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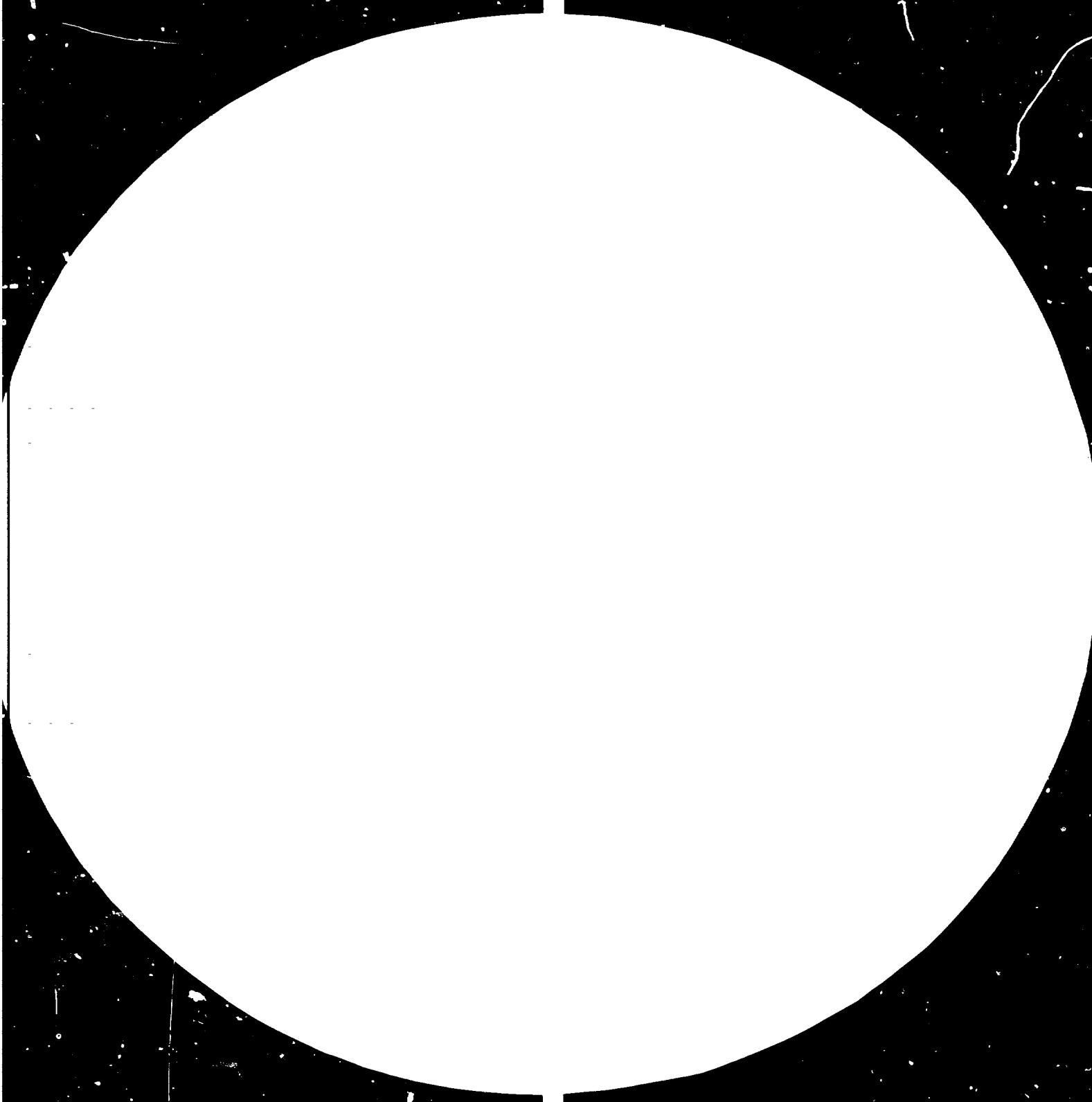
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UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANIZATION

**SECOND
CONSULTATION
ON THE
LEATHER
AND LEATHER
PRODUCTS
INDUSTRY**

060175

Cologne, Federal Republic of Germany
23-26 June 1980

REPORT

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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 developing countries' share in world industrial output through increased international co-operation (ID/CONF.3/31, chap. IV, para. 66).^{1/}

The General Assembly, at its seventh special session in September 1975, by resolution 3362 (S-VII), decided that the System of Consultations called for by the Lima Declaration and Plan of Action should be established at global, regional, interregional and sectoral levels^{2/} and that UNIDO, at the request of the countries concerned, should provide a forum for the negotiation of agreements in the field of industry between developed and developing countries and among developing countries themselves.

The Industrial Development Board at its tenth and eleventh sessions in 1976 and 1977 decided that Consultations should be convened among member countries, the participants from interested countries to include officials of Governments as well as representatives of industry, labour, consumer groups etc.^{3/}, ^{4/}

The First Consultation Meeting on the Leather and Leather Products Industry was convened at Innsbruck, 7-11 November 1977. The follow-up action on its recommendations is presented in the Secretariat Report to the Second Consultation (ID/WG.319/9).

The Industrial Development Board at its thirteenth session decided that the Second Consultation on the Leather and Leather Products Industry should be held during 1980.^{5/}

^{1/} "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.

^{2/} Official Records of the General Assembly, Seventh Special Session, Supplement No. 1, para. 3

^{3/} Ibid., Thirty-first Session, Supplement No. 16, para. 60.

^{4/} Ibid., Thirty-second Session, Supplement No. 16, para. 162.

^{5/} Ibid., Thirty-fourth Session, Supplement No. 16, para. 83.

Explanatory notes

The following abbreviations of organizations are used in this report:

FAO	Food and Agriculture Organization of the United Nations
GATT	General Agreement on Tariffs and Trade
ITC	International Trade Centre (UNCTAD/GATT)
UNCTAD	United Nations Conference on Trade and Development
UNEP	United Nations Environment Programme

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INTRODUCTION

The Second Consultation on the Leather and Leather Products Industry was held at the Messe Kongress Zentrum Ost, Cologne, Federal Republic of Germany, from 23 to 26 June 1980. The Consultation was attended by 170 participants (annex I) representing Governments, industry, labour and consumer groups from 53 countries and 16 international organizations.

