Scoping Report of the South African Fashion Design Sector – 28 March 2024				
	NAME	**TITLE**	**SIGNATURE**	**DATE**
Prepared and recommended by:	Ms. Unathi Lutshaba	SACO Executive Director		28 March 2024
Approved by:	Dr Mphikeleli Mnguni	DSAC SACO Project Manager		
Approved by:	Dr Stella (CN) Khumalo	DSAC DDG: Arts, Culture Promotion and Development		

Appendix 1: Case Study Summaries

Laduma Ngxokolo

Identification	South African fashion designer, businessperson, and creative artist Laduma Ngxokolo is the founder and designer of Maxhosa AFRICA. It is a designer company that features his distinctive knitwear patterns and incorporates elements of the Xhosa culture. The brand has received invitations to exhibit worldwide, including New York Fashion Week. Famous people like Samthing Soweto, Black Coffee, Maps Maponyane, and Siyabonga Ngwekazi have been photographed wearing Maxhosa originals.
Their Brand	With its special knitted apparel line, Maxhosa AFRICA aims to appeal to the high-end market. One of the brand's distinctive characteristics is its elaborate and one-of-a-kind patterns, which draw inspiration from Xhosa beadwork and other cultural themes.
The designer – their history and philosophy	Laduma Ngxokolo was born in Port Elizabeth, South Africa, on December 15, 1986. When he was fifteen years old, his mother taught him how to knit, which has since helped him in his career as a fashion designer. In 2010, he received his Btech in textile design from Nelson Mandela Metropolitan University. He received scholarships for his studies from Cape Wools South Africa and Mohair South Africa in Port Elizabeth due to his talent for knitwear design. He graduated from Central St. Martins with a degree in Material Futures in 2016. His designs have been greatly influenced by his Xhosa background and culture. His company, Maxhosa AFRICA, uses Xhosa beading and other cultural components to create its distinctive and elaborate patterns. Laduma Ngxokolo has received praise for his eco-friendly fashion business practices. Since its launch in 2011, the company has used eco-friendly materials including 100% wool. The company is transitioning to solar energy, and the production plant uses borehole water. To highlight the sustainable methods that form the foundation of his company, Laduma Ngxokolo has also sponsored a sustainability festival where customers learn about how much the brand is sustainable in terms of production and product offering. The brand's key principles are slow and robust. The brand's primary values include environmentally conscious, long-lasting, and slow fashion.
The business	With a concentration on knitted apparel that includes Xhosa culture in design, Laduma Ngxokolo launched his company, Maxhosa AFRICA, in 2011. The brand is based in Port Elizabeth, Eastern Cape, South Africa. Laduma Ngxokolo received scholarships from Cape Wools and Mohair South Africa to help fund the brand while she attended Nelson Mandela Metropolitan University. The brand has gained recognition on a global scale, including at fashion shows and on catwalks, in award ceremonies and art exhibitions, in publications, and on celebrities. The company's website is user-friendly, and it features a large range of products and an online store that distributes internationally. The business is

	vertically integrated, which means that it purchases raw materials and transforms them into fabric, which it then designs into clothing and distributes to retail outlets. The company is well-represented on social media, having more than 200k followers on Instagram alone. Numerous companies, including Woolworths, Vlisco, and BMW South Africa, have partnered with Maxhosa AFRICA. Several honors, including the 2015 Vogue Italia Scouting for Africa Prize, have been given to Laduma Ngxokolo for his work. Maxhosa AFRICA encounters difficulties with funding, markets, copyright protection, competitors, costs associated with reaching global markets, and space, to name a few.
Future Plans	The brand aims to enhance their position in the global market. Their designs have been updated to fit the current fashion landscape and appeal to the global fashion market. Beyoncé and Alicia Keyes are just two examples of celebrities who wear the line's clothing.

