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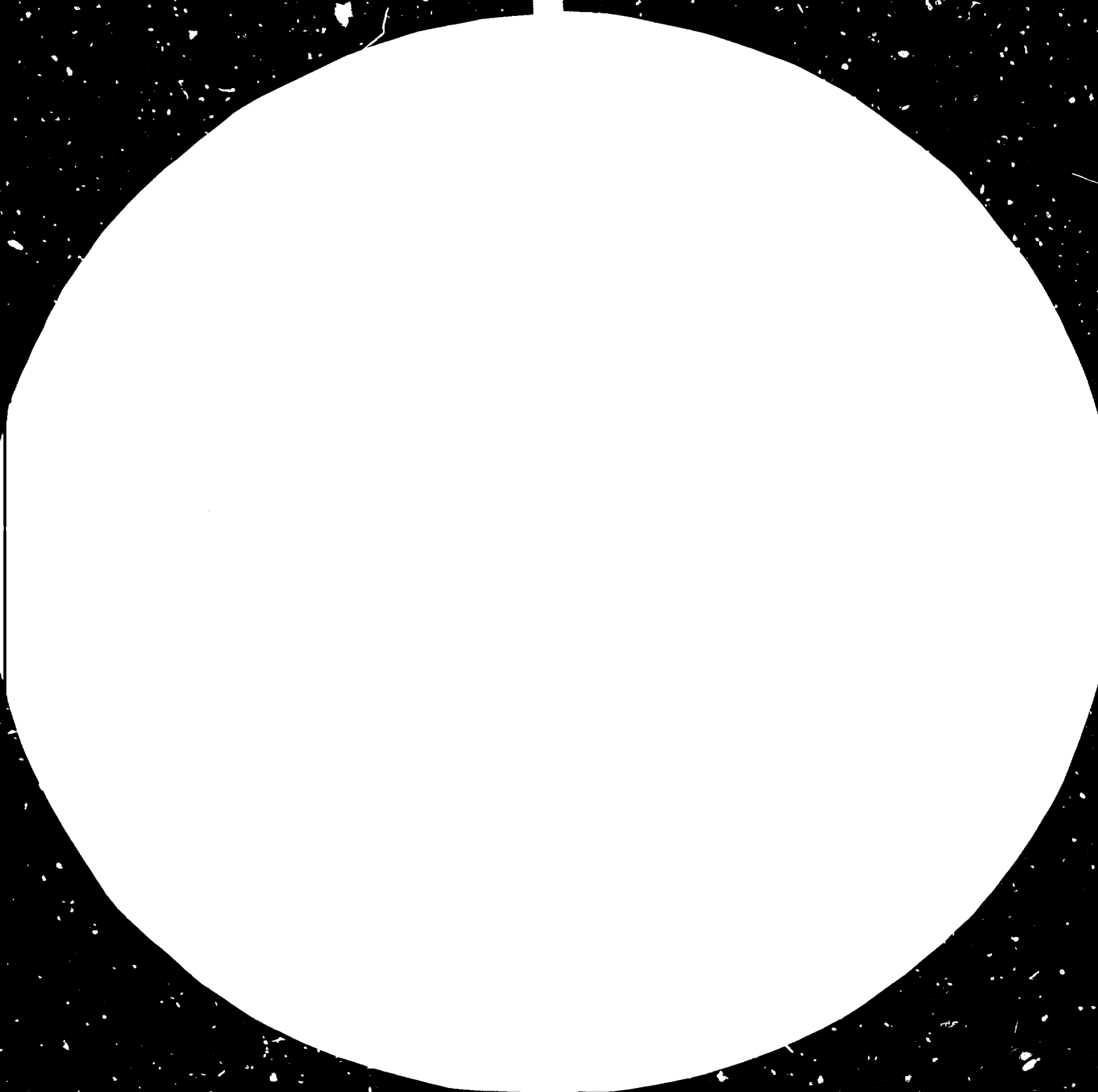
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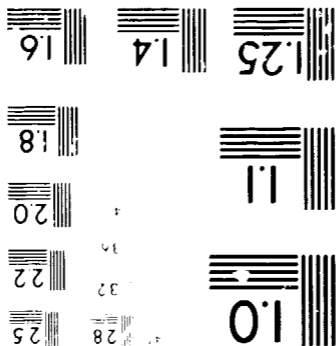
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UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANIZATION

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# THIRD CONSULTATION ON THE LEATHER AND LEATHER PRODUCTS INDUSTRY

Innsbruck, Austria, 16-19 April 1984

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REPORT.

(Consultation on leather  
industry).

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## PREFACE

The Second General Conference of the United Nations Industrial Development Organization (UNIDO), held at Lima, Peru, in March 1975, recommended that UNIDO should include among its activities a system of continuing consultations between developed and developing countries with the object of raising the share of the developing countries in world industrial output through increased international co-operation.<sup>1/</sup> The General Assembly, at its seventh special session in September 1975, endorsed the recommendation and requested UNIDO to implement it under the guidance of the Industrial Development Board.

Twenty-two Consultations have been convened since 1977 covering the following industries and topics: capital goods, agricultural machinery, iron and steel, fertilizer, petrochemical, pharmaceutical, leather and leather products, vegetable oils and fats, food-processing, industrial financing, training of industrial manpower, and wood and wood products.

In May 1980, the Industrial Development Board decided to place the System of Consultation on a permanent basis, and in May 1982 it adopted the rules of procedure<sup>2/</sup> according to which the System of Consultations was to operate, including its principles, objectives and characteristics, notably:

The System of Consultations shall be an instrument through which the United Nations Industrial Development Organization (UNIDO) is to serve as a forum for developed and developing countries in their contacts and consultations directed towards the industrialization of developing countries;<sup>3/</sup>

The System of Consultations would also permit negotiations among interested parties at their request, at the same time as or after consultations;<sup>4/</sup>

Participants of each member country should include officials of governments as well as representatives of industry, labour, consumer groups and others, as deemed appropriate by each Government;<sup>5/</sup>

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<sup>1/</sup> Report of the Second General Conference of the United Nations Industrial Development Organization (ID/CONF.3/31), chapter IV, "The Lima Declaration and Plan of Action on Industrial Development and Co-operation", para.66.

<sup>2/</sup> The System of Consultations (PI/84).

<sup>3/</sup> Ibid., para. 1.

<sup>4/</sup> Ibid., para. 3.

<sup>5/</sup> Ibid., para. 23.

Each Consultation shall formulate a report, which shall include conclusions and recommendations agreed upon by consensus and also other significant views expressed during the discussion.<sup>6/</sup>

The Industrial Development Board, at its seventeenth session in April-May 1983,<sup>7/</sup> decided to include the Third Consultation on the Leather and Leather Products Industry in the programme of Consultations for the biennium 1984-1985.

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<sup>6/</sup> Ibid., para. 46.

<sup>7/</sup> ID/B/308.

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## INTRODUCTION

1. The Third Consultation on the Leather and Leather Products Industry was held at Innsbruck, Austria, from 16 to 19 April 1984. The Third Consultation was attended by 108 participants from 46 countries and 11 observers from 9 international organizations (see annex I).

### Background to the Third Consultation

2. The first and second Consultations recommended measures to improve:

(a) Availability of raw materials in the leather and leather products industry by establishing an international hides and skins development scheme;

(b) Methods of international co-operation by establishing checklists for contractual arrangements between enterprises from developed and developing countries;

(c) Conditions of world production, marketing and trade by elaborating ground rules for the rationalization of those aspects of the industry;

(d) Co-operation in supporting the industry in developing countries by establishing regional development centres and design units for leather products;

(e) Global statistical intelligence for hides and skins, and leather and leather products.

