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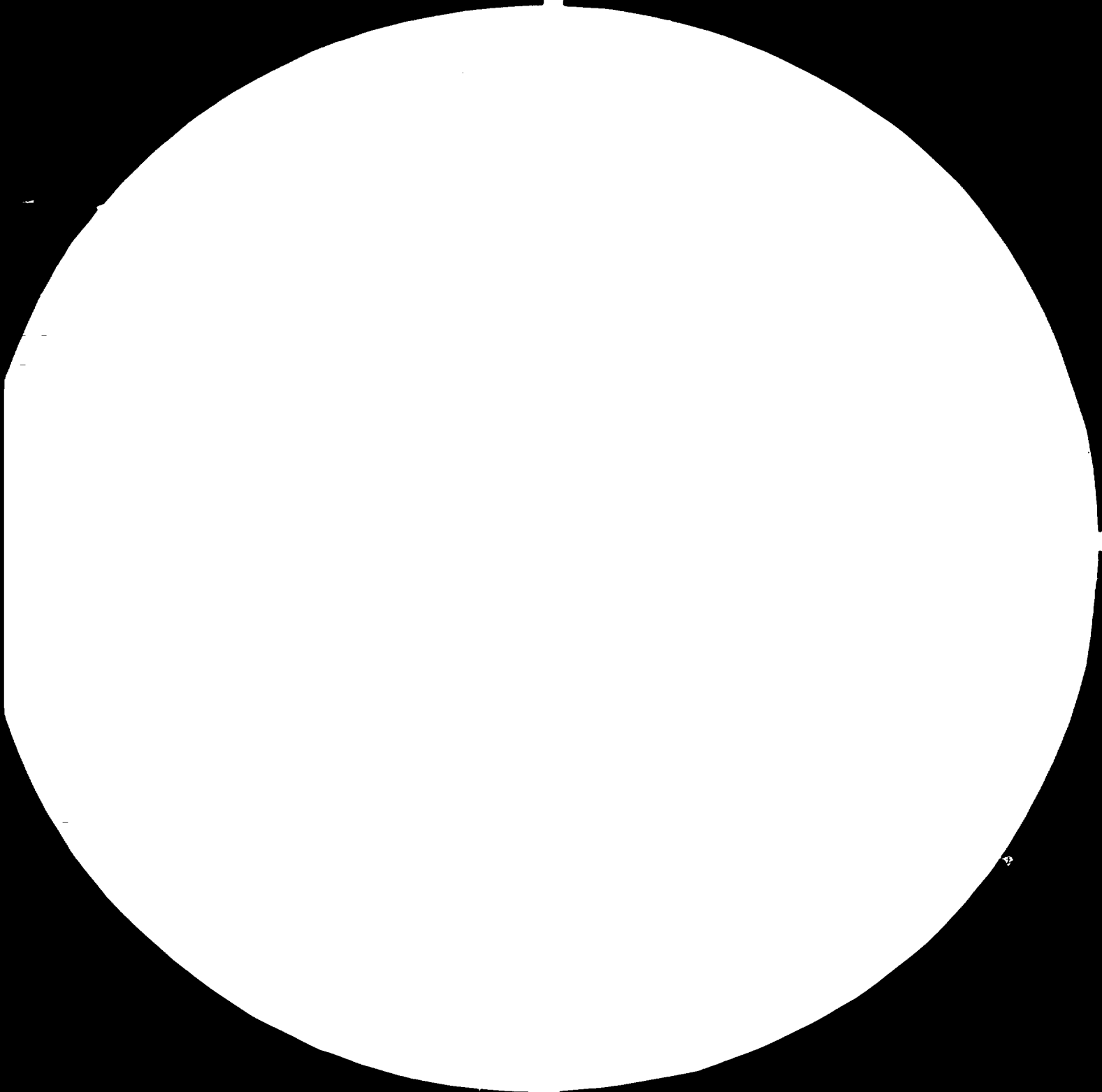
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LEATHER GARMENT MANUFACTURING

SI/ETH/77/801

ETHIOPIA

Terminal report*

Prepared for the Government of Ethiopia
by the United Nations Industrial Development Organization,
executing agency for the United Nations Development Programme

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Based on the work of Ronald G. Bowey,
leather industrial and marketing development adviser

United Nations Industrial Development Organization

Vienna

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FOREWORD

The master plan for optimum development of Ethiopia's very important indigenous resource of hides and skins - already a major export income earner as raw material and poised to become so as part-processed and finished leather - envisages the institution of large-scale manufacture of leather products of all the more important categories - footwear, clothing, personal accessories of all kinds, and certain industrial items. (Readers please note - footwear is not included in the coverage of the Project herein reported upon but this category - the largest consumer of leather - is given appropriate prominence in a contemporary Technical Assistance Project DP/ETH/78/001/A, and there is already a well-established leather shoe industry in Ethiopia. However, there is currently no industrialised production of other leather products).

Institution of leather products manufacture is now an important priority in national development programmes and the purpose of Project SI/ETH/77/801 has been to investigate possibilities and make recommendations accordingly. Within this project, opposite ends of a range of related considerations were earlier surveyed by two UNIDO experts and reported upon vide Reports ID. 79-3825 and ID. 79-9170. In very briefest terms, the former Report establishes ample supply of raw material and tanning capacity and, from analysis, that leathers produced are of good basic quality and can be developed and used with confidence. The latter Report provides further substantiation regarding leather production and, more importantly, features a very thorough feasibility study for a plant to produce some 0.3 million pieces of leather products per annum - this scale of production to be reached by stages and flexible over some four alternative product mixes each perfectly feasible and sound.

Both Reports recommend a stepping stone stage at production volume levels which roughly equate at 60,000 pieces p. a. approximately. Also, a very important point is made that this interim stage output should serve the domestic market and as a nursery for export-destined lines.

The work of the two colleague experts referred to, very professionally covers related aspects such as market research, production to economy of scale, selection of skins for end-purpose usage at the wet blue stage, sampling, range building and design, availability of components and accessories, location considerations, type of building, training, staffing and management, desirability of foreign joint venture as a short cut to know-how etc. etc. The record of that work stands as a useful source of reference for NLSC.

From results of the two earlier completed phases of Project SI/ETH/77/801, the National Leather and Shoe Corporation can see encouragement for proceeding with plans for large scale leather products manufacture having now the benefit of assurance of (i) good basic leather supply and (ii) a feasible eventual production target at which to aim.

The Corporation is, however, properly and cautiously appreciative of the size of the commitment relative to the latter. Also, and particularly in regard to the extremely competitive export markets for leather goods, of need for more guidance and information as to 'ways and means' of securing safe progression to and justification for, the ultimate goal and investment.

Accordingly, a third phase was introduced with objectives of probing achievable export possibilities, establishing contacts and, inter alia, sign-posting an export strategy. This third phase was conducted in two parts - Part One involved investigative work in Addis Ababa - carried out in close consultation with General Manager and Officers of NLSC and Project Manager of Project DP/ETH/78/001/A. Resultant findings and observation outlined a necessary framework for Part Two which consisted of a 3-week tour by the Writer, accompanied by a Counterpart very knowledgeable of the domestic situation in Ethiopia, of selected contacts in key European markets. Selection of contacts was made to match the needs of the observed situation in Ethiopia which is summarised in the Introduction.

