



**TOGETHER**  
*for a sustainable future*

## OCCASION

This publication has been made available to the public on the occasion of the 50<sup>th</sup> anniversary of the United Nations Industrial Development Organisation.



**TOGETHER**  
*for a sustainable future*

## DISCLAIMER

This document has been produced without formal United Nations editing. The designations employed and the presentation of the material in this document do not imply the expression of any opinion whatsoever on the part of the Secretariat of the United Nations Industrial Development Organization (UNIDO) concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries, or its economic system or degree of development. Designations such as “developed”, “industrialized” and “developing” are intended for statistical convenience and do not necessarily express a judgment about the stage reached by a particular country or area in the development process. Mention of firm names or commercial products does not constitute an endorsement by UNIDO.

## FAIR USE POLICY

Any part of this publication may be quoted and referenced for educational and research purposes without additional permission from UNIDO. However, those who make use of quoting and referencing this publication are requested to follow the Fair Use Policy of giving due credit to UNIDO.

## CONTACT

Please contact [publications@unido.org](mailto:publications@unido.org) for further information concerning UNIDO publications.

For more information about UNIDO, please visit us at [www.unido.org](http://www.unido.org)

07532

Distr.  
RESTRICTED

UNIDO/IOD.93  
21 December 1976

UNITED NATIONS INDUSTRIAL  
DEVELOPMENT ORGANIZATION

---

English

DEVELOPMENT OF EXPORT-ORIENTED INDUSTRIES  
IN SELECTED SOUTH-EAST ASIAN COUNTRIES

VS/RAS/75/011

INDONESIA

Technical report: The leather goods industry

Prepared for the Government of Indonesia  
by the United Nations Industrial Development Organization

Based on the work of Mohamed Maher Abou El-Khair,  
leather goods expert

id.76-7132

### Explanatory notes

A comma (,) is used to distinguish thousands and millions.

References to dollars (\$) are to United States dollars.

The following abbreviations are used in this report:

EEC      European Economic Community

NAFED    National Agency for Export Development

---

The designations employed and the presentation of material in this document do not imply the expression of any opinion whatsoever on the part of the Secretariat of the United Nations concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Mention of firm names and commercial products does not imply endorsement by the United Nations Industrial Development Organization (UNIDO).

ABSTRACT

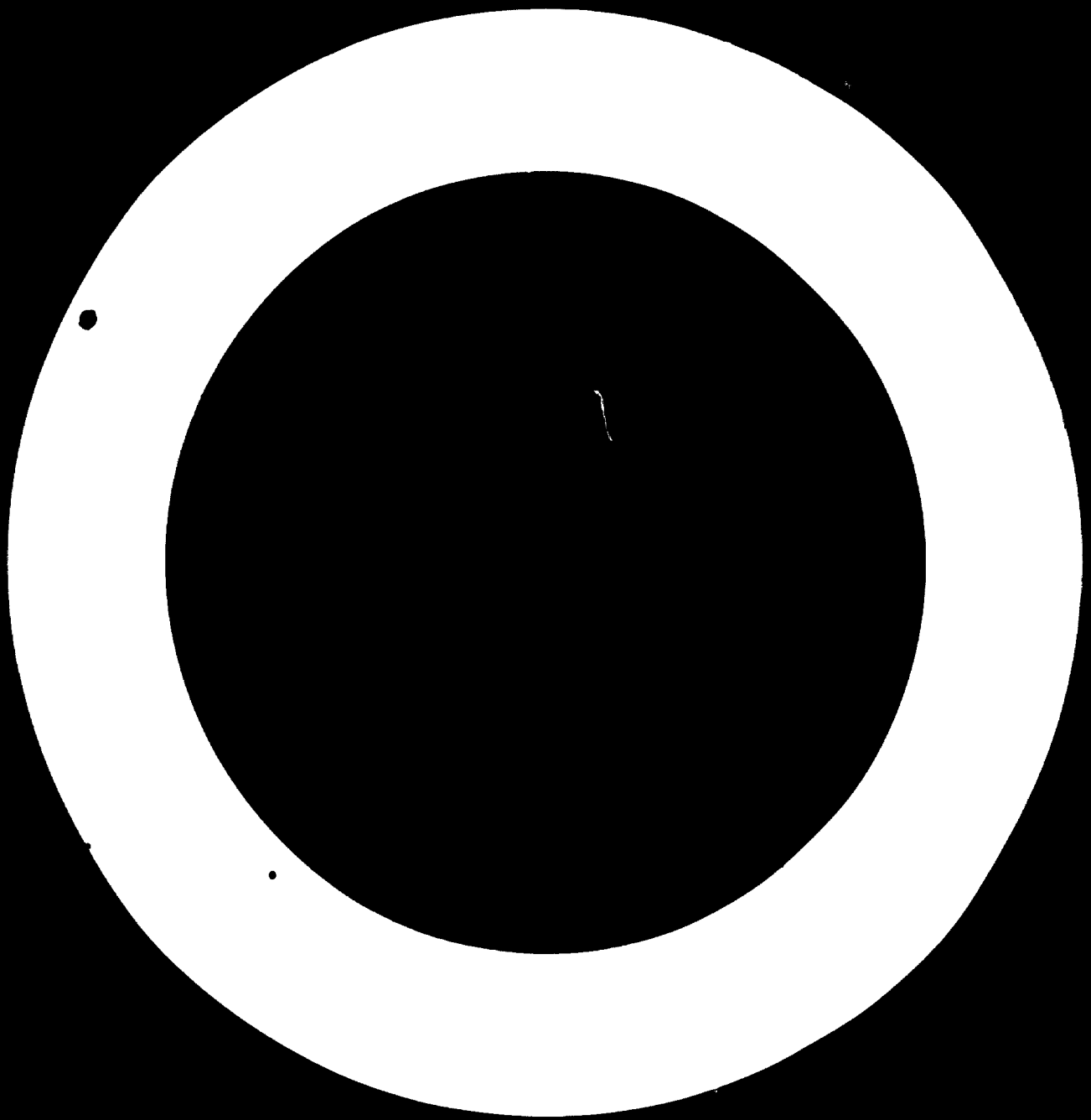
The consultant, an expert in leather goods, was assigned a one-month mission (9 September to 12 October 1976) under the title "Development of Export-Oriented Industries in Selected South-East Asian Countries" (VS/RAS/75/011). His assignment was to accompany a delegation of Indonesian Government officials and representatives of Indonesia's leather goods industry at the International Leather Fair (Semaine internationale du cuir) in Paris, 11 to 14 September 1976, and on a subsequent study tour.