3. Those recommendations have been carried out in the following ways:

(a) At the national level, FAO and UNIDO have included measures to develop the hides and skins sector in their technical assistance projects, as far as funding permit. At the global level, UNCTAD VI recommended the examination of the possibility of including hides and skins as a commodity group eligible for development funding by the technical assistance component of the UNCTAD Common Fund. The UNCTAD secretariat is currently engaged in intergovernmental preparations for setting up the Common Fund;

(b) Two checklists for contractual agreements, one for the tanning industry, the other for the footwear industry, were prepared by UNIDO and approved by the fifth and sixth sessions of the UNIDO Leather and Leather Products Industry Panel. These are being used as background documentation for the Third Consultation;

(c) The Leather and Leather Products Industry Panel did not reach consensus on the formulation of ground rules applicable on a world-wide basis, and therefore requested UNIDO to focus on regional deliberations for the time being;

(d) Concerning regional development centres, UNIDO has met with little success in their establishment, due to a lack of regional consensus in their location and the unavailability of financing for such centres. It is hoped that, as regional co-operation between developing countries increases, sufficient momentum will be attained to realize such centres;

(e) Since the First Consultation, FAO has published one statistical compendium containing world-wide production and trade data,<sup>1/</sup> and another containing commodity conversion factors for raw hides and skins and leather.<sup>2/</sup>

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<sup>1/</sup> World Statistical Compendium for Raw Hides and Skins, Leather and Leather Footwear 1961-82, p.72, FAO, Rome, 1983.

<sup>2/</sup> Hides, Skins and Leather: Provisional Compendium of Conversion Factors, CCP: HS 81/4, FAO, Rome, March 1981.

AGREED CONCLUSIONS AND RECOMMENDATIONS

Issue 1: Measures to maximize the potential of the leather and leather products industry in developing countries

Conclusion

4. The Third Consultation concluded that an integrated programme approach at the national level, with appropriate variations to meet the specific needs of individual developing countries, could provide a relevant framework for international co-operation for the development of the full potential of the raw hides and skins and the leather and leather products industry.

Recommendations

5. With a view to assisting the implementation of the above-mentioned integrated development programmes, UNIDO, in collaboration with the appropriate agencies and bodies, should:

(a) Assess and evaluate the potential of that industry in individual developing countries, with special emphasis on the least developed countries and others of special need, in order to make more efficient use of their capacity in the sector;

(b) Accelerate the implementation of the international hides and skins development scheme set out in the report of the Second Consultation (paragraphs 1-6);

(c) Advise concerned countries on practical ways of securing the necessary sectoral programme financing, including export credit and insurance schemes, required for individual programmes;

(d) Assist in the provision of technical services, management and marketing know-how, including appropriate guarantee schemes. Special emphasis should be placed on the training of personnel, especially maintenance personnel.

6. UNIDO, in collaboration with United Nations agencies concerned, should examine practical ways of establishing regional training centres and/or strengthening existing training centres in developing countries in the field of raw hides and skins and their related by-products, leather and leather products processing, manufacture, design, management and marketing.

7. Particular attention should be given to working conditions, safety and health. Due regard should be given to environmental considerations.

8. UNIDO and the United Nations agencies concerned should identify potential partners from developed and developing countries who might collaborate for their mutual advantage in the integrated development of the leather and leather products industry. The Third Consultation took note of the usefulness of providing a framework to encourage direct investment on a mutually beneficial basis.

9. The Third Consultation noted with appreciation the checklists for contractual agreements in the footwear and tanning sectors between enterprises from developed and developing countries (ID/WG.411/1 and 2). Considering that those could be of great assistance to negotiators from all countries, it was recommended that they should be published, including the proposed amendments on occupational safety and health, and given the widest possible distribution among interested parties. In addition, UNIDO, in collaboration with the appropriate agencies and bodies, should prepare checklists for trade in raw materials, leather and finished products as well as the purchase of machinery and chemicals.

10. UNIDO, in co-operation with other United Nations agencies, should prepare a list of organizations and institutions from both developed and developing countries able to provide assistance in training, research, technology, management and marketing to the developing countries.

Issue 2: Measures to facilitate the production and acquisition of tanning chemicals and footwear auxiliaries in developing countries, including regional co-operation among developing countries

Conclusions

11. The Third Consultation concluded that the procurement of tanning chemicals in many developing countries was a significant constraint. However, it recognized that the manufacture of those chemicals, one segment of a complex and capital-intensive chemical industry, required substantial economies of scale in order to be viable. It was noted that some developing countries had capacities to manufacture major basic tanning chemicals, whereas some others

were concerned with the realization of their potential for converting indigenous raw materials into tanning chemicals.

12. The Third Consultation recognized the growing importance of the manufacture of footwear component auxiliaries in developing countries.

#### Recommendations

13. With a view to assisting the implementation of regional co-operation programmes, UNIDO, in collaboration with the appropriate agencies and bodies, should:

- (a) Consider and evaluate existing co-operation between developing countries as a model for regional co-operation;
- (b) Compile a list of tanning chemicals produced and footwear auxiliary facilities existing in developing countries;
- (c) Examine the problems and consequences of import barriers, such as high duties on chemicals and footwear auxiliaries, on the competitiveness of the chemical and leather and leather products industries of developing countries in world markets;
- (d) Compile a list of the sources of supply from developed and developing countries of tanning chemicals most commonly used in the leather and leather products industry.

14. It was recommended that UNIDO, in collaboration with the United Nations agencies concerned, should:

- (a) Examine practical ways of establishing regional co-operation for developing countries;
- (b) Help the developing countries to establish a procurement system for the acquisition and distribution of basic tanning chemicals, which could cover the use of chemical saving and recycling processes. It could also include assistance for the establishment of specialized laboratories for the testing of products in countries where such facilities did not exist.

15. UNIDO, in collaboration with the appropriate agencies and bodies, should undertake technical and economic studies of the raw-material base and other necessary facilities existing in the developing countries that could lead, through international co-operation, to the production of selected tanning chemicals.

16. UNIDO, in collaboration with the appropriate agencies and bodies, should assist developing countries in the formulation of programmes for the manufacture of footwear components and auxiliaries at national, sub-regional, regional or interregional levels, as deemed necessary. UNIDO and appropriate bodies should endeavour to involve potential partners from both developed and developing countries in those programmes. Consideration should be given to the existing and potential absorptive capacity of regional markets and to co-operation between the regional trading partners.

17 With regard to the environmental and safety factors, the Consultation recommended that:

(a) Environmental considerations should be taken into account in the establishment and running of new and existing plants;

(b) Particular attention should be given to the products to be used by tanners to ensure that those products did not contain hazardous materials. For safety and health, existing factory safety data sheets written in national languages should be obligatory as applicable.

#### General recommendations

18. UNIDO, through its Leather and Leather Products Industry Panel, should monitor the progress made towards the implementation of the recommendations agreed at previous consultations and at the Third Consultation, particularly with regard to the integrated programme approach as implemented in individual developing countries. It should provide information on the progress made to all participants and Governments every two years. It was further recommended that the Industrial Development Board should consider the convening of the Fourth Consultation in due course.

19. Given the objectives of the Industrial Development Decade for Africa and the situation of the leather and leather products industry in that region, the Industrial Development Board should consider the convening of a regional consultation in Africa preceded by the meeting of a group of experts that would identify areas of international co-operation. That approach could be extended to other regions if the necessity arises.

I. ORGANIZATION OF THE CONSULTATION

Opening of the Consultation

Speech of the Executive Director of UNIDO

20. The Deputy Director of the Division of Policy Co-ordination and Head of the Negotiations Branch, representing the Executive Director of UNIDO, read the speech of Dr. Khane, who regrettably could not attend. On behalf of the Executive Director, the Deputy Director welcomed the participants to the Third Consultation and expressed gratitude to the Federal Government of Austria, the Province of Tyrol and the City of Innsbruck for again hosting a Consultation. Dr. Khane said he was particularly pleased with the presence of the many African participants in view of the fact that the United Nations had declared the 1980s the Industrial Development Decade for Africa. He said that the first two Consultations had brought about interesting developments in the industry in the developing countries, and he thanked the members of the UNIDO Leather and Leather Products Industry Panel whose deliberations had helped to lead to such developments.