Despite an ambitious schedule of coverage, an encouragingly high degree of positive outcome may be reported. Promising channels have been opened up for all key aspects and products. Subsequent successful follow-up will materially assist in laying a good foundation for Ethiopia's leather products industry and, hopefully and with intent, achieve this in such a way as to provide safeguard against possible adverse receiving-market attitudes in the future.

INTRODUCTION AND GENERAL FINDINGS -
PROJECT SI/ETH/77/801 (PHASE THREE)

This third phase was scheduled as a follow-up to, and an extension of, two earlier phases (see FOREWORD). The first phase showed substantiality of excellent potential for leather products manufacture in Ethiopia. Subsequently, the second phase emerged with a feasibility study for a comprehensive leather products manufacturing plant the planned and expandable output of which would constitute an enterprise of relatively large scale in this field, internationally considered, and so a major feature of industrial development for Ethiopia. Of equal significance, leather requirement of the envisaged scale of end-product manufacture could take up a high majority of present NLSC total hide leather producing capacity output and a large percentage of that of skin leather. It should therefore be noted that Ethiopia's present total tannery throughput can be greatly increased and has enormous raw material resources in support. Thus, high volume scale manufacture and export of end-products will still leave good scope for leather exports and may be seen as a stabilising factor in forward overall planning.

Phase three, herein reported upon, was specifically prescribed to analyse export possibilities for Ethiopian-made leather products (excluding footwear) in selected European markets and to inform the National Leather and Shoe Corporation, Addis Ababa, of contacts with possible future buyers. Further requirements were to 'provide concrete and reliable data for a manufacturing unit's product mix and to prepare a market research and export approach policy for the Corporation' and 'to assess the feasibility study'.

However, although these terms of reference are strictly germane to the purpose of providing guidance for development of an Ethiopian leatherproducts manufacturing and exporting industry, practicality of implementation was under grave constraint in that there is currently no industrialised production whatsoever of leather products. Moreover, there is not yet availability of export-quality finished leather from which exportable leather products could be competitively made even if manufacturing capabilities did exist. The project was thus necessarily to be conducted without the benefit of samples, prices, availability and delivery time schedules - and similar other practical commercial information. These serious anti-factors notwithstanding, by diagnosis and capitalisation of favourable aspects the situation could be seen not as one of having to attempt to 'make bricks without straw' - but as being resolvable into beneficial achievement of the underlying intentions: practical assistance to Ethiopia in inception and development of a national leather products industry. The favourable aspects mentioned, pro-factors, are:

excellent availability, and widespread international leather trade appreciation, of Ethiopian raw material and its leather-making capabilities;

visible proof of tanning advancement in Ethiopia instanced by leathers now produced to various stages up to 'ready to finish';

good preparation for planned, steady industrial development e. g.

installation of tanning capacity conservatively tailored within raw material availability; previous and on-going attention to technical and technological training and management - with expansion in this area on train; establishment

of a comprehensive and well-staffed managing and co-ordinating National Leather and Shoe Corporation providing good internal control and a central base for efficient domestic and export marketing and servicing;

ready official acceptance, appreciation of and reaction to, technical assistance programmes;

realistic acknowledgement that development be via progressive steps involving and co-ordinating domestic and export market promotion and servicing;

flexibility of attitudes regarding marketing policies and strategies - particularly in regard to foreign collaboration and co-operation;

very wide-scope leather production potential from 8 tanneries permitting marketing flexibility and adaptability through stable volume-usage, to speciality lines;

clear cut, official policy on leather and leather products industrial development - promising continuity of backing for the National Corporation's operations and reliability of servicing so essential for importers overseas catering to the demands of premium, high volume purchasing, retailer-dominated export markets;

security of tanning materials, chemicals, etc. back-up supplies;

access to knowledge of market attitudes, trends in the pattern of supply to volume-purchasing export markets, of concomitant problems facing suppliers and manufacturers engaged therein, coupled with personal access to them.

Conduct of Phase Three was organised and carried out against, and in regard to, this specific background, and the general, but equally relevant, background provided by findings and disclosures from Phases One and Two.

CONCLUSIONS AND RECOMMENDATIONS

1. Ethiopia's aim towards becoming a large-scale exporter of leather products can effectively and reasonably quickly be realised through adoption of a practical inceptional development policy advantageously including the following main salients which already exist or can soon be caused to exist:

- i. an efficient organisation for control, planning, direction and co-ordination - is in existence, may require expanding;
- ii. establishment of facilities for leather trade manual skills training and recruitment - non-existent. Urgent attention called for;
- iii. full and urgent take-up of advanced technical training opportunities scheduled within the provisions of Project DP/ETH/78/001/A;
- iv. collaborative foreign technical assistance to improve leather finishing and extension of leather types in order to be able to sustain servicing of market demands. Possibilities and contacts provided by the Project are recorded in Chapter 3.
- v. collaborative technical assistance in leather product research, development, design and manufacture. Possibilities and contacts provided by the Project are recorded in Chapter 3.
- vi. link-up with ready made export sales outlets. Opportunities opened up are also recorded in Chapter 3.

2. Policy motivation should be to service and develop the domestic market and simultaneously to introduce and perfect pilot lines for export trade development.

3. Implementation of the policy should be by two phases the first of which must set out to lay a solid foundation upon which successful development can be structured, and the second, to consolidate progress made, exploit and expand.

4. The first phase should be required to achieve the following practical results:

- i. establishment of a leather products management cadre;
- ii. institution of adequate, proper training and recruitment facilities;
- iii. creation of a trained work force nucleus;
- iv. complete and institute improvement of leather finishing arrangements;
- v. selection of an initial (part of which may become permanent) product range;
- vi. conclusion, after satisfactory investigation and negotiation, of collaborative arrangements with suitable foreign partners in connection with production and sales of that part of the initial product range destined for export;
- vii. installation of production capacity geared to (a) present, and adjustable to 1984 projected, domestic demand for home market servicing and (b) narrow-front range of special-for-export lines as specified in Chapter 2;
- viii. institution of, or extension of existing, ongoing domestic market surveys and observation particularly in regard to trends in consumer needs and channels and pattern of distribution;
- ix. review of wider and new organisational, servicing, management informational needs and preparation of requisite systems, with provision of adequate marketing services of prime importance;

- x. preparations for, and oversight of, structural, plant and equipment commissioning, building, installation etc;
- xi. targetting, planning and programming the second phase.

5. All executive, organisational, administrative and negotiating implications of the foregoing should be assumed by HQ NLSC. Where appropriate, other important practical aspects, particularly Training and Marketing, are prominently catered for within the provisions of contemporary Project DP/ETH/78/001/A.

6. Stress is laid that study by this Project SI/ETH/77/801, of the present situation of, and intentions for Ethiopia's leather and leather products industries conclusively point to need for thoroughness, resourcefulness and extension of NLSC marketing function.

7. The marketing needs and challenges of NLSC's leather and leather product development must now be seen as irrevocably inter-related over their complete scope, are patently soluble and richly promising - but demanding in their bringing to fruition.