Wide contacts in the international leather market were established during the International Leather Fair, as a result of which an assessment was made of potential buyers' preferences for specific goods, and the main considerations regarding product quality and acceptability were defined. It is recommended that first priority be given to such goods and that the equipment and machinery required for their production be identified.

The most promising products for export are small and fancy leather goods and out soles and uppers for shoes. To implement their production, present technologies should be upgraded and new ones acquired, preferably on an independent basis. There is an urgent need to study the application of a drawback or bonus system to support export of such goods that would be competitive in price and quality.

The large-scale development of the tanning and shoe industries should be carried out independently, although with strengthened co-operation with leading foreign enterprises. Also, the upgrading and development of medium- and small-scale manufacturers of leather goods and shoes should be implemented by establishing common facilities centres that would provide general services; they should be equipped with simple, easily operated machinery. Consistent follow-up activities will be needed to strengthen the contacts that have already been established between the foreign markets and the local producers. Specific proposals are presented.

The consultant had previously been assigned for the six months ending 12 September 1976 as an expert on product adaptation and as a production engineer on leather goods (IS/INS/74/030) to assist NAFED in offering technical advice to manufacturers of leather goods with export potential in order to adapt their products to export requirements. This task was performed through in-plant visits to various enterprises so as to provide direct on-the-spot consulting services.



CONTENTS

<u>Chapter</u>	<u>Page</u>
INTRODUCTION.....	6
I. FINDINGS.....	7
Participation in the International Leather Fair in Paris.....	7
Study tour.....	12
II. RECOMMENDATIONS.....	17
General recommendations.....	17
Recommendations to governmental bodies.....	17

Annexes

I. Members of the Indonesian delegation to the International Leather Fair ( <u>Semaine internationale du cuir</u> ), Paris, 11-14 September 1976.....	19
II. Persons contacted during the study tour.....	22

## INTRODUCTION

This one-month mission was arranged under the title "Development of Export-Oriented Industries in Selected South-East Asian Countries" (VS/RAS/75/011), from 9 September to 12 October 1976. The purpose of the project was to promote the export-oriented development of Indonesia's leather goods industries, with emphasis on the promotion of international co-operation in the upgrading of technical standards of production and the improvement of the acceptability of these products in export markets. Realizing the export potential of leather goods, the National Agency for Export Development (NAFED), Department of Trade, decided to participate in the International Leather Fair (Semaine internationale du cuir) to be held in Paris, 11-14 September 1976, aiming at export promotion. NAFED requested the assistance of a United Nations Industrial Development Organization (UNIDO) leather goods consultant, who would join the Indonesian delegation to this industrial fair. The delegation included representatives of 22 leather producing factories as well as four governmental agencies (annex I). The consultant was to:

(a) Assist in technical matters throughout the fair in Paris as well as obtain the comments of potential importers on the samples that had been prepared for consideration;

(b) Provide consultative service to the participants in the two-week study tour after the fair, visiting suppliers of machinery and leather production plants in several countries of Europe so as to determine the types of equipment best suited for the conditions that prevail in Indonesia;

(c) Participate in the discussions that would arise during the fair and the study tour in order to convert the results of these discussions into practical recommendations for in-plant implementation;

(d) Assist the delegation in preparing its report of its participation in the fair and the study tour and in identifying the factors that affect the promotion of the export capabilities of the leather goods industry;

(e) Prepare guide-lines for in-plant follow-up activities of the Indonesian enterprises.

Owing to the broad range of common interests of the Indonesian delegation and the importers, the expertise provided was extended to the leather and shoe sectors, with special attention to the leather goods industry.

The consultant had previously been assigned for the six months ending 12 September 1976 as an expert on product adaptation and as a production engineer on leather goods (IS/INS/74/030) to assist NAFED in offering technical advice to manufacturers of leather goods with export potential in order to adapt their products to export requirements. This task was performed through in-plant visits to various enterprises so as to provide direct on-the-spot consulting services.

## I. FINDINGS

### Participation in the International Leather Fair in Paris

#### Participants

The participation, for the first time, of the Republic of Indonesia in the International Leather Fair (Semaine internationale du cuir, 11 to 14 September 1976) in Paris was the result of fruitful co-operation between the European Economic Community (EEC) and Indonesia's National Agency for Export Development (NAFED), which is an arm of the Department of Trade. In all, 22 firms, representing a wide cross-section of Indonesia's leather and leather products industries, as well as four governmental agencies, participated (annex I).