21. The process of continuous restructuring of the leather and leather products industry could be improved by a continuous dialogue as provided for by the system of Consultations. So far it had been possible through Consultations to consider vital problems related to the industry, and to foster the technological capabilities of developing countries in the sector. First, developing countries would, by the year 2000, account for over half of global manufacturing activity in leather and leather products. Secondly, the industry was constrained by the slow growth of its global raw material base. Consequently, it was essential to minimize the wastage of raw materials in developing countries, and an international hides and skins development scheme had been suggested for that purpose. That scheme was being assisted through the technical assistance programmes of UNIDO and FAO and through the attempts of UNCTAD to include hides and skins as a commodity group eligible for development funding through the Second Account of the proposed UNCTAD Common Fund for Commodities. Thirdly, the transformation of developing countries from suppliers of raw materials to exporters of leather and leather products had led to a demand for greater access to developed country markets. The resultant trade problems had prompted the recommendation that ground rules be formulated for the rationalization of world production, marketing and trade in

leather and leather products. However, the UNIDO Leather and Leather Products Industry Panel had concluded that the situation of the different developing regions was too diverse to permit the formulation of ground rules of universal applicability and suggested holding more selective and specific discussions. Fourthly, the need to enhance the technological capabilities of developing countries was being met, to the extent permitted by resources, through the technical assistance programmes of UNIDO and other United Nations bodies.

22. The Executive Director said that in view of those findings there was a need, first, for a qualitative enhancement of the performance of developing countries at the various stages of the agro-industrial chain. The issue of sectoral programming and investment in developing countries was therefore critical to the consolidation of industrial performance in that sector. That reflected the thinking of some member States who had requested UNIDO to investigate the prospects for comprehensive sectoral development programmes through the System of Consultations. It was also in line with the recommendation of the First Consultation on Industrial Financing, which called upon UNIDO to promote the use of programme lending on a sectoral basis, including financing of related services, pre-investment work, and repair and maintenance.

23. Secondly, there was a need to reduce the dependence of the industry in developing countries on imports from the industrialized world. Tanning chemicals and footwear auxiliaries had been identified as the two most important sets of imports.

24. He ended by saying that the restructuring process in the leather and leather products industry was a reality as a result of the international evolution of the industry. However, in that process of change, the developing countries should consolidate their gains before contemplating further industrial expansion. Such a consolidation called for judicious utilization of investment and enterprise-level co-operation between developed and developing countries. He hoped that the Third Consultation would arrive at specific and practical recommendations that would enhance international co-operation in the sector.



Statement of the State Governor of the Tyrol

25. Mr. Friedolin Zanon, a member of the Tyrol State Council, welcomed the participants on behalf of the State Governor. He was happy that the capital of Tyrol should have been chosen as the site of the Third Consultation. Tyrol had a long history as a crossroads of trade in the heart of Europe, and Innsbruck, which had twice been host to the Winter Olympics, had proved itself as an international meeting place. A well-functioning economy was the basis for guaranteeing incomes and the precondition for social services. It was important to look beyond national boundaries and co-operate in the endeavour to improve conditions throughout the world. He wished the Consultation every success.

System of Consultations

26. A representative of the secretariat outlined the history of the System of Consultations, its relationship with other activities of UNIDO and its main characteristics. By drawing on UNIDO activities related to industrial studies and technical assistance, the System of Consultations was able to take full advantage of the interdisciplinary expertise available in UNIDO and to enhance its capacity to further the industrialization of developing countries.

27. The representative of the secretariat recalled some of the salient developments that had taken place in the leather industry as a result of its being examined through the System of Consultations since 1977. He then informed the participants of the UNIDO technical assistance programmes in that sector and the sources of funds available for them. The technical assistance programmes fell into three broad categories: direct assistance to industry, institutional infrastructure, and technical studies. Over the past five years, UNIDO had implemented approximately \$15 million worth of projects in the leather and leather products industry. The value of its annual implementation was approximately from \$2 million to \$3 million. Currently it had projects valued at \$7 million awaiting funds. He gave examples of some of the technical assistance given.

The UNIDO Leather and Leather Products Industry Panel

28. The Chairman of the seventh session of the Leather and Leather Products Industry Panel, F. Mencik, Président Directeur Général of BATA S.A., recalled that the Panel had been established by the Industrial Development Board upon the recommendation of the First Consultation. The Panel, composed of representatives from all regions of the world and from United Nations bodies, was established to advise UNIDO on the problems of the world leather and leather products industry and on possible solutions to them. He stressed that the industry had undergone serious difficulties in recent years due to stagnant markets and world trade. Nevertheless, several developing countries had made considerable progress in the handling of raw materials, tanning, production and marketing, thereby becoming important sources of world supply. In other countries, the crisis had revealed structural weaknesses, which could serve as a guide for future development planning in the sector.

29. He stated that papers submitted to the Third Consultation were the result of four years of work; they contained proposals for practical solutions to the problems encountered. He said that the main objective for the world industry was to make full use of the raw materials that were currently being wasted. He concluded by noting that the industry was on the way to recovery and that the opportunity should be seized to make joint initiatives involving the industry from developing and developed countries.

Presentation of issues

Issue 1: Measures to maximize the potential of the leather and leather products industry in developing countries

30. A representative of the secretariat referred to issue 1: "Measures to maximize the potential of the leather and leather products industry in developing countries" (ID/WG.411/5). He emphasized the need to improve the utilization of installed capacities in developing countries through the integrated development programming of the leather and leather products industry. He stressed that three aspects had to be taken into account.

31. First, with regard to national integrated developing planning and programme financing, there was a need to replace ad hoc or isolated investment by sustained efforts at the national level to link the supply of raw materials

with capabilities for tanning and manufacturing leather products. In that connection, the UNIDO secretariat suggested that investments be co-ordinated on the basis of an agro-industrial programme that could be supported by international co-operation. That approach could be particularly beneficial to the least developed of the developing countries.

32. Secondly, co-operation between enterprises suffered because it often did not include the required technical, managerial and commercial know-how. UNIDO therefore proposed that the Third Consultation discuss that problem area and particularly how the mechanism of export credits and insurance schemes could support the supply of know-how and services to the developing countries.

33. Thirdly, regarding the contractual framework for enterprise co-operation, the UNIDO secretariat had prepared two checklists: one for the tanning and one for the footwear sector, following a recommendation adopted by the Second Consultation on the Leather and Leather Products Industry. The Third Consultation was asked to consider the coverage of those checklists and the need to extend them to other aspects through similar checklists or other methods.

34. In concluding, he invited participants to consider the following questions from the issue paper (ID/WG.411/5):

(a) What were the possibilities for and constraints to integrated development programming for the leather and leather products industry in developing countries? How could international co-operation support such national sectoral programmes? How could UNIDO be instrumental in promoting such international co-operation for the benefit of individual developing countries?

(b) What policy measures could be taken by developed countries to encourage and support their enterprises in supplying know-how and services for the leather and leather products industry in developing countries? Specifically, how could export credit and insurance schemes support the supply of know-how and services in that industry?

(c) What policy measures should be taken by developing countries in order to enhance their receptivity to those services? What framework of co-operation could be established to enhance such co-operation on a basis that balanced the interests of partners from developed and developing countries?

