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Regional Meeting on the Leather and  
Leather Products Industry in Africa

Alexandria, Egypt, 12-15 January 1987

REPORT \* (*Meeting on the  
leather and leather products  
industry*)

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## Introduction

The Regional Meeting on the Leather and Leather Products Industry in Africa was held in Alexandria, Egypt, from 12 to 15 January 1987, and was attended by 50 participants from 25 countries and 5 international organizations. African countries were represented by 31 participants from 20 countries. (List of participants attached as Annex I.)

### I. BACKGROUND TO THE REGIONAL MEETING

The Regional Meeting on the Leather and Leather Products Industry in Africa was convened as a follow-up to the Third Consultation on the Leather and Leather Products Industry held at Innsbruck (Austria) from 16 to 19 April 1984. The Third Consultation strongly recommended that "given the objectives of the Industrial Development Decade for Africa and the situation of the leather and leather products industry in that region, the Industrial Development Board should consider the convening of a regional consultation in Africa, preceded by the meeting of a group of experts that would identify areas of international co-operation". (ID/318)

The Regional Meeting was preceded by the Eighth Session of the Leather and Leather Products Industry Panel, which was held at Vienna from 20 to 22 November 1985. The Leather Panel reviewed the integrated development programme of the leather and leather products industry in selected African countries, identified the areas for possible international collaboration and strongly recommended the convening of the regional meeting.

The basic objectives of the regional meeting were to assess the potential of the leather and leather products industry in developing countries in Africa and outline a strategy to accelerate the development of that sector in each of those countries, as well as to examine the modalities of expanding regional and sub-regional co-operation.

### II. CONCLUSIONS, RECOMMENDATIONS AND PLAN OF ACTION

The meeting recommended the following plan of action to rehabilitate and improve the situation in the African hides skins, leather, footwear and leather products sector: that plan of action should take into consideration the various development stages and individual conditions of the countries concerned.

The meeting felt strongly that one of the priority actions should be to make governments and competent organizations and bodies concerned aware of the enormous losses and waste in the hides and skins subsector and the poor economic returns from the manufacturing sector of leather, footwear and leather products. The governments should be advised to seek assistance from the competent international organizations and award this subsector high level priority to allow inclusion of such sectoral assistance within the country programme funding (IPF) and/or request assistance from other appropriate sources.

#### A. Hides and skins improvement

The meeting agreed unanimously that hides and skins improvement programme must be the first priority in order to upgrade raw materials and to avoid the huge losses and allow unfettered sectoral development.

- (i) UNIDO, in co-operation with FAO, should urgently prepare a draft project proposal for a regional hides and skins improvement scheme for some selected African countries as presented to the meeting and adapted to maximize the use of existing regional infrastructure. A chief technical adviser should be stationed in one of the countries of the region;
- (ii) To prepare the ground for a longer-term and more comprehensive programme, FAO, in consultation with UNIDO, should assess the feasibility of an internationally-operated levy scheme aiming at the establishment of a fund from which hides and skins improvement projects could be financed. Such a document should set out programme objectives and options for possible operational modalities as well as institutional requirements. In preparing this document, FAO should draw on the experience of similar schemes which are either operational or in preparation for other commodities, in particular wool and cotton;
- (iii) The meeting agreed finally that the proposals outlined in (i) and (ii) above should be brought to the attention of the First Session of the FAO Intergovernmental Sub-Group on Hides and Skins to be convened in Rome in the week following the meeting in Alexandria. This was considered essential as the two proposals, if acceptable, might have a positive impact on the future work programme of the Sub-Group in the field of hides and skins improvement to be formulated by its first session.

#### B. Training

Recognizing the great need for training of manpower at all levels the meeting recommended that UNIDO should seek funding for:

- (i) The implementation of the proposed training scheme entitled "uplifting technological standards and operational efficiency within the African tanning sector" as presented in Annex I of the document IPCT.5 of 20 October 1986. For rapid cost-effective results, this scheme could be complemented by distribution of relevant posters and other materials;
- (ii) To conduct a series of leather and leather products technical and marketing seminars utilizing existing centres and training institutes for participants from various African sub-regions, together with reputable chemical companies and others;
- (iii) To promote close liaison and interchange between the leather and leather products centres within the region by holding a meeting or meetings where mutual co-operation may be discussed and developed;

- (iv) To train and develop new types of entrepreneurs and re-train existing entrepreneurs for new business methods and new approaches for artisanal and small-scale industry. Utilizing experiences gained from successful projects in other developing countries and regions.