#### Goods displayed

The items displayed in the Indonesian stand represented a good sample of the various types of leather and leather goods that are produced in the country. Since 80% of the hides and skins (cattle, sheep and goat) exported are in semi-processed forms (pickled, wetblue and crust), such items predominated. A few samples of finished leather uppers and of nappa and sole leathers were also displayed. The Indonesian shoe industry was represented by samples of hand-made 100% leather shoes and boots as well as leather uppers and cut vegetable-tanned soles of cattle hide.

Limited varieties of leather goods that reflected the present situation of this sector were also displayed. They included:

#### Wayang kulit puppets

Small reptile-skin articles (handbags, wallets, passport covers, watch-straps, cosmetic cases and cigarette boxes)

#### Leather neckties

Traditional hand-ornamented goods of natural-colour vegetable-tanned leather (handbags, travelling bags, belts, desk decorations)

Jackets and soft handbags of crust sheepskins printed in batik design and combined with nappa leather

Golf-glove cuttings (unsewn)



Importers' comments and market demand

Leather. The semi-processed leathers (pickled, wetblue, crust) represent the majority of Indonesia's exports of leather and are found in the Netherlands market, which is the principal buyer of Indonesian leather, either through tanners or brokers that supply other markets, among them the Federal Republic of Germany, Italy and Spain.

Owing to the lack of standards for goods of this type, quality is assessed according to agreement between the buyer and the seller by personal judgement and the results of further processing and finishing. From discussions with several importers, it could be inferred that the quality of the semi-processed leather is fairly good. Better treatment of the hides and skins during curing is required for the success of further processing in the importing markets.

Several importers expressed their interest in finished leather of the following types:

Finished reptile

Goatskin leather for bookbinding full-grain aniline finish

Cattle-hide vegetable-tanned sole leather bends

Shoe upper leather

Garment and glove leathers

Shoes. The buyers showed very limited interest in importing leather shoes, for the following reasons:

The great changeability of fashion

The very high quality required by the sophisticated European market, which requires advanced technical know-how involving all of the numerous complicated details, from designing all the way to the finished product

The heaviness and stiffness of the finished shoes, which made them appear uncomfortable

The limited demand for expensive all-leather shoes that do not meet consumer expectations

Leather uppers and cut soles. On the other hand, both importers and shoe manufacturers showed very high interest in leather shoe uppers for both men's and ladies' shoes as well as in cut soles.

To counter the great changes in fashion, the inquiries tended towards classic colours and styles that are less subject to sudden change. The mocassin uppers of full-grain box calf, glazed kid and nappa in black, brown, navy blue and natural finish are needed in large quantities.

Men's work-boot uppers are also required, as well as ladies' boot uppers. Approximately 100,000 pairs per year of each type of these shoe uppers are needed.

Proper patterns and grading as well as straight stitching and proper closing in addition to good-quality colour-fast linings are the most important factors of quality in this connection. The importers showed their willingness to provide the producers with the necessary guidance as regards cutting patterns and grades, provided that delivery would be prompt and quality reliable.

The cut soles should be made only from the bends, with complete penetration of tannage through the leather section. To provide the lightness of soles, combined vegetable-synthetic tannage is preferred. The supplied cut soles should pass mainly the abrasion and waterproof tests. An even sole thickness is of the utmost importance as a factor of quality. It is felt that there is an assured need for this product.

Wayang kulit (shadow puppets etc.). The importers criticized the manner of applying the colours to these products, as it has the effect of covering the entire piece with various colours, hiding the skin material and causing the product to lose its value and attractive "skin" appearance. Furthermore, the quality of applied colouring materials should be upgraded to a level suitable for such expensive products. However, while there is limited demand for wayang puppets and fans, buyers prefer them to lampshades, which are difficult to package and ship.

Other leather goods. It was noticed that small leather goods of reptile skin (fancy goods) have very good export prospects, if the following considerations are borne in mind:

(a) The tanning and finishing of reptile leathers should be improved and fashion colours (black, brown, red, blue, green) should be introduced in addition to the natural colour;

- (b) Metal accessories of good quality should be used;
- (c) Special attention should be given to the skiving of the folded parts and to straight stitching;
- (d) The lining leather should be split to provide lightness and suppleness of the product.

The absence from the stand of leather goods made from other types of light leathers was also noticed, notwithstanding the wide range of use of such goods and the market demand for them. Handbags and purses of ornamented natural-colour vegetable-tanned leather could be also of interest provided that there was proper cutting of open edges and straight stitching. Leather travelling bags and suitcases have very limited export potential owing to competition from articles made from synthetic materials that are more durable and less costly.

Leather garments and gloves. The admirable quality of the finished clothing and glove leather as well as of the manufactured jackets displayed motivated the importers to request a reliable supply of large quantities of leather jackets and garments as well as of leather dress gloves. This trend greatly encourages the plan to establish a well-organized garment and glove factory. Some importers in Europe have drawn attention to their need for large quantities of work gloves made of full-thickness or splits of chrome-tanned crust leather, all-leather gloves and those that combine leather and textiles.

#### Machines and equipment

Leather industry. In order to supply the leather goods manufacturers with suitable leather of high quality, it is necessary to orient the leather industry towards the finished products. Various machines are required for equipping the tanneries to enable the tanners to attain international standards of quality, together with a thorough knowledge of modern technology.

During the fair, it was noticed that most of the tanning machinery displayed was both complicated and costly. There are serious difficulties in the acquisition and use of such machines by most Indonesian tanneries. Establishing co-operation with foreign tanneries through joint ventures or technical assistance might provide the best solution and facilitate the transfer of technology to attain the required levels of quality most rapidly. This matter was thoroughly discussed with some foreign companies during the fair.

