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REPORT OF THE SECOND SESSION OF THE LEATHER AND
LEATHER PRODUCTS INDUSTRY PANEL*,

Vienna, 5-7 February 1979 .

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INTRODUCTION

1. The Leather and Leather Products Industry Panel was established by the Industrial Development Board to oversee the implementation of the recommendations of the First Consultation Meeting on Leather and Leather Products Industry which was held in Innsbruck, Austria, from 7 to 11 November 1977.
2. The first session of the Panel was held in Vienna from 5 to 7 June 1978. It recommended that the Secretariat undertake, for consideration at the second meeting of the Panel, the following follow-up programmes:
 - a. Measures to ensure availability and dissemination of up-to-date information on raw materials (Eminent Consultants' reports) (Ref. Chapter II: Report of First Panel);
 - b. Technical assistance for LDC's who are potential leather producers (Ref. Chapter IV: Report of First Panel);
 - c. FAO/UNIDO campaign to improve raw material availability and quality (Ref. Chapter V: Report of First Panel);
 - d. Compendium on different types of technical assistance programmes provided to developing countries (Ref. Chapter VI: Report of First Panel);
 - e. Directory of potential partners in developed and developing countries for possible joint ventures or other types of cooperation (Ref. Chapter VII: Report of First Panel);
 - f. Improvement of environmental standards (Ref. Chapter IX: Report of First Panel);
 - g. Justification of topics/issues identified for a second consultation meeting (Ref. Chapter XI: Report of First Panel).

CHAPTER I. ORGANIZATION OF THE MEETING

Opening of the meeting

..... 3. The second session of the Leather and Leather Products Industry Panel was held at UNIDO Headquarters, Vienna, from 5 to 7 February 1979. The session was attended by 22 participants from 14 countries and 4 international organizations (please refer to Annex 1). In addition to the participants who attended the first session of the Panel from 5 to 7 June 1978, the following participants joined the Panel at its second session:

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4. The session was opened by the current chairman, Eugene L. Kilik (USA), who welcomed the participants at the second session.

Election of chairman and vice-chairman

5. The Panel elected Eugenio J. Koppany (Argentina) as chairman and Ahmad Saeed (Pakistan) as vice-chairman respectively.

Adoption of the agenda

..... 6. The agenda was adopted as modified in Annex 2. A number of participants felt that because of the world-wide price increase in leather raw material, there has been an increasing trend in the use of synthetic products. Other participants felt that the Panel should inscribe this issue in the agenda. After some discussion, it was recommended that the impact on the leather market of synthetic materials and the development of vegetable-based proteins instead of animal-based proteins should be considered at a second consultation meeting.

CHAPTER II. MEASURES TAKEN BY THE SECRETARIAT
TO IMPLEMENT THE RECOMMENDATIONS OF THE FIRST SESSION OF THE LEATHER PANEL

Measures to ensure availability and dissemination of the latest available information on the leather and leather products industry: Report of Eminent Consultants

7. The Panel was informed of the findings of the eminent consultants on raw material availability who were recruited by the Secretariat at the request of the Panel in order to inter alia collect, and correlate basic statistics relating to the leather and leather products sector from the different regions and also to suggest the most appropriate means for collecting information affecting the development of world leather and leather products industry (taking into account such factors as availability and growth trends of raw material supply, existing and potential capacities in leather and leather products manufacture, etc.). Because of the time constraints, the eminent consultants could only cover 17 developing countries in the following regions: Africa, Asia and Latin America in addition to the OECD countries.
8. The reports of these missions were only submitted in January 1979, and hence it was not possible to make all the documentation available to Panel members six weeks in advance of the meeting.
9. A report on the first visit by a UNIDO consultant to the People's Republic of China (1-13 December 1978) was submitted separately to the Panel which expressed its appreciation to the consultant for the information provided and the opportunities opened by his visit for further collaboration with China.
10. Although the eminent consultants could not be briefed at FAO, their report was submitted to the FAO for comments.
11. The reports of the consultants mainly emphasized the major difficulties and problems encountered in the collection of reliable statistical data. In spite of this difficulty, the constraints to development of the leather and leather products industry in each region have been adequately covered and the Panel felt that the eminent consultants have made a valuable contribution in this regard. A second conclusion that the Panel derived from the eminent consultants' reports is the fact that the necessity to provide adequate, reliable and acceptable statistical data will continue to be an elusive target given the lack of uniformity, i.e. the lack of a common statistical denominator in the data and secondly, the fact that statistics collected at the country level is derived from different sources. It was suggested that as an additional input to statistical gathering could be international and local experts located in the country; this would ensure more reliable and comparable data.