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Loxion Kulka

Identification	Loxion Kulca is designedby Wandi Nzimande. The company is located in Johannesburg and was established in 1999 at Johannesburg. Loxion Kulca is a successful brand that has been in the market for over 20 years. It has more than 150 outlets in South Africa and neighbouring countries, and also exports to the US, Europe and Australia. It has won several awards, such as the Loerie Award for best clothing design in 2003 and the South African Style Award for most stylish fashion brand in 2004
Their Brand	Loxion Kulca's work is mainly streetwear, which is casual clothing that reflects the urban culture and lifestyle. It targets the youth market, especially those who identify with the post-apartheid generation and the kasi (township) vibes. Some of its special features are the use of vibrant colours, African patterns, slogans and symbols that represent the history and identity of South Africa.
The designer – their history and philosophy	Wandi Nzimande was born in 1976 in Soweto, a township in Johannesburg. He grew up during the apartheid era and witnessed the struggle for freedom and democracy. He was influenced by the music, art and fashion of his surroundings, especially the kwaito genre that emerged in the 1990s. He studied graphic design at the Vaal University of Technology and later worked as a DJ, radio presenter and producer. He co-founded Loxion Kulca in 1999 with his friends Sechaba Mogale and Brian Abrahams. His philosophy was to create a brand that reflected the culture and identity of South Africa, especially the youth who were born after apartheid. He wanted to tell their stories and celebrate their diversity and creativity. He was also passionate about social issues and environmental sustainability. He supported various initiatives such as the Loxion Kulca Bursary Fund, the Loxion Kulca Foundation and the Loxion Kulca Green campaign. He passed away in January 2021 due to Covid-19 complications. He was widely regarded as a pioneer and icon of South African street fashion
The business	Loxion Kulca started as an informal enterprise of hand-made items that were sold at flea markets and events. The founders used their own savings and loans from friends and family to fund the business. They later rented a studio space in Newtown, Johannesburg, where they designed and produced their clothing. They also developed their brand identity and logo, which incorporated elements of South African culture and history. They initially struggled to find a market for their products, until they partnered with kwaito artists who wore and promoted their clothing. This boosted their sales and popularity, especially among the youth who related to the brand's message and style. Loxion Kulca expanded its product range and distribution network, reaching more than 150 outlets in South Africa and neighbouring countries, as well as exporting to the US, Europe and Australia. They also used their website and social media platforms to market their brand and engage with their customers. They won several awards and recognition for their design and innovation, such as the Loerie Award, the South African Style Award, the Design Indaba Award and the World Economic Forum Award. They also collaborated with other brands and organisations, such as Levi's, Nike, Coca-Cola, SABC, MTN and

	others. However, Loxion Kulca also faced some challenges and difficulties over the years, such as funding, competition, changing consumer preferences, protecting their intellectual property rights, sourcing quality inputs, reaching international markets and maintaining their studio space
Future Plans	Loxion Kulca has some aspirations and plans for the future, such as expanding their markets, especially in Asia, where they see a potential for growth. They also plan to partner with more retailers and distributors, such as PEP, to make their products more accessible and affordable to more customers. They also to innovate their design and production, using the latest tools and technologies, such as digital printing and e-commerce. They plan to revive their brand identity and relevance, by engaging with the new generation of consumers and influencers, and by staying true to their roots and values

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Lukhanyo Mdingi

Identification	In 2015, South African designer Lukhanyo Mdingi launched his eponymous label in Cape Town. Since its launch in 2015, the label has been featured in Vogue Italia, Nataal and I.D. Additionally, Lukhanyo Mdingi has displayed his work on prestigious stages such as the British Fashion Council's International Fashion Showcase, Pitti Uomo Immagine's Generation Africa, and the CFDA's New York Fashion Week. Currently, Lukhanyo's brand is available at prominent retailers throughout the world such as Netaporter, SSENSE and Selfridges as it continues to grow.
Their Brand	Lukhanyo Mdingi designs distinctive fashion for both men and women. His artistic style is about the fusion of a structured order with an organic structure. His fabrics come from traditional sources but are used in modern ways. His collections comprise of bright, punchy pieces that feature distinctive detailing, expertly woven elements and chic tailoring that reflect both his African roots and his '90s upbringing.
The designer – their history and philosophy	Born in 1992, Lukhanyo Mdingi grew up in the small coastal town of East London. In 2011, he relocated to Cape Town where he studied fashion design at Cape Peninsula University of Technology. A post-graduate year followed, where he graduated as the only student from Fashion Design. The 31-year-old fell in love with clothing as a young boy. It was the moments of the effervescent fashion style *from The Bold and the Beautiful that made him gravitate towards fashion. When he started his first year at university, his passion for fashion extended beyond its aesthetic value and gave him a firm belief that it was his true purpose in life. Mdingi is an advocate of the value of high-quality natural materials.* These include wool, silk, and mohair, which he flattens, wraps, and integrates into his monk-like silhouettes. He believes that it is the reinterpretation of traditional materials that highlights skin tones and celebrates African body forms. Mdingi collaborates with key textile developers and designers, which has helped his brand achieve its unique and identifiable signature. His collection, 'Perennial', integrated his brands sustainability ethos. He worked with high quality sincere materials like pure Angora Kid Mohair and Merino wool all sourced locally and other natural fibres like silks and linen. Some pieces in the collection were created with the felting process using blended wool, which meant working closely with the source of material and artisans in the Eastern Cape. He also collaborated with the Ethical Fashion Initiative led by Simone Cipriani. He has mentored young designers on sustainable fashion in the Try on Green programme.
The business	Lukhanyo Mdingi's design studio is based in Cape Town where he is designing his sustainable, contemporary namesake fashion brand. Due to lack of funding, he raised funds for his label through a crowdfunding campaign and set up his studio in Cape Town. Additionally, he worked many jobs to pay rent and keep his business running. He developed his brand by creating minimalist and