CONCLUSIONS AND RECOMMENDATIONS

Working Group I

I. International Hides and Skins Development Scheme

1. The Second Consultation recommends that an International Hides and Skins Development Scheme be established under the aegis of the United Nations agencies concerned, comprising the following stages:

Stage I

(a) The United Nations agencies concerned should send missions to selected countries in order:

- (i) To evaluate raw stock quantity and quality using existing and new data. The studies should provide an estimate of the total increased value that could be obtained through increased recovery of wasted raw stock and improvement in quality at ruling international prices;
- (ii) To identify and propose the measures needed in order to obtain such economic gains;

(b) The results of these missions, including the recommendations and the measures identified to raise the availability and quality of raw materials for the further development of the sector, should be submitted to Governments for their consideration;

(c) The Second Consultation recognizes that implementation and financing are the responsibility of the individual Governments. The missions proposed should, however, assist the different Governments to prepare requests for financing and identifying international and national institutions to implement the campaign;

(d) The object of these preliminary studies is to provide information to Governments enabling them to carry out the detailed technical operation outlined in Stage II;

Stage II

(e) At the initiative of either Governments or United Nations agencies, applications should be made to the appropriate United Nations agencies to assess:

- (i) The present methods of collection, handling, preservation, processing and storage of hides and skins, the trade and commerce relating to these and an estimate of their potential market value at prevailing international prices;
- (ii) The actual and potential raw material resources (hides, skins and related byproducts) and to estimate current losses incurred owing to little or no utilization of hides and skins;
- (iii) The possible reduction in production costs by the recovery and optimum utilization of the byproducts of hides and skins;
- (iv) The feasibility of increasing the recovery and improving the quality of hides and skins for both domestic and export markets to ensure optimum economic returns;
- (v) Alternative strategies for the development of the sector including investment in infrastructure, technical manpower and training;
- (vi) The areas where the above activities could be initiated;

(f) In order to initiate development activities along the lines discussed above, a modest beginning should be made by setting up a nucleus of available resources, talents and techniques where the various problems involved could be tackled. The nucleus should consist of rural extension services staff trained in animal husbandry and veterinary science who might be attached to an existing experimental farm or rural extension centre. In countries where such units do not exist, it might be necessary to set up self-contained experimental farms, with their own pasture land, where animals could be scientifically bred and reared free from disease and where the allied problems of animal husbandry and nutrition might be successfully tackled using as many local resources as possible. The objectives should be:

- (i) To control major infectious, epizootic and tick-borne diseases by a sustained programme of vaccination and dipping, to set up immune belts and disease-free zones, and to initiate effective sanitary regulations governing animal slaughter;
- (ii) To take such other measures as may be required to ensure the general health and well-being of animals, and to educate and train stock owners accordingly by demonstration and extension services;

(g) A Pilot Centre should be based in an approved abattoir with modern facilities for hygienic production, handling and storage of meat and meat by-products including hides and skins. A drying and curing yard and a unit for the primary processing of byproducts should be attached to the Centre. A demonstration wing of the Centre should be equipped with a mobile unit and other audio-visual aids and manned by two international experts, one in hides and skins improvement and the other in animal byproducts utilization, besides a mobile team of local extension workers. The objectives of the Pilot Centre should be:

- (i) To standardize simple, practical and quality-oriented methods for scientific ripping, flaying, trimming, curing, handling and grading of hides and skins, quality control, and the primary processing of related byproducts, and to establish the feasibility of commercial production;
 - (ii) To train operatives in the methods and techniques referred to above;
 - (iii) To disseminate the appropriate know-how and expertise to outlying areas through the mobile extension unit and the mobile demonstration party;
 - (iv) To work out a system, based on incentives, for marketing hides, skins and related byproducts that involves a primary producer, dealer and consumer (i.e. a tanner or exporter);
 - (v) To organize and hold in-plant group training courses for butchers, flayers, hides and skins dealers and byproducts technicians, and to establish a recognized system of licensing and registration by the parties mentioned above;
 - (vi) To stock and sell at cost price, simple tools and accessories as well as curing salt and treatment agents for standard flaying, curing and drying of hides and skins and for the preparative treatment of byproducts;
 - (vii) To initiate a pilot hides and skins improvement service as the forerunner of a national service, and to prepare appropriate regulatory legislation for that service;
 - (viii) To promote economic recovery and rational utilization of all abattoir byproducts for both local use and export;
 - (ix) To provide the necessary guidelines, based on the experience obtained, for a similar Pilot Centre elsewhere in the country;
- (h) In countries where the Pilot Centre was successful, it should be upgraded into a Central Depot and Facility Centre, the objectives of which should be:
- (i) To promote self-reliance for the country's industries in hides, skins and related byproducts, and to increase technical capability and competence in the country;
 - (ii) To improve the technical quality of the raw materials by proper handling, preservation and storage leading to their eventual classification, grading and standardization for organized marketing;
 - (iii) To develop suitable methods of flaying, curing and preservation of hides and skins under local conditions, and to standardize and demonstrate methods for higher productivity and efficiency;
 - (iv) To establish the mechanics for centralized collection and the proper recovery of hides, skins and related byproducts in a technically worthwhile condition, and to provide the conditions necessary for its implementation;
 - (v) To hold regular production-oriented training courses in appropriate technology tailored to the needs in the field, and to continue development of technical manpower at various operating levels by on-the-job training.

2. Stages I and II should initially be carried out in a limited number of countries or regions and preferably on a pilot scale. Once these initial stages are completed or show positive results in achieving the objectives of the Scheme, Stages I and II should be extended to a wider range of countries or regions.