The shoe industry. The recent general trend in the design of shoe-making machinery tends to solve the problem of high labour cost in the developed countries. However, machines of such types are unsuited to the shoe industry of Indonesia, which exists on home-scale level and employs considerable numbers of workers. This problem is complicated by difficulties in financing, operating and maintaining such machines. It could also be anticipated that locally produced upper leather would not have sufficient tensile strength for use with the automatic lasting machines, which represent the most costly part of a modern shoe plant. The introduction of modern shoe plants might be possible through co-operation with shoe manufacturers in Europe that are willing to provide the needed technical assistance and access to the European market.

Upgrading the product quality of small shoe manufacturers, coupled with a moderate increase in their capacity and product uniformity, could be achieved through equipping the production line with simply operated machines, the remaining operations still being done by hand. The machines suggested for this purpose are the following:

- Master drafting machine
- Master lasting machine
- Splitting machine
- Flash activating unit
- Sole-attaching machine
- Combined finishing machine

Other machines would be needed for the production of the shoe uppers and cut soles for the export market, namely:

- Electro-hydraulic arm-cutting press for soles
- Sole-evening machine
- Skiving machine
- Flat-bed and column stitching machines, according to the type of upper required

Leather goods industry. The production of leather goods requires very few machines, since most of the operations are done by hand. The machines that are required are the following:

- Skiving machine
- Sewing machine (single-needle, flat-bed)

Sewing machine (single-needle, cylinder-bed)

Band-knife splitting machine (maximum width, 60 cm)

The metal accessories attached to the leather goods strongly affect the judgement of the quality of the end products. Owing to the long experience required to achieve the production of good-quality accessories, it is advisable that they be imported from specialized companies that follow changes in fashion.

#### Study tour

After the fair, nine members of the Indonesian delegation (four government officials and five representatives of industry) and the UNIDO consultant went on a two-week study tour through several European countries so as to increase their awareness of modern trends in the industry and to intensify contacts with foreign markets. The schedule of the tour and the contacts to be made were arranged during the fair by an officer from UNIDO's Vienna headquarters, taking into consideration the various interests of the participants in the study tour. Accordingly, the following topics were covered:

The leather industry (Federal Republic of Germany, Italy and Spain)

The shoe industry (Belgium and the Federal Republic of Germany)

Machinery supplier (the United Kingdom)

The leather goods industry (Italy)

The Trade Promotion Programme of the EEC

#### The leather industry

In Spain, a large-scale tannery that was highly specialized in light leather made from sheepskins and goatskins with a capacity of 12,000 skins/day was visited. The latest and most advanced technology is extensively applied and is supported by research and quality-control laboratories, so its products are of high quality. The beam-house operations are carried out in one drum within 36 hours, and the entire operation is electronically controlled. Possible co-operation was discussed in reference to importing pickled sheepskins and goatskins from Indonesia and providing technical assistance to the Indonesian tanners in the form of joint venture.

This Spanish tannery expressed its preference for the direct import of pickled skins from the producers rather through brokers; it was felt that such direct co-operation could help to avoid the defects and improve the quality of the imported skins. It was realized by the members of the study group that it would be very difficult to attain so high a level of production within a short period without outside assistance.

The desire of the importing tanneries to establish direct contacts with the producers of pickled, wetblue and crust skins was proved during a meeting held at the Italian national leather association, which expressed its willingness to provide Indonesian enterprises with the required direct contacts.

Another approach towards the production of finished leather and improving the standard of quality was accomplished through visiting one of the suppliers of chemicals and dyestuffs to the tanning industry in the Federal Republic of Germany. This approach gave rise to the possibility of putting different types of Indonesian hides and skins into the experimental pilot plant in the Federal Republic of Germany to assess the best method for tanning and finishing the leather. Training the personnel in the company pilot plant for two to three weeks on tanning and finishing operations would be also a good step towards increasing their awareness of modern techniques.

#### The shoe industry

Visits to a men's shoe factory in the Federal Republic of Germany and to a ladies' shoe factory in Belgium as well as to a machinery supplier in the Federal Republic of Germany confirmed the difficulties of copying such advanced systems independently in Indonesia. The more important of these include financing, operating and maintaining plants of this type indigenously. Operations in these factories that are carried out mechanically and automatically, such as cutting the uppers, upper marking, cement applying, lasting and conveying, could be done in Indonesia either by hand or with simpler machines and tools at much lower cost and with reasonable quality. When increased capacity is desired, it could be achieved easily by increasing the labour input, with the benefit of providing possibilities for employment.

However, a shoe industry for export on a large modern scale could be established on the basis of close co-operation with leading manufacturers abroad to provide the technical assistance and marketing possibilities.

#### Machinery suppliers

A suitable way to upgrade the home-market shoe industry was investigated by visiting a machinery supplier in the United Kingdom. Contrary to the modern trend towards costly and complicated machinery, this supplier had developed a simplified range of machines to meet the demand of small-scale shoe manufacturers. For the lasting operation, two machines had been designed - one for drafting, the other for master lasting - that had the advantage of manual operation. It was noticed that both machines were designed in a manner that permits the operator to feed the amount of strain to which the upper material is being subjected. These machines replace hand lasting and increase output to as much as 200 pairs/day. There is a sole-attaching machine that also has the advantages of manual operation and simple design, offering a normal working pressure of  $150 \text{ kg/cm}^2$ .

Other machines such as those for roughing, skiving, splitting and finishing are similar in principle to their equivalents provided by other machinery suppliers. It could be inferred that such types of simple machines could be used for equipping medium-scale factories or common facilities centres that provide services to home-scale manufacturers.