	sustainable collections that tell stories of his heritage and identity. The brand focuses on the importance of community. He has achieved success both locally and internationally. He was the joint winner of the Karl Lagerfeld Prize where he received a year's mentorship at the LVMH Group and €150 000 (more than R2.5 million). He was also a finalist of the prestigious LVMH (Moët Hennessy Louis Vuitton) Prize. Adding to his international recognition, he is among the exhibitors at the Council of Fashion Designers of America (CFDA) men's fashion week. He has also collaborated with other designers and artists, such as Nicholas Coutts, Sindiso Khumalo and Thebe Magugu. He has faced challenges such as finding markets, protecting his intellectual property, competing with other brands, sourcing quality materials, and reaching international audiences.
Future Plans	The Lukhanyo Mdingi label are eager to increase their popularity. They have held a strong presence within South African and European markets, but want to bring the brand back to South Africa and strengthen their presence here.

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Nkhensani Nkosi

Identification	Nkenhsani Nkosi launched her iconic fashion label, Stoned Cherrie in 2000. It was based in Johannesburg where they had the flagship store and studio. Stoned Cherrie grew to become one of the most successful and recognized post-apartheid p0South African fashion brands, winning several awards, expanding to international markets, and launching a homeware range. Her work was exhibited at the Fashion Institute of Technology as part of the exhibition Black Fashion Designers from December 2016 to May 2017. One of her most popular t-shirt designs showing the face of anti-apartheid activist, Stephen Biko, featured cover from the Drum magazine. However, in 2011, one of the major retail outlets selling Stoned Cherrie brands discontinued the line, and it has since been discontinued.
Their Brand	Stoned Cherrie produced Afro-urban fashion that combines vibrant colours, prints and patterns with contemporary designs and styles. It targeted both local and international markets that appreciated the diversity and richness of African culture. Some of its special features included eyewear inspired by African icons, upholstery made from recycled fabrics and clothing that showcases the stories of South African heroes.
The designer – their history and philosophy	Nkhensani Nkosi was born in 1974 in Soweto, a township in Johannesburg. She grew up in a Venda family and was exposed to different cultures and languages. She studied drama at the University of the Witwatersrand and business administration at the University of Cape Town. She decided to become a fashion designer after working as an actress and a television presenter. She wanted to create clothes that reflected her personality and identity, as well as the history and culture of South Africa. Stoned Cherrie's designs were influenced by various aspects of South African heritage and culture, such as the Sophiatown era, which was a vibrant and cosmopolitan period in the 1950s that celebrated music, art and fashion. Stoned Cherrie incorporated elements of African fabrics, patterns, colours, and motifs into its products. Stoned Cherrie was aware of the environmental impact of the fashion industry and tried to be more sustainable by using organic cotton, recycled materials, natural dyes, and local suppliers. Stoned Cherrie also supported social causes, such as HIV/AIDS awareness, women's empowerment and education.
The business	Stoned Cherrie was launched in 2000 by Nkhensani Nkosi, who used her savings and a loan from her husband to start the business. She rented a studio in Johannesburg and hired a small team of designers and seamstresses. Stoned Cherrie quickly gained popularity and recognition in local and international markets. The brand participated in various fashion shows, such as the Cape Town Fashion Week, the New York Fashion Week and the Paris Fashion Week. It has also won several awards, such as the Designer of the Year at the SA