3. The Second Consultation strongly recommends that the funding for Stage I should be sought from the United Nations agencies concerned and other interested bodies to launch the preparatory missions proposed.

4. The Second Consultation recommends that the funding for Stage II, to implement a large-scale campaign directed towards making Governments aware of the potential of hides and skins in their national economies, should be by international, regional and national institutions (both public and private), and considers that certain countries may wish, on their own initiative, to contribute to specific projects outside their own countries.

II. Improvement of statistical intelligence for hides and skins and derived products

5. The Second Consultation recommends that Governments as well as international and national organizations should make every attempt to assist FAO and its Ad Hoc Working Party to maintain the momentum of the work on a standardized country reporting format and internationally agreed common denominator, appropriate conversion factors and the improvement of statistical analysis for the hides, skins and derived products sector.

6. The Second Consultation considers first, that this work is an indispensable requirement for progress in the discussion of economic and technical problems in international consultations. Secondly, that the improvement of the existing data and intelligence base will facilitate the effective monitoring of the proposed Hides and Skins Development Scheme. Therefore, the Scheme and the mechanism for the improvement of statistical intelligence should be closely associated.

Working Group II

III. Establishment of a check-list for contractual agreements in the leather, leather products and footwear sectors

7. As there is ambiguity as to what should be part of a contractual agreement between parties interested in international development in the sectors, the Second Consultation recommends that the UNIDO secretariat and its Leather Panel should undertake the research necessary to establish a check-list of

clauses, conditions and variations thereof that could be included in contractual agreements. In preparing the check-list the following items, along with others, may be considered:

Partners that may deal with the developing countries, especially LDCs, through private, public or Government enterprises

- (a) Private firms in market economy countries;
- (b) Industrial and foreign trade enterprises in centrally planned economies;
- (c) The more developed among the developing countries;
- (d) Countries that have the necessary financial resources.

Type of venture

- (a) Joint venture with equity/investment participation;
- (b) Joint venture without equity providing only technology, management and/or marketing.

Objectives for joint ventures with equity participation

From the point of view of enterprises in developing countries

- (a) To maximize the net gains of the values added;
- (b) To provide additional gainful employment;
- (c) To earn foreign exchange;
- (d) To develop skills for self-competence and self-reliance by securing training of personnel at different levels within the scheduled times;
- (e) To ensure that there is no over-selling or undue payments for machinery technology etc.

From the point of view of enterprises in developed countries

- (a) Distribution of capital in the joint company;
- (b) Guarantees for investment;
- (c) Profit to be shared both within and outside the country;
- (d) Pricing policy;
- (e) Management control for a given period specifying a minimum period to reduce the number of expatriates and for the local experts to take over;
- (f) Permission for remitting dividends and royalties abroad for a specific period;
- (g) Access to local and international markets and distribution to local retailers;
- (h) Sharing of profits abroad;
- (i) Expatriates given fair salaries and permission to remit some of their earnings to their home country.

Objectives for joint ventures without equity participation (such as, those for technology, management, marketing, or all these three combined)

(a) Ventures in which an enterprise in a developed country with an established brand name would provide designs, quality and quantity requirements, price, fixed schedules, and the enterprise in the developing country would undertake to produce and deliver these goods on time. Notice by either side would be needed to break the contract;

(b) The above could also apply to large-scale distributors for retail trade. Problems may occur if the prices for the raw materials unexpectedly shoot up or if the supply is not delivered in time because of extraneous problems such as shipping delays or strikes; some mechanism should be provided for arbitration;

(c) In a supply contractor system the obligation of the enterprise in the developed country is to provide designs and orders far ahead of time, and market the products in developed countries, whereas the production is in developing countries;

(d) A developing country can set up a joint venture in a developed country with production entirely in the hands of the developing country and the company abroad only acting as a marketing or trading company to provide market intelligence, designs etc.;

(e) Technology plus management is required by many countries that obtain machinery without expert services being provided and the machinery is therefore kept unused. Wherever such capital goods are involved, expert services should also be included in the contract.

8. With reference to the above check-list, the principles laid down in the conclusions of the ILO Second Tripartite Technical Meeting, December 1979, for the leather and footwear industry should be kept in mind.

IV. Setting up production and design units in developing countries

9. Since the fashion market may be entered by developing countries only if they are sure of their competence to meet fast-changing fashions and designs, it is recommended that their entry into the field of leather products be oriented to those products whose fashions do not change rapidly, such as:

(a) Products based on traditional artistic skills, exotic, typical of the country with an appeal to the consumer of developed countries, e.g. sandals, Mexican horachi, South American boots, Indian and Moroccan slippers;

(b) Replicas or imitations of requirements of developed countries for which delivery schedules allow a time margin and competition could be successfully met, e.g. stitched-down desert boots, industrial workers' boots, comfort shoes for older people, ordinary men's shoes, home slippers, shikari boots, riding boots;

(c) Moccasins;

(d) General-purpose articles, e.g. bags for women and men, other leather goods and souvenirs;

(e) Sports goods, e.g. footballs and volleyballs etc.;

(f) Harness and saddlery.

10. Once competence is built up in such areas, it is possible to move cautiously into more fashionable goods. It must be recognized that regardless of the type of product produced, adequate market research is essential. Since these areas afford possibilities for fruitful co-operation between developed and developing countries, it is recommended that UNIDO should undertake systematic studies to identify such opportunities and act as a catalyst for setting up production units in the developing countries.

11. Considering the importance of design and fashions in the marketing of leather products, it is recommended that UNIDO take the first steps for bringing together the interested parties and explore the possibilities of setting up design and fashion councils in Africa and Asia.

V. Rationalization of world production, marketing and trade in leather, leather products and footwear

12. Countries using their natural resources to build up the leather, leather products and footwear industry may need to give this industry special protection or incentives. However, all protectionist measures by developing and developed countries should be limited in duration, since such measures over long periods may lead to distortion in the world markets and create imbalances in international trade. Therefore, it is recognized that ground rules are necessary for a healthy, free and fair international trade development having regard to the circumstances peculiar to the hides, skins, leather and leather products industry. UNIDO, in co-operation with the international organizations competent in production, marketing and trade of leather and leather products, should create an industrial working group within the Panel to study and elaborate this proposal.

