

China-Togo Value Chains: Nanettes and the Trade of African Print Textiles

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Abstract

Until recently, the norm for global trade flows was largely North-South. However, from the early 2000's, global trade has shifted. Global North trade has declined while South-South trade has risen and today surpasses N-S trade. Whether a direct effect of Bandung or not, it is certainly in the spirit and follows the vision of Bandung. This paper focuses on one such shift, that of the African Print Textile (APT) trade in Togo. My focus is on the APT trade between China and Togo, as a way of exploring the nature of South-South trade today. From the mid-colonial period onwards, the African print textile trade was dominated by a North-South value chain (NSVC), involving production in the Netherlands for distribution and consumption in West Africa and with Togolese 'Nana-Benz' traders playing a key role. Yet the dynamics of APT trade have changed in the 21st century as APT manufacturing has shifted to China as part of a South-South value chain (SSVC). Drawing on primary fieldwork in Lomé, Togo, long a hub of APT distribution in West Africa, I analyse the emergence of the SSVC and its characteristics – including the involvement of a newer group of Togolese traders known as Nanettes in a more flexible, trader-driven trade. I argue that the rise of the SSVC has disrupted the monopoly of the lead firm-governed NSVC, which has not been completely replaced, but forced to adapt. The case contributes to emerging discussions of SSVCs, which are mostly focused on opportunities for producers serving new forms of consumption, by showing how SSVCs challenge NSVCs within long-standing Southern end markets and by demonstrating the crucial and changing roles of traders in this context.

Keywords: GVCs, South-South trade, governance, textiles, Africa, China.

Introduction

This paper analyses the structure and evolution of one among many contemporary China-Togo value chains—namely, an APT chain that emerged in the early 2000s to surpass a long-standing N-S APT chain. The paper uses global value chain (GVC) and global production networks (GPN) analysis to

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address the following research question: *How has the West African APT market been restructured with the rise of China and with what implications for value chain governance and the Togolese economy?*

While GVC/GPN scholarship has contributed important insights to the description and theorizing of global supply chains, enabling the analysis of value production across dispersed sites of manufacture and distribution and exploring where power and value chain governance are located, its primary focus has been on N-S chains (Gereffi & al, 2005). Such chains typically involve production at sites of manufacture in the global South and consumption in the global North. Today, however, a growing body of research has begun to explore SSVC value chains (Horner & Nadvi, 2018; Langford, 2021), work that examines the dynamics of governance in a SSVC and the restructuring that is occurring at the downstream end of these value chains.

My research explores this emerging terrain of study by examining the rise of a SSVC in a southern end-market. Lomé markets have long been leading suppliers of African print cloth to West Africa and offer a privileged view of APT value chains. The paper focuses on the emergence of Chinese-Togolese APT value chains that shadow, compete with, and attempt to subvert the old NSVC from the Netherlands. It also analyses value chain structure and mode of governance. Rather than lead-firm dominated and hierarchical, as in the N-S VCI (Gereffi et al., 2005), the governance of the S-S VC2 is trader-driven, horizontal, diffuse, and rhizomatic (and constantly engaged in restructuring). This mode of governance may typify S-S chains more generally (Haugen, 2018; Lyons & al, 2013; Prag, 2013).

The paper draws on more than 20 months of qualitative research in 2020 and 2021, supplemented by several months in 2024, in the APT markets of Lomé. I conducted over 100 interviews with Togolese traders and street sellers of APT, with port agents and brokers, and with textile company and state officials. These interview data were supplemented by quantitative data on cloth imports from secondary sources and by extensive reading in the APT literature.

In section 2, I give an overview of the scholarly literature on GVC/GPN, while highlighting recent work on South-South chains and value chain governance, as well as of upgrading and value capture. Section 3 discusses data collection and methodology. Section 4 describes the China-Togo relationship, the APT market in Lomé, and Togo's central role in that trade. Section 5 provides an overview of APT history, as well as of the structure and nature of value capture in the APT value chain. Section 6 explores challenges in the China-Togo value chain (VC2) as well as economic and developmental implications. Section 7 suggests policies to enhance the SS trade of APT in this moment of change. Section 8 concludes.