	Fashion Awards in 2001 and the Most Innovative Brand at the SA Tourism Awards in 2004. Stoned Cherrie expanded its product range to include eyewear, upholstery, homeware and ceramics. It has also collaborated with other brands and artists, such as Levi's, Vlisco, Laduma Ngxokolo and Zanele Muholi. Stoned Cherrie used its website and social media platforms to promote its products and engage with its customers. Stoned Cherrie has faced some challenges in its journey, such as securing funding, finding reliable and affordable suppliers, protecting its intellectual property, competing with other local and international brands, and reaching new and diverse markets. Stoned Cherrie has also faced some criticism for its use of Steve Biko's image, which some people saw as disrespectful or commodifying his legacy. In 2011, Foshini (a major commercial clothing retailer) stopped selling Stoned Cherrie. The retailer was reported as saying that the brand moved in a direction that did not appeal to their customers.
Future Plans	Stoned Cherrie planned to expand the brand to other African countries and beyond, collaborate with other designers and artists, and create more products that celebrate African culture and heritage. The designer wanted to empower young African designers and entrepreneurs by mentoring them and providing them with opportunities, seeing the brand as more than just a fashion label, but a movement that inspired people to be proud of who they are. Currently, Stoned Cherrie eyewear is still available on some internet sites for purchase, but the brand does not appear to be active anymore.

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Rich Mnisi

Identification	Rich Mnisi is a fashion designer and entrepreneur who founded the contemporary fashion brand Rich Mnisi in 2014. The brand is based in South Africa and caters to an aspirational market with a global view. Rich Mnisi's designs are young at heart and explore Africa's cultural heritage. The brand has won several awards, including the Africa Fashion International Young Designer of the Year 2014. Rich Mnisi has designed clothing for celebrities such as Beyonce and Naomi Campbell.
Their Brand	The Rich Mnisi brand targets a global market and has a strong presence in South Africa. The brand is committed to responsible production and consumption approaches in the fashion industry, incorporating eco-friendly materials and production methods into its designs. As a beneficiary of the Smiley Future Positive Creators Fund, Rich Mnisi contributes to sustainability in the fashion industry. Some special features of Rich Mnisi's work include his use of ethically sourced materials, a focus on improving the lives of people and communities directly involved in his production line, and collaborations with big brands like Johnnie Walker, Coca Cola, and Volvo.
The designer – their history and philosophy	Rich Mnisi was born on 14th December 1993 in Johannesburg. His designs are primarily inspired by African heritage and pop culture. Mnisi pursued a BA in Fashion Design and Business Management from Leaders in the Science of Fashion (LISOF). He was motivated by his younger sister to become a fashion designer. Rich Mnisi is committed to celebrating culture, heritage, and the human experience through minimalist structures and innovative design. His brand is inspired by sources outside of the fashion industry, including film, music, art, and nature. Rich Mnisi's commitment to sustainability is evident in its designs, which incorporate eco-friendly materials and production methods. Mnisi believes that their main responsibility is to create high-quality items that are true to their contemporary aesthetic and are produced responsibly at all levels of the production cycle. Some of their materials are produced in local mills, and others are surplus fabrics sourced from local suppliers. They work with a handful of small factories and suppliers that believe in transparency and are committed to fair working conditions. They consider deeply the ethical, social, and environmental impact of their operations.
The business	Rich Mnisi has achieved great success with his brand. He has won several awards, including the Emerging Designer of the Year award in 2019 at the Essence Best in Black Fashion Awards. He has also collaborated with big brands like Johnnie Walker, Coca Cola, and Volvo. They are committed to finding the balance between sustainability and growth. They have learnt from their partners BCI Cotton – they try as far as possible to use ethically sourced materials and focus on improving the lives of the people and communities directly involved in their production line. As a young African designer,

	Rich Mnisi has faced many challenges while establishing a e fashion label. However, these hurdles have been far outweighed by invaluable experiences and the lessons he is still learning from experts and peers in the industry. As a global brand growing in South Africa, he increasingly must find creative ways to respond to market challenges, and the legislative framework that governs business practices both locally and internationally.
Future Plans	Mnisi has recently partnered with French brand “Smiley Originals” as one of the six designers to be part of the first-ever Smiley Future Positive Creators - Class of 2023. The Rich Mnisi x Smiley capsule collection features the designer’s signature prints and the Smiley iconic logo. Mnisi says he is always exploring different creative disciplines, which helps him to expand on fresh ideas and offer a new perspective in the fashion world.

