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INTEGRATED PROGRAMME OF TECHNICAL CO-OPERATION
IN EXPORT TRADE PROMOTION WITH THE
GLO-PHOENIX NIGERIA LIMITED, BORNO INVESTMENT COMPANY
AND GLOBAL MART, INC. OF ATLANTA, GEORGIA

Technical Report:
Export of Leather and Reptile Skin Goods from
Nigeria to the United States of America

Prepared for the Government of Nigeria

by

the United Nations Industrial Development Organization,
Executing Agency for the United Nations Development Programme

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TERMS OF REFERENCE

for an expert assignment on marketing of leather and reptile goods in the export market

Aim

The purpose of the assignment is to promote the export of leather and reptile skin goods* from Nigeria to foreign markets, particularly to the United States of America, this being an integral part of the Industrial Partners Programme for Africa.

Terms of Reference

1. The expert, in co-operation with GLOBAL MART, INC., will carry out a survey of the major market leads for leather and reptile skin goods in the United States of America with a view to:

   (a) Identifying and assessing the potentials for the import of leather and reptile skin goods;

   (b) Identifying the critical market leads and assessing the penetration potentials for new products;

2. On the basis of the above, the expert will be required to advance recommendations relating, in particular, to:

   (a) Major market leads in the United States of America for the export of leather and reptile skin goods;

   (b) Estimating the quantity of such goods;

   (c) An appropriate approach to develop links between the identified market leads in the United States of America and the exporters in Nigeria.

3. The expert will also be expected to co-operate with the expert on export promotion and raw material development in preparing a comprehensive

study and enable the project promoters in Nigeria to mobilize the necessary investment financing required for the expansion and diversification of leather and reptile skin goods being produced by those factories, as well as the improved quality to meet the demand of the export market. This is an important aspect of the Industrial Partners Programme for Africa.

SUMMARY

The United States industrial outlook and the international climate for increased importation of leather and reptile skin finished goods into this vast market into the 1990s is very positive. It appears that there are certain fields that must be seriously tackled by the leather goods industries in Nigeria and the rest of the Sub-Saharan African countries, if they wish to penetrate this market on a large scale. The parameters of this study necessarily encompass the importation and exportation of raw hides and skins (animals and reptiles) in general and the circuitious route that characterizes international trade in the leather industry. Most of the big importers of processed finished leather from the United States are also the big exporters of the leather and reptile skin products to the United States. Most of these countries - Taiwan, Hong Kong, Thailand, South Korea, Singapore, Mexico, Phillipines - also import semi-finished leather goods components from the United States, assembled and finished them, then re-export them back to the United States as part of their export and United States imports. This circuitious trade route could constitute one of the penetrating routes for Nigeria and African leather goods industries, if they can produce competitive quality goods.

The continuing downward trend in the consumption of red meat in the United States and the value of the dollar abroad, are two significant factors impacting on the leather and leather goods industries. Stabilized currency and increased local production of refined goods in developing countries have also had significant influence on the United States leather industry, both imports and exports.

Raw material is the starting point of most industries. Within the leather and reptile industry, hides and skins constitute a small percentage of the leather and leather products industry by value. Given the dollar figures for yearly shipments alone, finished leather products dominate world trade in leather. However, the competitiveness of United States tanners and manufacturers are inhibited by several domestic constraints, including environmental, technological and dwindling hide production. Africa and Nigeria's raw material base in hides and skins is very solid. Of the estimated world bovine population of 1.4 billion heads, the share of the developing countries is 69.4 per cent, Africa, with 140.2 million heads accounting for 10.1 per cent of the world bovine population. Nigeria's cattle population is estimated at 12.5 million. The output of bovine hides in Africa has increased in the last 25 years to 40.1 per cent from 125,000 tons to 175,000 tons. On the other hand, Africa's export of raw hides has dropped from 64,000 tons to 46,000 tons, indicating an increased rise of the raw material by local tanneries. In fact, Africa's export of bovine leather increased by 67 per cent between 1976 and 1984.

The world livestock of sheep is estimated at 1.2 billion. Of this, developing countries account for 53 per cent, while Africa's share stands at 11.7 per cent. Nigeria's share is estimated at 12.5 million goats and 12 million sheep. Between 1960 and 1985, Africa's output of sheep skin grew from 17,500 tons dry weight to 28,100 tons. During the same period, Africa's export of sheep skin dropped from 9,500 tons to 5,700 tons. On the other hand, the export of processed skins from sheep increased by 11 per cent between 1926 and 1984. Africa, along with the Far East, commands the top position in terms of goat livestock population. Of the total of 465 million goat heads, Africa's share stands at 131 million or 28.2 per cent. Output of goat and kid skins between 1960 and 1985 grew from 17,100 tons to 23,900 tons, showing an increase of 39.8 per cent. Here, again, export of raw goat skin registered a decline from 9,700 tons dry weight to 5,700 tons by increased exports of processed goat skins.

However, this decreased export of raw and increased export of processed skins are neither showing in dollar value for Africa nor in the export of leather goods. In 1989, United States imports of leather and leather products from other countries declined 0.4 per cent to $11.23 billion, with developing countries accounting for an estimated 65 per cent of the total. By comparison, United States exports of leather, non-rubber footwear and other leather products were about $991 million, up 17 per cent from 1988. Thus leather and leather products imports exceeded exports by about $10.2 billion, with $7.1 billion of the deficit in footwear.

While other parts of the world export leather products to the United States, Nigeria and Africa only feature in the hides and skins segment of the United States import table. Even there, the dollar amount is neligible in a $11.23 billion transaction (see table I).

Table I

U.S. IMPORTS OF HIDES AND SKINS,
excluding furskins, undressed from Nigeria

(thousands of US$)

	Nigeria	Africa
1984	2,712	7,599
1985	1,457	6,134
1986	1,259	7,605
1987	5,064	17,764
1988	3,291	16,830

Africa's export of hides and skins between 1984 and 1988 was between $6,134 million in 1985 which was the lowest during that period and the highest was $17,764 million in 1987. Nigeria's highest was $5,064 in 1987 and the lowest was $1,457 million in 1985. Neither of them export any leather goods worthy of being recorded.