VI. Management training

13. The Second Consultation recommends that UNIDO should identify:

(a) Countries, organizations and firms that have facilities or capabilities to assist developing countries with practical training in fashion design, styling, marketing and management for middle and top management;

(b) Conditions under which such training could be made available.

In addition, UNIDO and ILO should facilitate arrangements for such training.

PART ONE: REPORT OF THE PLENARY

I. ORGANIZATION OF THE CONSULTATION

Opening of the Consultation

14. The Second Consultation on the Leather and Leather Products Industry was opened by the Executive Director of UNIDO who thanked the Federal Republic of Germany and the City of Cologne for hosting the Consultation and stated that the hosting of such meetings was a reflection of the interest, appreciation and confidence of Member States in the System of Consultations.
15. The Consultation was then addressed by Mr. Rainer Offergeld, Minister of Economic Co-operation of the Federal Republic of Germany, who paid tribute to the System of Consultations as a new mechanism for the exchange of technical experience between partners in the industrialization process and as an instrument for further development of international economic relations between North and South.

Election of officers

16. Otto Franz Klötzer (Federal Republic of Germany) was elected Chairman.

The following Vice-Chairmen were elected:

Ngongo Kamanda (Zaire)
Sanjoy Sen (India)
Raul Boccone (Uruguay)
Frantisek Malata (Czechoslovakia)

Adoption of the agenda

17. The Consultation adopted the following agenda:
1. Opening by the Executive Director of UNIDO
 2. Election of the Chairman and four Vice-Chairmen
 3. Progress report by the UNIDO secretariat on the recommendations of the First Consultation:
 - (a) Establishment of the Leather and Leather Products Industry Panel
 - (b) Survey of raw materials and programme to increase availability and quality
 - (c) Statistics on Leather and Leather Products Industry
 - (d) Establishment of regional leather industry centres

(e) Other recommendations of the First Consultation

4. Issues identified for the Second Consultation

(a) Raw hides and skins - measures to improve their world-wide availability, quality and statistical intelligence

(b) Problems and prospects of production and marketing of leather products in developing countries, and co-operation measures which could be envisaged between developing and developed countries

(c) Selected issues of trade and development in the hides, skins, leather, leather products and footwear sectors

5. Topics proposed for examination by UNIDO after the Second Consultation

6. Adoption of the report of the Second Consultation

Establishment of working groups

18. Two open-ended working groups were established to discuss the issues listed under agenda item 4(a), (b) and (c), as follows:

Working group I
(Chairman: F. Malata):

Raw hides and skins - measures to improve their world-wide availability, quality and statistical intelligence; and selected issues of trade and development in the hides and skins sector.

Working group II
(Chairman: Sanjoy Sen)

Problems and prospects of production and marketing of leather products in developing countries, and co-operation measures which could be envisaged between developing and developed countries; selected issues of trade and development in the leather, leather products and footwear sectors.

Adoption of the report

19. The report of the Consultation, including the conclusions and recommendations of the working groups, was unanimously adopted in plenary on 26 June 1980.

Documentation

20. Documents issued for the Second Consultation are listed in annex II.

II. SECRETARIAT REPORT TO THE SECOND CONSULTATION (ID/WG.319/9)
(Agenda item 3)

21. The UNIDO secretariat introduced its Report summarizing the action taken by the secretariat in collaboration with the United Nations agencies concerned to implement the recommendations of the First Consultation relating to:

The establishment of the Leather and Leather Products Industry Panel

The establishment of the United Nations Inter-Agency Standing Committee on Hides, Skins, Leather and Leather Products Industry

A survey of raw materials and programmes to increase availability, quality and statistical intelligence

The setting up of regional leather centres

A programme for least developed countries

Preparation for a directory of potential joint venture partners

The FAO World Statistical Compendium for Raw Hides and Skins, Leather and Leather Footwear.

22. A representative of the UNIDO secretariat presented the report "The Leather and Leather Products Industry up to 1985" (UNIDO/ICIS.134) prepared by a UNIDO consultant.

23. Although the report had been commended at the fourth session of the Leather Panel, held at Beijing, China, 11-15 March 1980, it had been felt that certain constraints experienced by the developing countries, and in particular the least developed among them, in that sector, such as those on trade and transfer of technology, had not been fully taken into account. Subsequently the secretariat made a summary of the Panel's comments on the consultant's report, including comments from governments, non-governmental organizations, other United Nations bodies and the UNIDO secretariat (ID/WG.319/6). However, there had not been time to incorporate these comments into the consultant's report, which was reissued for the Second Consultation.

24. Some participants at the Consultation expressed the view that the above-mentioned Summary (ID/WG.319/6) did not entirely reflect the views expressed during the fourth session of the Panel. It was therefore agreed that the Summary should be read in conjunction with the report of the fourth session of the Panel (UNIDO/EX.112).

III. RAW HIDES AND SKINS - MEASURES TO IMPROVE THEIR
WORLD-WIDE AVAILABILITY, QUALITY AND
STATISTICAL INTELLIGENCE (ID/WG.312/1)

(Agenda item 4 (a))

25. The first issue was presented by a UNIDO consultant who stressed the importance of the availability of raw hides and skins and mentioned some of the constraints affecting that important issue, inter alia, that the output was inelastic since the supply of hides and skins depended on the meat industry.

26. Developing countries were classified into three categories: first, those that had the necessary resources and infrastructure, but who did not export raw hides and skins; secondly, those that had adequate resources but no infrastructure or manpower, and who did export some leather; thirdly, those that had the infrastructure but not the necessary resources, and who did export raw hides and skins.