8. Breadth, depth and scope of the hide and skin resource, extreme potential flexibility and volume of leather production via 8 tanneries, plus enlightened attitudes to development policies and stratagems together constitute a far-horizoned, marketing-opportunity situation. This was seen, and was strategically used and should so continue to be used, in seeking methods and channels for institution of the envisaged important leather products industry combined with early attainment to required levels of leather qualities and types essential in support:

The latter being an essential pre-cursor to the former, consideration for each and both had to be accepted as responsibilities of this Project although its defined purpose related only to end-products. In point of fact, these conditions were used to secure positive results. As a bonus, in the event of execution, work to identify and open up future possibilities for export market-acceptable, made-up items also produced immediate business opportunities for part-processed and finished leathers. These latter are recorded in Chapter 3. In various selected key cases those opportunities were made to link with end-product opportunities. All call for determined follow-up.

NLSC need to ensure installation of marketing services to adequate scale is accordingly emphasised:

A 3-4 year OPAS, or suitable direct expatriate appointment by NLSC is recommended. This appointment should carry responsibility for capitalising the quite unique inter-relationship situation between Ethiopian (a) leather industrial further development (b) leather product manufacture inception and development.

Conclusions and Recommendations -
please see special note on following page

9. Remaining items of individual strategic, tactical and practical Recommendations, in the Writer's opinion, should not be lifted as extracts from their rationale contexts. Attention and study by Readers is therefore specially invited to Chapters 2.0, 2.1, 2.2.

CHAPTER 2

A POLICY FOR INSTITUTING LEATHER PRODUCT MANUFACTURE

Policy outline

NLSC faces the problem of how practically to go about initiating industrialised manufacture of leather products having regard to a scratch start and ultimate large-volume production per the feasibility study:

On basis of the findings of its Third Phase, inter-related with those of the two earlier phases, Project SI/ETH/77/801 has established feasibility of the following master policy recommendation:-

In all the circumstances, NLSC advisably should adopt and plan to a two-phase timing schedule - the first will require to be of 3-4 years duration and the second probably of 3 years -

PHASE ONE

- a. Continuously give attention to such needs as recruitment and leather improvement, training, leathergoods production management and techniques, home and export product research and development, marketing - and to provision and perfection of all infrastructural and extension services and systems necessary thereto.

- b. By stages build up capability to service 75 per cent of domestic market needs in major-volume leather product items.

c. Establish an export trade in (i) high demand, easy-to-make items and (ii) pre-fabricated components for assembly and finishing in concerned markets abroad.

d. Target, prepare and programme for expansion in Phase Two - with particular regard to export product and market identification, extension of distribution network and arrangements, customer contact and sampling.

PHASE TWO

a. Consolidate and exploit all Phase One achievements in domestic and export markets.

b. Expand (i) scope of the export trade established co-operatively in key markets to include direct trading through competitively marketed goods in the more sophisticated categories and (ii) research new markets. These targets and products to be identified and perfected during the course, and as a requirement task, of Phase One.

Leather products - Export - Introductory Lines

Leather products manufacture for export: in acknowledgement of the present non-availability of suitable finished leather and non-existent leathergoods industry situation and of introductions furnished from the Project, production must be instituted gradually commencing, ideally, on a co-operative basis with customer/ collaborators who would supply patterns, specifications and place orders. Products required are:

- i. comparatively easy-to-make, unsophisticated lines - industrial gloves, protective and safety clothing and equipment (aprons, belts, harness etc), utility bags, carriers, holdalls (for tools etc);
- ii. pre-fabricated components for various simple types of folio, document, school and other cases; capacious, flapover, casual-type shoulder sling bags; clothing (the latter recommended for later introduction).

These items mainly provide 'training ground' opportunities for green labour, are in good to great demand, can in great majority be made from simply-finished leathers now available from Ethiopia and are all of 'cut and sew' construction of the simplest type with the exception of dress clothing. In manufacture of the quoted items there is considerable interchangeability (catering for order fluctuations, seasonal influences, sampling etc)., if required in the early stages before sales and production can be planned forward to cover manufacturing capacities and capabilities. Production could be economically instituted on a module basis to sensibly proportioned scales particularly useful if dispersed manufacturing units are preferred before or in place of high unit volume production under one roof viz:-

- | | |
|---|--|
| i. industrial gloves | - 500 pairs per shift plus preparations for second shift |
| protective aprons & jerkins | - 80/100 pieces per shift |
| ii. firemen's linesmen's etc belts & harness, utility bags and holdalls | - 200 pieces per shift |
| iii. pre-fabricated components for folio, document cases, school satchels etc | - 800/1,000 pieces per shift |
| iv. pre-fabricated components for dress clothing - sleeves, front & back panels, collars, belts - for | - 100 garments per shift |

NB: iv. above should be for deferred introduction during Phase One.

Leather products - Home Market - Export Development

For economic safeguard and for stability, initial target production volumes should be geared so as, within the 3/4 years of Phase One, to be able to service a major proportion of domestic demand say, for targetting purposes, up to 75 per cent of the level of consumer uptake. On-going monitoring of the latter should be maintained with projections forward for the ensuing five years (a) for setting production schedules and (b) to assist adjustments, if necessary, during operations. Proportions of suggested volumes below indicated for export are considered to be realistic in the light of market conditions and trends. For flexibility in locating and motivation of the "specialised" incentive for management and operatives, separate units are preferable - this comment holds also for sports goods (which are not covered in the Report).

Under a 'roundabouts and swings' production and marketing policy, considered essential especially at this stage, leather products manufacture for the home market and for initiation and development of export products should be instituted jointly. Initially, it is advisable to settle upon a narrow-fronted range to cover the more important consumer-demand items: handbags, wallets, purses, belts, simple flap-over brief etc. cases, utility cases and holdalls, industrial gloves and protective clothing; and garments in the classic styles to commence with.

The first five mentioned to be handled by one production unit to take advantage of materials economy, inter-changeability and economy of force of the progressively trained and experienced labour. Recommended initial capacity installation:- Handbags 15,000, Flap-over brief etc cases 7,500, Flat goods 75,000, Belts 50,000. All these for the home market for the major duration of Phase One. Utility cases and holdalls and heavy belts and straps 50,000, 60/70 per cent targetted for export

Industrial gloves, protective aprons and jerkins should be produced in a specialised unit. Recommended initial capacity installation:- Industrial gloves 500,000, 65/70 per cent targetted for export; Protective clothing 60,000, 55/60 per cent targetted for export. ALL SUBJECT TO AVAILABILITY OF SUITABLE SPLITS.

Garment production should also be in a separate unit for an additional set of reasons including: size of the work by piece, special selections and types of leathers to be used which call for extra skills in matching, cutting, stitching, turning-in, sewing-in linings and, in the specific case of garments made under foreign licence or brand, whether

complete or in pre-assembly form, extremely strict examination and quality control at all making stages and in finished stock storage and despatch. Recommended initial capacity installation:- 25,000 (complete and an pre-assembly state), 60/65 per cent targetted for export.