The United States tanning and finishing industry experienced considerable contraction and consolidation between 1982 and 1988. By 1989, only 130 establishments of significant size were directly tanning raw hides and skins into leather. However, cattle hide supplies are expected to remain tight and leather prices quite firm.

The value of United States imports of personal leather goods increased during 1989 to an estimated $394.7 million, bringing the import penetration level to slightly more than one half of new supply. United States exports of persona' leather goods constitute only 5.2 per cent of domestic shipments. Although exports more than doubled in 1989, to $19.4 million, United States imports are more than 20 times that size.

Leather goods, excluding hides and skins, is actually another industry comprised of several major foreign exchange classifications. Non-rubber footwear is by far the most significant end-use category. Other categories include handbags and purses; leather and sheep-lined garments; leather gloves and mittens; gift items and flatgoods, such as billfolds, wallets, eye glass cases, cigarette, key and non-musical instrument cases. Luggage, as a separete category within the leather goods industry, includes suitcases, briefcases, tote bags, hand luggage, occupational cases and musical instrument cases. The fastest growing and potentially largest markets in the United States are those for auto-motive and furniture upholstery leather. In 1987, upholstery leather shipments represented 21 per cent, by value, of all leather product shipments, up from 7 per cent in 1982.

United States leather manufacturers will continue to face stiff competition from abroad. It is unlikely that much of the Unites States market lost to imports during the last decade, can be recaptured in the next.

Consumer demand for luggage and personal leather products will remain robust in the years ahead. The United States Industrial Outlook 1989 puts it this way, "Many of these products are considered staples for peronal use". Increased international production, stabilized currencies and domestic demographic trends suggest that future growth in consumer demand for leather products will be healthy.

However, market penetration by Nigeria and Sub-Saharan manufacturers is contingent on their being able to raise the quality of their products to an acceptable and competitive quality level. Presently, most African products are of low quality. American consumers don't buy because they have to buy, they buy because they want to buy. This means that Nigerian and African manufacturers must establish a network in the United States to enhance their sensitivities to the market. As for the reptile skins, it will be a while before Nigeria and the Sub-Saharan African countries could penetrate this market. No doubt, it is a florishing market with room to spare for new entrants. The reptile skin products have very high mark-up, if the quality is good. The present reptile skin products from Africa are of low quality and badly finished. Reptile skin tanning is entirely another technology. Nigerian manufacturers will do well starting with leather goods and up-grade the quality of the leather to establish the market before attempting the reptile skins.

According to the 1974 Convention on "International Trade in Endangered Wild Species of Fauna and Flora", products extracted from or made of skin or species from the wild are prohibited in international trade. The only exemption are products bred in captivity. Nigeria is a signatory to this agreement. These skins, when used in leather goods, fetch a high price but it also takes a great deal of skill to use them. Even if they want to go into reptile skins immediately, they cannot, until they can develop reptile farms. This will take a lot of investment capital. This is not advisable until there is a solid market established around an improved and up-graded leather manufacturing industry of international standard and quality.

Many demographic factors sugg optimistic prospects for future growth in consumer demand for leather and reptile skin products. Rising white collar employment suggest increased purchases of business cases and other leather products for the office. Expanding number of retirees and steady increases in real personal disposable income hint at expanding travel opportunities and corresponding increases in leather and reptile skin product sales.

The United States manufacturers are unlikely to regain much of the domestic market that has been lost to imports in the last decade.

In the following pages, this study will present the status of the United States market in leather and leather goods, the methods of classification, volume and value of shipments within categories, countries and regions dominating which segments, significant United States establishments involved in the leather industry, and the feasibility of developing countries of Africa, such as Nigeria, to expand their share of this $11-$12 billion industry.

RECOMMENDATIONS

1. Potential exporters from Nigeria and the Sub-Saharan African countries must improve the quality of the leathers used in the production of leather goods;

2. To improve the quality, technicians of high caliber and skills are required in the tanneries and factories; and better use must be made of national research institutes and close attention must be paid to research and development in the industry internationally;

3. Exporters should have better understanding of the type, style, quality and design of products required in the American and foreign markets. Expatriate tannery technicians and leather goods experts with adequate knowledge of American and European consumer tastes and preferences should be assets to the industry on the short run (the first three to five years);

4. Trade channels must be established in the United States. There are several approaches to this hurdle, but the easiest and most advisable is to get the potential importers involved in a joint-venture capacity. The alternative will be for a group of manufacturers in a country or subregion to form export co-operatives and ship directly to an appointed wholesale distributor in the United States. This way, the distributor can take a large order on their behalf. Once he is satisfied, they can deliver in terms of quality, quantity and at the right time and price. America is too vast a market for a single company to try to penetrate on its own from Nigeria or any other Sub-Saharan African country;

5. The joint-venture relationship being negotiated between GLO-PHOENIX (NIG.) LTD. and GLOBAL MART, INC. of Atlanta, Georgia, is an experiment that deserves close monitoring;

6. Governments should pay more attention to up-grading the quality of the products by providing special assistance for quality improvements to support serious exporters. Until the manufacturers can

produce qualitatively correct articles, no amount of export promotion assistance can yield anticipated results of obtaining orders;

7. Governments should find a way to discourage present individual suitcase export. It is time-, resources- and energy-consuming. Both at individual and at national level, it is not cost-effective;

8. Governments should establish programmes that will encourage serious exporters to form export co-operatives;

9. International organizations, such as UNIDO, should, apart from advising and assisting the Governments to implement the recommendations mentioned above, also assist serious exporters by:

(a) Encouraging them to form export co-operatives;

(b) Providing them with some assistance for their market travel;

(c) Sponsor their marketing specialists for attachment to establish large manufacture export/import houses in the United States for on-the-job hands-on training.