Issue 2: Measures to facilitate the production and acquisition of tanning chemicals and footwear auxiliaries in developing countries, including regional co-operation among developing countries

35. A representative of the UNIDO secretariat presented issue 2, "Measures to facilitate the production and acquisition of tanning chemicals and footwear auxiliaries in developing countries, including regional co-operation among developing countries" (ID/WG.411/7), which was supported by two background papers, "Strategies for increasing the production of tanning chemicals in developing countries" (UNIDO/IS.448), and "Components and auxiliaries manufacture for the shoe and other leather products industry in the developing countries" (ID/WG.411/3). Issue 2 covered three subjects: first, tanning chemicals; secondly, footwear auxiliaries; and thirdly, regional co-operation with regard to those two groups of products.

36. The subject of tanning chemicals emerged from experience in UNIDO technical assistance projects and information received from the industry. In certain developing countries severe problems were experienced in obtaining a steady, reliable and economic flow of tanning chemicals to the tanneries. The problems were caused by weak trading infrastructures, lack of foreign exchange or difficulties in obtaining import licenses. The UNIDO Leather Panel discussed the subject and agreed that it should be presented to the Third Consultation.

37. The background paper was only a first attempt to highlight the difficulties faced by the developing countries in the production and acquisition of tanning chemicals. It confirmed that much more work needed to be done in that area before fully comprehensive analyses could be made.

38. He stressed that the production of tanning chemicals in certain developing countries had already developed to a high degree of self-sufficiency, and those countries might be technically capable of participating in regional co-operation in the supply of tanning chemicals. He suggested that the Consultation examine the prospects for development, attempt to assess requirements of tanning chemicals and consider feasible alternatives and modalities for co-operation.

39. With regard to the background paper "Component and auxiliaries manufacture for the shoe and other leather products industry in the developing countries" (ID/WG.411/3), he stated that it examined the techno-economic possibilities of establishing component and auxiliary material production plants in the developing countries, either as national units or as regional sources of supply. The paper was intended for the use of the decision-makers in the developing countries dealing with the development of the leather and leather products industry, such as national development corporations, ministries of trade and industry or the parastatal leather and shoe corporations.

40. He concluded by requesting participants to consider the following questions, taken from the issue paper (ID/WG.411/7):

(a) What were the possibilities for and constraints to implementing policies of regional co-operation between developing countries for import substitution production of certain tanning chemicals? For which chemicals would import substitution production be most viable?

(b) Would it be possible to implement regional policies for the improved acquisition of specialized chemicals from the industrialized countries?

(c) To what extent were developing countries prepared to co-operate on a regional basis for the manufacture of footwear components along the lines suggested in the issue paper?

(d) Would producers of tanning chemicals and footwear auxiliaries from industrialized and the more advanced developing countries have an interest in participating in such regional co-operation?

#### Election of officers

41. The following officers were elected:

Sanjoy Sen (India) President, Indian Leather Technologists' Association	Chairman
Giorgis Getinet (Ethiopia) General Manager Industrial Project Services	Rapporteur
Frantisek Malata (Czechoslovakia) Manager, Ministry of Industry	Vice-Chairman
Howard Ralph Seccombe (Australia) Alternate Permanent Representative Permanent Mission of Australia to the United Nations	Vice-Chairman

Alberto Sofia (Argentina)  
Director del Centro de Investigación  
de Tecnología del Cuero

Vice-Chairman

Lakshman Ravendra Watawala (Sri Lanka)  
Chairman and Managing Director  
Ceylon Leather Products Corporation

Vice-Chairman

Plenary discussion of the two issues

42. It was decided that the discussion of the two issues would be held in plenary. The discussion on issue 1 would be chaired by F. Mencik (Canada), Président directeur général, BATA S.A.; the discussion on issue 2 would be chaired by A. Blazej (Czechoslovakia), Professor, Slovak University of Technology.

Adoption of the agenda

43. The following agenda was adopted:

1. Opening of the Consultation
2. Election of Chairman, Vice-Chairmen and Rapporteur
3. Adoption of the agenda
4. Presentation of the issues by the secretariat
5. Discussion of the issues
  - (a) Issue 1: Measures to maximize the potential of the leather and leather products industry in developing countries
  - (b) Issue 2: Measures to facilitate the production and acquisition of tanning chemicals and footwear auxiliaries in developing countries, including regional co-operation among developing countries
  - (c) Other matters
6. Conclusions and recommendations
7. Adoption of the report of the Consultation

Adoption of the report

44. The report of the Consultation, including the conclusions and recommendations, was adopted in plenary on Thursday, 19 April 1984.

Documentation

45. Documents issued prior to the Consultation are listed in annex II.

II. REPORT OF THE PLENARY

Issue 1: Measures to maximize the potential of the leather and leather products industry in developing countries

46. Since issue 1 (ID/WG.411/5) covered a broad range of subjects, the discussion was classified under several headings.

Integrated development programming for the leather and leather products industry

47. Many participants considered that an integrated approach to the development of the sector, requiring the examination of upstream and downstream linkages, was essential. They felt that developing countries, especially the least developed, should take an overall agro-industrial view of the sector in order to plan investments, development efforts and international co-operation within a comprehensive framework. They also felt that integrated national development efforts would establish the required priorities in the sector and thus contribute to the solution of the problems faced by developing countries. In addition, the integrated development of the agricultural and industrial elements of the sector would present possibilities for self-sustained progress within the developing countries with a view to meeting the increasing needs of the population. The approach would also present possibilities for new fields of co-operation and that could involve different actors in comprehensive programmes. One participant said that the integrated programme approach should extend to the manufacture of leather products and not be fragmented into two separate sectors, one for the manufacture of leather and another for the manufacture of leather products. Finally, some participants suggested that the prospects for integrated approaches in leather sectors of a few specific developing countries should be evaluated.

48. Some participants agreed that the better take-off, collection, handling and care of raw hides and skins would bring the greatest immediate benefit to

developing countries and it was felt that the implementation of the international hides and skins development scheme, as set out in the report of the Second Consultation, should be accelerated.

49. Some participants expressed reservations on various aspects of the integrated approach. One observer, while accepting the validity of the argument that developing countries should attempt to minimize raw-material wastage as well as maximize the utilization of installed industrial capacities, suggested that it would be better to plan schemes for the tanning and leather products industries of a similar nature to the international hides and skins development scheme recommended by the Second Consultation. That proposal would entail an evaluation of under-utilized industrial capacity in developing countries, and an assessment of the resultant economic losses, in order for the international community to become aware of the importance of taking action to improve the situation. However, he stressed that such an undertaking should be international in nature, and should look at the hides and skins, tanning, and leather products sectors as independent entities.

50. One participant expressed the view that the leather and leather products industry required a graduated approach to its development, which took time and required the accumulation of experience at each stage of development before graduating to the next stage. For that reason, the developing countries would find it difficult to implement an integrated approach in the sector and he suggested that instead a comprehensive rather than an integrated approach be discussed. A few participants stressed the complexity of simultaneously developing the different elements of the agro-industrial chain; they felt that while an integrated approach was an ideal, the development and implementation of integrated programmes would require large amounts of time and managerial and financial resources. In such circumstances, it was felt that within the framework of that integrated approach specific projects that were profitable and that could be easily implemented should be taken up even on a project-by-project basis.

51. Two participants pointed out that a practical step that needed to be taken was to make Governments aware of the economic importance of the sector as a whole rather than only of industrial installations.



52. Finally, a few participants questioned the basis of the approach being discussed, stressing that it was market forces that were the main stimulus to the development of each stage of the hides and skins, and leather and leather products sectors. Consequently, if developing countries were to open their raw-material markets, price incentives would stimulate primary producers to improve both the quantity and quality of their supply of raw materials. In that way, the operation of open markets would provide at least the foundation for the development of the industry.

#### Measures of co-operation

53. A considerable part of the discussion was devoted to measures of international co-operation including the possibilities of implementing an integrated approach and, more generally, of assisting developing countries in the leather and leather products industry.