Sources: https://www.iol.co.za/lifestyle/style-beauty/fashion/rich-mnisi-shares-how-he-created-a-successful-fashion-brand-c29a1acd-eba7-43be-bead-29ef72d6ca51; Rich Mnisi Biography: Age, Girlfriend, Career & Net Worth. https://wikisouthafrica.co.za/rich-mnisi/; RICH MNISI: Celebrating Culture & Heritage Through Innovative ... - Smiley. https://smiley.com/blogs/news/rich-mnisi; Sustainability – RICH MNISI. ttps://shop.richmnisi.com/pages/sustainability; Rich Mnisi - Southern Guild. https://southernguild.co.za/artist/rich-mnisi/; https://www.afdb.org/fileadmin/uploads/afdb/Documents/Policy-Documents/Agenda2063_Popular_Version_English.pdf; https://briefly.co.za/74251-rich-mnisi-bio-age-real-wife-website-clothing-prices-profile-net-worth.html; https://wikisouthafrica.co.za/rich-mnisi/; https://www.designindaba.com/videos/interviews/rich-mnisi-fashion-forward-and-business-savvy; https://www.timeslive.co.za/sunday-times/lifestyle/fashion-and-beauty/2023-07-20-native-hm-joins-forces-with-rich-mnisi-to-create-a-graphic-streetwear-collection/

Shweshwekini

Identification	Shweshwekini is a South African clothing brand that creates bold and colourful prints inspired by the Basotho culture from Lesotho. The brand was founded in 2017 by Refiloe Mapitso Thaisi. Shweshwekini is a range of swimwear and active wear for men and women is inspired by the Shoeshoe (shweshwe) prints, which are named after King Moshoeshoe, the founder of the Basotho nation. Each Shweshwekini piece has a Sesotho name with a meaning attached to it, which is a way of educating people about the Sotho culture. Shweshwekini is owned by Mapitso Thaisi, who studied a BSc in Occupational Therapy at the University of Cape Town and later a Master's degree in Human Rights Law. The brand has been featured on Top Billing, Foschini Magazine, Club Magazine, Elle Magazine, Glamour, Bona, The Sowetan, The Cape Argus and on Design Indaba. Mapitso has also received recognition for her work, such as the Foschini Sebenza Award in 2017, Design Indaba 40 Emerging Creatives Class of 2018, Top 3 Nominee in Santam Fair Lady Women of The Future Awards in the Rising Star Category in 2018, and the Mail & Guardian Women Changing South Africa in the Entrepreneur Category. Shweshwekini operates from Cape Town, Johannesburg and the Free State.
Their Brand	Shweshwekini range of swimwear and active wear is targeted towards men and women who are looking for unique and vibrant clothing that celebrates African culture. In creating the brand, Mapitso was inspired by her early childhood memories of her mother in shweshwe dresses, the Lesotho landscape and people who can be seen traveling along the Maluti escapement. The brand's swimwear collection includes swimsuits such as Mahali-Pink, Mariah-Mixed, and Mamello Swimsuit. The brand also offers swimwear sets such as Moselakini Set and Refiloe Kini Set. Shweshwekini active wear collection includes Mokorotlo Print Shirt and Mokorotlo Print Shorts. Shweshwekini Mokorotlo Print collection features a Basotho-inspired Mokorotlo hat, which forms an important cultural symbol in the Basotho culture. Traditionally worn by chiefs in the tribal courts in Lesotho and later by all genders, today, Basotho women are the primary manufacturers of these hats in Lesotho. The brand hopes to enable and uplift communities where it based by working with talents across South Africa to bring the brand vision alive. Shweshwekini's motto is "In Touch, Moving Forward".
The designer – their history and philosophy	Refiloe Mapitso Thaisi was born and raised in Lesotho, and later moved to South Africa. Growing up in Lesotho, Thaisi was inspired by her mother's shweshwe cloth dresses. The dyed cotton fabric is widely used for traditional South African clothing, but she later noticed that Ghanaian designers had given a modern twist to their own traditional fabric, kente cloth. She decided to do the same thing in South Africa by creating the Shweshwekini Activewear brand in 2017.