CHAPTER I

INTRODUCTION

1.1 Markets and export potential for leather and reptile skin goods to the United States

International trade, especially export to the United States in leather and reptile skin products are expanding rapidly, if the right goods can be made available at the right time.

Leather goods, excluding hides and skins, is another industry comprised of several major foreign exchange classifications. Non-rubber footwear is by far the most significant end-use category. Other categories include handbags and purses; leather and sheep-lined garments; leather gloves and mittens; gift items and flatgoods such as billfolds, wallets, eye glass cases, cigarette, key and non-musical instrument cases. Luggage, as a separate category within the leather goods industry, includes suitcases, briefcases, tote bags, hand luggage, occupational cases and musical instrument cases. The fastest growing and potentially largest markets in the United States are those for auto-motive and furniture upholstery leather.

United States leather manufacturers will continue to face stiff competition from abroad. It is unlikely that much of the Unites States market lost to imports during the last decade, can be recaptured in the next. The United States Industrial Outlook 1990 states, "labour costs represent a high proportion of total production costs in the luggage and personal leather goods industries. This condition contributes to their sensitivity to imports, particularly those from developing countries, where the wage rates remain far below United States levels". The estimated dollar value of imports of luggage and personal leather goods topped the $3 billion mark for the first time in 1989 representing over 60 per cent consumption in the United States. Imports continued to rise in 1989, by 8.9 per cent, a slower rate than the 12.2 per cent increase registered in 1988.

Table II

PERSONAL LEATHER GOODS SHIPMENTS, IMPORTS, EXPORTS AND APPARENT CONSUMPTION (1983-1988)

	1983	1984	1985	1986	1987	1988
Product shipments	419	405	402	371	391*	416*
Imports	109	138	154	183	229	257
Leather	53	68	80	107	144	161
Non-Leather	56	70	74	76	85	96
Exports	6	5	6	6	9	8
Apparent Consumption	522	539	550	548	611*	665*

* Estimated

Sources: United States International Trade Commission: United States Department of Commerce - Bureau of Census.

1.2 Tanning and Finishing

The United States leather industry, excluding finished products, is comprised of establishments engaged in primarily tanning, curing and finishing raw or cured hides and skins into leather. Shipments rose 17 per cent in 1988 to $2.9 billion and in 1989, the value of leather tanning and finishing industry shipments continued to rise, increasing 5 per cent to $2.46 billion.

The quantity of leather shipped (in cattle hide equivalents) increased about 2 per cent in 1988, and about 5.3 per cent in 1989, to an estimated 14.0 million cattle hide equivalents. This includes leather produced from the hides or skins of cattle, calf, kip, goat, sheep, lamb, cabretta, horse and other animals and reptiles. Cattle hide leather accounted for 13.5 million units or 89 per cent of the total in 1988. In 1989, cattle hide leather accounted for 86 per cent of the total or 12.1 million units. Still the market leader in hides shipped, cattle hide leather is ever so slowly, but steadily making room for other types of hides, as interest in exotic (genuine) leather and reptile products becomes increasingly popular.

Cattle hides are a by-product of the meat packing industry, and their supply depends solely on the demand for meat. A long-term downward shift in demand for red meat has discouraged any rebuilding of cattle herds despite favourable prices for feed grains since 1986. Drought conditions prompted growers to liquidate herds in 1986 and 1987, and more cattle, including breeding stock, were sent to market than otherwise would have been the case. Consequently, cattle slaughter continued to decline in 1988 and 1989. Cattle inventory, however, increased slightly during 1989, to about 99.5 million head. Lower cow slaughter in 1989 and 1990 will result in larger calf crops in 1990 and 1991, thereby increasing cattle inventory. Cattle slaughter is expected to stablize in 1990 and increase gradually in 1991. In the meantime, as long as cattle slaughter remains low, supplies of leather products are expected to remain tight and leather prices quite firm.

In 1989, prices for cattle hide leather declined slightly after reaching record highs in 1988. The Department of Commerce's "composite average monthly price" of three types of hides was 85 cents per pound, down 6 per cent from 1988. Hide prices were expected to strengthen as the year progressed, because slaughter continued at low levels and foreign demand for leather hides put pressure on available domestic supplies. Leather prices are expected to remain quite strong in 1990. The Unites States produces about 3.2 million calfskins annually and exports almost all of them, primarily to Taiwan, Japan, South Korea, and Italy.

The number of companies directly involved in the tanning and finishing industry declined from 342 in 1982 to 308 in 1987; the number of establishments or plants declined from 384 to 338. Put in other terms: in 1982, 342 companies operated 384 establishments in the tanning and finishing industry, primarily located in Maine, Massachusetts, New York, Pensylvania and Wisconsin. By 1988, only 130 establishments of significant size were directly tanning raw hides and skins into leather.

The United States tanning and finishing industry's total employment in 1989 was an estimated 14,700, up from 14,000 in 1988. Production employment also increase, from 11,700 in 1988 to an estimated 12,400 in 1989. Average hourly earnings for production workers were $9.28, up 3.6 per cent from 1988. Comparable production workers earning for Nigeria average equivalent of $25.00 per month in local currency.

1.3 United States Export

World hide production in 1988 was forecast to match the year-earlier level of 4.6 million tons. The United States continued to be the leading producer of hides in 1988, but the USSR was close behind and was expected to be the largest supplier going into the 1990s. The European Community was third.

Unlike many other countries with abundant hide supplies, the United States is a major hide exporter. In 1989, United States leather exports rose about 27%, to an estimated $642 million. The United States exported leather to some 70 countries in 1989. During January-June 1989, Canada was the largest importer, accounting for 13 per cent of all leather exports. Italy, where United States tanners have recently concentrated export efforts due to favorable currency relationships, was second with a 12 per cent share. Japan rose to third, with 11.4 per cent, because of a large increase in upholstery leather exports to Japanese automobile manufacturers. South Korea, a leading supplier of leather footwear and garments to the United States, was fourth with 11 per cent. Taiwan, another footwear and leather goods supplier, was fifth with 7 per cent, followed by the Dominican Republic, West Germany, and Mexico in that order. The European Community (EC) accounted for 23 per cent of total leather exports during the period.