54. One participant stressed that the basis of all co-operation should be equality and mutual benefit for the partners.

55. Many participants emphasized the need to obtain know-how in order to improve the quality of raw hides and skins, utilize existing industrial capacities in tanning and leather products, gain access to technical information and train manpower. Several participants from developed market economies expressed their readiness to co-operate through institutions existing in their countries. In that context, one observer said that a distinction had to be made between the type of co-operation and assistance that could be carried out at the intergovernmental level, referring mainly to the development of infrastructure and the improvement of the industry's raw material base, and industrial co-operation that pertained to the private sector, since that sector had the resources to implement co-operation. One participant stated that his Government was assisting enterprise level co-operation by the provision of export credit schemes, which had been recently expanded to cover the supply of services (Service Guarantee Scheme).

56. In the context of co-operation at the general level, one participant said that co-operation with the least developed of the developing countries was essentially a governmental matter and needed priority attention, whereas co-operation at the enterprise level, which is based on contractual

arrangements between firms, should be excluded from direct governmental intervention. In that participant's opinion, there were many sources of transfer of technology in the industrialized countries that could be made available for the use of developing countries.

57. Another participant expressed the view that the need was not to set up more plants in the developing countries but to undertake new efforts in transferring know-how. Financial aid and guarantees would be forthcoming for potentially successful projects to which the developing country would also contribute by limiting excessive import taxes and simplifying administrative procedures.

58. In that context, a few participants drew attention to the fact that their Governments provided numerous incentives to foreign partners such as tax concessions on imports, exports and investments, and guarantees of repatriation of profits and of salaries of expatriate personnel.

59. Another participant stated that his country was willing to co-operate, particularly in the areas of training and quality control. He noted that his country was particularly able to respond to the needs of developing countries since it was half way between being a developing and a developed country.

60. In the view of one participant, co-operation between suppliers of know-how and producers of equipment should begin by implementing simple projects; such co-operation could also be based on buy-back and compensation systems, especially for the production of footwear components.

61. Another participant presented an extensive report on the techno-economic development in the utilization of pigskins in his country. His Government offered to provide developing countries with know-how through training technology and licensing agreements.

62. Many participants pointed to the role of UNIDO in identifying the right partners for international co-operation.

63. In the context of co-operation at the enterprise level, some participants considered the two checklists prepared by the secretariat on the footwear and tanning industries to be useful. An observer, however, suggested that the

checklists could be supplemented by reference to the International Conventions and Recommendations on Occupational Safety and Health and the Need for Training in Safety and Health Matters, especially as the sector had a high accident and high levels of occupational disease. Another participant, supporting that view, proposed that in addition the subject of terms and conditions of employment in developing countries should be given proper consideration in the work of UNIDO in the sector.

64. In order to support an integrated approach to the development of the leather and leather products industry it was considered important, in one participant's view, to strengthen co-operation between the United Nations and governmental institutions at the field level. Such co-operation should be carried out with the authorities of the developing countries; the use of the Senior Industrial Development Field Advisers of UNDP and UNIDO would allow a better definition of the various external contributions required, including financing, mixed credits and services.

65. One participant requested the creation of a framework for co-operation between developing countries in the sector.

#### Regional co-operation

66. Several types of initiatives ought to be undertaken, according to many participants, to establish or strengthen regional centres for the development of the leather and leather products industry. Their main function would be to assist countries of the region to exchange technical and market information, exchange data on technology transfer, serve as focal points in co-ordinating external assistance and train workers. One participant said that such regional centres would be the first step to implementing an integrated approach to the industry. Others saw the role of regional centres as the promotion of co-operation between developing countries. In that context, one participant stated that economic feasibility studies for the setting up of industrial capacity for the tanning and manufacture of leather products should be undertaken on a sub-regional basis since complementarities could be developed in various aspects of the industry. The participant expressed his country's readiness to convene a meeting on that industry on a sub-regional basis in order to discuss, inter alia, component manufacturing, production of required chemicals and training schemes.

67. Several participants supported the proposal that UNIDO committees for the leather and leather products industry could be established in a given geographical area.

#### Training

68. Most participants singled out training as a crucial subject for international co-operation. It was felt that training was needed for all skills: animal husbandry practices, animal slaughter and the recovery of hides and skins, tanning and footwear technology, machine maintenance, production and management, design, and quality-control methods. Several participants pointed out that the training offered by developed countries was expensive and thus limited training possibilities. Other participants informed the Third Consultation of various scholarships and technical assistance programmes available in their countries that could diminish the training costs for candidates from developing countries, however, it was sometimes difficult to obtain applications from such countries. Several participants from both developed and developing countries drew attention to various training institutions and centres in their countries. One participant mentioned that the development of the industry in his country had fostered the creation of two technical colleges in leather technology that offered degree courses. Another participant mentioned the training offered in his country on tropical animal husbandry, the treatment of hides and skins and tanning technology. Those institutions offered training to developing countries through scholarships or grants. It was concluded that there should be an enhanced flow of information on training needs and opportunities.

69. A participant stressed the importance of in-plant training, which was considered of special importance for small and medium-sized enterprises because they could not afford to release staff from their day-to-day functions for prolonged training abroad.

#### Markets and marketing opportunities

70. Several participants drew attention to the difficulties they faced in penetrating export markets. They called for assistance and co-operation in seeking market opportunities in developed countries. In that connection, they called for the abolition of trade barriers imposed by the developed countries

on the import of leather and leather products. A few participants called for measures to stabilize price fluctuations of hides and skins and leather in international markets.

71. In response to those points, several participants said that projections of trends in the sector indicated that the major growth in the consumption of leather products would occur in developing countries. That was because developing countries would experience increasing urbanization and higher incomes, whereas the markets of the developed countries would have been saturated. Furthermore, the competitive conditions and the fashion orientation of markets in the developed countries posed another impediment to the prospective entry of developing countries into those markets. It was suggested that a solution to the problem lay in enterprises in developing countries primarily serving their domestic markets for finished products and producing semi-finished leather and leather products for export markets. That position was opposed by one participant who said that the developing countries should seek to export manufactured products that enjoyed the highest possible manufacturing value added.

Issue 2: Measures to facilitate the production and acquisition of tanning chemicals and footwear auxiliaries in developing countries, including regional co-operation among developing countries

72. The Chairman opened the discussion on issue 2: "Measures to facilitate the production and acquisition of tanning chemicals and footwear auxiliaries in developing countries, including regional co-operation among developing countries" (ID/WG.411/7) by outlining the development and application of tanning chemicals to and the consequent improvement of the leather industry. The Consultation agreed to consider the two main aspects of the issue: tanning chemicals and footwear auxiliaries.

Tanning chemicals

73. In referring to the quality and quantity of chemicals required for the world tanning industry, one participant expressed the view that tanning chemicals represented only 10 per cent of the cost of producing leather. He urged that attention be paid to the quality and consistency of the chemicals

used. Other participants said that the cost of chemicals in developing countries was high, and could be as much as 30 per cent of those costs. That expense, often in foreign exchange, limited the operation of tanneries in developing countries, and had a serious impact on working capital and the full utilization of installed capacities.

74. Several participants emphasized the desirability of initiating measures to protect the health and ensure the safety of workers who handled hazardous and toxic chemicals in the tanning industry. Attention was drawn to the standards established by ILO and WHO in that regard.

75. It was suggested by some participants that the producers of tanning chemicals should provide comprehensive technical literature on the characteristics of the chemicals and their safe storage, handling and application. The producers should also help to train workers to handle the chemicals, particularly to prevent accidents and, if they occurred, to limit the damage caused by them.

76. A participant and an observer cautioned the developing countries against local production of tanning chemicals mainly on the grounds that no country could be self-sufficient in the wide range of chemicals required. Also, there was over-capacity in production, and the small quantities required did not justify the high investment. Moreover, if local chemicals did not meet world quality standards, their use would produce leather of an inferior quality, which would result in a loss of earnings for developing countries.