#### The leather goods industry

The manufacture of small and fancy leather goods is the most promising sector of the industry with export potential. Export possibilities are circumscribed by the very limited range of machines and the high labour input required for such production, but these factors suit the local conditions while meeting the foreign market demand. This concept was verified during a meeting held with the Italian Leather Goods Association (AIMPES). Such products are manufactured in Italy on a home-production scale to a volume of 30,000 units, with an export value of Lire 160 thousand million (approximately \$200,000). This example is quite encouraging for the possible development

of a similar industry in Indonesia, oriented towards exports, since the transfer of technology through co-operation with foreign manufacturers would be impossible, owing to the small scale of the individual producing units.

A visit was paid to a private enterprise that manufactured a wide range of leather goods for export as well as supplying 300 home manufacturers with cut parts for assembly, returning the semi-finished goods for final finishing and packing. The equipment comprised mainly cutting presses, skiving machines, a guillotine and flat-bed and column sewing machines in addition to the essential simple tools such as hammers, folding bones and scissors. The very high quality of the metal accessories and linings, as well as the excellence of the preparation and cutting of the patterns, together with the high skill of the manual labour, combined to produce finished articles of superior quality. This example demonstrates that the development of an export-oriented leather goods industry in Indonesia could be achieved independently by means of providing appropriate and simple equipment for home-scale manufacturers and by providing them with the technical advice that they would require to raise their level of skill and to develop, as second nature, an awareness of quality.

The establishment of common facilities centres or of common services demonstration centres comparable to the private enterprise cited above would also be quite beneficial to the industry. Such centres could be equipped in a similar way, except that the cutting presses might be eliminated; cutting knives and templates could be used instead to minimize costs.

#### The Trade Promotion Programme of the EEC

An important meeting was held with officials in charge of the Trade Promotion Programme of the EEC. During this meeting, the members of the Indonesian study tour delegation expressed their appreciation of the contribution that had been made by the EEC. These officials, in their turn, expressed their satisfaction with the Indonesian effort. During the discussion, present benefits and anticipated follow-up actions were formulated.

Within the framework of the trade promotion activities of the EEC, the Indonesian delegation expressed their country's readiness to contribute in the following specific areas:

Indonesia's participation in the Semaine internationale du cuir for the year 1977; an effort would be made to increase the stand area



Arranging a business trip through the EEC countries, possibly after the 1977 leather fair, making contacts with specialized bodies in each country visited

Publishing information about the leather and leather products industry in Indonesia, supported by statistical data and specialized forms in four languages

Establishing contacts with the European Federation of Machinery Suppliers as regards equipment for producing leather and leather products

Establishing contacts with European enterprises that would be willing to extend their activities to Indonesia in the form of joint ventures or technical assistance

Studying the possibility of exempting exported Indonesian handicrafts, including leather goods, from import duties in the EEC countries

The representatives of the EEC emphasized the preference of the import market for leather goods other than finished shoes. There is thus a need for an advisory service to aid in adapting the tanned leather and manufactured leather goods produced in Indonesia to meet the requirements of foreign markets. The possibility that the EEC might contribute to such an effort, perhaps through its Development Aid Programme, should be investigated.

## II. RECOMMENDATIONS

### General recommendations

Special attention should be given to the development and adaptation for export of finished leather goods, in the following order of priority:

- Small leather goods of reptile and other light leathers
- Leather uppers and cut soles for shoes
- Work gloves
- Garments such as jackets, dress and golf gloves
- Traditional leather goods of hand-ornamented, natural-colour, vegetable-tanned leather
- Wayang kulit puppets and fans

The early stages of tanning and finishing leather should be oriented towards the requirements of these goods.

There is a great need for technical in-plant guidance to the small-scale leather goods manufacturers in various regions of Indonesia combined with short courses and demonstration facilities to help them adapt their designs and production for export. Continued support for this project is highly recommended to provide continuity with the activities of the on-going project IS/INS/74/030 by 12 man-months.

### Recommendations to governmental bodies

#### To the Department of Industry

Carry out extensive and intensive surveys covering all regions of the country, indicating the addresses, types of production and capacities in the leather, shoe and leather goods industries. When published, it could be used as a buyers' guide and as a reference work for foreign investors and national planners.

Support is recommended for the establishment of common facilities and demonstration centres for up-grading the leather goods and shoe industries on the home scale level. Further assistance from UNIDO directed toward the establishment of these centres, as well as providing the necessary technical assistance for equipping and training, is also recommended.

Encourage and support the Leather Development Board of Indonesia's Department of Industry to enable its members who are involved in the subject to contribute to the foreseen development and to harmonize the activities of the governmental bodies through it.

The National Agency for Export Development (NAFED), Department of Trade

Encourage co-operation between the leading Indonesian tanneries and shoe factories abroad and the national enterprises in the form of technical assistance or joint ventures aiming at the dependent transfer of technology in these industrial sectors.

Work out an integrated study in consultation with the International Trade Centre (UNCTAD/GATT) projects team to decide upon the best drawback or bonus system to be applied to the export of leather products in order to reduce the incidence of high rates of import duties on raw materials and machinery and to support the finished product with the competitive price.

Facilitate the import of the accessories, equipment and tools required for the exporting factories.

Follow up and intensify the contacts made by local producers during the International Leather Fair and the following study tour.

Follow up the technical advice that has been given to various producers in the course of the present project and the preceding one (IS/INS/74/030) through personal contacts and circular letters.