The share of United States exports going to beneficiary developing countries (BDCs) - countries that receive tariff concessions from the United States under the Generalized System of Preferences (GSP) section of the Trade Act of 1974 - declined, during the first six months of 1989, to 28 per cent of the total value of United States leather exports, from 49 per cent for the same period in 1988. The decline was due largely to the United States' withdrawal of benefits to South Korea, Taiwan, Hong Kong, and Singapore in January 1989. Large dollar increases in United States exports were recorded by the Dominican Republic, Japan, Thailand, Brazil, West Germany and Mexico.

Table III demonstrates that the leather industry in developing countries, particularly in South America, is on the rise.

Table III

WORLD PRODUCTION OF BOVINE HIDES AND SKINS
(Thousands of units of metric tons)

	U.S.	USSR	France	*Germany	Italy	UK	Canada	Brazil
1986	1164	1022	186	161	95	104	94	324
1987	1113	1060	193	162	93	105	88	355
1988	1083	1075	184	151	91	98	86	370

* These figures represent West Germany only.

Table III (con't)

	Mexico	Argentina	Turkey	New Zealand	Australia	Colombia
1986	120	332	62	36	131	92
1987	122	308	62	54	143	91
1988	144	297	63	45	132	90

Because tanning capacity in many of these countries exceeds domestic supply, many import hides and skins from the United States and other developing countries and produce the finished goods for export. Many of these countries have converted more of their domestic raw material supplies to leather and leather products for export markets. Many developing countries that are major producres of hides and skins - such as Argentina, Brazil, and India - use export controls or taxes to restrict exports of these raw materials in order to encourage the growth of their own tanning and leather products industries. Export restrictions depress domestic prices of hides and skins, thereby lowering raw material costs to tanners and leather products manufacturers and indirectly subsidizing exports of finished leather products. Nigeria has just joined the number of developing countries prohibiting the export of raw hides and skins. A large proportion of these finished goods come back to the United States.

1.4 United States Imports

United States imports of leather in 1989 declined about 2 per cent to an estimated $735 million, following a sharp increase in 1988 of about 55 per cent. About 74 per cent of this total was leather from bovine animals, 5 per cent was from sheep, and 5 per cent from goat. The imported leather came from about 70 countries. Argentina supplied 25 per cent, or an estimated $185 million. Italy had a 12 per cent share: the United Kingdom, 10 per cent; Brazil, 6 per cent; and West Germany, 5 per cent. Argentina was also the largest supplier of bovine leather, with 30 per cent of the total; Italy, Brazil, and the United Kingdom followed in that order. The United Kingdom (40 per cent) and Italy (27 per cent) supplied most of the United States sheep and lamb leather imports. India (51 per cent) and Pakistan (23 per cent) supplied most of the goat and kid leather. Imports of upholstery leather increased substantially in 1989, reaching an estimated $136 million, or 25 per cent of total United States imports of bovine leather.

Developing countries with adequate natural resources for raw material production are greatly expanding their share of the United States import market by utilizing their tanning and finishing capacities to add further value to their exports of leather.

Many companies have improved efficiency and quality by adopting modular production techniques. The use of robots within these modules will improve productivity and quality even further. The industry considers the adoption of new technology essential to improve cost competitiveness in manufacturing. Increased use of computers has already helped to integrate design, manufacturing, management, and marketing functions and to emphasize non-price factors, such as quality and quicker delivery, in competition with imports.

The use of leather as a material in clothing and other garments has grown considerably in the last decade. Statistics in retail show that the United States consumer has come to regard the use of leather products as a staple of American life.

The footwear industry is the tanning industry's largest market, consuming an estimated 55 per cent of leather shipments in 1989. About 56 per cent of all non-rubber footwear is made with leather uppers. Higher leather prices seemed to have little effect in reducing the proportion of footwear with leather uppers in both domestic and imported non-rubber footwear.

Production of sole leather declined about 10 per cent. A downward trand in sole leather production persists because of substitution by cheaper synthetic materials. These synthetics have been made even more competitive than sole leather by new equipment and technology that reduces labour costs in shoe bottoming operations. Cattle hide garment leather production increased slightly following a decline in 1988, and production of leather for the handbag, luggage, and personal leather goods industries also registered a gain from 1988.

The fastest growing and potentially largest markets in the United States are those for automotive and furniture upholstery leather. Nineteen per cent of all furniture manufactured in the United States is covered with leather. Leather is offered now as an option in most medium-priced automobiles and is a standard interior in high-priced foreign and domestic models.

CHAPTER II

GENERAL CATEGORIES OF LEATHER AND SNAKE SKIN GOODS

Exportable leather and reptile skin goods can generally be divided into three categories. These are the following:

2.1 Traditional Products

Countries with old-established leather industries have evolved traditional ways of working with material. This is especially true of Africa and Asia where hand-tooling and colouring of the leather surface is generally practised. Concentration on the overall grain patterning and tooling of the finished products is often such that little account is taken of the quality of the leather; fineness and evenness of stitching; and general design. Countries that have tried to export this type of hand-tool article have had limited success. Tourists and visitors are keen to buy such articles as memories of their trip abroad, but otherwise, there is only a limited market for this type of article.

The main advantages of traditional products are that, as they are not fashion goods, no urgent changes are likely to be called for; sales may be arranged over a long period; and normal postal exchange is usually sufficient to obtain preliminary orders. Also national exhibitions in overseas countries guarantee some markets, however limited. For example, handbags of crocodile, snake skin and hair-on calf skin are produced and sold in Nigeria and many countries for little or nothing in dollars, whereas the same raw materials, if properly cured, processed and manufactured into a well-designed and finished article, could yield a great deal. Greater technical assistance to the rural tanner and leather goods craftsman is needed, if this great wastage of resources is to be avoided.