77. Another observer advised against the establishment of new capacities to produce vegetable-tanning extracts because of the downward trend in consumption that was likely to continue in the short- and medium-term. In any event, since the existing producers of vegetable-tanning extracts were mostly in the developing countries, the establishment of new capacities would only adversely affect those producers.

78. Many participants drew attention to the existence in their countries of the raw materials necessary for the production of tanning chemicals. They emphasized the desirability of transforming those resources in order to be self-reliant at least at the regional level, and international co-operation would be welcomed for that purpose. The assumption that developing countries

would produce inferior chemicals was not shared by them. Those participants, analysing the economic implications of the existing situation, pointed out that their raw materials were transformed abroad and had to be reimported by them at a great cost differential. A time-lag was created thereby to overcome which higher inventory and stock were necessary. That in turn added to the costs by tying up valuable capital. Those factors argued in favour of local or regional production or at least the establishment of a mechanism for joint purchasing and distribution of tanning chemicals.

79. Some participants also argued that it would be to the mutual advantage of developed and developing countries to promote such regional production. The former could make use of the raw materials and lower labour costs, while the latter could improve their industrialization and gain domestic manufacturing value added.

80. Several participants recalled that the 1980s had been declared the Industrial Development Decade for Africa. Stressing the importance of the leather and leather products industry, they urged that a regional consultation on that sector be held. However, prior to the convening of such a meeting, they suggested that a group of experts on that region should identify concrete issues and possible co-operation programmes that could be accepted and negotiated at the regional consultation and thereafter implemented.

81. One participant urged that as far as possible the same participants from developing countries should attend all subsequent meetings in that sector to maintain continuity.

82. A few participants emphasized the necessity to develop special programmes related to the needs of the least developed of the developing countries.

83. Some participants drew attention to the different stages of production and the supply of basic tanning chemicals in the developing countries. There was a group of countries that produced almost all their requirements, while another group had a lesser capability but had the potential to meet most of its needs at competitive prices. Yet another group of countries was completely dependent on imports in spite of having some raw materials that could be converted into tanning chemicals. Consequently, a gradual approach to production taking account of existing capabilities suited to the individual or regional needs of the developing countries should be adopted.

84. One participant suggested that the best method of realizing that concept would be the preparation by UNIDO of an industrial profile of a group of countries to illustrate how such regional co-operation could be achieved.

85. Emphasizing the vital importance of information on the sources of supply of tanning chemicals, several participants suggested that UNIDO should develop a suitable listing.

86. Some participants expressed concern about the environmental aspects of chemical production and use, and the high cost of effluent treatment plants. It was suggested that the use of new techniques, such as recycling, would not only have less adverse impact on the environment but would also improve the cost-effectiveness of the industry.

#### Footwear auxiliaries

87. Several participants pointed out that in developed countries the sub-sector of footwear production increasingly involved a process of assembly. They felt that if the production of the components could be shifted to the developing countries with all the necessary raw materials, it would allow the partners from the developed countries to take advantage of the availability of labour at lower costs as well as of the incentives provided by some developing countries.

88. It was mentioned that many developing countries had already achieved a high degree of sophisticated footwear production, and that other developing countries could follow their example. It was felt that UNIDO could help them to identify interested partners, both from developed and developing countries, on an individual as well as a regional level.

89. A few participants, however, felt that developing countries should not establish footwear auxiliary manufacturing capabilities as there was already over-capacity in that sub-sector.

#### General

90. Referring to a background document, "The leather and leather products industry, trends, prospects and strategies for development" (UNIDO/IS.442),



one participant pointed out that certain information on a tannery in his country was incorrect. He presented the correct information and underlined that the specific case discussed was of minor importance to the country.

91. One participant requested the secretariat to schedule future Consultations in conjunction with industry events, such as the "Semaine du Cuir", in order to obtain a better representation of industry at the Consultations.

Annex I

LIST OF PARTICIPANTS

Algeria

Khaled Benmouffok, Directeur, Entreprise Nationale des Manufactures  
Chaussures et Maroquineries, Mascara

Brahim Tahir, Directeur, Entreprise Nationale des Industries des Peaux et  
Cuirs, Rouiba

Argentina

Alberto Sofia, Director del Centro de Investigación de Tecnología del  
Cuero (CITEC), Camino Centenario e/505 y 508, Casilla Correo 6,  
1897 M.B. Gonnet

Ariel Ricardo Mansi, Representante Permanente Alterno ante ONUDI, Embassy  
of the Republic of Argentina, Goldschmiedgasse 2/1, 1010 Vienna, Austria

Pablo Julio Otto Grunbaum-Franke, Vice-Presidente, Cámara Industria  
Curtidora, Avenida Alvear 1934, 1129 Buenos Aires

Australia

Howard R. Seccombe, Alternate Permanent Representative, Permanent Mission  
of Australia to UNIDO, Mattiellistrasse 2-4/III, 1040 Vienna

Austria

Walter Goetz, Secretary, Chamber of Commerce, Schwarzenbergplatz 14,  
1041 Vienna

Heinrich Leopold, Geschäftsführer der Fachverbände ledererzeugende and  
lederverarbeitende Industrie, Bauernmarkt 13, 1010 Vienna

Carl Ritsch, Manager, Firma Carl Ritsch, Lederfabrik GesmbH,  
6361 Hopfgarten, Tirol

Walter Schreiber, Federal Chamber of Commerce, Bauernmarkt 13, 1010 Vienna

Adolf Tschernjak, Secretary, Gewerkschaft Textil, Bekleidung, Leder,  
Treitlgasse 3, 1043 Vienna

belgium

Gabriel Bruneel, Secrétaire, Centrale chretienne energie, chimie et cuir  
(CCECC), 4, Stoktmolenstraat, 8880 Tielt

Eddy Jacobs, Secrétaire, Conseil Professionel du cuir, 17-21, avenue de  
la Joyeuse Entrée, 1040 Bruxelles

José Libert, Secrétaire général, Conseil central de l'economie, 17-21,  
avenue de la Joyeuse Entrée, 1040 Bruxelles

Ginette Parent-Colson, Fonctionnaire, Conseil central de l'economie,  
17-21, avenue de la Joyeuse Entrée, 1040 Bruxelles

Roeland Smets, Président, Fédération belge de l'industrie de la chaussures  
(FBIC), 53, rue F. Bossaerts, 1030 Bruxelles

Burma

U Aung Min, Manager, Leather Factory (Rangoon), No.3 Insein Road, Thaing,  
Rangoon

Burundi

Jean-Berchmans Kandeke, Directeur général, Société nationale des peaux,  
B.P. 2970, Bujumbura

Canada

Ferdinand Mencik, Président directeur général, BATA S.A., 39, avenue de  
l'opéra, 75002 Paris, France

China

Shi Xianglin, Technical Manager, Shanghai Leather Corporation, 33 Szechuan  
Road (middle), Shanghai

Czechoslovakia

Frantisek Malata, Manager, Ministry of Industry, Na porčí 24, Prague

Anton Blazej, Professor, Slovak University of Technology,  
Gottwaldovo nám.17, Bratislava

Eduard Mück, Director, State Department for Science and Technical  
Development, Slezská 9 Prague

Koloman Raus, Manager, Ministry of Industry, Bratislava

Vladimir Ivanovsky, Commercial Director, Strojimport, Vinohradská, Prague 3

Democratic Yemen

Saeed Mansoor, General Manager, Leather Shoe Factory, P.O. Box 5022,  
Maalla, Aden

Egypt

Yehia Al Mokadem, Chairman, El-Nasr Tanning Co., 6 Horria Street,  
Alexandria

Ethiopia

W. Giorgis Getinet, General Manager, Industrial Project Services,  
P.O. Box 2569, Addis Ababa

Habte Markos Macco, General Manager, National Leather and Shoe  
Corporation, P.O. Box 2516, Addis Ababa