Follow up the results of the meeting with the EEC officials that are mentioned in chapter I with special attention to the earliest arrangements for the participation in the International Leather Fair during 1977 with both the EEC authorities and the participants.

Annex I

MEMBERS OF THE INDONESIAN DELEGATION TO THE INTERNATIONAL LEATHER FAIR  
(SEMAINE INTERNATIONALE DU CUIR), PARIS, 11 TO 14 SEPTEMBER 1976

Indonesian government officials

Mr. Pietoyo Sukarbowo<sup>a/</sup>  
Director, Leather Research Institute, Jogjakarta, and  
Chairman, Leather Development Board  
Department of Industry  
(Chairman of the Study Tour Delegation)

Mr. Arifin Morsalin<sup>a/</sup>  
Director, Directorate General of Light Industry  
Department of Industry

Mr. T.M. Yusuf<sup>a/</sup>  
National Agency for Export Development (NAFED)  
Department of Trade

Mr. Djolang Djohar Raya<sup>a/</sup>  
National Agency for Export Development (NAFED)  
Department of Trade

Mr. M. Maher Abou El-Khair<sup>a/</sup>  
UNIDO/UNDP Leather Goods Adviser to the National Agency for  
Export Development (NAFED)

Private enterprises represented

<u>Names and addresses</u>	<u>Product</u>	<u>Representative</u>
PT. Cakung Leather Factory Jl. Ir. H. Juanda III/31-i Jakarta, Phone: 43736	Pickled, wetblue, crust vegetable tanned (goat and sheep)	Mr. Sjarifuddin Siregar <sup>a/</sup>
PT. Pan Vici and Sons Jl. Mangga Besar No. 179 Jakarta, Phone: 21596	Pickled, wetblue, crust, finished leather (goat, sheep, cow and buffalo)	Mr. Rajong Djunaidi
Fa. Natraco Jl. Gajahmada No. 94 Jakarta, Phone: 20694	Pickled, wetblue (goat and sheep)	Mr. Ishak Noor <sup>a/</sup>
CV. Ramli Jl. Karet Raya No. 9 Jakarta, Phone: 582060	Pickled, wetblue (goat and sheep)	Mr. H. Ramli

<sup>a/</sup> Member of the study tour delegation.

<u>Names and addresses</u>	<u>Product</u>	<u>Representative</u>
PT. Budi Makmur Jaya Murni Jl. Sukonandi No. 1 Jogjakarta, Phone: 3115	Pickled, wetblue crust, nappa, glove suede, chamois (goat and sheep)	Mr. R.Y. Suratno
P.K. Mertoyudan Jl. Mertoyudan Magelang, Phone: 2697	Leather articles: puppets, handbags, fans, neckties and similar leathercraft products	Mr. Ambar Soedardjo Mr. R. Rosidi
P.K. General Jl. Pemuda No. 239 Magelang, Phone: 2830	Pickled, wetblue finished leather (cattle hides)	Mr. Liong Tjok Jun
PT. Haka Surabaya Leather Jl. Kedung Sari No. 19 Surabaya, Phone: 45402	Pickled, wetblue (goat and sheep and cattle hides)	Mr. Aminullah Thalib Karim
CV. Wonosari Jl. Bukit Barisan No. 8 Surabaya, Phone: 42615	Pickled, wetblue (goat, sheep and cattle)	Mr. Harry Syoufron <sup>a/</sup>
PT. Budi Rapih Kpg. Rejowinangun Jogjakarta, Phone: 3169	Pickled, wetblue, crust nappa upholstery, suede (cattle hides)	Mr. Sukardi Ms. Soekaimi
Pinda Aneka Group Carma Jl. Jendral A. Yani 115 Surabaya, Phone: 68526	Soft cattle leather	Mr. Sjahrial Mr. Darsof Sofjan
CV. Pagina Cipta Jl. Menari No. 47 Malang, Phone: 3295	Cut soles	Mr. Gunawan Nugroho <sup>a/</sup>
PT. Bina Usaha Kulit <sup>b/</sup> Jl. Kalibesar Timur No. 27, atas Jakarta, Phone: 20998	Shoes and other leathercraft products	Mr. Nusjirwan A. Hamzah <sup>a/</sup>
Pinda Aneka Group Carma Magetan	Pickled, wetblue sheep, goatskins and leathercraft products	Mr. R. Arjono Koesoemowinoto Mr. R. Atmadji Koesoemowinoto
PT. Hakama Leather Jl. Laiya No. 37 Ujung Pandang, Phone: 4379	Pickled, wetblue, sole, cattle and buffalo hides	Ms. A. Thalib Karim
PT. Budi Murni Jl. Sukonandi No. 1 Jogjakarta	Garments, golf gloves and other leather goods	Ms. R.Y. Suratno

<u>Name and addresses</u>	<u>Product</u>	<u>Representative</u>
PT. Sukajujur Leather Factory Jl. Roa Malaka Utara 9 Jakarta-Kota, Phone: 245392	Pickled, wetblue crust (goat and sheep)	
Per. Kulit B.S. Jl. Ngasem No. 10 Jogjakarta	Handbags, travel- ling bags and other leather products	Mr. Mohd. Salim
Per. Kulit Mulyosuharjo Jl. Taman Sari No. 37 b Jogjakarta	<u>Wayang kulit</u> and other leather products	
Per. Kulit Manding Bantul-Jogjakarta	Miscellaneous leather bags, other leather products	
Per. Kulit Trisula Gg. Sukriwo 135 Nyutran Jogjakarta	Leather shoes	
Per. Kulit Kusuma Kauman 48/50 Jogjakarta	Handbags and leathercraft products	