2.2 Classical products

This category of products include: attaché and brief cases; shopping bags; wallets; purses; jewellery cases; and handbags; which are still one of the most popular items of international trade. At first glance, this market seems the one that potential exporters should aim for: demand is high and importers are willing to pay reasonable prices for a well-finished cow hide handbag. However, for serveral reasons, sales in this field in the past had been limited for developing countries.

When an American woman pays a reasonable but relatively lower price for a handbag of classical design, she expects that it will give good service for perhaps five years. She also expects the fittings (e.g. clasps and handles) to be of the highest quality and the finish of the leather to be durable and to have an aesthetic appeal. Industries in Nigeria and many African countries are unable to meet all these requirements for , even though there may be no problem with the design (which can be copied from accepted markets), there remain the problems of obtaining leather supplies of adequate quality and finish, and of finding workers with the necessary skills. The latter is the most important. The evenness of the stitching and edge-threding seldom comes up to the expectations of the importer; likewise, the quality of the fittings is usually below the expected standards. It would appear, therefore, that exports of classical goods are best tackled by those countries that already have some leather goods industries and have therefore some chance of producing to the high standards the international market requires.

The problems involved should not be minimized. New companies that wish to enter this field should put adequate attention and commitment to skills development. Sub-Saharan African countries that wish to enter can, given intensive training schemes over a three to five-year period, reach the required standards. Only whole-hearted effort on the part of the Government or private financiers can result in success. It is not merely a question of installing a few machines, but of all-round training. This operation is best conducted in association with manufacturer or importer in the United States who would be able to advise on styles and standard of workmanship and would seek outlets for the goods.

The advantage in the classical goods sector is that, as fashions do not change, time is not a problem and business may be arranged over long distances by correspondence. It may be necessary to consider seriously in-factory training for workers to meet the standards required for this type of product and to ensure uniform production. The amalgamation of co-operation of various firms to allow them to undertake large orders is also an important question.

In general, the standard of material and workmanship required for classical goods is very high, and there is keen competition from established industries. In return for the high prices paid for these goods, importers expect great uniformity of product. There may well be a lower level of acceptability, if prices are low enough, but with these goods, prices are of minor importance. Whether the customer buys cheap or not, he expects good workmanship.

2.3 Fashion products

Business is ever booming in the sector of the industry producing fashion articles. The problem here is basically one of liaison. Products may change three or four times a year in style and colour, and the importer expects his order to be delivered promptly, so that he can sell his goods, while they are still fashionable. However, it may be worth trying to overcome these problems, as fashion products do not have to reach as high technical standards as the classical goods discussed previously. The essential thing is that the article should have an attractive appearance. Durability is certainly far less important than appearance, as very few fashion-conscious people study such points as the seams and clasps, knowing very well that, if one product lasts for three or four months, it would have served its purpose.

With modern and advanced communication services, there is little problem in getting samples from the potential importer to the manufacturer rapidly. The question that many Nigerian and Sub-Saharan African manufacturers must ask themselves is, whether the local industry can supply leather of the right quality in the right colour and finish for a particular article. The answer is frequently "No", as the fashion colours are seldom produced in African countries until many months after their entry into the established world markets, if they can be produced at all. The management of Global Mart, Inc. informed us of the loss of a large order from one of the sorority groups because the manufacturer in Nigeria could not produce the right colour or shade of pink.

United States importers usually import two classes of products: a high quality, highly priced article that may be beyond the capacity of producers in developing countries; and a more general, mass-produced bulk-sales article with appreciably low prices and standards which producers in developing countries can more easily manufacture.

Importers in the United States expect a producer to offer a range of goods in a number of styles illustrated in brochures in colour. It is very difficult for a prospective exporter to meet these expectations, as a full range of goods in various styles can be produced or offered only when a consortium of producers (or co-operative) has been formed, and sales literature of good quality is expensive to produce.

CHAPTER III

UNITED STATES MARKET PROFILE OF SELECTED LEATHER AND REPTILE SKIN PRODUCTS

3.1 Footwear

3.1.1 United States Market

The non-rubber footwear industries produce all footwear except rubber (protective) and rubber soled fabric-upper footwear, both of which are classified separately.

In 1989, industry shipments declined 4.5 per cent, measured in constant dollars, and increased less than 1 per cent, to $3.99 billion, in current dollars. The rate of increase in unit shipments varied among the four major sectors of the industry: house slippers and footwear, except rubber, were up 8 per cent and 12 per cent respectively; men's footwear and women's footwear, except athletic, were down 11 per cent and 2 per cent, respectively.

Production of all non-rubber footwear increased about 1 per cent in 1989, to an estimated 222 million pairs. A slight decline occurred during the first 6 months of 1989, but industry production strengthened as the year progressed. In 1986, domestic consumption peaked at 642 million pairs, and until 1988 declined steadily at an annual rate exceeding 5 per cent.

In 1989, about 56 per cent of non-rubber footwear was produced with leather uppers, unchanged from 1988. About 95 per cent of men's footwear and 64 per cent of women's footwear are produced with leather uppers. Juvenile types average about 50 per cent leather; slippers only 6 per cent. Manufacturers generally have been able to achieve higher profit margins on leather footwear compared with footwear of other materials. Higher cattle hide and leather prices since 1986, apparently have not affected the proportion of footwear produced with leather. The proportion of imported footwear with leather uppers has climbed steadily during the 1980s, reaching 59 per cent in 1989 and exceeding the domestic share for the first time.

In 1989, the average factory price for non-rubber footwear increased about 8 per cent, to $18.09 from $16.75 in 1988. Higher prices for leather continued to push up factory costs. An analysis published by Footwear News indicated that the most successful footwear companies in 1988 were athletic footwear producers manufacturing overseas. Athletic footwear firms dominated the sales and profits totals. Nineteen firms had a 6.4 per cent increase in net profit in 1988 because of strong gains by two of the top three athletic shoe companies, which together provided 77 per cent of the total profit for the group. The United States International Trade Commission states that in 1988, the top 20 companies in the non-rubber footwear industry, produced about 55 per cent of total output.