12. While some Panel members expressed satisfaction with the eminent consultants report, other Panel members felt that the report left some information gaps, particularly as regards Africa and the CMEA countries.

13. The Panel felt that the problem facing the development of the leather and leather products industry in Africa is far greater than in many other regions and called upon the Panel to stress a technical assistance action programme to African countries and report the results to the Second Consultation Meeting. In this context, the Panel stressed the need that an integrated approach to the solutions of the problems faced by developing countries in the hides and skins sector should be strengthened.

14. The Panel noted the reports of the FAO delegation on: (a) the results of the Ad Hoc Government Consultation on Hides and Skins which was held in Rome from 17 to 20 October 1978 and (b) FAO's activities in the field of increased recovery and improvement in the quality of hides and skins in the developing countries.

15. Insofar as the improvement of statistical intelligence as well as raw material quality and availability were concerned, the Panel heard with interest the report from the FAO representative who drew the attention of the Panel to the conclusions of the Ad Hoc Government Consultation on Hides and Skins which have a direct relationship to the UNIDO Consultation Meeting on Leather and Leather Products Industry. The Panel, therefore, strongly urged both organizations to join efforts particularly in launching a hides and skins improvement programme in developing countries.

Conclusions and recommendations: Joint UNIDO/FAO programmes

16. The following conclusions and recommendations were agreed upon:

- (a) UNIDO and FAO should cooperate very closely in the compilation of the raw material data and reconcile existing statistics to arrive at a rational projection of future supply and demand without delving into the mechanism of projection; further, that both organizations should concentrate on obtaining statistics from countries where these are lacking;
- (b) Future statistics should give additional information on the demand and supply situation in the leather and leather products industry in the CMEA countries and reduce the gaps of information in Africa;
- (c) The two organizations should jointly undertake the necessary action to compile an accurate statistical base on leather and leather products industry for monitoring purposes so that the statistical data would be pertinent for future decision-making by governments in developing their leather/leather products industry (the final recommendations of the Ad Hoc Government Consultation on Hides and Skins is attached as Annex 3);

.....

- (d) The Panel recognized that FAO should continue to be the focal point for all aspects related to production and trade of raw hides and skins, including statistics and economic intelligence. Since the consultants' reports are now available to FAO, the Panel requested the FAO with the active participation of UNIDO to align the material contained in these reports with FAO's computerized data system;
- (e) The Panel requested the FAO Secretariat to inform it of FAO's efforts to compile statistics on a uniform basis and to recommend acceptable methodology for the collection of statistics as requested by the Ad Hoc Government Consultation on Hides and Skins and the progress made in the Ad Hoc Working Party of Experts on Statistical Intelligence for Hides and Skins once it is established.

17. A film on hides and skins in Africa was produced by FAO as a contribution to the campaign to raise the raw material availability and to improve the quality of hides, skins and leather in developing countries. This film is available to interested parties.

18. The Panel accepted that there was a growing gap between leather production capacity and raw material supply which would not automatically adjust under normal competitive pressures. The global choice is therefore between increasing raw material availability or consciously decreasing production. The Panel felt that a global programme of hides and skins improvement and usage should be instituted to prevent wastage of scarce raw materials.

Special assistance programme to the LDC's

19. The Panel heard an interesting situation report on the leather and leather products industry in the LDC's based on visits during 1978 by UNIDO consultant, B. Lunden, to 10 African countries, 1 Middle East country and 1 Asian country. The consultant emphasized in his report that as far as the LDC's are concerned, hides and skins comprise one of the few indigenous raw materials which serve as the base for local industry. Consequently it is inevitable that the LDC's should be given all the assistance possible from the developed countries and international organisations in their endeavours to transform their leather raw material into a quality product with all the implications that this involves relating to the improvement of supply and the quality of leather, the need for managerial and technical training, and the requirements for optimum utilization of present leather capacities. The consultant also reported that there had been little or no interest by the LDC's in instituting regional co-operation programmes among themselves due to the different conditions obtaining in the LDC's. The Panel expressed its appreciation for the concise and practical analysis of the problems of the LDC's, and called on the Secretariat to considerably step up its technical assistance efforts to the LDC's.