The meeting recommended that facilities available from the private sector and offered for the use of the African leather and leather products sector should be utilized through UNIDO training programmes. It was further recommended that applicants from the private industry sector for training and study tours should be increasingly accepted by various UNIDO training programmes.

**C. Measures to increase the capacity utilization of the tanning sector and shoe manufacturing**

The meeting fully supported the various proposals presented for the rehabilitation programme of tanneries and shoe factories, namely:

- (i) Specially formulated projects for field maintenance engineers to diagnose specific requirements and spare-part needs, and to procure and install such parts and train existing staff;
- (ii) Survey of footwear factories in Egypt in order to select a suitable plant to be upgraded, with assistance from a reputed technical international partner directed towards producing market-oriented export quality footwear and to act as a model for other footwear manufacturers in the region through guided study tours;
- (iii) Following government requests for assistance, the project proposals prepared under the XA/RAF/85/610 for short surveys of limited specific objectives should be implemented;
- (iv) Where feasible a leather and leather products cell should be established in appropriate government departments to ensure that appropriate sectoral strategies are adopted. Experiences from countries and regions where such "cells" are already functioning should be utilized by arranging study tours on request.

**D. Shoe component manufacturing**

The meeting agreed that the technical report "Pre-feasibility study on shoe components and auxiliaries manufacturing" should be submitted to relevant governments for techno-economic appraisal.

**E. Regional and interregional co-operation**

The meeting felt strongly that positive steps should be taken to promote regional and interregional co-operation in leather and allied trades in particular and that UNIDO should provide assistance if requested.

- (i) Countries with excess tanning capacity should be encouraged to contract the raw hides of those countries in the sub-regions which have no industrial tanning capacity, especially in those cases when the raw material availability does not justify the installation of an industrialized tannery. The hides and skins tanned and/or finished should then be returned to the country of origin for finishing and processing to footwear and other leather products;
- (ii) Countries which have potential to manufacture certain types of tanning chemicals and auxiliaries should be assisted in making a thorough evaluation and survey of the needs of the neighbouring countries in order to determine whether significant economies of scale would allow the establishment of a viable industry;
- (iii) UNIDO and other appropriate agencies should continue and expand their efforts to upgrade and utilize the facilities of existing leather and leather product centres to satisfy the needs of all countries in the region;
- (iv) UNIDO should promote increased interaction between the established leather and leather products centres in Africa and South American and Asian countries to take advantage of the experiences of such regions where the leather sector is well developed.

**F. Measures for promoting international and regional trade in leather and leather products**

The meeting recognized the need to develop harmonious trade relations both regionally and interregionally in hides, skins, leather and leather products and recommended the following action:

- (i) The agreed international contracts (ICHSLTA/ICT) Nos. 2 and 3 currently employed and available from the International Council of Hides Skins and Leather Traders Association\* should be employed for all trading of raw hides and skins semi-processed and finished leather, to avoid any possibility of dispute and to minimize litigation;
- (ii) UNCTAD should be requested to make further attempts to get hides and skins accepted as one of the commodities of the Integrated Programme for Commodities in order to make those commodities eligible for commodity development financing by the Common Funds, should it be established.

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\* International Council of Hides Skins and Leather Traders Associations, Herrenhausallee 95, D-2000 Hamburg 65, Federal Republic of Germany.

**G. Financial aspects of the leather and leather products sector development**

Recognizing the reported variations in added-value at different stages of production and under different conditions, the meeting recommended that UNIDO should conduct a further study in the subject matter and present its findings for discussion to and evaluation by the UNIDO Leather Panel.

**H. Follow-up**

Recognizing the invaluable assistance which the UNIDO Leather Panel has provided to the orientation of UNIDO leather and leather products technical assistance work and to the enhancement of the relationship between the developed and developing countries leather sector, the meeting strongly recommended that the Leather Panel should continue to meet at regular annual intervals and that the next meeting should take place as early as possible.

**III. ORGANIZATIONAL MATTERS**

**A. Opening of the meeting**

The meeting was opened by His Excellency the Governor of Alexandria, Mr. Ismail el-Gawsaky and the participants were welcomed by Mr. Yehia Al Mokkaem, Chairman of the El Nasr Tanning Company in Alexandria. On behalf of UNIDO, the welcoming statement was delivered by Mr. Andras Miklovicz, Chief of the Agro-based Industries Unit in the System of Consultations Division.