In 1989, apparent consumption of non-rubber footwear declined about 6 per cent, to 1.038 billion pairs. Per capita consumption also declined, to about 4.2 pairs from 4.5 pairs in 1988. During the early 1980s, growing consumer demand for non-rubber athletic footwear was largely matched by a decline in rubber/canvas footwear consumption. After 1986, this trend was reversed: per caita consumption of non-rubber footwear dropped, and rubber/canvas footwear consumption increased. Demand continued strong in 1989 for casual "athleisure" and walking types of footwear stressing comfort. These styles are produced with padded linings, collars and insoles, but their styling shifted away from the athletic look toward more functional types, many with more traditional styling. Boots of all types and for all purposes continue to be popular. Boat shoes and mocassins with water resistant leather uppers continue to be in demand.

3.1.2 Imports

For the third consecutive year, non-rubber footwear imports dropped in 1989, about 8 per cent to an estimated 830 million pairs. Some of this is due to the decline in consumption of non-rubber footwear and a corresponding increase in consumption of rubber/fabric footwear or sneakers. A large portion of the statistical decline may be attributed to the variances recorded between the 1988 data under the old system of (TSUSA) Tariff Schedule of the United States Annotated and the data in the newly adopted Harmonized System, January 1989. Despite the differences, import penetration in the category is estimated at 79 per cent for 1989.

Imported footwear with rubber uppers constituted 59.3 per cent of total non-rubber footwear imports for the first six months of 1989. This is an increase of 53.6 per cent over the same period in 1988. Footwear with vinyl or plastic uppers took a 36.2 per cent share, down from 37.2 per cent in 1988; and footwear with other uppers, including textiles, had a 4.5 per cent share, compared with 9.2 per cent for 1988. Clearly, the use of leather in imported footwear is rising as the use of other types of materials decline. This is attributable to the increasing domestic demand for leather.

The United States imported non-rubber footwear from over 90 countries in 1989. Taiwan remained the largest supplier with a 33 per cent share of United States non-rubber footwear imports, down from 38.3 per cent in 1988. South Korea ranked second with 18.3 per cent, Brazil and China each represented 14.2 per cent for third place, followed by Italy with 5.8 per cent. These five countries accounted for 85.5 per cent of all United States non-rubber footwear imports.

Breaking down the category into its sub-groupings: men's leather footwear imports come mainly from Taiwan (19 per cent), Brazil (17 per cent), China (15 per cent) and South Korea (14 per cent); women's leather footwear came predominantly from Brazil (44 per cent), Italy (14 per cent), and Taiwan (12 per cent); juvenile leather footwear comes from South Korea (22 per cent), Brazil (18 per cent) and Italy (16 per cent); while athletic leather footwear is imported from South Korea (64 per cent), Taiwan (19 per cent) and Thailand (6 per cent). Taiwan and China were the largest suppliers of vinyl or plastic footwear imports, with 57 and 26 per cent, respectively, for men's; 74 and 18 per cent for women's; and 57 and 32 per cent for juvenile footwear.

United States imports from China for the first six months of 1989, increased 104 per cent from the same period in 1988. This moved that country ahead of Italy as the fourth largest foreign supplier. China's increased exports to the United States were primarily of women's and children's vinyl types of footwear. Taiwan shifted most of this low-cost production as it moved away from producing vinyl footwear and upgraded its product offerings into more leather types. Thailand and Indonesia also recorded strong growth in exports as branded athletic footwear importers shifted their sources of supply from South Korea to lower-cost factories in these countries.

The movement of import sourcing to lower cost countries held down unit prices in 1989. From January through June, the customs based unit value of imported non-rubber footwear was $7.99, up only 2.3 per cent from the same period in 1988. The unit price of imported leather footwear dropped 2.3 per cent, to $10.65. Unit prices of imported vinyl footwear averaged $4.26, up 1.9 per cent from the 1988 period, while imported textile types averaged $2.92. A major factor contributing to the unit price decline in imported leather footwear, despite continued tight supplies of leather worldwide, was the stronger United States dollar in early 1989. For the first six months of 1989, unit prices for leather footwear imported from the major supplying countries, such as Taiwan, Italy, Spain and China, declined compared to the same period in 1988. Footwear from South Korea and Brazil, however, recoreded increases of 6 and 4 per cent, respectively.

Substantial quantities of cut footwear parts are exported from the United States to many developing countries where they are assembled and exported back to the United States as finished or partly finished products. Duties are then assessed only on the value-added content of these products. Frequently, final manufacturing operations requiring less labour such as bottoming, finishing, and packing - are performed in the United States. During January to June 1989, imports of such partially assembled leather footwear toalled 10.5 million pairs, primarily from the Dominican Republic, Brazil, India and Taiwan.

3.1.3 Exports

In 1989, the United States exported non-rubber footwear to about 74 countries. Exports declined about 10 per cent from 1988, to an estimated 14.9 million pairs. Unlike the case with imports, none of this decline can be attributed to reclassification of non-rubber footwear types under the new system, because combined exports of non-rubber and rubber footwear were down an even greater 26 per cent, or by 8.6 million pairs. The value of United States non-rubber footwear exports also decline, about 23 per cent from 1988, to an estimated $177 million. The unit value of these exports was down to $11.33 from $11.54. United States exports were composed predominantly of athletic footwear with textile uppers and men's and juvenile types.

Mexico was the largest market for United States exports with a 23 per cent share, by quantity, of total exports. Many of these were partially completed footwear parts, primarily for slippers, that after final assembly were imported by the United States as finished products. Japan was number two with a 15 per cent share. About 38 per cent of these exports were men's leather types and 29 per cent were athletic types, exempt from Japan's stringent tariff rate quotas. Most United States manufacturers are reluctant to commit resources to exploit Japan's large market for leather footwear as long as the quotas are so small and import licensing procedures so restrictive and cumbersome.