I. South-South Trade, Global Value Chain Analysis and Value Capture

Beginning in the mid-1990s, global trade began to shift, from N-S to S-S (Horner & Nadvi, 2018, p. 213). In 2004, UNCTAD reported that “*the centuries-old international trade geography, where the South served as hinterland of resources and captive markets for finished goods of the North is changing*” (UNCTAD, 2004, p. 1; UNCTAD, 2015). Other reports confirmed these changes. In 2012, developing countries' trade exported within the global South exceeded the share of trade exported from South to North (Horner & Nadvi, 2018).

This new trade geography led the World Bank to use the term 'shifting multipolarity' to describe the rise of emerging economies in developing countries such as China, India, and Brazil. This shift has echoes in a long history of south-south cooperation, including language emerging from the conference of Bandung which urged countries in the global South to exchange resources, technologies and knowledge (Maruri & Fraeters, 2010, p. 5). This change signals the abandonment of a North-South trade relationship in which trade was market driven, often with specific requirements and conditions, and always asymmetrical in nature (that is, dominated by the global North), in favor of a South-South relationship that is still market-driven but also more horizontal and symmetrical in nature (Horner, 2016).

The GVC analysis, which emerged in the 1990's consisted in analysing the different activities or segments assigned to or carried out by different actors in a value chain. Traditional GVC analysis is known for its two concepts of "governance," exploring where power lies in the value chain, and "upgrading," which examines how actors in the value chain might enhance their value capture. Thus, GVC scholars have productively analysed a range of topics related to the global dispersal of production processes, including value capture and profit distribution along segments of the value chain (Gereffi, 2018), issues of power and chain 'governance' (Gereffi & al, 2005; Kaplinsky & Morris, 2000; Schmitz & Knorringa, 2000), relations between Southern producers and Northern lead firms (Gereffi & al, 2005; Henderson & al, 2002), and attempts at 'upgrading' by actors along the value chain (Bair, 2005; Barrientos & al., 2011).

While making significant contributions, these scholars' focus has largely remained on N-S chains, involving Northern lead firms and their connections with global South suppliers.

Such an orientation misses a growing element of global trade—namely S-S trade—to which, as mentioned, GVC scholars have only recently turned their attention (Horner & Nadvi, 2018; Langford, 2021). This new interest in S-S trade—reflecting today's 'shifting geography of the world economy' (Horner & Nadvi, 2018, p. 210)—responds to the emergence of South-South relations in becoming the dominant direction of trade flows for countries in the global South.

It is important to note that many GVC actors in the global South, especially Africans, participate in GVCs less through production and export than through import and trade. Consequently, many SS chains are less governed by lead firms than by traders, who rely on personal and informal networks in conducting business (Haugen, 2018; Meagher, 2010).

In the China-Africa (China-Togo) relationship, there has also been a shift from bilateral (state-to-state) relations to one focused on private actors—small, private entrepreneurs (Gu, 2009).

2. Data and Methodology

Over the course of 20 months, initially between December 2019 and September 2021, and later in 2024, I conducted 97 interviews with Togolese traders and street sellers of APT in Lomé, Togo's capital. I also conducted another 17 interviews with port agents/brokers and with textile companies and state officials. Among these, I engaged in multiple interviews with key interlocutors, especially large traders in the Lomé market. Some of these interviews were in-person, while others took place through the social media messaging service WhatsApp because it was during COVID-19. All interviews were

semi-structured and conducted in Ewe or French, both native languages for me, with notes written up following each interview. During a shorter period in 2024, I conducted three months of field work with traders, state officials, and young Togolese who work for Chinese traders.

The interviews focused on a range of topics, among others, recent shifts in the APT market, especially the intersection of N-S (Dutch) and S-S (Chinese) value chains, as well as implications of these shifts for value chain governance and upgrading. In 2024, I became interested in the presence of other, especially non-Togolese, traders in the APT market. I also engaged in participant observation—sitting in traders' boutiques, listening to their conversations and observing how they conducted trade, circulating in the markets and on the street—and was able to learn broadly about market activities. There is a robust emerging literature within anthropology on the APT cloth trade in Lomé (Edoh, 2016; Sylvanus, 2016) from which I have drawn insight about the culture and fashion of APT in Togo and beyond. Sociologists and economists (Prag, 2013; Murenzi, 2015) have also offered interesting studies of APT beyond Togo's borders. However, these works differ from a development study and GVC perspective, which gives greater attention to the embeddedness of APT within larger global structures and inequalities.

