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An Examination of Production Challenges Faced by Clothing Manufacturing Companies in Zimbabwe Towards a Competitive Strategy

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Abstract

The Zimbabwe Clothing manufacturing sector is struggling to survive and produce competitive products due to the economic down turn. The study aimed at examining the challenges faced by the clothing manufacturing companies in Zimbabwe with the aim of suggesting strategies that could be implemented to improve competitiveness of clothing products for the market. Qualitative research approach and a descriptive case study research design was adopted for the study. The population comprised managers, supervisors and designers purposively selected from five clothing manufacturing companies in Harare, Zimbabwe. The sample was made up of twenty-one participants. Data was gathered using telephonic interviews. The study found out that the clothing manufacturing industries were facing challenges of low quality fashion products, simple designs, outdated machinery, poor infrastructure, high rates of imports and high inflation rate. It was suggested that the clothing manufacturing industry may implement strategies like product differentiation and new product development using advanced technologies to improve competitiveness of products on the market among other recommendations.

Key words: Clothing, Production, Competitiveness, Mass production, Quality

Introduction

This study sought to examine production challenges faced by the clothing manufacturing companies in Zimbabwe towards development of a competitive production framework that may help to improve production

processes and quality of products to meet stiff competition on the market. The Clothing manufacturing industry is the key sector within the fashion supply chain since it is very important in the economic development of any country (Sedex, 2021). It provides jobs, income and foreign currency giving a country an opportunity for a sustainable economic development. Due to economic hardships, many companies have closed down and some have reduced production capacity resulting in a low domestic share (Chingono, 2016). The study intends to examine production challenges faced by the clothing manufacturing companies in Zimbabwe and suggest possible solutions to challenges to enable production of competitive products.

With the fast changing product production approaches worldwide, business leaders are expected to monitor changes on the production approaches and work towards aligning their strategies to the realities of the context in which most organisations operate in this new millennium if they are to remain competitive.

Many studies on production of competitive products have been carried around the world. For example, Azmeh and Nadvi (2014) conducted a study, "Asian firms and the restructuring of global value chains." where they state that, the garment industry is highly competitive, marked by pressures for higher quality, greater choice, and more fashion content and reduced costs. This has spurred moves to what is often referred to as fast fashion, high quality fashion intensive but yet low priced garments. Fast fashion is the need for cost efficiencies (Azmeh & Nadvi, 2014).

Eryuruk, Kalaoglu and Baskak (1990) conducted a study "Logistics as a competitive strategy analysis of the Clothing industry in terms of Logistics" in

Turkey. The study presented logistics as a strategic solution and it investigated problems as well as necessary solutions according to the needs of Turkish clothing industry. The findings reflected that, to compete in the global market, the Turkish textile and clothing industry should engage in a permanent process of restructuring that involves the adoption of new technologies and modes of work organisation to increase productivity, reduce costs and keep ahead of producers in low wage areas. In Zimbabwe, the clothing industry has gone through an economic down turn period. High competition in the industry and high cost of transportation are the factors which are affecting the Clothing and Textile market of Zimbabwe (Nsingo, 2018).

Makasi and Govender (2017) conducted a study entitled “Sustainable marketing strategies in the context of a globalized clothing and textile (C&T) sector in Zimbabwe”, a developing country. This study was done to mitigate challenges of competition and constant confrontation of competition from firms in low wage industrialised economies. It provides a new perspective on sustainable marketing strategies in the context of a globalised clothing and textile (C&T) sector. This study also intends to identify possible sustainable competitive strategies which the Zimbabwean clothing and textile companies can use to lessen the impact of globalisation on the sector. Each company has to have its own competitive strategy to fit on the market, providing customers with variety of products and prices. Whatever, the strategies are, the most important thing is to achieve huge market share and generation of high profits. Goriwondo, Mhlanga and Mutsambwa (2013) in their study “Agility for sustainability in Zimbabwe: A case study for manufacturing companies in Bulawayo” found out that competitive pressure on manufacturing companies

is presented by customer demand which transforms from being general to individualistic, demanding in specific terms and more inclined to choose to be treated as an individual entity defined by his/her own preferences. The study concluded that meeting the dynamics and provision of a good quality product at an acceptable cost, with high delivery speed as well as manufacturing the product in the shortest time frame possible will result in the manufacturer having a competitive advantage over his/her competitors. Therefore, there was need to conduct this study to establish competitive production strategies that can be utilised to improve product competitiveness in order to meet customers' expectations.

The clothing manufacturing industries in Zimbabwe is expected to revive and grow despite all the challenges being faced. There are economic conditions caused by national and international instability, and various internal challenges faced by manufacturers (Kanya, 2019). Most manufacturing companies are facing challenges that includes wastage of finances, time and energy as well as overworked staff (Esmaeel, Zakuan, Jamal & Taherdoost, 2017).