Finland

Pertti Hellemaa, Chairman of the Board of Directors of the Friitala Group,  
Tanners' Association of Finland, 28.00 Ulvila

Jaako Sora, Commercial Attaché, Embassy of Finland, Untere  
Donaustrasse 13-15, 1020 Vienna, Austria

France

François Essner, Président de la Fédération nationale de l'industrie de la  
chaussure de France, 55, avenue Kléber, 75116 Paris

Alain Fournier, Vice-Président de l'Union de la Mégisserie Française,  
122, rue de Provence, Paris

Antoine Giscard d'Estaing, Attaché d'Ambassade, Mission Permanente de la  
France auprès de l'Organisation des Nations Unies pour le Développement  
Industriel, Walfischgasse 1, 1010 Vienne, Autriche

Laurent de Gouvion Saint Cyr, Délégué général, Fédération nationale de  
l'industrie de la chaussure de France, 55, avenue Kléber, 75116 Paris

Magdeleine Janeriat, Chargée des relations internationales, Centre  
Technique du Cuir, 181, avenue Jean Jaurès, 69007 Lyon

André Henri Robinet, Expert, Coopération et développement, Ministère des  
relations extérieures, 20, rue Monsieur, Paris

Eric Alain Roty, Sous-Directeur, Ministère de l'industrie et de la  
recherche, 30, rue Guersant, 75017 Paris

Michèle Sauteraud, premier secrétaire, Mission Permanente de la France  
auprès de l'Organisation des Nations Unies pour le Développement  
Industriel, Walfischgasse 1, 1010 Vienne, Autriche

German Democratic Republic

Günter Reich, Director, Research Institute for Leather and Artificial  
Leather Technology, Thalmanring 1, 9200 Freiberg

Harald Munzig, Director, Leather Department of VEB Kombinat Schuhe,  
Schlossmühlenweg 3, 6508 Weida

Germany, Federal Republic of

Philipp Urban, Secretary General, Hauptverband der Deutschen  
Schuhindustrie, Waldstrasse 44, 605 Offenbach

Adalbert Boha, Secretary, Verband der Deutschen Lederindustrie,  
623 Frankfurt/Main - Hoechst 80

Klaus Diehl, Managing Director, Association of the German Leather Products  
and Suitcase Industry, Kaiserstrasse 108, 605 Offenbach

Georg Dittrich, Member of the Board, Gewerkschaft Leder, Wilhelm Bleicher  
Strasse 20, 7000 Stuttgart

Rolf Manfred Fritzing, Sales Manager, Fortuna Maschinenfabrik,  
7000 Stuttgart

Rolf Hochreiter, First Secretary, Federal Ministry of Economics,  
Villemomblerstrasse 76, 5300 Bonn

Emil Jekel, President, Managing Director, Schön und Cie. GmbH,  
6780 Pirmasens

Wilhelm Kappelmann, Chairman of the Trade Union for Leather Industry,  
Willi Bleicher-Strasse 20, 7000 Stuttgart 1

Josef Reingen, Verband Deutscher Maschinen- und Anlagenbau e.V. (VDMA),  
Postfach 71 01 09, 6000 Frankfurt/Main

Cornelia Richter, Assistant Head of Section, Ministry for Economic  
Co-operation, Karl-Marx-Strasse 4-6, 5300 Bonn

Hermann Schmid, Sales Director, Maschinenfabrik Moenus-Turner GmbH,  
Postfach 15 80, 6370 Oberursel

Harro Träubel, Bayer AG, 509 Leverkusen

#### Guinea

Ousmane Bah, Directeur des Industries chimiques et textiles, Ministère de  
l'industrie, B.P. 468, Conakry

#### Hungary

Béla Somkuti, Senior Counsellor, Ministry of Foreign Trade,  
J. Houvid-u. 13-15, Budapest

Otto Gödönyi, Director, Ministry of Industry, 11, Martirok u. 85, Budapest

Tamás Karnitscher, Director, Research-Development Company for the Leather  
and Shoe Industry, Paksi u. 43, 1047 Budapest

Gabor Rekettye, Deputy General Manager, Tannimpex, Szabadsag-Ter 15,  
Budapest

#### India

P.C. Rawal, Director, Ministry of Industry, Department of Industrial  
Development, New Delhi

D.K. Jain, Alternate Permanent Representative, Permanent Mission of India  
to the International Organizations in Vienna, Körntnerring 2, 1015 Vienna,  
Austria

Sanjoy Sen, President, Indian Leather Technologists' Association,  
33A Chowringhee Road, Ninth Floor, Calcutta 700 071

#### Italy

Giuseppe Landi, Secretary General, Politecnico Internazionale per lo  
Sviluppo Industriale ed Economico (PISIE), Via S. Marco 13, P.O. Box 364,  
Jesi, Ancona

Salavatore Cimmino, Adviser (Industrial Engineering), Politecnico Internazionale per lo Sviluppo Industriale ed Economico (PISIE), P.O. Box 364, Jesi, Ancona

Japan

Hideo Fukawa, Executive Director, Otsuka Shoe Co. Ltd., 4-23-4 Shinbashi, Minatoku, Tokyo

Isao Hosoi, Managing Director, Daikoku Leather Industry Co. Ltd., 5-1, 3-Chome, Higashi-Sumida, Tokyo 131

Fumiya Masuda, Consulting Officer, Tanners' Council of Japan, 1526-29 Shinyoshida-cho Kohoku-ku, Yokohama 223

Lesotho

Makalo Ishmael Monare, Tannery Manager, Maluti Skin Products, P.O. Box 1100, Maseru 100

Madagascar

Raherivololona Ravaofara, Supervisor/Designer, Etablissements "Chaussures Rainivony", Antananarivo

Malawi

Macleod Tsilizani, Senior Industrial Development Officer, Ministry of Trade, Industry and Tourism, P.O. Box 30366, Lilongwe 3

Nepal

Ajit Narayan Singh Thapa, Executive Chairman, Bansbari Leather and Shoe Factory, Kathmandu

Netherlands

J.P. Ros, Senior Officer, Ministry of Economic Affairs, Bezuidenhoutseweg 30, The Hague

Peter J. Van Vlimmeren, Director, Institute for Leather and Shoe Research, Mr. Van Coothstraat 55, Waalwijk

Norway

Brita C. Borge, Norske Garveriers Landsforening, 5250 Lonevag

Pakistan

Safdar Sheikh, Director, Phedra Industries Ltd., Small Industrial Estate, Sialkot 4

Philippines

J. Apolinario Lozada Jr., Alternate Permanent Representative to UNIDO, Embassy of the Philippines, Gregor Mendel Strasse 48, 1190 Vienna, Austria

Poland

Stanislaw Pilawski, Director, Leather Research Institute, Zgierska 73,  
90-960 Lódz

Portugal

José Carneiro, Director, Direcção Geral da Industria, Av. Conselheiro  
Fernando de Sousa 11-2º, 1000 Lisbon

Jorge Melo da Costa, Presidente da Associação Portuguesa dos Industriais  
de Curtumes, Av. Fernao de Magalhaes 460-5º, 4100 Porto

Antonio da Silva Clara, Presidente da Associação Portuguesa dos  
Industriais de Calçado e Artigos de Pele, Rua Anselmo Braacamp 299-2º,  
4000 Porto

Manuel Carlos Silva, Secretary General da Associação Portuguesa dos  
Industriais de Calçado e Artigos de Pele, Rua Anselmo Braacamp 229-2º,  
4000 Porto

Sierra Leone

Henrietta Evelyn Greene, Deputy Permanent Secretary, Ministry of Trade and  
Industry, Freetown