3. China-Togo and the APT retail market in Togo

3.1 The China-Togo relationship

While the Chinese presence in Africa dates to the 15th century (Wasserman, 2012), and grew during the 1960s and 1970s, it became largely absent and silent in the 1980s (Alden, 2007) before re-emerging with strong ties and development projects in Africa during the 1990s—ties and development which continues into the present (Wasserman, 2012).

As with many other African countries, China and Togo have a long history of bilateral relations, beginning in the 1970s with the construction of key infrastructure in Togo, such as the Palais de Congrès de Kara, Kegué Stadium, a regional hospital in Lomé. China has also been involved in technical trainings in Togo, in agriculture and health. China has tied this developmental relationship to cultural exchange through the Chinese culture and language “Confucius Institute” (Sovon & Long, 2023). This relationship is on-going and increased during the time of the Belt and Road initiative (2010s).

While China still has a strong bilateral (state-state) relationship with Togo, its presence has been deepened by private and small businesses. In the early 2000's China became Togo's largest trade partner because of its deep-water port and also because of having the lowest import tariffs in the larger West African sub-region. Togo is today a hub for the distribution of cheap Chinese manufactured goods to other West African countries, and especially to the landlocked countries of the Sahel in the north.

Today, imports from China to Togo cover a wide range of manufactured products, including textiles, clothing, machinery, and consumer electronics, among which are APT, the case study of this paper.

3.2 The APT Retail Market in Togo

African print textiles' origins lie with European imperialism and the Industrial Revolution. When the Dutch colonized Indonesia, they discovered a popular hand-made batik which they tried to machine-produce for Indonesian consumption. However, Indonesians rejected the European variety, preferring their own, and the Dutch looked to other markets and eventually found a large one in West Africa, where people were drawn to the wax print style of batik and its bright colours (Edoh, 2016; Sylvanus, 2016; Murenzi, 2015). Today, West Africa and much of sub-Saharan Africa are identified with this cloth and have incorporated it into their everyday dress (Edoh, 2016; Sylvanus, 2016). It is typical couture for professionals going to work and for those going to market, for those attending ceremonies—such as weddings, naming ceremonies, baptisms, funerals—and for people going to church. Today, APT is sold everywhere in West Africa, with Nigerians, Ghanaians and Ivorians its largest consumers (Murenzi, 2015).

The *Grand Marché* in Lomé, also known as Assigamé, is a hub of daily coming and going that is famous for its APT trade. This trade makes Assigamé the most important economic site in Togo's capital city and the largest cloth market in West Africa. In a small space of less than two square kilometres, this is where APT wholesalers and retailers from all over West Africa and beyond gather to buy and sell—and where VCI and VC2 converge and compete for attention. It is here that APT is bundled and sold to cross-border traders as well as to local street vendors, before the latter sell it to consumers who take it to the workshops of tailors, seamstresses and fashion designers located at the edge of the market and throughout the streets of the city who transform it into garments according to customer design.

While Togolese per capita consumption of APT likely matches or exceeds that of other countries, Togo is not a great overall consumer of African print cloth because its population is only eight million compared to Nigeria's 205 million, Ghana's 30 million, and Cote d'Ivoire's 26 million. However, Togolese traders remain the major distributors of APT throughout the West African sub-region. Anthropologist Nina Sylvanus (2016) claims that during the 1980s the wealth accumulated from the APT trade in Togo was greater than the revenue generated by Togo's state-owned phosphate industry (p. 9), long regarded as the main money-maker in the country, thus making the cloth market, as one interviewee commented, 'bigger than the Togolese state'.

The exact quantity of APT imported into this marketplace today is not easy to measure because companies at the port jealously guard their secrets, including from port authorities, and Togolese government statistics are incomplete and fiercely protected. Nevertheless, through conversations with traders, I was able to piece together estimates of APT annual imports from the Netherlands and China. During 2019 alone, an estimated 1.22 billion yards of imported cloth were sold in the Lomé marketplace.