Mangudhla (2014) points out that clothing companies are struggling to survive under a tough operating environment. Zimbabwe's textile and clothing industry is still weighed down by economic challenges and are operating below 10% capacity according to the government statistics. There are some companies operating between 0-30% that has been severely affected by the dollarization in the Zimbabwean economy in 2009 and the influx of cheap products from abroad. These companies do not have foreign currency to buy raw materials and pay wages and utilities. There are also companies operating between 30-60%, these have been into export and have contracts to

supply certain companies especially those in South Africa. These companies get finances for raw materials from the abroad clientele or customers. However, with the high inflation in Zimbabwe, the clothing manufacturers are failing to recapitalize and acquire new technology. Foreign exchange restrictions, highly pegged exchange rates, high inflation and interest rates have prevented most companies in Zimbabwean from affording and accessing the much-needed capital and equipment. This has reduced competitiveness of Zimbabwean products even in the domestic market (Mugumisi, 2014). Sithole, Sithole and Chirimuuta (2018), in their study found out that large companies in Zimbabwe need to implement creative and decisive marketing strategies and catch up with the winning marketing strategies for the Zimbabwean economic environment.

Mpofu (2013) notes that the Zimbabwean clothing sector is fast losing its domestic market share forcing companies in the sector to close, downsize its labour force and reduce production capacity. Aliyan (2011) notes that the major challenge facing the clothing sector is the issue of finance, which is difficult to get from the banks. The banks that offer them loans provide it on a short-term basis and the interests' rates that are being charged by the banks are too high. This is more to companies that are not exporting and are only selling to the local market and they do not have any foreign currency reserves to buy raw materials and pay salaries after the introduction of multi currencies in Zimbabwe. Clothing firms continued to downsize and some close even after the adoption of multicurrency system due to liquidity crisis that has seriously hindered efforts to recapitalize. Mugumisi (2014) asserts that Zimbabwean banks cannot offer long term loans, and the costs of borrowing have become too high making recapitalization difficult and consequently

hampering competitiveness. Recapitalization and buying of new technology has become difficult due to hyperinflation, resulting in reduced competitiveness of Zimbabwean products even on the domestic market.

The high cost of utilities also made it difficult for companies to afford the charges from suppliers like ZESA, Tel-one and the City Council. Power shortages and outages are constraining the volume production and causing some firms to use generator power. This has led Zimbabwe to rank poorly in global comparison of economic crisis (Mugumisi, 2014). Taking into consideration the high production costs the sector companies cannot compete with the imported goods, which are way cheaper than what they produce (Aliyan, 2011). Mugumisi (2014) in his study explained that the Zimbabwean infrastructure deteriorated significantly during the period 1999 to 2009. The roads, railways and communication lines are now in a very poor state, resulting in significantly increasing transport costs as well as production costs. These bottlenecks however, make it difficult for the clothing sector to regain competitiveness.

Zimbabwe's clothing manufacturing industry is also suffering. The Clothing industry is suffering due to the influx of cheap often substandard imports from countries like China, Mozambique and Dubai, of which most of the importers do not pay duties (Mhlanga, 2020). Nyoni (2017) states that second hand clothing and cheaper alternative clothing continue to flood the market, taking a significant share of the clothing market and leaving the manufacturers teetering on the brink collapse. As reported by Chingono (2016), this has forced many companies to close down and some retrenching the workers. The sector has lost its domestic market share which therefore, forced the companies to reduce production capacity. Mpofu (2013) also stated that the

clothing manufacturing companies are failing to sustain the local as well as the international market share due to the production costs that have gone high. This has led to a continuous collapse of the sector hence the need for revival. Studies on how competitive products can help formulate production frameworks are abundant but mostly done in other countries and other areas but not in the Zimbabwean clothing sector. Therefore, the need to conduct this study to examine challenges that are being faced by clothing manufacturing companies . The findings of this study may be used to design strategies that may be used by Clothing manufacturing companies in Zimbabwe in the current economic situation and in any country in the economic situation that is similar to that of Zimbabwe. The production of competitive products will help the companies to be effective and promote competitiveness on the market. The section below presents the research objectives and questions that guided this study.

Research objectives

The study sought to:

Establish production challenges faced by clothing manufacturers depriving production of competitive products in Zimbabwe.

Research questions

1. What production challenges are faced by clothing manufacturers depriving production of competitive products in Zimbabwe?