Inception of Manufacture - Possible Starting Points

Actual and physical inception of NLSC leather garment and products manufacture, (subject to NLSC operational policy and any national or local policies regarding location of industries, industrial development areas etc.), can apparently effectively and fairly promptly be brought about by building on to existing footings:-

- a. Leather garments - Present production, collectively quite important in volume, is from fragmented, artisanal workshop sources - those seen were primitive as to housing and layout. However cutting, sewing and making-up skills as observed are good and experienced. One or more of such units could be re-housed, re-equipped to good production flow layout, given appropriate organisational back-up and access to reliable supplies of better grades of leather (at present they can only buy reject grades, they report). This implementation can be brought about under NLSC wing - either by acquisition or via entrepreneurial arrangements - and will provide a nucleus for industrialised garment manufacture. Having informally researched the attitude of one of the largest private operators with favourable response, the recommendation was broached with NLSC and is doubtless under consideration. Detailed census of this sub-sector via Chambers of Trade etc. may bear further fruit.

b. Leather products - As with garments, production currently remains almost exclusively in private sector hands. Shop and market observation expectedly showed existence of basic artisanal dexterity and skill in both leather and textile ethnic and copied items. Tutoring and practice is clearly much needed toward more sophisticated and organised production via training and occupation at mechanised workshops for which plans reportedly have been made. There may be mid- to long-term prospects for NLSC in this area. An immediate opportunity exists with the Awash Tannery workshop, recently established to utilise low grade and split leathers and now employing some 25/30 staff and workers. Quality of production is patchy but promising given requisite training, equipment and with re-housing and re-organising on commercial lines.

NLSC already has plans for the necessary re-location and development of the unit which can now be set against the programming needs of suggested Phase One production targets - if adopted or as may be amended by NLSC.

Product Mix and Quantity - Further Research Vital

Export items - product mix and quantities: Terms of reference for Phase Three of this Project SI/ETH/77/801 call, amongst other results, for 'concrete and reliable data for a manufacturing unit's product (i. e. export product - Ed.) mix'. In setting out to meet this requirement, severe limitations were imposed upon researches by

present non-availability of acceptable-quality finished leathers and non-existence of industrialised leather products manufacture and capability. Strategic consideration of these limitations by the writer is related elsewhere in the Report.

Especially with regard to recommendations on product mix and volume:- the situation in Ethiopia matched against situations within the targetted export markets leads to one, inescapable conclusion: a start can only be made at a beginning. That beginning in the case of Ethiopia is as described above as to products and first-target production volumes - with the exception of Industrial Gloves institution of production facilities for which can immediately envisage two-shift working.

However it must be stressed, and this is the reason for this particular entry into the Report, the Project could only conceivably identify (a) export product requirements which Ethiopia can reasonably expect to meet in reasonably short-term in all the circumstances and (b) locate and introduce opportunities and contacts. So, in addition to investment and other decisions relating to setting up manufacturing capacity, further and intensive market research is essential to confirm price levels, official and customer specifications requirements, export/import procedures etc, etc, etc. AND to progress and satisfactorily conclude arrangements with trading associates and partners. NLSC is perfectly aware of all these considerations but may well need further related technical assistance in dealing therewith. Stress has been laid on provision of adequate market research and services elsewhere in this Report. In view of the need, repetition does no harm. Importance of the recommended "roundabouts and swings" marketing and manufacturing policy is also re-stressed.

Leathergoods Export - Proceed With Caution - Suggested Method of Procedure

It is necessary to make special reference to what are commonly known as 'leather-goods' - by which the trade understands personal accessories such as wallets, purses, notecases, key etc. cases and so on. Except at the 'top end' and specialised branded and promoted item sections, this category of leather products manufacture is probably the most punitively competitive and certainly the most extensive:-

Ethiopia should not prematurely attempt to enter export markets with this group:

The developing home market justifies investment in economic scale production and should be used also for development of exportable lines. Research is needed to identify possible export 'starters' and note should be taken of the fact that major purchasers are departmental store groups, buying groups and importer/agents/sub-agents/small retailer networks and connections. The Buyers employed by such organisations are highly professional and approachable in their Company's etc. interests.

The recommended tactic for entry into the market is by direct contact with such Buyers.

A policy of readiness to invest in product development, probably with exclusivity of styles and designs and/or house branded, should be adopted together with resignation to product sampling and re-sampling over three or four seasons. Buyers will not change from an established source to another until reliability of product and servicing can be guaranteed in addition to price etc. competitiveness.

Other developing countries have experienced the dangers and losses stemming from attempts to 'buy into' the small leathersgoods market. Implications in the foregoing for NLSC market research activities are clear.

Another feasible entry channel would be via 'offshore' manufacturing, probably under licence, for a foreign-based operator. At the time of this Project, and in its circumstances, it would have been fruitless to attempt contacts but the possibility should be scheduled for investigation by NLSC marketing operations at an appropriate stage of recommended Phase One.

CHAPTER 2.1

ACQUISITION OF HIGH-LEVEL LEATHER
FINISHING TECHNOLOGY THROUGH FOREIGN COLLABORATION

Ethiopia must become able in the shortest possible time to produce the right qualities and types of leather from which export-saleable products may be made. THIS IS A MATTER OF UTMOST PRIORITY.

Early acquisition of requisite techniques can most effectively flow from adoption of a new 'wing' to NLSC leather marketing policy viz. - selective collaboration with foreign partners active in the trade and having certain requisite qualifications.

These include:

- excellent finishing technology - maintained up-dated;
- familiarity with Ethiopian-type raw and part-processed material;
- established and operational processing plant(s);
- established sales and sales servicing operations and/or connections;
- financial resourcefulness;
- compatibility and co-operativeness.

Following prior consultation in Addis Ababa, as part of programmed researches a number of suitable and willing-in-principle potential collaborators were identified. These are included in Chapter 3 which records the history of the field work and contacts made.

Various alternative methods for co-operation were discussed with the firms concerned. These range over:-

- i. straightforward commercial dealings - seller and buyer relationship. Both parties to combine to produce leather(s) to buyer's specification at long range. The latter to undertake analysis, sampling, test-marketing, reporting back. Eventually, when product becomes right, buyer to conduct marketing commercially to own account on a basis of exclusivity in regard to the jointly-developed product concerned;
- ii. provision of on-site know-how to perfect part-processed formulation initially for finishing in collaborator's market-based tannery or associated tannery. This to be followed by finishing in Ethiopian tannery(ies) to specification supplied and monitored by the collaborator on contractual basis;
- iii. contract finishing and marketing by foreign tanner on a financial basis to be agreed but to include progressive provision of finishing know-how to Ethiopian tannery(ies) and continuing export marketing services on contractual basis;
- iv. co-operative experimentation succeeded by ongoing joint venture involving each party i. e. (a) NLSC and one or more of its tanneries and (b) an operational, market-based foreign partner, in investment input and proportional profit-sharing. Ultimate development of this arrangement to be production by NLSC tannery(ies) of the staple, high-volume usage

colour leathers under techniques supplied and monitored, seasonal fashion colour leathers to be produced within the market, by the foreign partner. The latter also to be responsible for export marketing, market information and feed-back as appropriate.

Subject to domestic clearance on policy and viability and bearing in mind NLSC's leather production volume, scope and flexibility potential - all or any of the alternatives illustrated above could be employed and still leave room for completely home-developed ranges as required. Further, duration and extent of any joint venture entered into can be limited or extended as conditions require. In any case, the object of this exercise - to prospect possibilities of early access to better standard finishing techniques - is demonstrably achieved.