While there are two major APT value chains, my focus here will be on the one from China to Togo (VC2).

Figure I illustrates the different segments in VC2, from production to consumption, and the different actors involved in the chain.

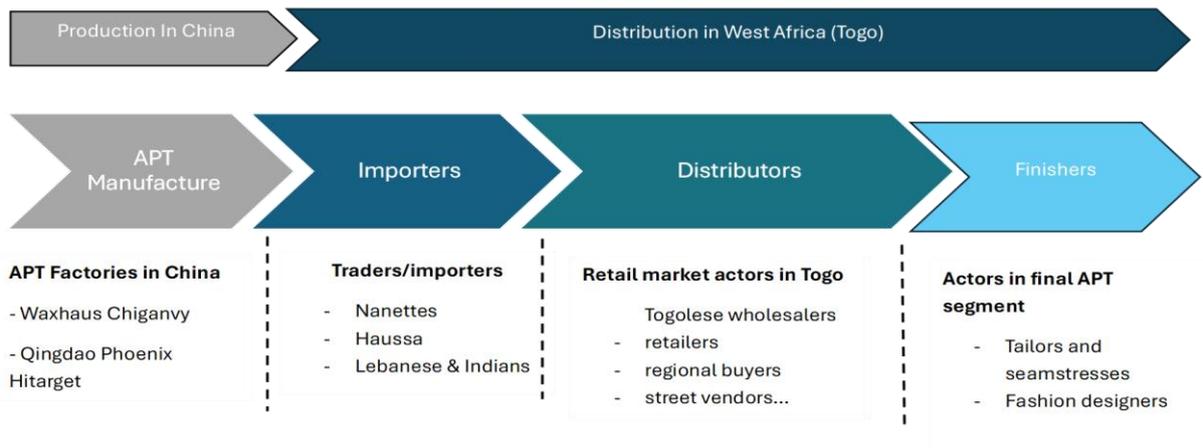


Figure I China-Togo APT value chain actors

Source: Author

In principle, the APT trade in Togo today is regulated. Thus, Dutch APT is only sold by Nana-Benz traders (20 total), with the Dutch company and lead firm Vlisco exerting vertical and hierarchical control. Chinese APT can only be imported by Togolese or other West African traders (usually from Niger), who must obtain a permit from the Togolese Minister of Commerce.² This means that when it comes to trading APT in Togo, Chinese are not permitted to distribute: they may intervene in production in China but not in distribution in West Africa.

However, this special ministerial decision has not been effective. Recently, Assigamé has seen Chinese companies also importing and selling APT.

4. APT history and structure

Togo, like other West African countries after independence, manufactured APT. In Togo, a state-owned factory, Datcha, produced APT, with the aim of capturing greater value from the APT value chain in West Africa. Unfortunately, due to a range of factors—the onset of SAPs (structural adjustment programs), poor infrastructure, mismanagement—the Datcha experiment failed. While Dutch APT was still present in Togo in the 1990s, distributed by Nana-Benz, the political turbulence of that decade, the devaluation of the FCFA in 1994, and global trade liberalization, opened the door to APT produced in China (but sold by Togolese Nanette traders in Lomé). This Chinese-manufactured cloth was often an imitation of Dutch APT patterns but sold for one tenth the cost.

4.1 Mapping the two value chains

Nana-Benz and Nanette traders are cultural heroes for Togolese, recognized as being responsible for bringing APT to West Africa and for transforming the dress and everyday life of West Africans. Though they are the primary and best-known stakeholders in VCI and VC2, they are necessarily dependent on a range of other actors. Without these other stakeholders, these value chains would cease to exist.

² <https://www.togofirst.com/fr/gouvernance-economique/1501-7099-togo-il-faut-un-agrement-pour-importer-des-pagnes-et-tissus-imprimés-rappelle-le-gouvernement>

While Nana-Benz today work under contract for a lead firm, the Dutch Vlisco Company (Interviews, OT-I – 2), for whom they do little more than sell the firm's product on the street—in fact they are now more retailers than traders—Nanettes are autonomous traders who direct and tie together much of the VC2 value chain. They go to China on their own, purchase cloth they commission (and often design) from Chinese manufacturers, arrange for its transport to Lomé, then sell it wholesale to second-tier suppliers. (Interviews, NN-I, NN-3, NN-11, NN-21).