Research methodology

The research is based on a qualitative research approach. This study employed unstructured telephone interviews and an explanatory case study research design was employed to fit the data collection instruments. Due to the Corona

virus (Covid-19) pandemic and restrictions, the researchers were unable to travel to the manufacturing companies to collect data that is why unstructured telephone interviews were used. A population from five clothing manufacturers in Harare, Zimbabwe was desired for the purposes of the study. The participants were five production managers, five marketing managers, five operation managers and or five merchandisers, five line supervisors and five designers of each company selected through purposive sampling technique. These participants were purposively selected for the study because the assumption was that these participants were skilled and well experienced in their areas of work meaning they were able to communicate their experiences and opinions on the challenges faced preventing production of competitive products. Confidentiality was practised, where information was considered secret, sudo names were used such as D1 for designer 1 to 5, PM1 for production manager 1 to 5, OM1 for operations manager 1 to 5, LS1 for line supervisor 1 to 5, MKM1 for marketing manager 1 to 5 and MC1 for merchandiser 1 to 5. The data collected in this study was presented in form of narrations augmented with tables. Thematic analysis was utilized in this study. The researchers established protocols and procedures necessary for the study to be considered worthy of consideration by readers like credibility, transferability, dependability and confirmability. Ethical considerations that include institutional approval, informed consent, active consent, deception, coercion and freedom to decline participation and confidentiality, anonymity, and the concept of privacy were followed in this study. The paragraphs below presents the findings of the study.

Findings and Discussion

Demographic characteristics of participants

Gender

The gender of participants for the study were 9 males and 12 females. This implies that the females were the majority gender that occupied most management positions since the study participants were drawn from company managers, designers and line supervisors.

Age

The majority of the participants were aged between forty and forty- nine years as these totaled to ten. A few of the participants were aged between thirty and thirty- nine years. Very few of the participants were above fifty years and these were only four participants. Since most of the management posts in the sampled clothing manufacturing companies were filled by young personnel between thirty and forty -nine years such age group is considered energetic to accomplish high demanding managerial duties for smooth running of production (Dewitt, 2016). The section below presents the academic qualifications of the participants.

Academic qualifications of the participants

The academic level of the sampled company managers, supervisors, designers, line supervisors and merchandiser participants for this study varied from grade 7, form 2, Ordinary Level, to Advanced Level. Out of the 21 participants, seven Grade 7 qualification, one participant had reached Form two. An average number of the participants had "O" Level "A" Level qualification. The findings show that most of the participants of the study had

“O” level qualification. This could be an indication that majority of the clothing manufacturing management personnel did not advance much in their education and this could be due to economic hardships or lack of motivation to pursue higher education qualifications. However, those few management personnel with qualifications above "Ó" Level could adequately guide those with lower qualifications in designing strategies that would lead in production of competitive products among the clothing manufacturing industries. Generally all of the participants were highly literate to effectively communicate in business forums which require management opinion.

Professional qualifications of the participants

It was revealed that out of twenty one participants, ten of them did not possess any professional qualification, two had National certificates in Clothing production, whilst seven had Diplomas in clothing management related programmes and two had Degrees in their areas of specialisation related to clothing manufacturing. This however, indicates that above half of the management posts in the sampled clothing manufacturing companies were filled up by employees who had professional qualification in their areas of specialisation and had vast experience in working on the management positions they occupied. Such experienced personnel are very essential in management duties as they are always confident with work procedures they have implemented and succeed. With such experience and vast professional qualifications, the management personnel faced some challenges in their job and have tried some mitigatory measures for achievement of production of tasks within their organizations. Employing unskilled workers may be inexpensive for the clothing manufacturing companies to accomplish their production without raising consumer costs (Vitez, 2017). Therefore, if

meaningful production is to be accomplished, clothing manufacturing companies should employ well qualified workers with relevant professional qualifications in the posts for effective and efficient production sessions.

Participants' positions

From the total number of 21 participants in the study, there was only one operations manager, five production managers, three marketing managers, two merchandisers, five line supervisors and five designers. This gave us a clear indication that there were less operations managers in the clothing manufacturing companies and the production managers carried responsibilities of the operations manager in most cases. Having a few operations managers means that most sampled companies did not have operations manager's post, implying that most of the duties of the operations manager were done by production managers and line supervisors. This was giving a lot of work to those who were assisting in areas that were not theirs and this situation could lead to low-quality garments being produced. The section below presents the findings with regards to challenges that were encountered in the clothing production in clothing manufacturing companies in Harare.

Challenges in the clothing production

From the conducted interviews, the following challenges were unveiled: low quality fashion products, simple designs, outdated machinery, poor infrastructure, high rates of imports and high inflation rate. These challenges are going to be discussed in the sections below.

Low quality fashion products

The issue of production of low quality products was mentioned by most participants during interviews as one of them complained that:

“It is now very difficult to get the right raw materials for the designs. Sometimes the fabrics we find here does not match what the design requires and we do not have money to import. That is why we end up using whatever is available for work to be done.” (MKM1).

On the same issue of low quality products another participant echoed that:

“The needles and threads are a challenge because they break in the middle of production. Poor quality needles and threads are compromising quality of the end product”. (MKM2).

From the above statements, it shows that the clothing manufacturing companies struggled with getting the right raw materials for their designs of which some participants argued that, sometimes they would not get them at all.