With special relation to spring-boarding into leather products manufacture under experienced guidance and with ready-made access to export outlets: whatever else may be decided upon regarding foreign co-operation and methods thereof, it is strongly recommended that NLSC should proceed purposefully with introductions made by this Project to the CUIRTAN Group of France. Activities of this Group include excellent potential for (i) leather finishing and sales via their Tanneries de Bugey, France, and other operations in Italy, and (ii) for co-operative manufactures of specialised leather products plus secure volume sales outlets in desirable sections of premium export markets via their famous Le Tanneur operation.

For reference in connection with any subsequent negotiations on collaborative or joint ventures, the following summary of some economic and operational benefits which should be secured may be useful:

NLSC - Ready-made sales organisation in key markets

Good sales servicing

Ability to compete in the fashion market

Better competitiveness

Improved assurance of continuity of business

Safeguard against possible protective measures by importer-markets

PARTNER - Continuity of supply in conditions of procurement shortage

Optimum usage of finishing plant initially followed by better flexibility in servicing fashion colour demands

Eventual savings on finishing plant replacement and finishing materials costs

Reduced raw and part-processed material investment costs

Savings on liming and tanning costs

Safeguard against anti-pollution legislation problems.

BRIEF NOTES ON PRODUCTS RECOMMENDED
FOR FIRST PHASE EXPORT MANUFACTURE

Industrial gloves - The market, although very price conscious, is immense (West Europe imports in excess of 300 million pairs per annum alone), is self-generating as usage life is very short, servicing is easy via the substantial agents and importer-wholesalers who handle the vast majority of distribution and sales. A situation of under-supply exists and is likely to continue.

The product is simple to make, uses low grade leather, has very limited sizing and style requirements and is highly suitable for dispersed-unit manufacture. Conformity with official leather and construction specifications and safety regulations is necessary.

An organisation which can supply details of legal and specification requirements, samples, and which provides servicing for market requirement, both direct and via importers, has been introduced to NLSC and is to be contacted by them. Effective market entry can be achieved through this introduction. Market indications are that NLSC could confidently target towards a conservatively reckoned 500,000 pairs p. a. sales volume provided prices are competitive and, equally important, servicing can be guaranteed.

Protective clothing and safety equipment, military and public services equipment - This is a high volume, quick turnover field comprising mainly simple design, easy-to-make items. It is specialised as to specification and performance standards. Once these latter have been reached, good and continuous trade may be expected. Because of specification requirements and the level of contact necessary, entry into this market is best achieved in collaboration with overseas manufacturers already established in the field. A suitable contact has been made and is prepared to co-operate with sampling, advice on products and prices, to evaluate pilot run samples and to proceed to customer status in due course.

Workmen's tools etc, bags and holdalls - Not so demanding in specification as those detailed above, these items have several of the same characteristics, and are usually in the product ranges of protective and safety etc, equipment manufacturers. Moreover, for price reasons, they are acceptable in lower grade leather providing it is rugged enough. The firm indicated above is also well established in this field of leather products manufacture and is prepared to extend co-operation.

Packaged wash leathers (chamois) - Manufacture of these leathers is eminently possible from Ethiopian raw stock. Marketed branded and packaged, good sales will be achieved. Project field work was unable to include contacts with firms active in this field due to absence of the Principals concerned: NLSC market research is recommended to explore possibilities and purposefully to continue with the experiments witnessed.

Leather garments - A boom area for leather in the sixties and early seventies, in established export markets demand for popular-priced ranges has severely declined and has become savagely competitive. Many export market-located manufacturers servicing the popular-price trade have latterly been forced out of business, have cut or diversified production. Some have moved over to importing made-under-licence lines and others to assembly and finishing foreign-made components cut to their own patterns thus capitalising on their design skills and sales contacts plus cutting running and overhead costs and investments.

Ethiopian sheep and goat skins can be made into finest quality clothing and gloving leathers - although small in area for the former usage. However, at a future stage of advanced finishing capabilities, possibilities may be charted domestically for this product range. For immediate exploration, associated production with foreign manufacturers prepared to supply designs for components is recommended proceeding eventually to whole piece manufacture later on when necessary skills are available.

Development of good clothing leather with all its necessary qualities and properties in grain (nappa) and suede versions will take a considerable time as the following listed requirements will show:

Absence of grain defects

Soft, smooth, supple feel; good draping

Flesh side free of flay cuts

No fibre structure looseness

Fastness to washing, dry cleaning; perspiration resistance

Wet and dry rub, light fastness

Shower proof

Resistance to flexing

Cold crack resistance

Stitch tear resistance

Abrasion and scuffing resistance

Fastness to surface flaking

More so than in any other case where this matter has been stressed - the leather MUST be right before reasonable export business in leather garments can be contemplated.

NLSC needs to give extra special attention to attainment of required standards of its clothing leather both for sale as such at the premium prices obtainable and in wholly or part made-up form.

Some long-term specialised expatriate technical aid may be necessary to perfect finishing techniques and to ensure the various properties exemplified above.

With regard to business co-operation with a foreign manufacturer as is recommended, the Project located and interested a suitable partner - a Company with manufacturing and importing operations plus self-owned outlets as well as a wide-ranging retail sales organisation. The contact has promised to receive, comment upon and generally assist with clothing leather development following achievement of which to acceptable standards, to negotiate business in part-made and complete garments to designs supplied.

NLSC is further recommended to commence leather garment manufacture via a module scaled to produce 100 garments per shift whole (for home trade) or in component form (for export).

CHAPTER 2.3

LEATHERS FOR LEATHER PRODUCTS

The following notes may serve as a basis from which NLSC may check presently produced leathers against the range of types, finishes etc. required for servicing a comprehensive leather products manufacturing industry.

Handbags

a. Types of leather

1. High priced merchandise - calf, goat, pig, reptile
2. Middle priced merchandise - hide, sheep, goat
3. Low priced merchandise - hide (doped and printed), split leathers, sheep

b. General requirements

Tannage - chrome or chrome retan
Substance 1.0 mm

Colour - Black, brown, navy and variety of shades co-ordinated
with seasonal fashion colours

Finish - Soft and supple; preferably full grain with a natural
leather look.

The top finish must withstand both wet and dry rubbing and possess "easy care" properties - this necessitates finishes based on netro-cellulose, polyurethane, or acrylic resins.

A much faster finish than for normal shoe upper leather is required.

A tactile smooth feel is required.

The range of finishes will run through highgloss patent, glazed, semi-bright to dull and matt.

Flat leather goods (including dress belts)

a. Types of leather

1. High priced merchandise - calf, goat, pig, reptile
2. Middle priced merchandise - thin hide, hide offal, goat, sheep
3. Low priced merchandise - thin and printed hides, hide split and offal; sheep

b. General requirements

Tannage - vegetable, chrome, chrome retan.

NB: For rigid construction articles the firmer vegetable tanned leather is preferable.

Substance - 0.6-0.8 mm . Dress belts 1.2-1.6 mm

Colours - A limited range is generally used, e. g. black, dark brown and tan brown

Finish - Attractive bright finish with a natural leather look
Often supplied with 2-tone finishes e. g. antique effects
Reasonably fast top finish with "easy care" properties
May have to be supplied with a "moss back" for unlined goods.