27. The consultant pointed out that structural changes had occurred in the raw hides and skins sector in that the developing countries had become net importers of hides and skins. In conclusion, he stated that there still were urgent requirements for:

- Improved statistical data
- Increased availability of quality hides and skins
- Continued market intelligence
- A rational use of world hides and skins
- Solutions to trade restrictions.

28. Additional information on the issue was given by an agricultural industries officer from FAO who stated that the major problem was to improve raw material quality. Also an urgent world-wide campaign should be mounted to improve recovery of hides and skins. He noted that there was an increased awareness among the developing countries to recover and improve the quality of hides and skins.

29. A Senior Commodity Specialist of FAO gave a brief introduction to the World Statistical Compendium for Raw Hides and Skins, Leather and Leather Footwear prepared specifically as an FAO contribution to the Second Consultation on the Leather and Leather Products Industry. The Compendium constituted a revised, updated and expanded version of the first issue presented to the FAO Ad Hoc Government Consultation on Hides and Skins held in Rome in 1978.

At the request of that Ad Hoc Government Consultation, the FAO Secretariat had embarked upon a number of activities directed at improving the statistical intelligence base of the sector: first, a standardized country reporting format; and secondly, a compendium of conversion factors covering an indicative estimation of unit weights and sizes of major types of raw stock and leather from goats, sheep and cattle, which was nearing completion. The inadequacies of the currently used classification systems - Brussels Trade Nomenclature and Standard International Trade Classification - were also being identified. Those and other activities would form the basis of the documentation prepared for the Ad Hoc Working Party on Statistical Intelligence which had the task of guiding FAO in improving the intelligence base. A meeting of that Working Party would be held in early 1981.

IV. PROBLEMS AND PROSPECTS OF PRODUCTION AND MARKETING OF LEATHER PRODUCTS IN DEVELOPING COUNTRIES, AND CO-OPERATION MEASURES WHICH COULD BE ENVISAGED BETWEEN DEVELOPING AND DEVELOPED COUNTRIES (ID/WG.319/2)

(Agenda item 4 (b))

30. The Chairman of the UNIDO Task Force on Agro-based Industries introduced the issue. He made a distinction between two categories of developing countries. The first category was composed of the more advanced developing countries with an adequate raw material supply and an industrial capacity to produce leather goods. Their main concern was the marketing of leather goods in developed countries. The second category was composed of the least developed countries that might have an adequate raw material supply but whose capability to produce marketable leather and leather goods was extremely limited. The latter countries required massive assistance from not only the developed but also the more advanced developing countries.

31. He suggested that a dialogue be stimulated between the developing and the developed countries with a view to identifying the technology, training and marketing needs of the developing countries; taking into account those needs, the developed countries would then be in a position to specify their conditions for joint ventures with the developing countries.

V. SELECTED ISSUES OF TRADE AND DEVELOPMENT IN THE HIDES, SKINS,
LEATHER, LEATHER PRODUCTS AND FOOTWEAR SECTORS (ID/WG.319/3)

(Agenda item 4 (c))

32. The issue was presented by the UNIDO secretariat and dealt mainly with the problems of access to markets:

- (a) Tariffs, tariff structure and escalation of tariffs according to the stages of processing;
- (b) Operations of the Generalized System of Preferences;
- (c) Non-tariff barriers;
- (d) Export restrictions on raw materials and further processing of raw materials in developing countries;
- (e) Increasing protectionism.

33. The main consideration was whether countries that applied trade restrictions on the import of leather and leather products also had the right to claim free access to the sources of raw materials' supply.

VI. TOPICS PROPOSED FOR EXAMINATION BY UNIDO AFTER THE SECOND CONSULTATION

(Agenda item 5)

34. Most participants felt that the UNIDO Leather and Leather Products Industry Panel should continue to follow up and monitor the progress made in implementing the recommendations made at the Second Consultation. The participants considered the work of the Panel most useful but felt that it would be advantageous to make it more concrete. One participant from a developed country expressed the view that the report of the Panel should be sent to professional organizations and associations in developed and developing countries.
35. Most participants expressed their support of continuing consultations but felt that there should be a longer time between them. One participant suggested that UNIDO should convene technically oriented regional seminars between consultations. Another participant stated that effluent control and environmental protection were matters for serious consideration by the Panel.

PART TWO: REPORTS OF THE WORKING GROUPS

Working Group I. Raw hides and skins - measures to improve their world-wide availability, quality and statistical intelligence (ID/WG.319/1); and selected issues of trade and development in the hides and skins sector (ID/WG.319/3)

36. The potential of increased use of pig skins as an additional raw material for the leather industry was stressed by two participants whose countries were using extensively their indigenous pig skins for leather production.

37. There was some discussion on the liberalization of trade in hides and skins. Developing countries, particularly in Africa and Asia, were not in favour of the proposal made by a member of the International Council of Tanners, which was discussed more fully in Working Group II. However, several developed countries expressed their support of that proposal. One participant suggested linking the free trade in hides and skins with easy access to the meat markets. Improving the quality and yield of hides and skins and the quality of the livestock breeds was considered very important by all participants. Collection of hides and skins appeared to be a serious problem in many developing countries and had therefore to be given priority in most cases.

38. The opinion was expressed that to solve such problems action should be taken simultaneously at different levels: political, economic and technological. It was considered essential that Governments of developing countries and United Nations organizations collaborate to try and overcome some of those problems. It was recognized that technical assistance activities were only providing a short-term solution to those problems; direct co-operation between interested parties in developing and developed countries would be more effective.

39. A participant from a major leather producing country in Africa presented a paper on opportunities for, and domestic efforts in, enhancing the supply and quality of hides and skins.

40. The view was expressed that the difficulties confronted in the development of a hides and skins improvement programme could be overcome by co-operation between developing countries and international organizations and between developing and developed countries.