Simple Designs

This was also raised by the interviewed participants a challenge that was faced in the production. One of the participants indicated that:

“I did not do any designing course so sometimes it is really difficult to bring out the exact design as it is for the client. In other words, I lack designing skills”. (D2).

Another Participant presented the issue of simple designs by explaining that:

“Our products lack originality in a way that designers are copying

designs from the internet and fashion magazines. There is also an issue of misinterpretations of designs that would make the products difficult to sell". (MC1).

Another interviewed participant also hinted that:

"If you design your product, it will not come out the way you would have wanted because we are told things are expensive and the organization cannot afford to buy the actual raw materials we want. We end up making simple designs to reduce costs and pricing". (D3).

Another participant echoed that:

"Mass production is hindering us to make designs that are too stylish because costing will be too high so we are not designing at full capacity". (D5).

These statements above clearly indicates that the companies were not designing unique garments due to lack of designing skills, cost of materials and the selling prizes they would charge per product.

Outdated machinery

This was another challenge that was unveiled by the participants during the interviews. Most of them indicated that use of out dated machinery hindered production of good quality garments that would satisfy their customers. On the issue of machinery one of the participants explained that:

"Machines in this company are now old and are no longer working well. They keep breaking down during production affecting our production schedules." (Ls3).

On the same challenge of outdated machinery, another interviewed participant explained that:

“It is expensive for us to have a properly planned machine maintenance or to have a mechanic employed by the company” (PM1).

On the issue of machinery another interviewee indicated that machine breakdown was persistently disturbing the smooth running of production. The participant echoed that:

“There is always machine breakdown and fixing of machines every time is really a problem. Operators spent more time seated doing nothing waiting for the machines to be fixed” (PM5).

The Above explanations show that machinery was a challenge since it was outdated and hardly maintained since the companies were failing to employ staff to service the machines regularly. It is therefore suggested that companies should try to update their machinery and have members employed to better maintain the over used machines for improved production speed.

Poor infrastructure

The findings of this study shows that infrastructure was a challenge during productions as this was indicated by the interviewed participants. On this issue of infrastructure one of the participants explained that:

“Electricity is a big challenge here. The power shortages are too high and it is affecting production lead times and cycles. Sometimes we have to work night shift to cover up production and it is very stressful and tiresome because you are needed at work the following morning by 7 am you are logging in”. (PM4).

The issue of infrastructure was also hinted by another interviewee who disclosed that:

“Roads have potholes, some are dusty and uneven. Our vehicles are not working because of these roads. Fuel costs are very high and sometimes not available, you need USD to easily access fuel. Our transportation costs have gone too high because of the poor road infrastructure”. (MKM3).

Shortage of water was also mentioned by another participant as a challenge during pressing the products. One of the participants reiterated that:

“We do not have running water sometimes which is a problem in production when it comes to ironing, cooking and for the toilets. It really makes life difficult at work” (LS2).

The above explanations show that infrastructure like roads, water and electricity shortages were hindering production in most clothing manufacturing companies. There is need for a manufacturing company to be located where there are good roads and should also have continuous supply of electricity and water which are needed highly in clothing production if

meaningful production is expected.

High rates of imports

The findings also show that high rates of clothing imports was a challenge to most clothing manufacturing companies in Harare. The incoming clothing bales disturbed the quantities of clothing items a company could produce and sell. As a result production quantities were low. One of the interviewed participant elucidated that:

“Everyone is now selling clothing imports from China, Italy , Turkey. Some even order from South Africa. They are selling online through WhatsApp and some in their car boots especially in town, Westgate and Machipisa. It is destroying the clothing market”. (MKM1).

On the same issue of high rates of imports another participants explained that:

“There is now a lot of mabhero (second hand cheap clothing items) whether it is in town or in locations where we stay that are competing with what clothing manufacturers produce and people tend to go for these cheap clothing products because people are hit by our poor economy. They do not have money”. (MKM3).

The above sentiments by interviewees reflect that the influx of secondhand clothing items had a negative effect in the production in most companies as they are forced to reduce the quantities since most people were lured to buy cheap second hand clothing items from abroad. Therefore, these companies may should design very high quality collections that attract a lot of customers for them to sustain their businesses.

High inflation rates

The finding of the study reveals that high rates of inflation had a bearing on the

production in most companies. The sampled participants indicated that high inflation rates were affecting the amount of money they would want to use to source fabrics and equipment in their companies. One of the participants alluded that:

“We are unable to buy new technology, software and high quality raw materials because of the currency issues. Our clients buy from us in ZW\$ (Rtgs) and by the time we want to change it to USD it would have inflated.” (D3).

On the same challenge regarding high inflation rates another participant who was interviewed echoed the following sentiments:

“Production has become costly because everything has become expensive, that is transport, electricity, water and maintenance of machinery. Prices change every day and we cannot cope up with them because our profits are low”. (OM1).