Different sources of technical assistance programmes available to developing countries

20. The Panel considered the paper prepared by the Secretariat on this topic which was found to be useful as a first attempt to compile information on all the technical assistance sources available to developing countries. The feeling was expressed that the compilation could be further expanded to include details on the type of assistance offered.

Directory of possible partners in developed and developing countries for joint ventures or other forms of cooperation

..... 21. The Secretariat paper on this subject was welcomed by many participants of the Panel. The questionnaire prepared by the Secretariat (see Annex 4) was forwarded to 52 leather and leather product manufactures' associations and research institutes in 25 countries; the embassies in Vienna of 8 Socialist countries; the 13 members of the Leather and Leather Products Industry Panel; and the members of the Federatie van Nederlandse Schoenfabrikanten. Due to the meagre response, the deadline which was set for 20 October 1978 was extended to end January 1979 when 68 replies had been received. Most of the replies indicated interest in collaborating to provide manufacturing know-how in the production of shoe upper leather.

Conclusions and recommendations

22. The Panel requested the UNIDO Secretariat to ascertain the reason that countries with the highest technological facilities and capabilities have not responded. The Panel recommended that the questionnaire be broadened to include offers of collaboration from developing countries.

Strengthening regional technological centres in Africa and Asia

23. The Panel considered the Secretariat progress report on this item which was recommended for follow-up action. The potential of national centres in Africa (Leather Research Institute of Nigeria-LERI-Zaria, Nigeria, and Centre National du Cuir et de la Chaussure-CNCC-Tunis, Tunisia) and national centres in Asia (Central Leather Research Institute-CLRI-Madras, India and Leather Research Institute-LRI-Yogyakarta, Indonesia) to develop into regional centres was examined, as well as the international assistance needed to broaden their activities to the regional level. Some Panel members welcomed the fact that UNIDO and FAO are deploying a joint effort to assist the CLRI. Because of the varying interests and levels of development of each region, a participant from Latin America stressed that regional centres should concentrate on conventional technologies research; other participants on the other hand felt that their basic priorities are mainly in market and economic information, and the transfer of basic technology rather than research.

Improvement of environmental standards

24. Due to time restrictions, the Secretariat invited the Panel members to provide their comments in writing on the background paper entitled "Means of Achieving Improvements in Environmental Standards in the Tanning Industry: Environmental Assessment and Management" (ID/WG.290/5).

CHAPTER III. STRENGTHENING AND EXPANDING UNIDO'S WORLD-WIDE STUDY

25. Certain practical considerations emerged from the discussions and the review of the UNIDO papers. It was felt that while studies will continue to be revised and up-dated, FAO would continue to mount in co-operation with UNIDO, action-oriented programmes in the developing countries to increase raw material availability and quality. The Panel emphasized that this action programme should not await the results of surveys and studies but be conducted concurrently with any surveys or studies which need to be undertaken.

Conclusions and recommendations

26. In the case of studies still to be undertaken or to be modified by the Secretariat, the following was decided by the Panel for the third Panel meeting and in preparation for a second consultation meeting on the leather and leather products industry which is scheduled for 1980:

- (a) The revised World-Wide Study should give increased consideration to the conditions and situation of the leather and leather products industry in the CMEA countries, Africa and China;
- (b) With the increasing world prices in leather from bovine hides, a brief survey should be included in the revised World-Wide Study of the potentialities of pig skin production;
- (c) Preparation of case studies in 2 to 3 LDC's to develop a comprehensive action programme for hides and skins improvement. These should be undertaken by FAO with the active support of UNIDO.

CHAPTER IV. STATEMENT BY REPRESENTATIVES OF THE U.N. BODIES ON THEIR
CO-OPERATION WITH UNIDO IN FOLLOW-UP THE RECOMMENDATIONS OF THE
CONSULTATION MEETING

Co-ordination of the activities of the U.N. system

27. The representatives of the competent participating U.N. agencies as reflected in the list of participants met informally at the request of the Panel. They noted that there was need to avoid overlapping of activities in the hides, skins, leather and leather manufacturing sector. They therefore recommended that a standing committee of U.N. agencies concerned should be established with a view to co-ordinate on-going and planned activities at the technical level in this sector.