Brief, folio and document cases. small luggage, "bord" cases

a. Types of leather

1. High priced merchandise - hide, pigskin, goatskin, reptile
2. Medium priced merchandise - hide, printed hide, hide offal (bellies)
goat
3. Low priced merchandise - printed hides, hide splits, goat

b. General requirements

- Tannage
- a. For rigid construction - Vegetable or chrome retan
 - b. For soft construction - Chrome

Leather may have to accept tooling and gold blocking, for which purposes a vegetable tanned leather is to be preferred.

Substance - 1.2-1.6/1.9 mm

Colour - Black, brown, antique, batik, brindle, mottled

Finish - Aniline finish for high priced goods; smooth, pigmented and printed finishes for the remainder.

Top finish must be abrasion resistant and fast to water (rain) spotting. This necessitates use of lacquer type top-finishes.

Garments (dress)

a. Types of leather used

1. High priced merchandise - deer, calf, hair sheep, reptile (snake), goat, pig
2. Medium priced merchandise - goat, hair sheep, hide splits
3. Low priced merchandise - hide and pig splits, woolled sheep

b. General requirements

Tannage - Full chrome

Substance - 0.8 mm for ladies wear
1.2 mm for mens wear

Colours - Black, brown, tan, dark green, red and variety of seasonal fashion shades

Finish - Soft and supple with drape properties

Must be colour fast

Suede leather to be washable or dry cleanable

Nappa (grain) leather must have high abrasion resistance with 'easy care' properties. This necessitates use of emulsified polyurethane finishing materials

High stitch tear resistance and good shape retention properties essential.

Industrial gloves

a. Types of leather

1. Better quality - Thin cowhide
Hide bellies
Horse hide
2. Lower quality - Hide splits

b. General requirements

Tannage - - Full chrome

Substance - 0.1-1.2 mm

Colour - Natural chrome, pale amber yellow

Finish - Supple for unrestricted handling but not too soft

Natural or suede as required

Good stitch tear resistance important

Must not ignite - this necessitates use of special fat liquors

e. g. as specially prepared by Sternal Oil Company Limited

c/o Mr A. Mayers
Hideaway
Middlings Wood
Sevenoaks
Kent - UK

Safety belts, harnesses etc

- Leather - Best quality Butt leather, free from defects
- Substance - 4.75 mm
- Tannage - Vegetable or prechromed vegetable
- Dressing - Heavily fat liquored or lightly curried leather
- Acidity - Ph of aqueous extract must be above 3.3
- Tensile strength - 211 KgF/cm² minimum
- Cracking - The leather shall not crack when bent 180° round a mandrel of 19 mm in diameter

NB: Safety Standard Specifications apply in all W. European, US and most export markets. In UK BS1397 of 1979 applies and may be purchased from:

The British Standard Institute
2 Park Street
London W1
Tel: 01-629-9000

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Cash bags, shopping bags, sports cases

- Leather - Bovine sides
- Tannage - Full chrome or chrome retain
- Substance - 2.0 mm to 2.5 mm
- Colours - Black plus a simple, staple colour range
- Texture - Soft and supple
Fat Liquor at 8 per cent level
- Finish - Acrylic resin plus nitro-cellulose top coat
Plain or printed finishes

Leather balls - As Ethiopia plans manufacture for the domestic market, the following information on leather specification requirements is here included:

White football leathers

- Leather - Bovine sides or butts
- Tannage - Chrome plus a synthetic tanning, re-tannage to bleach colour of leather. Dry under tension on a stretching frame to remove stretch from leather for the essential good shape retention properties
- Substance - 3.0 mm
- Finish - Special white poly-urethane - supplies and advice obtainable from:
Farbenfabriken Bayer of West Germany

Information on spherifying and stretching frames may be obtained in the UK from either:

Messrs Edward Wilson Ltd
Aintree Road
Bootle
Liverpool
Tel: 051 922 2291

Messrs G. L. Murphy Ltd
Imperial Works
Menston
Leeds
Yorks
Tel: Menston 0943 - 3132

There are several other European and US suppliers and a list is in course of preparation.

EXPORT MARKET INTRODUCTIONS,

ENTRY CHANNELS AND OPPORTUNITIES OPEN UP

i. HISTORY OF FIELDWORK

The fieldwork of Phase Three was carried out by a two-man team comprising a UNIDO Expert and a Senior Executive representing the National Leather and Shoe Corporation. The team set out to meet contacts and obtain information germane to inception of leather garment and products manufacture on commercial scales by NLSC. The itinerary programmed was structured to meet needs of the situation currently pertaining in Ethiopia by introduction to suitable co-operative contacts in key markets.

Generally speaking, interviews carried out, although largely pre-arranged, were unavoidably 'cold-calling' to considerable degree in absence of product information and samples. Interviews were thus speculatively prospective. Further, although purposed to research potential contacts and customers to assist NLSC in decisions on export-type products and selling strategies, scope of the field work undertaken had to be extended to include coverage for essential pre-cursive elements:

- i. leathergoods technical, production and business management training;
- ii. possibility of assistance to accelerate attainment of better finished leather standards. (See also Chapter 2. 1).

Practical coverage, and results obtained from field researches carried out between February 18 and March 12 in Europe, are recorded under various headings:-

TRAINING, COLLABORATION ON LEATHER FINISHING (by country), PRODUCTS (by category), RESEARCH SUBJECTS AND ASPECTS COVERED, OUTSTANDING RESEARCH SUBJECTS.

ii. TRAINING

Cordwainers Technical College, London, was visited and toured. This institution offers specialised leathersgoods courses the most suitable of which for NLSC purposes is the two year Diploma Course in Leathersgoods Production. Course objects are to prepare entrants for responsible positions in production management and design in the leathersgoods and allied industries. Each of the two years of the Course commences annually in September and lasts until the following June/July. At the time of the team's visit only two vacancies then existed for the 1980/82 Course and the accompanying Counterpart requested that these two places be 'pencilled' in for NLSC students. The visit revealed that there were already three Ethiopians attending the College and the Counterpart, Mr Bacry Yusuf, informed them of leathersgoods industrial development plans in Ethiopia to their considerable interest. A copy of the Cordwainers College current prospectus accompanies the Master Copy of the Report for onward transmission to NLSC.

The College permits senior members of the teaching staff to accept short-term overseas instructional assignments, which opportunity NLSC may care to prospect in connection with leathersgoods operatives training.

National Leathersellers Centre, Nene College, Northampton, opportunity was taken to visit the Centre whilst in Northampton on other business of the mission. Until recently the National Leathersellers College, London, the work of the Centre is widely acknowledged internationally in the tanning industry. Currently, five Ethiopians are on Centre courses and more candidatures are scheduled from Project DP/ETH/78/001/A now under way.