The statements above shows that high inflation rates were affecting the production in most clothing manufacturing companies in Harare. The companies were facing challenges in buying fabrics, trimmings and the sewing notions, paying water and electricity bills, buying new technology due to the everrising exchange rates in the country. To cater for inflation it was suggested that they can sell their products in the United States Dollar which was being demanded by every business person.

Discussion of findings

From the study findings it was revealed that the manufacturing companies were producing low quality fashion products as they were using low quality

trimmings and sewing notions like threads. As a results, some of their fashion product did not satisfy the targeted customers because of the cheap trims, low range and low quality of fabrics locally available. Tahiduzzaman, Rahman, Dey and Kapuria (2018) hinted that quality is key for customer satisfaction. The local textile sector could not meet the demand for the clothing manufacturing sector. The fabrics' aesthetic value could not match the trendy fabrics made elsewhere and Chuma, Chipambwa and Komichi (2018) agrees to this. The production of low quality fashion products in most of the companies reduced the number of repeat sales as customers were after good quality products worth their money. This has led to the clothing manufacturing companies being unable to meet desired competitiveness as well as company objectives (Nyoni, 2015). In order to improve the quality of fashion products, the clothing manufacturing companies may make use of the best quality fabrics and trims to satisfy their customers as suggested by most of the study participants. From the findings, most marketing managers mentioned that the products produced at their companies were of high quality and they produced acceptable quality garments for the intended market although the quality would not match international market standards in terms of fabric quality and production proficiency. It was mentioned that garment quality was assessed at every stage of production from raw material sourcing to delivery since quality adds value of the product. The managers complained that they were not getting high quality materials within the country and it was very expensive to import the materials due to high import duty and long procedures to follow when importing materials. Covid-19 pandemic has also worsened procedures of raw material importation process. Due to the city/ nationwide lock downs peoples earnings from businesses were reduced and that led to a drop in

demand of clothing products and it took manufacturers longer times to have enough funds for raw materials. The fear of infection from other countries slowed down possible transportation of materials since some transport companies reduced their trips and workers' mobility.

It was also revealed that garments sold well but there were yielding low profits due to the high production costs emanating from high cost of power, transport, raw materials as well as labour costs. The cost of a garment after calculating all the costs would then prove to be expensive. From the records in the companies, one could tell the rise of selling price ranges of the clothing products caused by high cost of inputs. The sampled participants in the clothing manufacturing companies revealed that these companies were trying their level best to minimise costs by retrenching some workers and cutting down on other things like food provisions at tea breaks and at lunch. The clothing manufacturing companies were then looking into ways of reducing costs like improving fabric utilisation and reduction of overheads costs so that they would be able to buy high quality raw materials that would enhance the quality of garments produced. Labour productivity where more pieces per tailor per day was needed to increase as a way of reducing production costs and yet still be producing high quality fashion products. The approach highly strained the manpower and in most cases negatively affected the quality of the products.

From the study findings it was mentioned that the companies ended up designing simple clothing garments as compared to the imports as a way to cut cost on raw material like trims (buttons, zips, shoulder pads, sewing threads and linings

The study findings revealed another factor that was affecting the quality of produced clothing products, hindering the production of competitive products, pointing to the shortage of equipment and materials. It was noted that quality in clothing production was also compromised by inputs like poor quality needles and threads. The threads and the needles broke during production and open seems, missed stitches and holes on the garment were the common defects found on the finished garments. Though the line supervisors mentioned that almost every department in the clothing manufacturing companies had a quality control system in place to control and maintain consistency of high levels of quality, these problems still persisted. The fact that there was quality control in these companies suggested that the clothing manufacturing companies in Zimbabwe are strongly aware of the importance of quality but it needed some improvements. The clothing manufacturing companies should therefore invest in buying the best quality raw materials to produce the clothing products competitively clothing products that may satisfy customers (Tahiduzzaman et al., 2018).

The findings revealed that most companies were producing very simple designs. It was revealed that since some designers were not skilled in creating unique fashionable designs. This was due to lack of professional fashion designers in most companies. Dzikite (2017) indicated that the technical process is guided by skills essential in the workplace at a time when industries change skills development, creativity, and innovation and collaboration as major issues in the economic and social context of work in the knowledge society. Dandira and Maphosa (2018) holds the view that for an individual to come up with creative designs, in the new millennium individuals have to be taught how to use a variety of technologies in designing. Having advanced