41. A representative of a trade union stated that the problems of a regular supply of raw material had direct influence on employment in the leather sector in his country. He underlined that the problems should be solved through negotiations and agreements between developing and developed countries. The trade unions were prepared to support and assist developing countries but there were limitations, especially in regard to employment problems in developed countries.
42. Participants from countries in Latin America were in agreement with the adoption of measures to increase the availability of raw hides, taking into account the importance of the potential of those countries as producers of that raw material.
43. It was their understanding that any increase in the supply of raw hides would be inseparably linked to the production of meat, and consequently, in view of the existence of trade barriers to the marketing of the meat produced by the area, it was proposed that the countries importing such meat should contribute to the solution of the problem of the supply of hides by eliminating the current artificial obstacles.
44. In examining a draft proposal for the improvement of the supply and quality of raw hides and skins, the Working Group agreed that owing to damage on the farm, during and after slaughter, the global loss in the value of hides and skins was approximately \$US 2 billion annually. That value would be greatly increased if expressed in terms of finished leather products. The Working Group believed that much of that loss could be avoided.
45. It was considered that in order to monitor the International Hides and Skins Development Scheme, comprehensive and comparable sets of production, trade and consumption data were needed at the national level. Statistical series should be such that global developments in the market over a given period were clearly discernible. The exposition of historical trends in production, consumption and trade flows of raw hides and skins as well as products made from them was a prerequisite for projecting developments of prices and trade opportunities for individual countries. At the country level, a clear analytical picture of the domestic market and its likely developments was a prerequisite for sectoral planning. Those requirements could only be adequately met if the data used facilitated comparison between countries and within countries, not only at the raw material stage but also at subsequent stages of processing.
46. The Working Group expressed its appreciation of the work undertaken by the FAO Secretariat on the improvement of the statistical and economic intelligence for the hides, skins and derived products sector and in particular the compilation of the World Statistical Compendium for Raw Hides and Skins, Leather and Leather Footwear. It welcomed the decision by the FAO Committee on Commodity Problems to convene the Ad Hoc Working Party

on Statistical Intelligence for Hides and Skins with the purpose of improving the data base, its national and international comparability and the quantitative assessment of the economic and technical factors governing the hides, skins and derived products market.

47. In support of its recommendations the Working Group was of the opinion that the resources of the United Nations agencies concerned should be increased in order to enable them to provide greater assistance to the developing countries.

Working Group II. Problems and prospects of production and marketing of leather products in developing countries, and co-operation measures which could be envisaged between developing and developed countries (ID/WG.319/2); and selected issues of trade and development in the leather, leather products and footwear sectors (ID/WG.319/3)

48. Participants from developing countries felt that the Working Group should concentrate on proposals to deal with growing protectionism and that new rules and international guidelines should be formulated particularly since in their view only 25 per cent of the footwear industry market was free ^{6/}.

49. A participant from a developed country stated that the least developed countries might raise more foreign exchange selling raw hides on world markets rather than poor quality processed goods. The foreign exchange gained could be used to import resources for the manufacture of non-leather footwear and other made-up goods, which was technically more simple. Export statistics for developing countries of non-leather footwear were evidence of the possible value of such a strategy.

50. Participants from the Commission of the European Communities pointed out that there were no quantitative restrictions on imports in the sector. Tariffs for many developing countries had been eliminated and for other countries were low and were gradually being reduced even further.

51. A participant from an international shoe company with factories worldwide said that co-operation with developing countries, in particular LDCs, could include:

(a) Full-scale operation including manufacturing and marketing management and equity investment;

^{6/} A participant from a developed country stated that the problems noted in Recommendation No. V, p. 12 are essentially within the competence of GATT.

- (b) Management contract generally without equity investment;
- (c) Agreements in which the developed country partner agreed to supply machinery and equipment and know-how for a fee against payment;
- (d) Marketing co-operation.

52. Basic conditions, particularly for the first alternative, would be (a) a guarantee of investment safety; (b) just compensation to be paid to the investor in the event of nationalization; (c) reasonable returns on investment with the right to remit a reasonable dividend; (d) full control of management; and (e) assignment of expatriate staff, some only for an initial period until local staff is trained.

53. It was stated that one of the serious problems in industrial co-operation between developed and developing countries, especially in a joint venture, was the nationalization of companies without adequate compensation. However, that company had faced only few problems of that kind in the 70 countries in which it had operated. However, there were a number of minor problems such as the import of spare parts, materials etc.

54. Participants from countries with small- and medium-scale enterprises mentioned the need for prior investment guarantees. They felt that a small- or medium-scale operation did not have the same chance as a large multinational organization to start operations in a developing country as they lacked the experience and financial resources.

55. A participant from a developing country suggested that, in order to facilitate international co-operation between the developing and developed countries, the following measures, inter alia, should be taken:

- (a) The investment climate of the developing countries should be improved;
- (b) The countries concerned should, wherever possible, enter into a form of investment guarantee agreement;
- (c) Trade and non-tariff barriers should be eased;
- (d) Bilateral agreements such as joint ventures, should be encouraged on a case-by-case basis between the interested parties.

56. The participants from the developed countries agreed that the lifting of trade barriers should be on a world-wide basis.

57. A participant from a major leather-producing country in Asia suggested that UNIDO should assist in the creation of an international fashion council that should disseminate fashion information and styling services to the developing countries. UNIDO should also conduct training seminars for fashion designers, stylists and artisans.

58. According to one participant from a developed country, the Lima target had been reached in the leather products sector since the developing countries already contributed 38.4 per cent of the world production of leather. It was, however, pointed out that there was no sectoral target made in the Lima Declaration.

59. A participant from a developed country stated that there was free import of leather and leather products into his country. However, he said that traditional products from developing countries found only a limited market in the industrialized countries. He suggested that UNIDO and the International Trade Centre (ITC) should examine what made a successful exporter to industrialized countries and that any country starting a leather products industry should first try to satisfy its own market and then gradually build up exports. For that purpose it would be helpful if UNIDO could assist developing countries to arrange study tours in the industrialized countries for an on-the-spot assessment of the leather products marketed in those countries.

60. In concluding the discussions, the Working Group emphasized two basic themes, namely, industrial co-operation and protectionism.