Annex II

PERSONS CONTACTED DURING THE STUDY TOUR

United Nations Industrial Development Organization

Mr. Magne Nestvold  
Senior Industrial Development Officer  
Agro-Industry Section  
Industrial Operations Division

Indonesian Embassy officials<sup>a/</sup>

1. Belgium  
Mr. Atmono Suryo, Ambassador  
Mr. Masismid, Deputy Chief of Mission  
Mr. Wendeljati, Commercial Attaché
2. United Kingdom  
Mr. Sofian Boedjang, Commercial Attaché<sup>a/</sup>
3. Italy  
Mr. Haringun, Commercial Attaché<sup>a/</sup>
4. France  
Mr. Asmin Darwis, Commercial Attaché<sup>a/</sup>
5. European Economic Community officials  
Mr. B. Kendel,<sup>a/</sup> Trade Promotion Programme  
Mr. Hattet<sup>a/</sup>

Tanning industry

6. Colomer Munmany, S.A.<sup>a/</sup>  
San Francisco 1  
Vich, Barcelona  
Spain  
Mr. Andres Colomer Munmany, Director General  
Mr. Juan Colomer Munmany, Assistant Director General  
Mr. Manuel Portanella Casanova, Technical Director  
Mr. Jose Costa Riera, Commercial Director
7. International Leather B.V.  
Stationsstraat 62-64  
Rijen, Netherlands  
Mr. J.C. Wouters, Manager  
Mr. P.C. van den Eerden, Sales Manager

---

<sup>a/</sup> Visited during the study tour.

8. K.M. Muhamed Abdul Khader Firm  
40-A, V.V. Koil Street Periamet  
Madras - 600 003, India  
K.M. Md. Abdul Gani, Partner
9. Ger. Preyde B.V.  
Van Harnestraat 32  
Loon op Zand, Netherlands
10. Tannerie-Megisserie S.A.A.T.T.M.  
122, Rue de Province,  
Paris 75008, France  
Mr. Bauchet, Director General
11. BASF  
6700 Ludwigshafen, Federal Republic of Germany  
Mr. Müller, Director, Leather Department  
Mr. Walter H. Puls, Manager, Asia Sales Division  
Mr. Karl Heiny Giety, Sales Department  
Division of South and East Asia  
Mr. Alfred Göty, Technical Manager,  
Leather Department  
Mr. Kurt Hess, Sales Department  
South and East Asia
12. Peaux de Reptiles  
59 Rue du Faubourg Saint-Martin  
Paris X<sup>e</sup>, France
13. Herbert Reuter  
Marien Str. 37  
6053 Abertzhousen  
Federal Republic of Germany
14. Chaffers and Walfertan  
72 Gibbs St.  
Chatswood  
New South Wales 2067, Australia  
Mr. Collin W. Chaffer, General Manager  
Mr. Aldo Giovannini, Sales Manager
15. Buchbinderleder  
Theodor-Heuss Str. 34a  
7 Stuttgart 1, Federal Republic of Germany  
Mr. Anton Glaser
16. Unione Nazionale Industria Conciara  
Via Brisa 3  
20123 Milano, Italy  
Mr. Arturo Ballini<sup>a</sup>



17. Mavinpel S.n.c.  
Via Toscana, 56029 Santa Croce Sull' Arno  
Pisa, Italy
18. Gimarpel S.n.c.  
Via Toscana, 56029 Santa Croce Sull' Arno  
Pisa, Italy
19. Rettilconcia  
Via Merano 28  
21100 Varese, Italy
20. Italrettile  
26010 Montodine  
Cremona, Italy

Shoe industry

21. Kesko Coy  
Satamakatu 3  
00160 Helsinki 16, Finland  
Mr. A. Laitinen
22. Giancarlo Falaschi  
Via C. Pisacane 16, Santa Croce Sull'Arno  
Pisa, Italy
23. GPM pvba<sup>a/</sup>  
Boomsestraat 24  
2640 Niel, Belgium  
Mr. Guy Serrien, Sales Manager  
Mr. Pierre Serrien, Technical Manager
24. Tanninpex  
Shoe Department  
Gusyev U. 16, Hungary  
Budapest V
25. Christian André  
77260 Reuil en Brie, France
26. Sacfininter, S.A.  
Palace du Champ de Mars 2,  
B-1050 Brussels, Belgium  
Mr. Laurent Mariotte
27. Sogescol, S.A.  
Palace du Champ de Mars 2,  
B-1050 Brussels, Belgium  
Mr. Jean-Claude Grandjean

28. S.A. Dulis  
16, Rue St-Simon  
78000 Versailles, France  
Mr. Henri Dulis
29. Dominant Exclusiv  
Rieschmeiler-Mühlbach 1, Federal Republic of Germany  
Mr. Johann Konrad