skills in fashion designing will enable companies to produce fashionable fashion products that will sell well. As noted by some participants in the marketing and merchandising departments that sometimes, the pattern making team misinterpreted designs because the designer would not have captured the exact design features or the features were not accurately executed in illustrations and first sample pattern. This was because some of the designer participants had minimum qualifications. Most participants got their skills from working-experience and only one had advanced to university level. As a result, the garments produced lacked originality and some had outdated details. It was revealed that most of the companies relied on the internet and fashion magazines to get inspiration for designing. This could be as reason why the designers had no skills to explore their markets and only relied on information the marketers and merchandisers brought. Designers need to understand all the complex and interacting issues that needed to be taken into consideration in order to come up with good eye catching designs (Kozlowski, Bardecki & Searcy, 2019). There was also need to incorporate innovation in all aspects of their practice, visions and goals making sure garments produced are timeless, durable and continued to competitively attract customers (Essays, 2018). In order to come up with good designs, Maine (2019) points out that designers should be extremely competitive, be in a position to push themselves and continually striving to be always ahead of their competitors. They should constantly come up with original, creative and innovative ways to produce competitively successful clothing designs. However, McRoberts, Freeman and Thibodeaux (2015) explained that creativity in design is an ever-increasing demand for the fashion industry professionals. This points to the fashion designers as the creators of fashion to

be quite creative in order to come up with interesting designs that would attract the majority of customers and sell well. On the other hand, some participants felt that the designs produced in the clothing manufacturing companies in Zimbabwe needed improvement on style. It was said that the designers copied designs from Europe, hence there was lack of originality though one production manager argued that designs they get from Europe were effective to consumer demands because customers were also following these designs on the internet. In addition, they did not just design but design to solve problems hence some customers were satisfied by the copied designs. There was lack of skills required in the Zimbabwe clothing sector a significant number of participants in this study had no qualifications in the related field. Therefore, the need for capital to upgrade the clothing manufacturing workers through skill training and educational programmes that will better equip the workers for improved competitiveness and high productivity. This could be in house training where the qualified train the unqualified or outside training where employers offer employees incentives to go to school or colleges to get trained in the skills to the industry standards. The employers also needed to communicate high expectations to employees that would motivate and give them self-confidence to wanting to advance in their professional skills. There was also need to evaluate the employees' performance regularly leading to promotions and terminations of contracts on those who were not willing to advance themselves (Skripak, 2016).

Another factor that affected product designs was that the raw materials initially wanted by designers were not provided. One of the sampled designers mentioned that their designs would not come out the way they would have wanted because they were told raw materials were expensive and the

manufacturing companies could not afford to buy the actual materials to suit the designs. These designers ended up making simple designs to reduce costs and pricing. This shows that the clothing manufacturers were not giving their designers exposure to be innovative and thus reducing competitiveness of garment designs produced. The interviews revealed that in some of the sampled companies, fabrics and designs were mostly proposed by the retailers who sold these clothes. A common practise whereby customers and the manufacturing companies would decide on a style was also noted in some companies. However, the design function rarely became involved in the research on fabrics or different styles but they were more into sample production processes, grading patterns or improving existing designs that were already on the market. However, if unique functional designs are to be realized, there is need for the designers to be very resourceful and involvement in critical thinking.

It was noted from some marketing managers that the designs were accepted well on the market because the buyers from the local shops kept ordering for more supplies. These buyers also gave feedback to the manufacturing companies on customer satisfaction. One of the sampled marketing manager in the sampled company that specialised in women's wear was confident that their designs were effective because they would sell fast and were always supplying shops around the country. The quality and performance of the garments met the customers' demands but there was room to improve the designs of existing products by incorporating innovative features to the products. The clothing manufacturing companies that focused on intrinsic quality features greatly achieved better results in terms of resourcefulness, creativity and innovation in designing unique competitive garments that

would attract the market (Sutter et al., 2015).

The recommendation is that customer preferences change rapidly, therefore, to fulfil the changing needs and demands of the customers in the clothing industry, through innovations, the clothing manufacturing companies need to invest in research and product development. This would enable them to produce stylish original designs that are up to date with the fashion trends that satisfy the customers.

Outdated machinery was another challenge the clothing manufacturing companies were facing as indicated in the study findings. The interviewed line supervisor said that the machines used in the clothing manufacturing companies were quite old and they continuously experienced machine break down during production. This showed that Zimbabwe clothing manufacturing sector was facing challenges like obsolete equipment in the clothing industries and this resulted in the rise of operation costs, thereby affecting the price of products produced. It was also noted that these were the main reasons for delays and bottlenecks in the clothing production. Some production managers mentioned that they were using outdated and not properly maintained machines which worked slowly and some were idle due to some machine parts that had been altered, removed or destroyed. This gave a clear indication that there was limited acquiring of new machines and proper maintenance of old machines happening in the clothing manufacturing companies in Zimbabwe. The inability of the sector to compete on the market was due to inadequate investment in technology (Chiromo & Nel, 2018). There was always a machine breakdown and fixing of machines every time. Operators would spend more time seated waiting for the machines to be fixed, according to one of the production managers. Workers sometimes sat for

hours waiting for broken machines to be fixed, meaning there was high idle time created in fixing these machines. This was also a clear indication why the clothing manufacturing sector was struggling in its operations because there was no maintenance to improve on machinery and technology that would lead to enhanced product competitiveness. Total production maintenance had become a thing of the past. Machines were no longer maintained as before at stipulated times, there was no improved equipment effectiveness for the production of competitive products as highlighted by the sampled participants. Of which machinery maintenance is key to improved equipment effectiveness and high efficiency (Shah, Deshpande & Ramchandra, 2015), thus improving competitiveness of a clothing manufacturing company.