VC2 traders—Nanettes—assume the place of lead firms in S-S value chains. But while Nanette (VC2) traders share governance features with lead firms, namely “market,” “modular,” and “relational” modes of governance ([Gereffi & al, 2005](#)), their characteristics are not fully contained within these categories and suggest a different, trader-driven governance regime. As solo actors, often one-person businesses accompanied by a few assistants, they can adapt flexibly to unpredictable market conditions.

Notice too that, while production in both value chains lies outside of Africa and creates value capture for Europeans and Chinese, distribution in West Africa incorporates many local actors—not only a chain of sellers, retailers and tailors but also state actors (national port officers and tax collectors (OTR)).

4.2 The emergence of Nanettes and VC2

VC2 traders, known as Nanettes, unlike Nana-Benz in VCI, are often not from prominent families. They are often everyday market women who took the opportunity to go to China to start working with Chinese APT factories (in designing and ameliorating the quality of Chinese APT). In so doing, they built their personal and business networks.

This meant that not only was value captured in China by these Nanettes, but also knowledge was exchanged (transferred)—for me, an asset and advantage of South-South APT trade compared to North-South trade. Most of the Nanettes I interviewed said that trading with the Chinese did not require much, simply samples of the APT they wanted to print and money to pay for the printing of the APT. In effect, both parties collaborated in designing, producing and ameliorating APT.

4.3 Flexibility and informality in VC2: Engine of competition

The structure of VC2 is fragmented and more complex than VCI. First, VC2 traders work with multiple manufacturing firms, sometimes at the same time, other times in sequence. Most manufacturers are located in China, with Qingdao Phoenix Hitarget Ltd, Sanhe Linqing Textile Group, and Waxhau Ltd, among the best known. However, there are dozens of other factories that are open to business with African traders. Some, like Sanhe and Hitarget, are private, while others are state-run (Interviews with NN-I, NN-3, NN-I6).

When I interviewed Nanette Noellie, always elegantly dressed in Dutch or brand-name Chinese APT, in her boutique several times in 2021 and 2022, she described an initial trip to China during which she visited 15 factories, all at factory expense, and discussed costs and benefits with staff at each, before deciding which one to work with. On a later trip, she inquired whether the factory could make copies of Vlisco—counterfeit Vlisco—for her. They refused, because they were state-run and ‘operate only during the day’, but they referred her to a private factory that ‘worked at night’ and ‘might be able to help’ (Interview, NN-3). In short, Togolese traders who go to China are offered a large and diverse

field of manufacturers from which to choose, in contrast to VCI Nanas, who do all their business with a single company in the Netherlands.

Second, like Vlisco, Chinese manufacturers control the logistics of conveying APT to Togo, but unlike with Vlisco, the transport fees are paid by Nanettes (Interviews, TP-1, TP-2), which provides a benefit to them. Once in Togo, these Nanettes, like Nana-Benz, distribute their Chinese APT to a range of wholesalers, petty distributors, and street vendors, as well as to trade partners in West and Central Africa (Interview, NN-1). Other traders stay home but give money to Nanettes to import APT from China for them.

Nanette Adangbeton gave an interesting account of how she came to design her own APT brands. When she began going to China in 2000, she bought counterfeits of Dutch cloth to sell on the Lomé market. At that time, however, Vlisco began pressuring the Togolese state to regulate the sale of fakes, and Adangbeton was fined a large sum when several of her containers were intercepted at the port. In response, she decided to design her own patterns, similar to the famous Dutch patterns although different enough to avoid litigation, and a new lucrative business was born. Today, she is famous for her VC2 APT designs.

Third, VC2 is flexible and not as rigidly structured as VCI. Anyone can become a Nanette, as long as she can find the means to cover the cost of APT manufacture and transport. Sometimes she obtains funding through bank loans, other times through personal credit networks.