United Nations Conference on Trade and Development (UNCTAD)

28. The representative of the UNCTAD made a report on international trade in hides and skins, leather, leather products and footwear, concentrating on trade policy issues of the sector under consideration. His discussion touched upon tariff structure, escalation of tariff by stages of processing, non-tariff barriers, multilateral trade negotiations, and growing protectionism affecting leather, leather products and footwear. He emphasized, in particular, the importance of non-tariff barriers in this sector, and proposed that information on non-tariff barriers should be made available to the extent the tariff information is available. He called the attention of the Panel for the dangers of the growing protectionism and the selective nature of the new protectionist measures. Furthermore, he pointed out that protectionist measures provide no real solution to the underlying problems of the protected industry and such measures only prevent one from finding long-lasting solutions in time.

29. In view of the considerations given above, the representative of UNCTAD recommended that trade policy aspects of hides and skins, leather, leather products, and footwear should be included as one of the important issues to be examined in the next Panel meeting as well as the Second Consultation Meeting.

International Trade Centre/UNCTAD/GATT

30. The Panel heard with great interest the statement made by the representative of ITC with regard to the marketing problems most commonly encountered by developing countries' exporters of leather and leather goods, as well as to some of the suggested possible solutions available. The Panel took also note of the work accomplished by ITC in the field of export marketing of leather and leather products and of the possible assistance available from ITC to help requesting developing countries in their export promotion efforts in this sub-sector.

31. The Panel was also briefly informed about the main findings of the ITC contributions to the UNIDO World-Wide Study on the subject "Export Marketing and Distribution of Leather and Leather Products". This study was carried out by ITC at the request of UNIDO.

32. Finally, the continued and full support to the development of hides and skins, leather and leather products in developing countries was emphasized by the ITC in its field of competence.

International Labour Office (ILO)

33. The ILO representative drew the attention of the Panel to two major research projects in progress in the ILO in preparation for the Tripartite Technical Meeting on the Leather and Footwear Industries, to be held in Geneva, 4-13 December 1979. The first project will survey the implications of technological change for working conditions, hours of work and the organization of work in both large- and small-scale enterprises. The second project, which reflects the ILO's traditional concern with social issues, is entitled "The implications of technological choice and changes in trade for the leather and footwear industries". This will include an examination of alternative technologies of production in leather tanning and in footwear production, and the employment implications of different technologies in developing countries. A related study is being prepared on trade patterns and the options in the future for the international division of labour in footwear production. Finally, an analysis is being carried out of government policies in the footwear industry, particularly in the developed countries; this is necessary because increasingly policy makers are having to take into account the employment impact of imports of footwear in European countries and measures to assist the industry's adjustment to the changing trade pattern.

34. The Panel welcomed the ILO representative's suggestion that the two technical reports containing the results of the research projects mentioned above, should be circulated to Panel members when they become available (about October 1979).

CHAPTER V. SECOND CONSULTATION MEETING ON LEATHER AND LEATHER PRODUCTS INDUSTRY
ISSUES TO BE ELABORATED BY THE SECRETARIAT

35. The Panel considered the issues presented by the Secretariat under document ID/WG. 290/3.

36. Although the validity of each issue was not questioned per se, some participants raised the specter of protectionism as a political and economic weapon to the detriment of all parties; another view which was expressed pointed to the existence of protectionist measures at the early stages of the industrialization of developed countries. In examining the issues, participants from both developed and developing countries examined the options faced by developed and the developing countries: should the priority be to produce finished leather, which is capital intensive, or leather products, which is labour intensive? The Panel concluded that a future meeting should be devoted to a full discussion of these options.

37. The Panel, after reviewing the issues presented, decided to recommend that a second consultation meeting should be convened during the last quarter of 1980, and that sufficient substantive preparations have been made to warrant such a recommendation to the Industrial Development Board.