Inadequate investment in technology has been the cause for the clothing manufacturing sector failure to compete on the market. The findings indicate that the clothing manufacturers need to engage with the local government in policy formulation to promote technology investment (new machinery and systems). The clothing manufacturing industry is continually experiencing changes in the technology worldwide. But it was surprisingly noted that despite the rampant availability of a variety of Computer Aided Design programs, only one company under study was using CAD systems for automating the design process. Even in pattern making and cutting where a full CAD/CAM system like Lectra or Geber systems, could be used for pattern generation and computer-controlled cutting were not available in most of the sampled clothing manufacturing companies. Most designers mentioned that the manufacturing companies were still doing it manually. The production managers agreed that the assembly and finishing operations were also mainly manual where they used general purpose machinery that required skilful

operators. The Zimbabwe clothing manufacturing sector could make use of automated machines that would help them with fabric utilisation, more speed, flexibility in terms of style changes and production runs and high-quality competitive products. There was need for automation of sewing machines where computer controls are programmed to position foot and needle, back tacking enablement, thread trimming and stitch condensing as well as adding fullness. Sensors could also be added to report thread breaks, skipped stitches and fabric edge. These have potential for the clothing manufacturers to enhance the production efficiency, quantity and quality of products. Lack of advanced technology made it very difficult for the clothing manufacturing companies to meet lead times set by buyers.

Investment in new technology would enable the industry to compete with imports from the Southern Africa region those from the Far East. Dandira and Maphosa (2018) commented that scarcity of new technologies such as sewing machines hinder production work in clothing manufacturing companies. With the severely constrained local textile sector which is only able to supply a small range of cotton fabrics, support measures that will help textile products to be produced locally and competitively needs to be introduced. Poor infrastructure was another problem raised.

The challenges of poor infrastructure such as power and water shortages and other added costs related to production. It deprived the manufacturing companies from operating well in production when there was load shedding hence increased lead times and late deliveries. Some of the clothing manufacturing companies did not have borehole water at their premises. Since the City Council of Harare no longer consistently supply tapped water they had to buy water every now and then for their daily use like ironing,

washing and sanitary uses and even for drinking. Some participants especially in the marketing sector complained that transportation of raw materials and deliveries had proved to be very expensive due to the poor roads which had potholes that were destroying company vehicles and also high fuel costs and its availability affected the transport system like roads and railway lines were poorly maintained contributing to longer delivery times.

The shortages of these resources had led to the depletion of the clothing manufacturing companies as noted by Mugumisi (2014) who echoed that some companies were stretching to their limits due to high production costs. Availability of adequate infrastructure could be viewed as an essential link for the growth and development of manufacturing companies in Zimbabwe (Bonga & Sithole, 2020). It could be quite significant that the government of Zimbabwe addresses these problems of poor infrastructure that hinder the production of competitive clothing products like water shortages and power outages as a matter of urgency as high production is to be realised in clothing manufacturing companies. It is therefore recommended that the local government need to help the clothing manufacturing companies with upgrading the infrastructure (cost and supply of electricity, water and transport networks) and giving financial support to the textile companies. Clothing production was also hindered by an influx of imports.

Some of the responses from the participants revealed that due to the economic meltdown, there was an influx of cheap imports from Italy, Turkey, China and South Africa in the form of first and second hand clothing items that were flooding the clothing market. The Zimbabwe clothing sector was fast losing its domestic market share forcing companies to downsize in labor and reducing production quantity due to the tough competition from the influx of

cheap products (Mpofu, 2013, Mapanga ,2015) and a lot of second hand imports (Mapanga, 2015).This concurs with the responses of the sampled participants of this study.The participants especially from marketing and merchandising sections mentioned that there was also a lot of second-hand clothes from Mozambique that had flooded the clothing market. These were relatively cheap and affordable to the disposable income of the customers of a bigger segment of the society as also revealed by Sithole et al., (2018). These second-hand clothes have imposed a very stiff competition with the locally produced products to the extent that competitiveness of clothing manufacturing companies in Zimbabwe has declined. Most people are now on the roads selling clothing items to sustain themselves but at the same time imposing a competition threat to the local clothing manufacturing companies. Another challenge that came out was that the advertising cost which was said to be so high that the clothing manufacturing companies could not consistently market their products making it difficult to be highly recognised on the market. From the records, the profit margins had excessively declined due to the stiff competition. The companies no longer had high sales volumes like some years back.