**B. Election of officers**

The following officers were elected:

Chairman: Mr. Yehia Al Mokkaem (Egypt)  
Rapporteur: Mr. Ralph Adewoye (Nigeria)  
Vice-Chairman: Mr. Girma Wolde-Aregaie (Ethiopia)

**C. Adoption of the agenda**

The meeting adopted the following agenda.

- (i) Introduction of the background, purpose and working pattern of the meeting



(ii) Evaluation of the present situation in the leather and leather products sector in African countries

- Hides and skins improvement scheme
- Tanning sector
- Shoe manufacturing (components and auxiliaries)
- Tanning chemicals

(iii) Review of the integrated development programme of the leather and leather products industry in selected African countries, including:

- Measures to increase the capacity utilization level in the tanning sector and shoe manufacturing
- Shoe component manufacturing
- Promotion of training in the leather and leather products sector
- Measures for promoting international and regional trade in leather and leather products
- Regional and interregional co-operation in the sector, following the example of SADCC
- Financial aspects of the leather and leather products sector development
- Possible elaboration and adoption of a Plan of Action which would include technical co-operation projects geared into developing and/or rehabilitating the leather and leather products sector in individual African countries

(iv) Conclusions and recommendations

D. Documentation

The documents prepared for this meeting are listed in Annex II.

**IV. EVALUATION OF THE OVERALL SECTORAL SITUATION IN AFRICA**

A UNIDO consultant introduced the main points of the background report (IPCT.5) and pointed to the fact that the African continent was not homogeneous in its sectoral development; some countries had strong tanning traditions, others had none.

A. Raw material sector

Considerable losses occurred mainly due to:

- (i) Poor recovery and preservation techniques;

- (ii) Non-enforcement of relevant regulations;
- (iii) Merchants and licenced trading organizations avoiding grading of the commodity in their purchases, thus removing incentives for primary producers to upgrade products.

The UNIDO consultant stressed the importance of drawing the attention of governments to losses arising from failure to solve those problems.

#### B. Tanning sector

An extremely low level of tanning capacity utilization existed due to, inter alia:

- (i) Shortage of raw materials arising from low recovery; recorded and unrecorded exports, etc.;
- (ii) Lack of spare parts, leather chemicals, etc., due to foreign exchange problems;
- (iii) Monopolies enjoyed by certain organizations engaged in the purchase of hides and skins and in the manufacture of leather; and
- (iv) Lack of managerial experience, particularly in the middle-level cadres.

Due to the above reasons, leather production in Africa tended to be more expensive than in similar plants in industrialized countries.

#### C. Leather chemicals

The UNIDO consultant referred to the conclusions of the Eighth Leather Panel meeting in November 1985 which considered that the time was not ripe for leather chemicals production in Africa.

### SITUATION REPORTS BY PARTICIPANTS FROM AFRICA

The reports from the countries represented can be summarized as follows:

(a) Prevalent poor animal husbandry techniques arose mainly from lack of know-how, over-grazing, etc.;

(b) Man-made defects, skin diseases, bad curing and storage practices and poor marketing strategies constituted a major problem;

(c) Human consumption of hides and skins appeared to be spreading in many countries, particularly in West Africa;

(d) Hides and skins improvement schemes backed by relevant enforced regulations could bring about significant positive changes;

(e) Frequent spells of drought had devastating effects on the industry in the sub-Saharan region;

(f) Poor transportation systems within each individual country and between countries in various sub-regions posed a bottle-neck for rapid growth of the industry especially in its interregional co-operation efforts;

(g) Introduction of processing of gameskins and other exotic skins should be undertaken to make up for the short-falls in raw material supply, in line with the Convention on international trade in endangered species;

(h) Lack of incentives for entrepreneurs in the sector slowed down growth;

(i) Qualified technicians were scarce where most needed;

(j) Many installed over-capacities existed resulting in over-dependence on neighbours or frequently in under-utilization; and

(k) The problem of environmental pollution arising from practices in the industry had been increasingly felt.

Participants, however, showed general appreciation for the comprehensiveness of the identified problems contained in the background report.