61. On industrial co-operation, a number of participants from developed countries took exception to the view expressed in the Issue Paper (ID/WG.319/2), namely, that the leather products industry contribution to their economy was minimal, and they stressed the point that even if 1 per cent of gross national product reflected an average share, it was still a significant share of the national economy. They also considered that the use of the word "transfer" was unfortunate and should be replaced by "extension". In such a case, developed countries should assist in the extension of the leather and leather products industry to developing countries and provide more access to their markets. Some participants from developed countries pointed out that developing countries already had considerable access to their markets. On the other hand, it was equally emphasized that the developing

countries must be prepared to reciprocate by providing security of investment to their developed country partners and to ensure that the standard and quality of leather and footwear was maintained.

62. Various views were expressed on ways and means to stimulate industrial co-operation between developing and developed countries: Since the market for footwear in the developed countries was saturated, the only way to increase exports to developed countries would be to improve the quality of leather products. Some participants from developed countries emphasized the need for security of investment including compensation against nationalization but other participants from developing countries felt that it was normally not possible to provide such guarantees.

63. On protectionism, the participants recognized that it was increasing and was a serious obstacle to international trade and co-operation. It was pointed out that three quarters of the world's leather and footwear manufacturing capacity was protected and the only substantial markets that were still open were in West Europe and the United States of America. It was also mentioned that export restrictions on hides and skins were a matter of serious concern.

64. It was suggested by some participants from developed countries that poor quality, styling and unreliable delivery times were often serious obstacles to the exports of developing countries; another obstacle, according to one participant, was low-priced competition from East Europe.

65. A discussion followed on the opportunity of having a model contract in the leather and leather products industry. Some participants argued against the proposal of preparing detailed formal model contractual arrangements because the wide variety of international industrial co-operation practices called for flexible solutions. On those grounds they agreed to the possible value of check-lists for contractual arrangements.

Annex I

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Annex II

LIST OF DOCUMENTS

Issue papers

Issue no. 1: Raw hides and skins - measures to improve their world-wide availability, quality and statistical intelligence

ID/WG.319/1

Issue no. 2: Problems and prospects of production and marketing of leather products in developing countries, and co-operative measures which could be envisaged between developing and developed countries

ID/WG.319/2

Issue no. 3: Selected issues of trade and development in the hides, skins, leather, leather products and footwear sector

ID/WG.319/3

Background documents

International trade in hides, skins, leather, leather products and footwear

ID/WG.319/4

List of documents

ID/WG.319/5/Rev.1

Summary of comments received on the "Leather and leather products industry up to 1985", by Irving R. Glass, UNIDO consultant

ID/WG.319/6

Agenda

ID/WG.319/7/Rev.1

Campaign for increased recovery and improvement in the quality of hides and skins supply

ID/WG.319/8

Secretariat report to the Second Consultation on Leather and Leather Products Industry

ID/WG.319/9

UNIDO technical assistance projects in the field of leather and leather products industries

ID/WG.319/10

Provisional list of participants

ID/WG.319/11

Production and marketing of leather products in developing countries: problems and prospects

ID/WG.312/7

Report on export marketing and distribution of leather and leather products from developing countries. ITC Report

UNIDO/ICIS.105

The leather and leather products industry
up to 1985, by Irving R. Glass, UNIDO consultant

UNIDO/ICIS.134

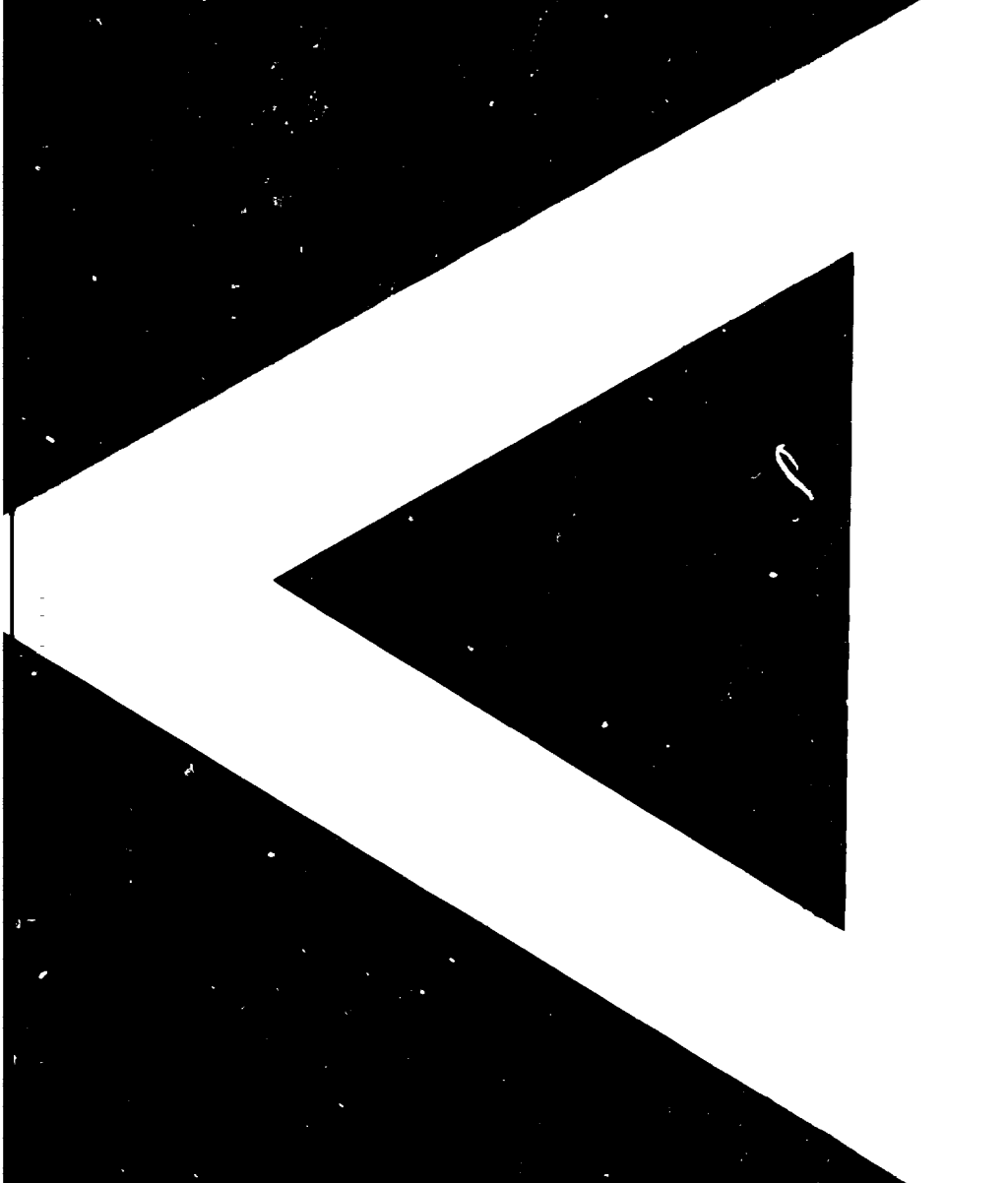
Information sources on the leather and
leather products industries