38. The following issues have been identified (among others which may be recommended at future meetings of the Panel) to be examined at the Second Consultation Meeting:

- (i) Measures for improving raw materials availability and quality;
- (ii) Prospects and problems in developing countries of marketing and production of downstream leather products industry; and co-operation measures which could be envisaged between developing and developed countries.

39. The Panel urged that the Secretariat should have sufficient time to make adequate preparations for these two issues. The Secretariat will submit detailed background and issue papers on these two topics for consideration at the third Panel meeting.

40. The Panel agreed that the third Panel meeting would be held in Vienna from 12 to 14 November 1979. The following tentative agenda was agreed upon:

- a. Report on progress made to-date in implementing previous recommendations of the Panel (ref. para. 38, page 9, report of first session of Panel);
- b. Trade and trade-related restrictive measures and ways and means of overcoming them through international cooperation;
- c. Downstream leather products, including products made from synthetics.

41. Due to limitation of time, the Panel agreed to postpone the discussions under agenda item 7. "Other business".

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ANNEX 2

**Second Leather and Leather Products
Industry Panel Meeting**

Vienna, 5-7 February 1979

A G E N D A

1. Opening of the session by the current Chairman, Mr. E. Kilik
2. Election of the new Chairman and officers
3. Adoption of the Report of the First Panel Meeting
4. Adoption of the provisional agenda
5. Statement by the Secretariat on follow-up to recommendations of the First Panel Meeting:
 - (i) Preparation of the Second World-Wide Study on the Leather and Leather Products Industry
 - (ii) Summary Report on eminent consultants' findings on world-wide raw material availability and the quality of supply
 - (iii) Special assistance programme to LDCs
 - (iv) Raw material availability and quality:
 - (a) Cooperation with FAO in mounting a campaign to improve raw material availability and quality
 - (b) Ad Hoc Government consultation on Hides and Skins, Rome, 17-20 October 1978 and follow-up actions resulting therefrom
 - (c) Ongoing and actually planned activities to improve raw material availability and quality (reference is made to item 5 iv(a) above
 - (v) Different sources of technical assistance programme available to developing countries
 - (vi) Directory of possible partners in developed and developing countries for joint ventures
 - (vii) Strengthening Regional Technological Centres in Africa and Asia
 - (viii) Improvement of environmental standards

6. Background papers in issues identified for a second consultation:
 - (i) Raw material availability and quality
 - (ii) Development of downstream leather products industry in developing countries and the present international division of labour
 - (iii) Problems and prospects for international trade in hides and skins and leather and leather products: statement by (a) UNCTAD; (b) ITC
 - (iv) Proposal for a jointly coordinated long term technical assistance programme in developing countries by UNIDO, FAO, and other international bodies in the field of hides, skins and leather industries
7. Other business: alternative options of utilizing land for ranching or agriculture
8. Date, place and provisional agenda for the Third Panel Meeting
9. Adoption of the Draft Report.

Ad Hoc Government Consultation on Hides and Skins

V. RECOMMENDATIONS TO THE CCP FOR FOLLOW-UP ACTION 1/

34. The Consultation considered various options for follow-up action for recommendation to the Committee on Commodity Problems (CCP), as suggested in document CCP: HS 78/5. It agreed that the economic, statistical and technical problems in the market of hides, skins and leather were very complex and that it had neither been possible to sufficiently define all of them individually nor to fully assess their effects on the market. The Consultation considered it premature, therefore, to examine the usefulness of establishing an Inter-governmental Group on Hides and Skins.

35. The Consultation, nevertheless, felt that the severe impact of some of the problems on the hides, skins and leather economy of developing and developed countries alike necessitated a continuation of discussions at an appropriate time. In particular, delegates unanimously agreed that as a first step to facilitate a better understanding of these problems, the deficiencies in the basic statistics and economic information merited international attention. With this in mind, the Consultation agreed to recommend the establishment of an Ad Hoc Working Party of Experts on Statistical Intelligence for Hides and Skins to assist the Secretariat in its endeavour to resolve some of the statistical problems identified by the Consultation. It should further improve the basis and set the framework for further consultations should they be required in order to define more clearly the problems ruling in the market, to enable a better understanding of the factors governing the hides and skins economy and to facilitate more substantive agreements at a later stage. It suggested that, in furtherance of this, the Secretariat should report to this Working Party on progress made in the four work areas which the Consultation had requested it to undertake in paragraph 15 of this report, and obtain guidance on further steps from the Working Party.