British United Shoe Machinery Company, Leicester, was contacted with a view to discussing availability of information and assistance with modules for leathergoods production, senior staff practical and technical training in Leicester, Bristol or at other BUSMC and associated Group plants. Contact established is for eventual follow-up by NLSC when required.

iii. COLLABORATION ON LEATHER FINISHING:

UNITED KINGDOM

Contacts and visits were made to:

Messrs Fredk Rose, Northampton, London, (Mr W. Rose, Managing Director, Mr J. Best, Manager)

Messrs Harrold Leather Co, Harrold, Bedfordshire, (Mr J. Tusting, Managing Director, Mr O. Evans, Technical Director).

These two companies have long experience in processing Ethiopian-type raw and part-processed skins. After discussions, both firms expressed preparedness to investigate co-operative business association on mutually acceptable bases to be agreed. As a result of the contact Mr Tusting will visit Ethiopia April/May 1980 and Mr Best at a subsequent date. In addition to co-operative activity, both firms are good potential customers for Ethiopian part-processed leathers and, eventually, finished. Messrs Rose entered a trial order subject to price and delivery. This order was transmitted by the mission. Crust samples were taken by both contacts and further samples were requested.

FRANCE

The selected contact in France was Messrs Cuirtan Albert Bonéfant of Paris, Cholet, Belley, de Bugey, Bourg, Santa Croce s'ull Arno, (M. Pierre Bonéfant, President-Director General; M. Escoula, Export Manager of Le Tanneur; various plant production and technical managers). This Group has considerable interests in all aspects of the leather trade - hides and skins, tanning, finishing, leather products manufacture and distribution. Three detailed discussional meetings in Paris and a day visit to Tanneries de Bugey and Le Tanneur (Leather products manufacture) factories, Belley and Bourg, resulted in agreement in principle to collaborate in joint venture export market contract finishing, production of special-purpose suede splits plus association on leather products manufacture (see under LEATHER PRODUCTS below). M. Bonéfant undertook to write to NLSC in confirmation of his Group's interest.

FEDERAL REPUBLIC OF GERMANY

Leather usage in this very demanding market is importantly serviced by the well-established importer trade mainly based in Pirmasens. The selected contacts are known to be pioneers of leather development in association with exporter-countries and are experienced in and have access to technology standards necessary for both leather and leather products. Discussions resulted in expressions of keen interest and willingness to collaborate in mutual interests with a view to production of leather acceptable in this market and progress to joint venture finishing within the market, this to be followed by introduction to leather product manufacturers (see under LEATHER PRODUCTS below).

Firms contacted are:

Firma Schmenger Leder, (Hrrn. K. Gaisbauer, Director of Buying), and
Firma Hermann Jakob, (Hrrn. H. Jakob, Proprietor). Both firms operate to own
account and can provide considerable leather business as well as technical leather-
finishing aid and entrées to the German market for leather products. Sample cuttings
were left and fuller sampling was requested for analysis and comment.

AUSTRIA

Contact - Firma C. F. Merker, Vienna, (Dr Werner Kleinknecht, Proprietor): in
addition to important operations in the Austrian market. C. F. Merker have long-
established connections with the Yugoslavian and Hungarian markets for part-processed
and finished leathers. The former is an important nett-importer of clothing leather for
its large leather clothing industry. The latter similarly so for its large leathergoods
producing industry. Austria itself imports large quantities of part-processed and finished
leathers for clothing and gloves as well as leather clothing. This contact is thus
extremely well placed to assist with development of leathers-for-purpose in the three
markets concerned and eventual leather product placing. Dr Kleinkecht is very ready
to commence co-operation and has undertaken to institute requisite researches within
his markets and customer circles. The Company is able to act on basis of direct
business, joint venture or distributor - or on any combination and progression of
these.

ITALY

This market is probably the richest in leather finishing capability and creativity of finishes - particularly on low grade material. For this unique leadership alone, access to Italian techniques will be of great assistance to Ethiopia. However, the Italian tanning and finishing industry is greatly fragmented and, as far as this mission was concerned, could not be representatively covered in the time available. In order to open up channels of 'down the line' contact, NLSC representative was introduced to the long-established agency of Messrs E. A. Piantanida, Milan, (Sre. Enea Piantanida, Proprietor, and Sre L. Piantanida (son), General Manager). This contact agreed to conduct the necessary detailed survey of selected (and typical of this market) small tanner-finishers as a contribution towards starting up co-operation with NLSC (a) for business in part-processed and, later, finished leathers and (b) identification of a joint venture partner, or partners, on finishing. The Piantanida Agency would wish to act on a commission basis and this might well be a desirable interim arrangement for NLSC regarding the Italian market. It is appropriate to point out here that the French Cuirtan Group has a very good finishing operation in Santa Croce s'ull Arno - an alternative feasible access to Italian finishing techniques as well as to the market itself. The subject has been noted by Cuirtan during talks in Paris.

SPAIN

An introduction was made for Ethiopia in Spain to the Colomer International Group (Sr Andres Colomer-Munmany, President; Sr J. Ylla Catala, Director; Sr J. Costas, Senior Executive - Technical). This Group is one of the largest tanning, leather

distribution and other leather-related activity organisations in the world. Concentrating mainly on skin processing, the Group has a total throughput capacity of approximately 50,000 pieces per day. Colomer has agreed to assist NLSC co-operatively to produce export-standard finished leather and has proposed, firstly, to test a full range of part-processed samples, to pass back technical comments, re-sample, and then, provided know-how has been assimilated, to move on to finished leather distribution. The association to be desirably on a basis of joint venture with exclusivity for leather resultantly produced. Colomer can also provide know-how and sales for leather garments and practical introductions for other leather products - both manufacturing and distribution-in the important Spanish, and in various other international, markets. Colomer is also wishful to purchase part-processed leathers and has very large-scale business potential.

iv. LEATHER PRODUCTS - INDUSTRIAL
GLOVES AND CLOTHING, SAFETY ETC. EQUIPMENT

INDUSTRIAL GLOVES

Subject to continuing availability of suitable splits and good servicing of the market with the finished product, industrial gloves can be sold by Ethiopia to export in great volume. A start can confidently be made with an immediate target of 250,000 pairs per year with early progress to double that figure. This item, provided competitive, is ideally suited to the situation in Ethiopia. Talks in London, with

Intermarkt of Hitchin, Herts, UK, have set up channels for product sampling, development and eventual representation and distribution throughout Europe and in other major world markets. A typical Manufacturing Standards Specification accompanies the Master Copy of this Report.

INDUSTRIAL CLOTHING, SAFETY ETC. EQUIPMENT

Another category especially suitable for uptake by NLSC leather products division at this inceptional stage. Following introduction made, practical co-operation in development leading to placing of sizeable orders has been extended by specialist manufacturer and international distributor Messrs Barrow Hephurn Equipment (Mr T. Fuller, Managing Director), London, UK. Mr Bacry, Counterpart, has been shown samples; illustrated brochures accompany the Master Copy of this Report.

v. LEATHER PRODUCTS - LEATHERGOODS

Export of leathersgoods (maroquinerie) by Ethiopia can be opportunely commenced through collaboration with the world famous LE TANNEUR manufacturing and distributing operation. Part of the CUIRTAN Group, the French-located factories produce 1.7 million pieces of leathersgoods per year over a range of more than 800 different items distributed through 3,000 outlets in Europe alone. LE TANNEUR has successfully introduced 'Tann's' - a special range for the pre-teen market. Part of this range is already supplied from offshore arrangements: the talks conducted opened up possibilities for extension to Ethiopia - initially probably with component pieces

made to LE TANNEUR designs and standards, later progressing to made-up articles. Longer-term prospects exist with the 'senior' ranges - but as was demonstrated to Mr Bacry at the Offenbach Fair, visited as part of the field work, much experience and development must be undergone before this top stratum can be approached. Illustrated catalogues to show examples of both ranges accompany the Master Copy of this Report.