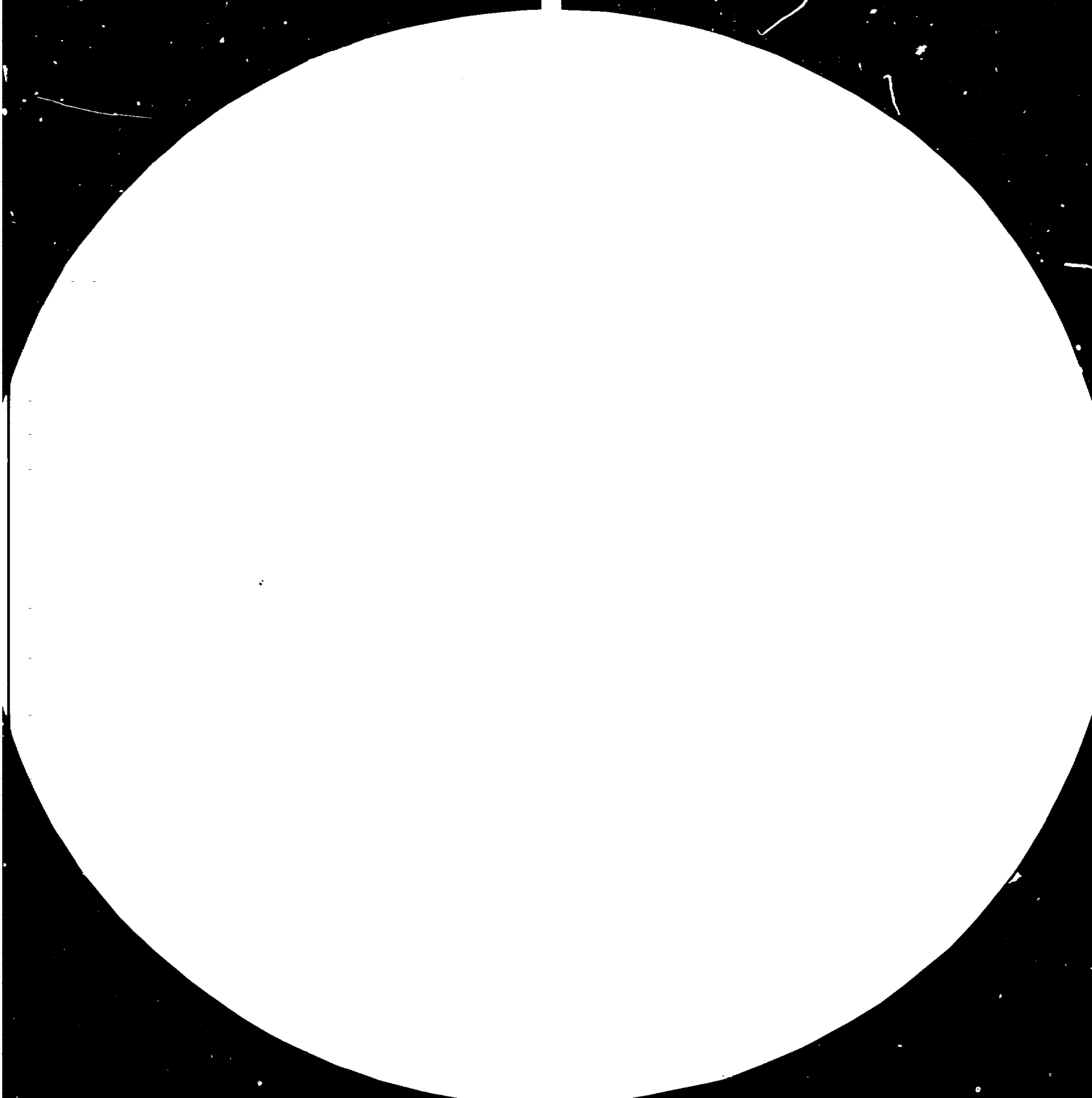
ID/226
UNIDO/LIB/SER.D/3/Rev.1

Document submitted by the Food and Agriculture Organization (FAO)

World statistical compendium for raw hides and skins,
leather and leather footwear 1961-1979









4.5



MICROCOPY RESOLUTION TEST CHART

NATIONAL BUREAU OF STANDARDS-1963-A

UNITED NATIONS INDUSTRIAL
DEVELOPMENT ORGANIZATION

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SECOND CONSULTATION
ON THE
LEATHER AND LEATHER PRODUCTS INDUSTRY
Cologne, Federal Republic of Germany, 23-26 June 1980
REPORT

Corrigendum

Page 23

Footnote 6 should read

Several participants from developed countries stated that the problems noted in Recommendation No. V, p. 12 are essentially within the competence of GATT.