Canada, the Dominican Republic, Italy, France and West Germany in that order, were the next largest importers of United States non-rubber footwear. Exports to Central America and Caribbean countries, such as Dominican Republic, are composed mostly of partially completed footwear. These shipments increased sharply in 1989.

In 1988, Congress passed the first Caribbean Basin Initiative (CBI) providing duty free status for most products except footwear, leather products, textiles and sugar. In 1989, the Caribbean Basin Economic Recovery Expansion Act, provided for a 50 per cent reduction in tariffs for rubber and vinyl footwear, duty free status for textiles, and relaxed import rules for some other products. Leather footwear was exempted from the legislation. By early fall 1989, enactment of this new CBI legislation was uncertain unless Congress exempted all footwear from duty reductions. Also, further attempts by Congress to pass footwear global quota legislation, with or without textile quota legislation, appeared likely to be delayed until after 1990.

Shipments of slippers increased about 8 per cent in 1989, to an estimated 63.2 million pairs, and their product value increased about 11 per cent, to $235 million. Slippers accounted for 19 per cent of the quantity but only 6 per cent of the value of total domestic shipments of non-rubber footwear, mainly because more than 90 per cent of slippers are produced with vinyl or textile slippers.

Imports of slippers were about 5 million pairs, less than 1 per cent of total non-rubber footwear imports for January through June 1989 and about 14 per cent of domestic consumption.

3.1.4 Men's Footwear (except athletic)

Men's non-athletic footwear includes dress and casual shoes, workshoes, and boots. In 1989, shipments of these products declined about 11 per cent, to 46.2 million pairs. Their value declined about 5 per cent, to $1.7 billion. Men's footwear accounted for 21 per cent by quantity and 45 per cent by value of all domestic non-rubber footwear shipments in 1989.

Production of men's footwear declined from 51.8 million pairs in 1988, to an estimated 46.2 million pairs in 1989. Most of this decline occurred in production of dress and casual types. About 95 per cent of men's footwear was made with leather uppers.

For the first six months, imports of men's non-rubber footwear totalled 53 million pairs, down 13 per cent from the same period in 1988. Import penetration for this sector was 76 per cent.

3.1.5 Women's Footwear (except athletic)

Women's footwear shipments declined in 1989 about 2 per cent, to an estimated 68.8 million pairs. Their value increased about 1 per cent, to $1.3 billion. By value, women's footwear accounted for 33 per cent, and by quantity 31 per cent. Domestic production of women's footwear declined about 2.6 per cent, to an estimated 67.4 million pairs. For the first six months of 1989, imports of women's footwear, by quantity, were down 11 per cent from the same period in 1988. Import penetration was 85.4 per cent for the same.

3.1.6 Footwear (except rubber)

Misses, youths and boys, children, and infants and babies are included in this group, as well as athletic and other miscellaneous types of footwear. In 1989, shipments of all these types increased about 12 per cent, to an estimated 44.2 million pairs. Their value increased about 17 per cent, to an estimated $578 million. Shipments of these types of footwear accounted for 20 per cent by quantity and 15 per cent by value of all non-rubber footwear shipments in 1989. Production of these footwear types in 1989 increased about 11 per cent, to 43.6 million pairs. For January through June, production was up 34 per cent for youth's and boys, 60 per cent for misses', and 5 per cent each for children's and for infants and babies' footwear. Athletic footwear production declined about 11 per cent.

For the first six months of 1989, imports of all juvenile footwear were up 18 per cent from the same period in 1988. Imports of athletic footwear were down 22 per cent. Import penetration was 81.2 per cent for juvenile footwear and 95.9 percent for athletic footwear for the period.

Including rubber/canvas footwear imports and domestic production, athletic footwear consumption fell to an estimated 495 million pairs in 1989 from 529 million in 1988. This total represented about 37 per cent of combined non-rubber and rubber/canvas footwear consumption, which exceeded 1.3 billion pairs.

Forecasts for 1990 include growth in most sectors. Shipments of non-rubber footwear are expected to increase about 4.5 per cent to 231.5 million pairs. Shipments of slippers by 6 per cent, to 67 million pairs; men's footwear by 2 per cent, to 47.1 million pairs; footwear, except rubber by 8 per cent, to 47.7 million pairs. Import of non-rubber footwear are expected to decine in quantity for the fourth consecutive year, by about 2 per cent. As a result apparent consumption will decline slightly and per capita consumption will stabilize at 4.2 million pairs. Import penetration will remain at 79 per cent.

The non-rubber footwear manufacturing industry has finally stabilized and is expected to increase over the next five years. It appears that the long period of industry contraction and consolidation is over.

3.2 Luggage and Personal Leather Goods

The luggage and personal leather goods industries produce a wide variety of consumer goods, including leather gloves and mittens, luggage, women's handbags and purses, personal leather goods, and leather and sheep-lined clothing.

The most recent government statistics on the luggage, leather goods and handbag sectors of the leather products industry for 1988/1989 reflect growth in all three categories. Domestic product shipments are estimated (as of June

1989) at the same growth rate as 1987; 7 per cent, 6 per cent, respectively. Apparent consumption, also was up for all three categories, but unlike recent years, growth was not supplied solely by a dramatic increase in imports.

Imports continued to rise in 1989, by 8.9 per cent, a slower rate than the 12.2 per cent increase registered in 1988. The 1989 trade statistics, collected and reported under the new Harmonized System are not directly comparable, however, with those collected and reported in previous years. Year-to-year changes reported here, both in imports and exports, are estimated, due to statistical inconsistencies in this category.

In recent years, Asia has been by far the largest regional supplier of luggage and leather products imports to the United States, and this held true in 1989. China, South Korea, Hong Kong and Taiwan together accounted for more than three-quarters of the value of United States imports of these products. Other important suppliers included Italy, France, the Phillipines, and Thailand.