As elsewhere recommended, another channel into leathers goods manufacture, calling for further research than the Project had time for, is via further 'offshore' arrangements with other European etc. manufacturers supplying the wholesale and agency trade.

vi. LEATHER PRODUCTS - DRESS GARMENTS

Contact was made with Messrs R & J. Pullman, London, UK. (Mr M. A. Hope, Chairman and Managing Director). This is one of the few Public Companies engaged in large-scale manufacture, distribution and retailing of leather garments (the latter through about 50 wholly-owned stores). The meeting established that the contact is alert to new avenues of supply.

Possibilities of (i) garment components manufacture to Pullman designs, progressing to (ii) garments made under licence were put to Mr Hope and resulted in his expressing readiness to receive, evaluate and comment on leathers sampled to his Company.

when leather reaches acceptability standards, R & J Pullman would be prepared to supply patterns for making-up and, eventually, orders.

The above summarised account of contacts made, and of opportunities opened, makes its own weighty reiteration of salients by which NLSC may best and most securely navigate its objective of leather product industrial development for export. These are:

Perfect the necessary leathers

Start with comparatively small volume production of simple-to-make items and components

Obtain know-how and export business footings through foreign collaboration.

THOROUGH FOLLOW-UP OF ALL CONTACTS MADE IS NOW FOR PRIORITY ACTION BY NLSC. COUNTERPART MR BACRY YUSUF HAS ALL NAMES, ADDRESSES AND APPROPRIATE NOTES. THE WRITER STANDS READY FOR CONSULTATION AT ALL TIMES IF REQUIRED.

vii. FIELDWORK RESEARCH AREAS COVERED - BY SUBJECT

The following summarises research subjects covered during the fieldwork by country. This fortunately proved to be extensively successful as the list shows. However, time and other constraints did not permit full completion of the programme set by the Writer for the Project. Subject matter unavoidably omitted is separately listed for scheduling-in with future NLSC Marketing Department activities.

viii. RESEARCH SUBJECTS AND ASPECTS

COVERED BY FIELD WORK OF PROJECT SI/ETH/77/801

UNITED KINGDOM

- Senior Technical Training; possibility for later recruitment of instructors, short-term, for Ethiopia
- Volume Leather Garment Manufacture
- Import/Distribution Part-Processed Leathers
- Possibilities of Commercial Co-operation - Contract Finishing/Joint Venture Including Imparting Leather Finishing Technology
- Assessment of Ethiopian-made Workgloves Against Other Supplies and Potential for Development of Trade
- Importer and Manufacturer Requirements. Leather Protective Clothing and Equipment
- Leathersgoods Equipment Suppliers' Training Facilities Available to Customers.

FRANCE

- Volume Leathersgoods Manufacture, Wholesaling and Retailing
- Import/Distribution Part-Processed and Finished Leathers
- Possibilities of Commercial Co-operation - Contract Finishing/Joint Venture Including Imparting Leather Finishing Technology

GERMANY/AUSTRIA

- Import/Distribution Clothing Leather and Leather Clothing
- Requirements and Specifications for Leather for Leathersgoods
- Requirements and Specifications for Part-Processed and Finished Lining Leathers
- Import/Distribution Dress Glove Leathers
- Import/Distribution Leather Workgloves

ITALY

- Channels of Distribution and Preferred Methods of Entry to the Market, Identification of potential Agents
- Possibilities of Commercial Co-operation - Contract Finishing/Joint Venture including imparting Leather Finishing Technology
- Import/Distribution Clothing Leather and Leather Clothing
- Requirements and Specifications for Part-Processed and Finished Lining Leathers

SPAIN

- Possibilities of commercial co-operation
- Joint venture including importing leather finishing technology
- Leather garment manufacture development and distribution, internationally
- Introduction to leather products interests in Spain

ix. SOME OUTSTANDING RESEARCH SUBJECTS FOR COVERAGE

IN CONNECTION WITH NLSC LEATHER PRODUCTS' INDUSTRIAL DEVELOPMENT

Leathergoods Retail Purchasing, Patterns of Distribution

Contacts with Leathergoods Factories - Turnkey Project Possibilities, Tailored-for-

Purpose Modules

Leathergoods and Sportsgoods-Making Machinery and Equipment

Chamois Leather Importers and Distributors

Leathergoods and Garments Accessories etc. Suppliers - Scope and Contact

ACKNOWLEDGEMENTS

Warm appreciation is recorded of assistance and co-operation freely given by:

Many friends in the international leather and leather products industries, Mr. Getinet Wolde Giorgis, General Manager, Officers and Staff of the National Leather and Shoe Corporation of Ethiopia.

Mr J. Hietaniemi, Project Manager, DP/ETH/78/001/A, now in progress in Ethiopia.

Mr Bacry Yusuf, a receptive Counterpart.

Ms K. Hellamaa and Mr F. Schmel, through the record of their earlier work on the Project.

VARIOUS BROCHURES, SPECIFICATIONS, PROSPECTUS ACCOMPANYING
THE MASTER COPY OF THIS REPORT AND FOR USE OF NLSC

1. "Prospectus Leathergoods Courses"- Cordwainers Technical College
2. Manufacturing Standards Specification - Industrial Gloves
3. Messrs Barrow Hepburn - Brochure illustrating Safety etc
Equipment and Utility Carriers and Bags
4. Messrs Le Tanneur - brochures illustrating TANN'S Pre-teen range
of leathergoods and Le Tanneur ranges of high class leathergoods.

SOME EUROPEAN MANUFACTURERS AND SUPPLIERS OF
METAL ACCESSORIES FOR THE LEATHERGOODS INDUSTRIES

United Kingdom

Samuel Price Ltd
Tantarra Street
Walsall, Staffs.

Ace Slide Fastener Co Ltd
11-12 Mallow Street
London EC1

Shirley Manufacturing Co Ltd
33-35 Floodgate Street
Birmingham,
B5 5SN

Elbief Ltd
Prince of Wales Lane
Warstock
Birmingham, B14 5SN

F. H. Tomkins Buckle Co Ltd
Brockhurst Works
Bescot,
Walsall WS5 4AS

Federal Republic of Germany

Heinrich Sudhaus
Sohne

Schaeffer-Homberg, GmbH
Schutzenstrasse 23
Wuppertal, 2

Stock Metallwarenfabriken
Wuppertal

Spain

Elig Manufacturas de Acero, SL
Partida Carrus
662 Elche (Alicante)

France

Ets. H. Deshayes
20 Rue Capitane-Ferber
Paris 75020

Daude
79 Rue du Temple
75003 Paris

Ets. Leon Weil
27 Quai Jules-Guesde
94400, Vitry

Italy

Fibbiera Italiana Bornago
Via Montello 1
Milan

Source: ITC/OTC/61