The business	Since the inception of the brand in 2017, Shweshwekini has continued to get recognition for its work in the fashion space. Over the years, the brand has been featured on Top Billing, Foschini Magazine, Club Magazine, Elle Magazine, Glamour, Bona, The Sowetan, The Cape Argus and on Design Indaba. One of the challenges Thaisi faced was the extra cost of production and printing of the unique Shweshwe design as opposed to buying ready-made fabric. Despite the current economic downturn, Thaisi says there is a great deal of interest in the brand. She runs the swimwear business part-time, as she understands the struggles of a start-up and also needs to fund her master's degree in human rights.
Future Plans	The designer hopes to enable and uplift communities where it based by working with talents across South Africa to bring the brand vision to life.

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Thando Ntuli

Identification	Thando Ntuli's designer label is Munkus. She is based in Johannesburg. She established her label in 2021, after graduating from university. Her business is relatively small but growing fast. Some indicators of her success are the awards she has won, the exposure she has gained, the positive feedback she has received, and the loyal customers she has attracted.
Their Brand	Munkus, is a contemporary trans-seasonal fashion brand that creates womenswear. It targets the young and urban market, especially those who appreciate local culture and heritage. Her work is characterised by bold, bright and retro-inspired designs that use vibrant colours, prints, patterns and textures. She aims to create garments that are fun, expressive and empowering.
The designer – their history and philosophy	Ntuli was born and raised in Soweto. She comes from a family of seamstresses, who taught her how to sew and inspired her love for fashion. She studied fashion design at the University of Johannesburg, where she graduated in 2020. She decided to become a designer because she wanted to express her creativity and celebrate her identity and culture. She is proud of her heritage and culture and incorporates elements of them into her designs. She also respects the environment and tries to use sustainable and ethical materials and practices in her production process.
The business	Munkus, started in 2019, when Thando Ntuli was still a student at the University of Johannesburg. She used her savings and some funding from her family to start her brand, which she named after her nickname. She initially worked from her home studio in Soweto, where she designed and produced her garments. She later moved to a bigger studio in Johannesburg, where she hired a small team of assistants and seamstresses. She developed her brand identity and logo, which reflect her colourful and retro style. She also created a website and social media accounts, where she showcases her collections and connects with her customers. Some of her successes include winning the South African Fashion Week New Talent Award in 2022, which gave her exposure and recognition in the local fashion scene. She also won the Design Indaba Emerging Creative Award in 2022, which gave her access to mentorship and networking opportunities. She was invited to showcase her work at the Lagos Fashion Week in 2022, which opened up new markets and collaborations for her in Africa. She also secured some distribution deals with local retailers, such as PEP and Edgars, as well as some online platforms, such as Superbalist and Zando. She exports some of her products to the US, Europe and Australia, where she found niche customers who appreciate her unique designs. She has registered her brand name and logo as trademarks, to protect her intellectual property rights. Some of the challenges she faced include finding funding and investors to grow her business, especially during the Covid-19 pandemic, which affected the fashion industry negatively. She also faced competition from other local and international brands, who

	offer similar or cheaper products. She struggled to source quality and sustainable fabrics and materials, which are scarce and expensive in South Africa. She faced some difficulties in reaching international markets, due to high shipping costs, customs duties, and regulations. She also had to deal with some issues of space and storage, as her studio was not big enough to accommodate all her equipment and inventory.
Future Plans	Her future plans include expanding her product range to include accessories, shoes and bags, as well as menswear and childrenswear. She plans to increase her online presence and sales, by improving her website and social media platforms, and partnering with more online retailers and influencers. She also plans to explore more international markets, especially in Africa, where she sees a lot of potential and demand for her designs. She plans to innovate her designs, by incorporating more technology and functionality, such as smart fabrics, wearable devices and interactive features. She will continue learning and growing as a designer, by attending more workshops, courses and events, and collaborating with other creatives and experts. She also plans to give back to her community, by mentoring young aspiring designers, supporting local artisans and suppliers, and donating some of her profits to social causes.