36. All delegates expressed the readiness of their governments and organisations to cooperate in the attempts made by the FAO Secretariat to tackle the statistical intelligence problems obstructing the establishment of a sounder base for market analysis and planning decisions.

37. The Consultation agreed further that once the results of the statistical work of the Ad Hoc Working Party were sufficiently advanced, the Secretariat should consider whether it would be useful to propose to the CCP that a second Ad Hoc Consultation on Hides and Skins be held. The terms of reference and the subjects to be examined by a second Consultation should cover similar ground as for the first Consultation, suitably amended by new factors which might deserve attention.

38. The Consultation agreed that the various proposals made above should be carefully considered by member governments with a view to a final decision being taken at the next session of the CCP. It noted that, in making its decision, the CCP would take into account the availability of resources and the priorities which would be set in the Organisation's programme of work and budget for 1980/81.

1/ As extracted from FAO Report of the Ad Hoc Government Consultation on Hides and Skins CCP:78/5 (CCP:HS 78/6) November 1978

UNITED NATIONS  NATIONS UNIES
UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANIZATION

Survey "PARTNERS FOR LEATHER & LEATHER PRODUCTS"

This Questionnaire should be returned to

UNIDO Section
UNIDO, P.O. Box 707
A-1011 Vienna (Austria)

	PLEASE PRINT (ONE LETTER PER BOX)																					
NAME																						
TITLE OR POSITION																						
ORGANIZATION																						
STREET AND No. (or P.O. Box)																						
CITY/TOWN/STATE/PROVINCE/DISTRICT*																						
COUNTRY																						

Telephone Number																						
Telex No. + Answerback																						
Cable Address																						

PLEASE DO NOT WRITE IN THESE SPACES

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S/A	<input type="checkbox"/>	DISP. CODE	<input type="checkbox"/>	COUNTRY	<input type="checkbox"/>
CITY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

WE ARE INTERESTED TO COLLABORATE

- as participants in a joint venture
- as marketing partners
- as providers of manufacturing know-how
- as providers of designing services and fashion know-how
- by having work done for us in sub-contract
- as licensors for patents owned by us
- as managing agents for a manufacturing enterprise
- as investors in an established enterprise
- as investors in a new enterprise
- by doing feasibility studies
- as equipment suppliers
- _____
- _____
- _____

OUR PRIMARY AREA(S) OF COMPETENCY

- production of shoe upper leather
- production of vegetable sole leather
- production of garment leather
- manufacture of gents' shoes
- manufacture of ladies' shoes
- manufacture of children's shoes
- manufacture of luggage
- manufacture of leather clothing
- manufacture of leather handbags, belts, etc.
- _____
- _____

OPTIONAL INFORMATION

Paid-up capital of our enterprise: \$ US _____
 Sales last year (19__) were \$ US _____
 We have a total of _____ employees in _____ plants.