4.4 Value capture through exchange

If defined as the exchange of resources, knowledge or technology, any SS corporation or set of relations must realize one of these three outcomes (Maruri & Fraeters, 2010). From the standpoint of GVC/GPN analysis, these exchanges become the real value of SS relationships compared to NS relations, which are narrow and exclusively defined by market relations and conditionalities and requirements of production and distribution. SS trade, by contrast, enhances exchange between Southern actors. While these exchanges are always a work in progress and ever only partially productive of equitable value capture, the case of APT illustrates a range of exchanges between Chinese manufacturers and Togolese traders (Nanettes), and between Nanettes and West African consumers, that have been innovative and mutually beneficial. In the following, I allude to some of the knowledge and resources that have been at play in this SS value chain.

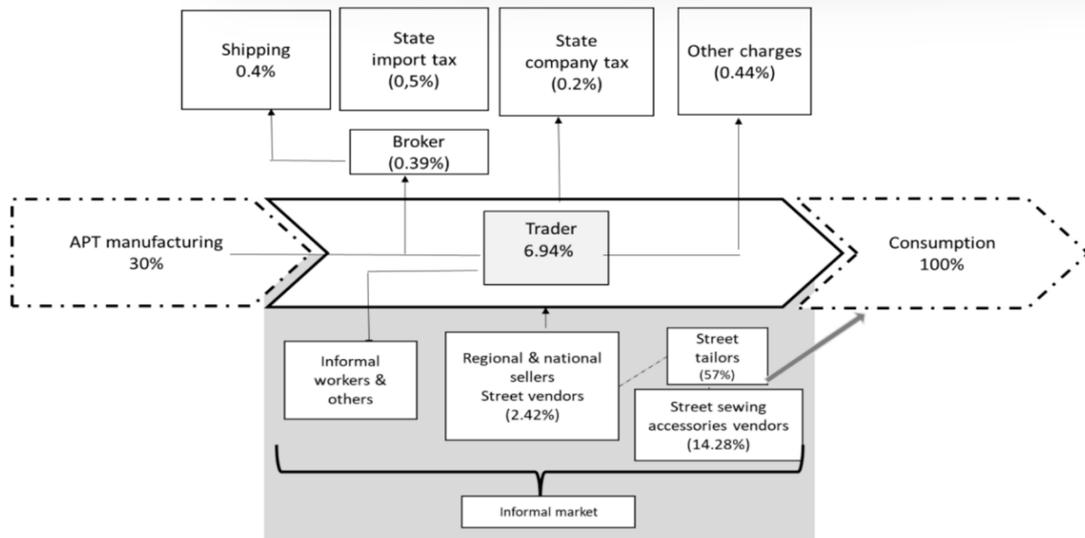
4.4.1 Exchange of knowledge

As mentioned, APT is mainly worn in sub-Saharan Africa and is identified as “African” (Edoh, 2016), this despite the fact that it is not produced in Africa and it remains quite expensive. While Nanettes may be known for trading cheap/fake copies of Dutch APT, the quality of APT is improving each year. Like their predecessor Nana-Benzenes—who help designing and giving names to APT (which contributes to its popularity throughout the sub-region)—Nanettes also work hand in hand with Chinese manufacturers to change the quality of APT. Today, while the price of Chinese APT remains 1/10th the price of Dutch APT, the quality and brightness of Chinese APT is rapidly improving and is quickly approaching the quality of Dutch APT. An interviewee told me in July 2024 that it is difficult today to tell the difference between APT from VCI and APT from VC2. While knowledge exchange

in VC2 is still rudimentary, the flexibility the value chain affords and the expanded role that Togolese traders play in it can also enhance upgrading in the production of APT, thus enhancing value capture for Togolese.

4.4.2 Exchange of resources

According to Uqalo (2015), more than 70% of APT is produced in China, though the figure is surely higher today. While China is the main supplier of APT, Nanette traders are the main distributors, especially in West Africa. Thus, value capture along the value chain is divided between Chinese at the upstream end and Togolese (West Africans) at the downstream. This latter creates a lot of job opportunities for Togolese (West Africans). Nanettes, wholesalers, regional buyers, street sellers, and vendors all capture value from trade. So do local fashion designers, tailors and seamstresses. APT is imported as semi-finished cloth that is transformed by West Africans, adding value to the chain and sustaining West African livelihoods.



Source: Author.