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Thebe Magugu

Identification	Thebe Magugu is a South African fashion designer who established his in Johannesburg in 2016. The label primarily operates within the field of women's ready-to-wear clothing and accessories. Since its establishment, the label has gained significant recognition and success. Magugu has released eleven solo collections since 2017, as well as several capsules in collaboration with international brands such as Dior, Adidas, and AZ Factory. His debut collection, titled Geology, was featured in Vogue Italia. Magugu was announced as the winner of the International Fashion Showcase by the British Fashion Council in 2019. He then became the first African to be awarded the 2019 LVMH Young Fashion Designer Prize, which earned him 300,000 euros and a year's worth of mentoring from LVMH.
Their Brand	Thebe Magugu's collections often start from a place that is quite conceptual, and then he works on how to bring that into an international fashion collection. For example, his Autumn/Winter 2018 "Home Economics" collection explored domestic violence, combining mid-century tropes of domesticity with the colours of household cleaners. He has named each of his collections after an academic subject area, often linking it to topical social themes. Magugu produces an annual publication, Faculty Press, dedicated to people and ideas in South Africa. He describes himself as a multidisciplinary — "but a designer first and foremost". His target market is global, with a focus on emerging markets. He has been approached by many of the world's leading stockists, indicating a wide and diverse market for his designs. His work actively seeks to expand global perceptions of South African identity, making it appealing to those interested in unique, culturally rich fashion.
The designer – their history and philosophy	Thebe Magugu was born in 1993 in the township of Ipopeng on the outskirts of Kimberley. He is of Sotho ancestry and his cultural background and upbringing have greatly influenced his work. Magugu was educated at St. Patrick's Christian Brothers' College in Kimberley, and then at the London International School of Fashion (LISOF) in Johannesburg. He studied fashion design, fashion photography, and fashion media. His decision to become a designer was influenced by his interest in using fashion as a medium to address social issues and tell stories about his home country. For example, his winning installation at the International Fashion Showcase in London positioned garments from his latest collection above a long scroll with the text of the South African constitution. Magugu has shown commitment to environmentally sustainable practices in his work. For instance, he built his Spring/Summer 2023 collection by sourcing garments from Dunusa, a place in Johannesburg where people rummage through discarded clothing that comes from the west. This approach not only repurposes what is

	considered textile waste from North America and Europe but also gives these items new life as luxuries for a new demographic.
The business	Thebe Magugu moved to Johannesburg to study fashion design, fashion photography, and fashion media at LISOF. After winning the best graduate collection, he interned and worked for a selection of designers, fashion institutions, and retailers. After 2 years, he began his namesake label. Magugu's label quickly gained critical acclaim for his thoughtful and inventive collections that comment on history, culture, and politics. One of the challenges Magugu faced was the lack of documentation on the subject matter he was particularly interested in, like his tribe of people and Tswana culture. This made it difficult for him to incorporate these elements into his fashion designs. Another challenge was the lack of fabric suppliers and factories experienced in designer ready-to-wear in Johannesburg.
Future Plans	Magugu has shown a commitment to expanding global perceptions of South African identity, and this is likely to remain a key aspect of his work. In terms of market expansion, Magugu has been approached by many of the world's leading stockists, indicating a potential for further growth in international markets. His collections have already garnered critical acclaim, and his label is gaining recognition as he expands outside of South Africa.

Sources: https://en.wikipedia.org/wiki/Thebe_Magugu; https://connect.industrieafrica.com/designers/thebe-magugu; http://www.thebemagugu.com/; https://www.vogue.com/vogueworld/article/thebe-magugu-south-african-fashion-designer-born-free-generation; https://www.voguebusiness.com/fashion/lvmh-prize-finalist-thebe-magugu-building-global-business-africa-emerging-market; https://www.metmuseum.org/perspectives/articles/2021/9/thebe-magugu-interview; https://showstudio.com/news/thebe-magugu-tackles-textile-waste-in-new-documentary; https://luxiders.com/sustainable-brands-thebe-magugu/; https://www.sowetanlive.co.za/s-mag/2020-04-17-5-things-you-didnt-know-about-award-winning-designer-thebe-magugu/; https://mg.co.za/friday/2022-05-27-magugus-new-collection-challenges-african-fashion-cliches/