Spain

Cayetana del Fresno, Jefe de la Sección de calzado y otras manufacturas de  
la piel, Ministerio de Industria y Energía, Paseo de la Castellana 160,  
Madrid 16

Andrés Colomer, General Manager, Colomer Munmany S.A., Calle San Francisco  
no. 1, Aptdo. Correos no.15, Vic, Barcelona

José Luis Alvarez, Jefe de la Sección de industrias de la curtición,  
Ministerio de Industria y Energía, Paseo de la Castellana 162, Madrid 16

Sri Lanka

Lakshman Ravendra Watawala, Chairman and Managing Director, Ceylon Leather  
Products Corporation, 141, Church Road, Mattakuliya, Colombo 15

Sudan

El Shiekh Tambal, General Manager, Khartoum Tannery, Ministry of Industry,  
P.O. Box 134, Khartoum South

Switzerland

Grégoire de Kalbermatten, Adviser to the Permanent Representative,  
Permanent Mission of Switzerland to UNIDO, Wagramerstrasse 14,  
1220 Vienna, Austria

Thailand

Boonluck Boonyaratanakornkit, President of Leather Based Group,  
Association of Thai Industry, 1406/3-1408 Rama IV Road, Bangkok 10900

Songkram Thamagasorn, Industrial Attaché, Royal Thai Embassy,  
Weimarerstrasse 68, 1180 Vienna, Austria

Turkey

Siddik Ozbek, Managing Director, Sümerbank, Derive Kundura Sanayii  
Beykoz, Istanbul

Uganda

Absalom Kenneth Oteng, General Manager, Uganda Leather and Tanning  
Industries Limited, P.O. Box 388, Jinja

Upper Volta

Tenkodogo Some, Conseiller des affaires économiques, Direction générale de  
l'industrie et de l'artisanat, B.P. 258, Ouagadougou

United Kingdom of Great Britain and Northern Ireland

William Geoffrey Sandover, Second Secretary, Permanent Mission of the  
United Kingdom of Great Britain and Northern Ireland to UNIDO,  
Reisnerstrasse 40, 1030 Vienna, Austria

Michael Atkin, Economist, Landell Mills Commodities, 50/51 Wells Street,  
London W1P 3FD

William Nicholas Calvert, Director (Trade), British Footwear Manufacturers  
Federation, 72 Dean Street, London W1V 5HB

Claire C. Horton, Assistant Director, British Leather Federation,  
290A Barking Road, East Ham, London E6 3BA

Iain Robert Howie, Editor, "Leather", Benn Publications Limited, Sovereign  
Way, Tonbridge, Kent TN9 1RW

Eugen Mallon, Assistant General Officer, National Union of Footwear,  
Leather and Allied Trades (NUFLAT), The Grange, Earls Barton,  
Northampton NN6 0JH

United States of America

Daniel Anthony Vernon, Alternate Permanent Representative, Permanent  
Mission of the United States of America to UNIDO, Kundmanngasse 21,  
1030 Vienna, Austria

Venezuela

Delma Miralles, First Secretary, Embassy of Venezuela,  
Marokkanergasse 22/4, 1030 Vienna, Austria



Yugoslavia

Muharem Biljali, Secretary of General Association of Leather and Leather Processing Industries of Yugoslavia, Terazije 23, Belgrade

Zdenka Barbara Ban, Assistant, Centre for Co-operation with Developing Countries, Titova 104, 61000 Ljubljana

Tomislav Vukovic, Manager, Bial Research and Development, Technological Center, Karlovac

Ratomir Vicentic, Director, Visa Politehnicka Skola, 17 Brankova, Belgrade

Dobrivoje Stevcic, Agricultural Engineer, Jugoexport, 11000 Belgrade

Zimbabwe

Edwin Gora, Assistant Secretary, Ministry of Industry and Technology, P.O. Box 8434, Harare

Carlos Jorge Costa, Executive Member, Footwear Manufacturers and Tanners Association of Zimbabwe, P.O. Box 2658, Harare

Morgan Ndisengei, Tannery Manager, Bata Shoe Organization, Zimbabwe Bata Shoe Co., Box 279, Gweru

Observers

United Nations system

United Nations Conference on Trade and Development (UNCTAD)

Myong Che Chon, Economic Affairs Officer, Manufactures Division, Palais des Nations, 1211 Geneva 10, Switzerland

International Labour Organisation (ILO)

Karl-H. Ebel, Industrial Specialist, Manufacturing Industries Branch, 1211 Geneva 22, Switzerland

Food and Agriculture Organization of the United Nations (FAO)

S.K. Barat, Agricultural Industries Officer, Hides, Skins and Animal By-products Specialist, Via delle Terme di Caracalla, 00100 Rome, Italy

Werner Lamadé, Senior Commodity Specialist, Commodities and Trade Division, Via delle Terme di Caracalla, 00100 Rome, Italy

International Trade Centre (UNCTAD/GATT)

José Luis Albaladejo, Market Development Officer, Division of Product and Market Development, Palais des Nations, 1211 Geneva 21, Switzerland

Intergovernmental organizations

European Economic Community (EEC)

Carlo Felice Lovera, Administrator, Industrial Affairs and Internal Market Directorate, 200, rue de la loi, 1040 Brussels, Belgium

Marie-Claire Saüt, premier secrétaire à la délégation de la Commission des communautés européennes auprès des Organisations internationales, Hoyosgasse 5, 1040 Vienna, Austria

Non-governmental organizations

Comité Européen des Fédérations Nationales de la Maroquinerie Articles de Voyage et Industries Connexes (CEDIM)

Costantino Friz, Place Stephanie 10, 1050 Bruxelles, Belgique

International Council of Hides, Skins and Leather Traders Associations

Rolf Teichert, Director, Herrenhausallee 95, 2000 Hamburg 65, Federal Republic of Germany

International Council of Tanners

Guy Reaks, Secretary, 192, High Street, Lewes, East Sussex, BN7 1EQ

Tanning Extract Producers Federation

Gerald H. Tatham, Secretary General, 58, Bleicherweg, Zurich, Switzerland

Annex II

LIST OF DOCUMENTS

<u>Issue No.1: Measures to maximize the potential of the leather and leather products industry in developing countries</u>	ID/WG.411/5
<u>Background papers to issue no.1</u>	
Checklist for contractual agreements in the footwear sector between enterprises from developed and developing countries	ID/WG.411/1
Checklist for contractual agreements in the tanning sector between enterprises from developed and developing countries	ID/WG.411/2
The present situation, constraints and prospects for the leather and leather products industry in Sudan	ID/WG.411/6
The leather and leather products industry, trends, prospects and strategies for development *	UNIDO/IS.422
Prospects for sectoral programme financing in the leather and leather products industry *	ID/WG.411/13
<u>Issue No.2: Measures to facilitate the production and acquisition of tanning chemicals and footwear auxiliaries in developing countries, including regional co-operation among developing countries</u>	ID/WG.411/7
<u>Background papers to issue no.2</u>	
Component and auxiliaries manufacture for the shoe and other leather products industry in the developing countries	ID/WG.411/3
Strategies for increasing the production of tanning chemicals in developing countries *	UNIDO/IS.448
<u>Information papers *</u>	
Soft leather substitute materials and their impact on the international leather and leather products trade	ID/WG.411/4
Marketing leather and leather products in the United States of America	ID/WG.411/8
Techno-economic study on measures to mitigate the environmental impact on the leather industry, particularly in developing countries	ID/WG.411/10

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\* Available in English only, with the exception of the "Regional survey on Latin America", which is available only in Spanish.

Information papers (cont'd)\*

Regional survey on Africa

ID/WG.411/12

Regional survey on Asia

ID/WG.411/11

Regional survey on Latin America

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\* Available in English only, with the exception of the "Regional survey on Latin America", which is available only in Spanish.