Figure 2: Value capture in the China-Togo APT value chain

Figure 2 details where value is captured in VC2. On a two-yard piece of APT cloth, 30% is allocated to the manufacturer. The trader’s margin is almost 7% (multiplied by millions of yards in each imported container). With that she pays import and sales taxes. She also pays her workers and other charges. When the cloth enters the informal market, a final vendor will realize almost 2.5% on the sale of two yards, from which she will pay market fees. The tailor or seamstress of the final garment gets 14%. These figures give some indication of the importance of the import trade for economies in West Africa.

While the assumption of classical economics—that national economic growth depends on production and export, a hypothesis that is not entirely false—it is also true that the distribution of APT in Togo distributes value across the commercial landscape in West Africa, thus enhancing the livelihood of thousands of Togolese in precarious informal markets.

What would make this South-South collaboration even more advantageous for Togo and West Africa would be a transfer of technology.

4.5 Challenges in the APT Chinese-Togolese value chain

Much change and innovation begin with a crisis. The COVID-19 pandemic was one such crisis that brought many changes to VC2. The borders were closed, and many normal activities were stopped at least for the first trimester of 2020. Even before COVID, travelling to China to purchase goods was becoming complicated for newcomers who wanted to get into the APT import business, both in Togo (which required the Commerce Ministry's approval) and in China (which required a visa, increasingly difficult to obtain). But during COVID, all travel to China was interrupted, and Nanette traders were unable to order cloth as before.

But due to the flexibility of VC2, and the ingenuity of its traders (who had built strong relationships with their Chinese suppliers), Nanettes were able to continue ordering APT, often working through email or WhatsApp. In this manner, Nanettes with strong ties to Chinese manufacturers were able to sustain themselves during the pandemic (while others found their businesses in serious decline). This new method—of calling an APT supplier in China, placing an order, sending the desired APT samples to China through FedEx—became the way APT imports are now carried out, even after the pandemic. There were also innovations to cross-border trade developed during COVID that continue today.

However, in interviews in 2024, I discovered a new set of traders on the scene in Lomé's Assigamé market: Chinese APT wholesalers. One of their companies is located on the second floor of a building which nowhere announces a company name, though apparently most market women know about it. In fact, it is quite convenient for them. Instead of gathering all the conditions to place an order with a Chinese manufacturing company to import a whole container of APT, this company plays the role of intermediary for them. The Togolese or other regional APT sellers bring a desired sample and place an order which no longer has to be an entire container's worth. Even 1/8th of a container is enough to place an order at this Chinese company in Assigamé—and at a price cheaper than what Nanettes sell APT to others.

This all seems very convenient: the Chinese factory is closer to the Lomé market and it is no longer necessary to travel to China to start an APT business. However, Nanettes are no longer the queens of Chinese APT in Assigamé. To put it simply, Nanettes now have serious competition in their local market, and Chinese today are attempting to monopolize not only the production of APT in Togo (and throughout West Africa) but also its distribution. If this take-over is successful, it will reduce West Africans to mere consumers.

4.6 Implications for VC2

Here, we need to pose a question: What happened to the Commerce Ministry requiring APT import authorization, an authorization reserved exclusively for Nanettes and West African importers? How was such authorization granted to Chinese entrepreneurs? After speaking with women at the market, I extended my interviews to young Togolese who work with the Chinese.

One of the interviewees explained that there is a Nanette in her 70s who was ill, and whose children were abroad, who agreed to let her Chinese partners conduct imports in her name. Today, he (the Chinese partner) imports more than what the Nanette needs and he is able to resell the surplus. It is of course also not difficult to bribe port officials.

The change this may bring about in VC2 is dramatic—and appears inevitable. It is another instance of producers taking over the entire value chain. The Dutch have done it with VCI. If earlier, Nana-Benz were partners of the Dutch, the distributors of their cloth in West Africa, today Vlisco has taken over distribution as well, reducing Nana-Benz's role and importance. Nana-Benz are today little more than retailers, with Vlisco now controlling the entire value chain from production to distribution, including the manufacturing of fashion and niche-designed clothing. Nanettes would appear to be following in their footsteps, albeit with Chinese rather than European interlopers, a fate that will leave them without significant value capture.

In terms of business, that is how the market works. However, it becomes pointed when it comes to APT. APT is not an ordinary commodity or product. It is produced only for African consumption.