## V. REVIEW OF THE INTEGRATED DEVELOPMENT PROGRAMMES

The UNIDO secretariat introduced the subject by reporting on the measures proposed following the work carried out in connection with the project entitled "Integrated Development Programme of the Leather and Leather Products Industry in Africa". Those included the proposals for a regional hides and skins improvement scheme in five selected African countries; promotion of training; starting up of maintenance schemes; survey of the Egyptian shoe industry in order to identify suitable plants to be upgraded for production of footwear for export with "know-how" from a reputable European shoe factory. In addition to these, several other proposals had been submitted with the country papers to the surveyed African countries; requests for implementation had, however, so far not been received from the countries concerned.

The meeting was informed that in 1986 UNIDO's delivery of technical assistance in the leather and leather products industry sector was about \$US 1.8 million of which only about \$US 250,000 was delivered in Africa. This low delivery was not because of unwillingness on the part of UNIDO to assist the African leather sector, but because the African countries did not give high enough priority and importance to the sector. UN resources, therefore, could not be tapped for funding such projects.

Following exhaustive discussions after an FAO film on hides and skins improvement programmes, the meeting agreed that the single most serious constraint to further progress in the development of the leather and leather products sectors in Africa was the extremely poor quality of domestically available raw hides and skins. Economic losses due to defective and non-recovered raw hides and skins had been estimated at more than \$US 800 million per year, which represented almost ten times the annual export value of hides and skins from Africa of around \$US 90 million. In view of the vast proportions of those financial losses which could be ill-afforded by the African continent, an immediate relaunching of hides and skins improvement and development measures on a large scale was considered vital. The meeting agreed therefore that a development programme should be prepared on both short- and long-term bases.

The meeting also agreed that it would be advisable for each country to set up an advisory committee on leather and leather products development. Those committees should include participants from relevant government ministries, leather and leather products institutes, as well as public and private industry. Representatives of UNIDO and FAO should be invited as observers to the committee meetings.

A UNIDO consultant introduced a study carried out to examine the viability of setting up shoe components manufacturing in a selected African country with a large shoe industry, and it was agreed that some aspects of the study should be re-examined to truly evaluate its model-status.

The UNIDO secretariat amplified the well-recognized training needs in that sector on the continent stressing that it lacked the middle management cadres. Short courses, provided in the local environment, involving the use of modern audio-visual methods (videos, posters, etc.) were considered the

most urgent. Emphasis was placed on the utilization of well-equipped laboratories and pilot-plant tanneries which existed in a number of training and development centres on the continent. An entrepreneur training development programme was also considered important.

Willingness to offer various forms of training assistance was expressed by representatives of several organizations from different countries (Brazil, India, Italy and one multinational company).

Regarding measures for promoting international and regional trade, Contracts Nos. 2 and 3 prepared by the International Council of Hides Skins and Leather Traders Association in conjunction with the International Council of Tanners were considered relevant.

The ITC representative informed the meeting of market information provided on a regular basis to the sector by his organization and explained how its services could be obtained. Inclusion of hides and skins in UNCTAD's commodity list was considered important.

The FAO representative briefed the meeting on the task of the First Session of the FAO Sub-Group of Hides and Skins, Rome, 21-23 January 1987 and on the relevant documentation.

The problems of interregional co-operation in the sector were recognized by the meeting. The participants suggested new ideas which could assist in overcoming such problems.

Financial aspects for the development of leather and leather products sector were introduced by the UNIDO secretariat. The meeting noted with interest the data presented on added-value accrued at different levels of processing but sought clarification on variations that could be brought about by production at different locations or in different countries. Because of the differing views expressed on the subject, further detailed examination was considered necessary.

Annex I

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Annex II

LIST OF DOCUMENTS

- |    |  |                 |
|----|--|-----------------|
| 1. | Integrated Development Programme of the Leather and Leather Products Industry in Africa  | IPCT.5          |
| 2. | Some financial aspects of the development of the Leather and Leather Products Industry in Africa                                     | IPCT.6          |
| 3. | Advisory service on the manufacture of footwear components and auxiliaries   | DP/ID/SER.A/778 |
| 4. | UNIDO Technical Assistance Activities in the field of Leather and Leather Products Industry as of December 1986                      | -               |
| 5. | Practical guidelines for increasing the use of local inputs in the manufacture of leather goods and footwear in developing countries | IO.4            |

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