These imports were competing with the locally produced garments due to their aesthetic look and affordable prices as compared to the simple ones produced in Zimbabwe with high costs Nyoni (2017).Some of the sampled designers in the clothing manufacturing companies mentioned that they were forced to use the fabrics and trims that were in stock because the companies could not afford to buy trims or fabrics that were in the prevailing fashion. In some cases, the designers ended up using available fabrics with flaws like shading and the garments produced would not move fast on the market.

To boost their sales for the Zimbabwe clothing manufacturers, the import of second-hand clothes should be totally banned and this can be done with the help of the government (Mapanga, 2015) to promote local textile and clothing industries sales. The government can also impose the buy local policy where the leading clothing outlets order their products from the local clothing manufacturers. On the other hand, the manufacturing companies need to target the right customers and understand their needs. There was also need to connect with existing customers that would give them referrals to new customers in order to boost their sales. Pricing strategies also needed to be put in place to make sure that produced clothing products were competitively priced hence boosting sales (Edwards & Jenkins, 2015). It also called for the clothing manufacturing companies to be innovative in production so that they could have competitive prices (Sithole et al., 2018).

The clothing manufacturing companies need to be protected from unregulated imports of clothing items from China and Italy so that the local companies can be viable and produce more than they were producing. The next section presents a discussion on high inflation as another challenge faced by the clothing manufacturers that were studied.

High inflation rate had hindered companies to acquire new technology and high quality raw materials for the industry. They sell their produce in ZW\$ (Rtgs) and by the time they convert it to USD it would have inflated and they get small amount of the foreign currency. This money then would not be enough to buy new technology and raw materials of high acceptable quality.

Inflation has led to a decrease in manufacturing productivity in the clothing

sector. Policy makers should however, manage inflation very well in order to improve the productivity of the clothing manufacturing sector (Mawufemor, Isaac & Faisal, 2016).

High inflation rate was not only hindering the buying of new technology and raw materials, but also led to increased production cost.

The findings also revealed that it was expensive to maintain the available machines and company vehicles they used to transport goods. High transport costs, high utility costs and high costs of maintenance of machinery constrained the production volumes and as a result hiked the production costs. High Inflation rate has an impact in the production of competitive products. Some companies were severely affected by the dollarization in 2009 and were finding it difficult to revive (Mangudhla, 2014). This had reduced competitiveness of the Zimbabwe clothing manufacturers even on the domestic market because the production prices changed every day due to inflation. The clothing manufacturing companies that were not exporting faced challenges because they had no foreign currency reserves to buy raw materials. These findings are supported by the study that was done by Siyakiya (2014) as noted by Mawufemor Isaac & Faisal (2016). The study reported that hyperinflation reduced manufacturing sector output in Zimbabwe for the period of 2000-2009 since the economy was highly monetised and had depreciating assets (Mawufemor et al., 2016).

Conclusion

From the study findings, the researchers concluded that clothing manufacturing companies face challenges in producing competitive products. These challenges included simple designs since they were not designing

unique styles as they were mostly copying designs from the internet and, magazines and taking specifications from the customers. The workers themselves lacked skills in designing. Low quality fashion products were also another challenge that was revealed by the participants. This challenge was caused by use of low quality fabrics and trimmings since they were not able to buy the best suitable fabrics because of very high prize charges. It was also concluded that most clothing manufacturing companies were making use of outdated machinery in their production which were rarely serviced since it was expensive either to recruit or even hire machine technicians to repair them. The researchers found out that poor infrastructure paused a challenge among clothing manufacturers such as power shortages due to continuous load shading such that most of the weekdays were spent without any reasonable production experienced. Water shortage was also established as a challenge experienced by most clothing manufacturing companies in Harare as they had no borehole water to supplement. This was scenario was ranged as not healthy at all by most companies as they ended up buying water from the municipality and some from shops for workers and for pressing and cleaning their workspaces. Poorly maintained roads with portholes delayed delivery of supplies to companies and orders to customers. High rates of imports from countries such as China and Mozambique paused a challenge to production since most of their customers were rushing for these cheaper fashion products leaving the locally made staff. As a result most companies closed down and others retrenched most of their workers. This lowered production since they could not keep on producing clothing items that were not bought. High inflation rates was another identified issue since most clothing manufacturing companies could not meet the high demand of raw

materials to use, payment of worker salaries and purchasing of new technologies. The paragraph below presents the recommendations for further studies.

Recommendations for Further Research

There are many opportunities for future research from this study. A similar investigation could be expanded to include all the clothing manufacturing companies in all cities and towns of Zimbabwe as this study was conducted using population in one town with fewer participants and the results cannot be generalised to the whole of Zimbabwe. A comparative study could be conducted to compare the challenges that are faced by clothing manufacturers in Zimbabwe and those in other countries abroad such as South Africa, Nigeria and Mozambique. Future studies could evaluate whether the proposed strategies are the best for clothing manufacturing companies in Harare, Zimbabwe, to enable them to produce competitive products. Another study could be conducted using quantitative research approach for comparison purposes.

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