From the standpoint of GVC value capture, this means that the value that Nanettes have been able to capture and distribute to other Togolese sellers along the value chain will now be split between Chinese traders and Nanettes, or worse. Chinese are not only capturing value in production and shipping, but also in the distribution segment.

For now, in terms of the larger national economy, the livelihood of smallholders will remain the same. Street sellers and tailors will continue carrying on their everyday activities. And value capture by the state will remain—if Chinese are transparent and pay import taxes. However, re-investment in other activities in Togo will diminish considerably for the Chinese will likely expatriate their profits to China, as they tend not to have local bank accounts (Huang, 2024, pp. 220-240).

We are entering a new era in which developing South economies must re-design their trade policies if they are not to go the way of North-South value chains.

5. Policy recommendations

So far, South-South trade has been a positive for Togo, especially in an economy where more than 80% of the population works informally. Importing vast amounts of trade goods from China, then wholesaling and retailing them locally, constitutes an important means of income for Togolese urban dwellers.

South-south trade has meant trade between an emerging or developing economy (China) who, in the case of APT, produces for another developing economy (Togo), which benefits from distribution and consumption. However, there is a uniqueness to APT, not only in terms of its history but also its meaning for sub-Saharan Africans. APT is widely consumed in sub-Saharan Africa, not elsewhere. Moreover, if China stops producing APT, consumption of APT will stop in SSA. The reciprocal is true as well: if SSA stops consuming APT, China will lose a large market. Because of the nature of APT, if SSA refuses to buy it, China cannot turn easily to another market. This market has thus created a dependency that we might call a “win-win.” Throughout its brief history of SS APT trade, both Chinese manufacturers and Togolese traders have learned from each other, exchanging both resources and knowledge. Despite these positives, however, one important potential exchange has been lacking: the exchange of technology.

By technology exchange, I mean production. While private Chinese and Togolese traders have been engaged in a long-standing relationship, it is time to move to the next level in order to avoid

history repeating itself. We may be in a neoliberal era in which free markets and maximizing value capture are the order of the day, but I strongly believe the Chinese-Togolese APT relationship needs to be revised. I suggest that the state must play an important role in generating policies that incentivize Chinese APT manufacturers to move to Togo and to continue to encourage Togolese traders to partner with the Chinese.

5.1 The exchange of technologies

Sooner or later, Africa must return to manufacturing (industrialization). APT might be a good starting point. The market and the consumption of APT exist already but it is outrageous that this product is continually produced elsewhere for African consumption.

While China's future direction vis-à-vis manufacturing is not yet clear, there are indications that it is moving away from manufacturing to focus on research and design, finance, and AI—moving from “smoke stacks to industries without stacks.” In this context, APT would seem to provide a legitimate bargaining chip for African countries in their relationship with China. The history of S-S collaboration illustrates that China has long appeared flexible and willing to engage in win-win scenarios. Moreover, if nothing is done now, in the case of APT, the Chinese will continue to take over the entire value chain. It is in this context that I suggest that Chinese APT manufacture must be transferred to West Africa. Doing so is capital for national economic growth, for it will provide jobs for many, taxes to the state, and value capture through trade and export.

5.2 The active role of Africa in implementing industrial policy

If nothing is done now, another African generation will be jeopardized. It all depends on the desired short, medium, and long-term outcomes. If Africa is committed to a new narrative, it must seriously negotiate with China to bring APT manufacturing back to Africa. China represents an opportunity for Africa to change, but the fact remains that Africa must plan what it wants from China.

Conclusion

The political economic relationship between southern countries is not only bilateral (between states) but also between private entrepreneurs within the global South. African Print Textiles (APT) is a perfect illustration of this, of SS manufacture-and-trade that is in the hands of private entrepreneurs. This signals an evolution or transformation since the time of Bandung, when state-driven bilateral relationships were the model.

While GVC analysis enables us to map the APT China-Togo value chain's different segments and actors, it also helps us explore how different actors capture value within the chain. More particularly, this analysis reveals bottlenecks produced by new Chinese actors in the distribution segment, as well as suggesting potential innovations in the transfer of resources and knowledge and essential technology. It is not exaggerating to say that Togo's future depends on taking bold measures to address the inequities of global trade today.

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