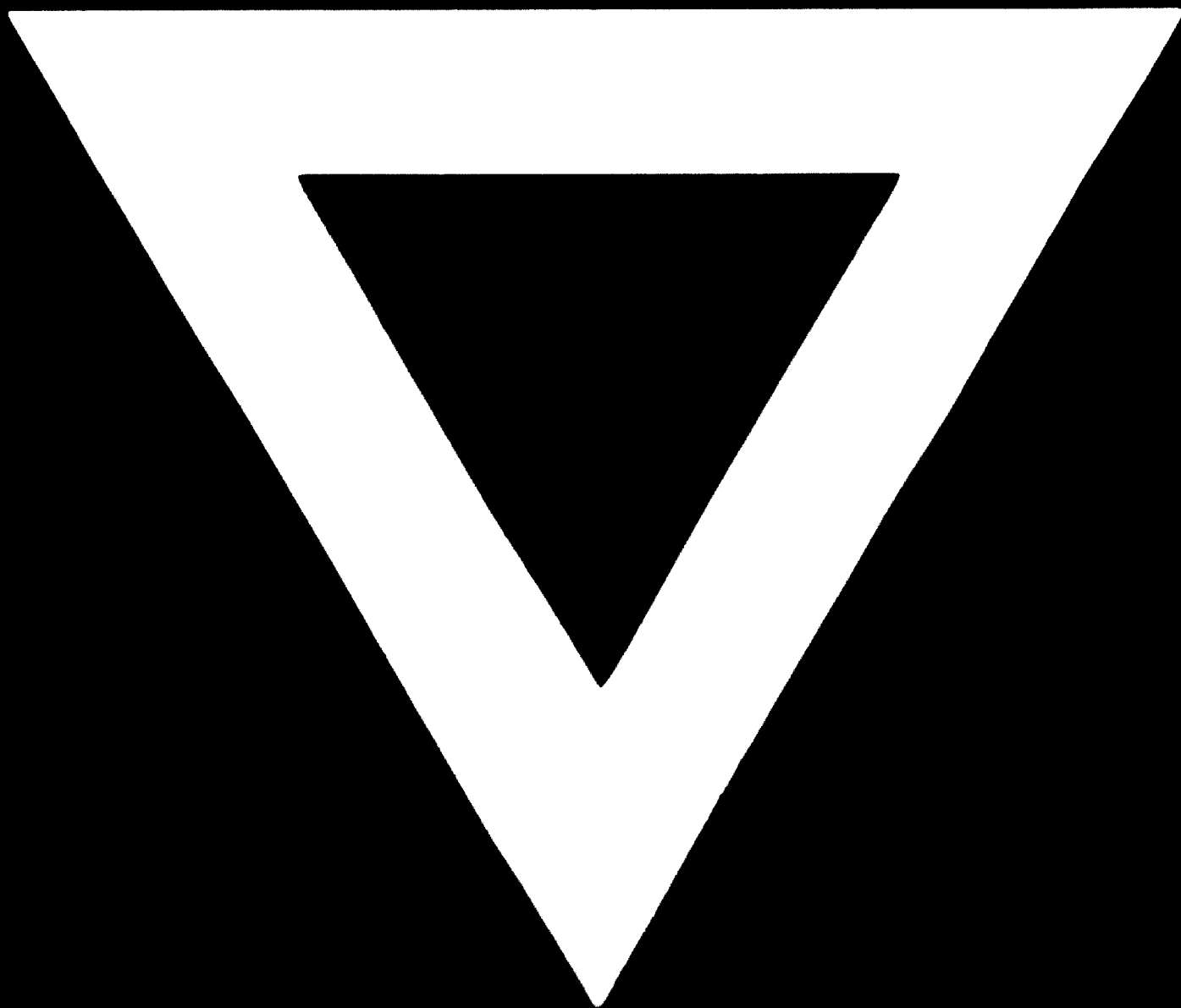
Please use this space for any other information you consider relevant:

SUMMARY OF CONCLUSIONS AND RECOMMENDATIONS

1. Raw material availability and improvement of quality
 - a. Joint FAO/UNIDO programmes should be undertaken in the following sectors:
 - i. Compilation of raw material data to reconcile existing statistics in particular on leather and leather products industry in the CMEA countries and in some African countries (where data is not available); the data collected should be relevant for future decision-making by interested governments;
 - ii. FAO, with UNIDO's participation, to reconcile the material and data contained in the Eminent Consultants' reports with FAO's computerized data system.
2. Special assistance programme to LDC's : UNIDO should considerably step up its technical assistance to LDC's.
3. Directory of possible partners: UNIDO should -
 - a. Ascertain the reasons for the non-response from highly advanced countries;
 - b. Questionnaire should be broadened to include offers of collaboration from developing countries.
4. Strengthening and expanding of World-Wide Study
 - a. Revised World-Wide Study to consider and review:
 - i. Condition of the leather and leather products industry in CMEA countries, Africa, and China;
 - ii. Potentialities of pig-skin production.
 - b. Preparation of integrated case studies in 2 or 3 LDC's for a comprehensive programme for hide and skins improvement.
5. Co-ordination of the activities of the U.N. system in the leather and leather products industry

A standing committee should be established to co-ordinate on-going and planned activities at the technical level in this sector.
6. Elaboration of issues for a Second Consultation Meeting on Leather and Leather Products Industry
 - i. Measures for improving raw materials availability and quality;
 - ii. Prospects and problems in developing countries of marketing and production of downstream leather products industry and co-operation measures which could be envisaged between them and developed countries.

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