Leather goods

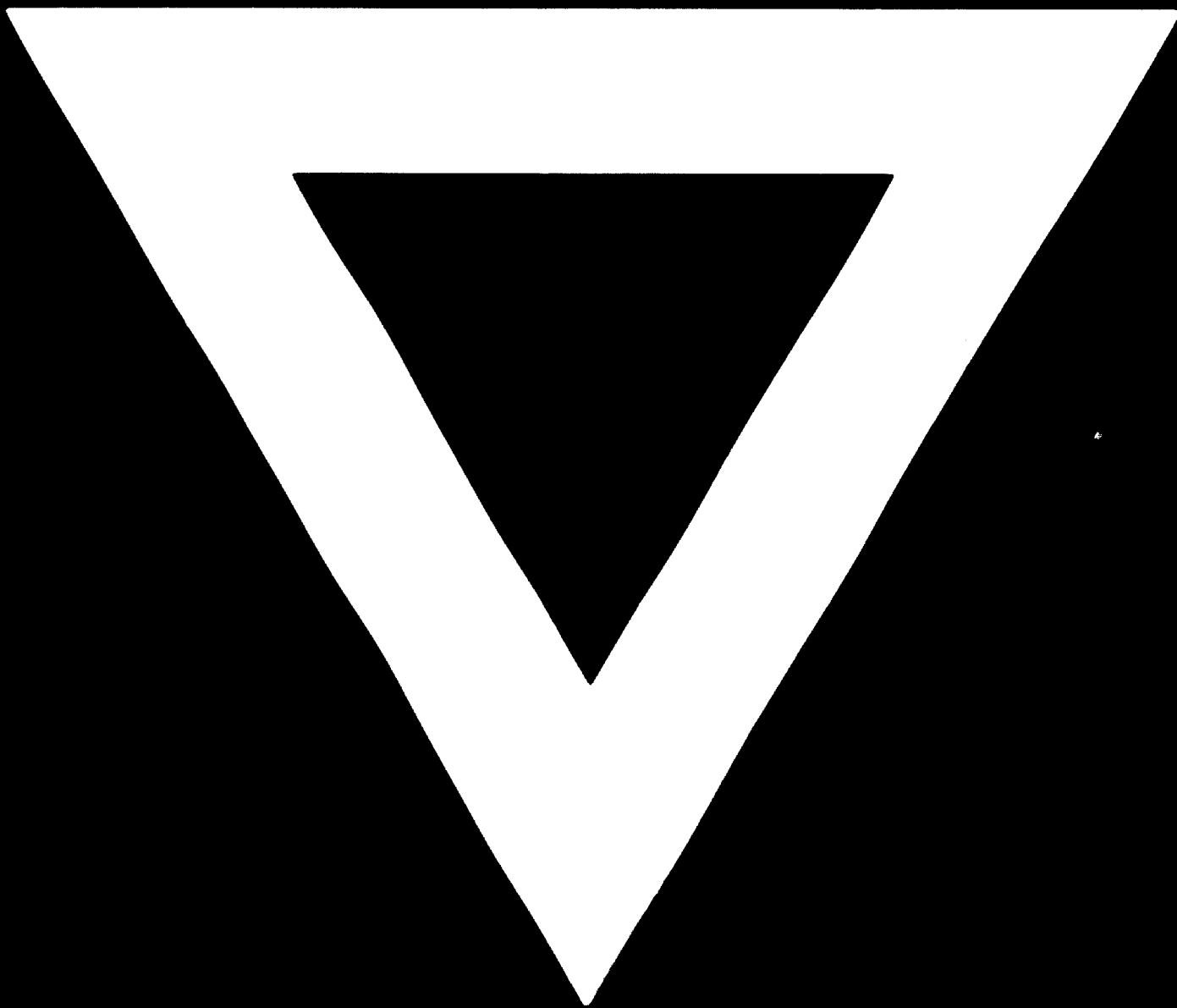
30. Conceria Rettili  
26024 Ponte A. Egola  
Pisa, Italy  
Mr. Adolfo Matteucci
31. Leegin  
508 Monterey Pass Road  
Monterey Park, California 91754, United States  
Mr. Jerry Kohl
32. Bhantung  
5600 Faaborg, Denmark  
Mr. Gunnar Nielsen
33. Willy Coopmano-Van Sande  
11 Snekenshof  
Lichtaart (Ley Herentals), Belgium
34. Argolanda B.V.  
Schiedamse Vest 422-44c  
Rotterdam, Netherlands  
Mr. S. Sytsma
35. Aksire-Senrey and Fils  
89, Rue de Lyons-la-Forêt  
76000 Rouen, France
36. AIMPES (Leather Goods Association)  
20122 Milano  
Viale Beatrice D'Este, 43, Italy  
Mr. Francesco Mafera, Secretary General
37. Fashion of Florence  
Via del Padule, 1, 50018 Cazellina-Scandicci  
Florence, Italy
38. W. Georges  
26, Rue Yves-Taudic  
75010 Paris, France

39. Fremder  
Via Fusetti 12  
20136 Milano  
Mr. Beppi Fremder

Machinery suppliers

40. Alletti Giovanni Figli  
Via Tiepolo 14  
Varese, Italy  
Mr. M.M. Franco  
Mr. Torlasco
41. ANVER  
2-6 Rue Suchet  
94702 Maisons-Alfort, France  
Mr. Bernard Clair, Export Manager
42. Standard Engineering Company<sup>a/</sup>  
Evington Valley Road  
Leicester LE5 5L2, England  
Mr. Raily Sinain, Vice Chairman  
Mr. John F. Kidston, Sales Director  
Mr. John Richards, Technical Engineer  
Mr. Roger Taylor, Export Manager
43. Moenus<sup>a/</sup>  
Voltastr. 74-80  
Frankfurt am Main, Federal Republic of Germany  
Mr. Schivalbach  
Mr. J. Gaus
44. Charno S.A.  
Rue Leconte-de-Lisle,  
33100 Grenoble, France
45. Adler AG  
D-4300 Bielefeld 1, Federal Republic of Germany
46. S.A.L.P.  
10036 Rivarolo Canavese  
Torino, Italy
47. Benozzo Bagnoli  
Via S. Tomasso, 51-56029 Santa Croce Sull'Arno  
Pisa, Italy

**G-331**



**77.09.23**