United States exports of luggage and leather goods continued to climb in 1989 reaching an estimated $171.9 million, more than double the value for 1987 and more than 50 per cent higher than in 1988. The principal markets for United States exports of luggage and leather products continued to be Japan, the United Kingdom, Canada, and France for finished goods, and Mexico for parts. Much of the luggage and leather goods United States manufacturers ship to Mexico is actually components for producing those items; eventually they return to the United States in the form of finished goods imports.

The total value of product shipments for all five of these industries in 1989 slipped to $1.97 billion. Measured in constant dollars, the year-to-year decrease was 3.6 per cent. Industry employment also declined modestly, though not as much as product shipments. Industry wide employment fell 1.8 per cent to 32,000 and production worker employment fell 1.2 per cent to 24,700.

Labour costs are a high proportion of total production costs in the luggage and personal leather goods industries. This condition contributes to their high sensitivity to imports, particularly from those developing countries where wage rates remain far below United States levels. The estimated dollar value of imports of luggage and personal leather goods topped the $3 billion mark for the first time in 1987 and furnished more than 62 per cent of apparent consumption.

3.3 Luggage

As Table IV shows, apparent consumption and imports of luggage have been on the rise over the last few years and are both expected to continue their upward swing. By contrast, exports are flat and product shipments have been increasing lately following a steady decline in the mid-80s.

Table IV

LUGGAGE SHIPMENTS, IMPORTS, EXPORTS AND APPARENT CONSUMPTION

(Million dollars)

	1983	1984	1985	1986	1987	1988
Product shipments	676	717	627	567	774*	825*
Imports	402	553	614	691	851	843
Textiles	216	331	349	401	504	488
Plastic	135	147	175	179	201	201
Leather	51	75	90	111	146	154
Exports	33	27	22	18	25	37
Apparent Consumption	1,045	1,243	1,219	1,241	1,600*	1,631

* Estimated

Source: United States International Trade Commission: United States Department of Commerce - Bureau of Census

The luggage industry produces a wide assortment of products that include suitcases, briefcases, hand luggage, tote bags, occupational cases, and musical instrument cases. Materials used in production range from top grain leather to metal alloys and from laminated plastics to jute. Individual products often are fabricated from a combination of materials. Industry analysts estimate that less than 15 per cent of United States produced finished luggage goods are made of leather, although leather is often used as decorative trim.

The value of shipments of luggage products increased to $860.2 million in 1989, marking a third year of rising product shipments. In constant dollars, shipments rose 1 per cent. With the economy continuing to be relatively healthy, and with generally low levels of unemployment, travel and tourism increase, expanding the demand for luggage. Along with the growth in product shipments, industry-wide employment and production worker employment also rose in 1989 - 3.4 per cent and 4.7 per cent, respectively - for the second consecutive year. The value of luggage imports also increase in 1989, to $894 million, and accounted for just over half of new supply in the United States. Taiwan, China, and South Korea maintained their positions as principal foreign suppliers of luggage products to the United States market. These three countries provide over 80 per cent of the quantity and 75 per cent of the value of imported luggage products. All three are bound by separate quota agreements under the Multi-Fiber Agreement (M-FA), which limits shipments to the United States of certain luggage products fabricated out of textiles - both natural and man-made fabrics.

Although United States luggage exports rose to $75.6 million in 1989, nearly doubling the value shipped overseas in 1988, this value is still only 8.5 per cent of that for luggage imports. Moreover, part of the apparent increase in exports is related to the changes in data collection and reporting under the Harmonized System. The top five overseas markets for United States production were Japan, the United Kingdom, Canada, and Hong Kong for finished goods, and Mexico for luggage parts. United States luggage manufacturers are more actively soliciting overseas marketing opportunities than at any time during the 1980s.

3.4 Leather Gloves and Mittens

The United States leather glove and mitten industry comprises two product segments: work gloves and mittens, accounting for approximately 85 per cent of domestic production; and dress gloves and mittens, approximately 15 per cent. Finished goods are made either entirely of leather or of leather lined with other materials such as cotton or wool.

In 1989, the value of shipments of these products declined to $147 million. Measured in constant dollars, product shipment fell by 3.2 per cent. Employment levels were unchanged from 1988, remaining at 2,600 employees industry-wide, 2,300 of whom were production workers. The hourly earnings of production workers climbed to $5.52.

Imports of leather gloves and mittens rose in 1989, accounting for more than half of United States supply. Principal sources of supply continued to be China, the Phillipines, and Mexico, and Taiwan replaced Korea as the fourth largest supplier. Together, these countries accounted for more than 80 per cent of the value of United States imports in 1989. China alone supplied three quarters of the quantity of United States imports of gloves and mittens in 1989.

Less than 8 per cent of domestic shipments of leather glove and mittens were exported in 1989. By quantity, United States exports were only 4 per cent of imports. These statistics are somewhat misleading, in that more than 80 per cent of reported overseas sales in 1989 were actually cut glove parts. Most of these products are exported to Mexico and the Phillipines for assembly and eventually re-entered the United States as finished merchandise. Mexico imported more than 70 per cent of United States exports of cut glove parts in 1939.

3.5 Women's Handbags and Purses

The United States handbag industry produces women's and children's handbags and purses of leather, plastics, or other materials except precious metals. In 1989, industry-wide employment declined 8.3 per cent, while production worker employment fell 9.6 per cent. The decline in employment reflected the sharp drop in the value of shipments of these products - down 11.4 per cent in constant dollars. Although industry shipments fell as well, the rate of decrease was somewhat less dramatic, indicating that some firms may also be producing other types of products.

The value of handbag imports declined slightly in 1989, to $799.4 million; however, the share of imports in the United States market climbed to 67.1 per cent of new supply from 65.3 per cent in 1988. china held its position as the principal supplier, capturing an estimated 35 per cent of the vlue and 57 per cent of the quantity of United States handbag imports in 1989. Other important suppliers include Taiwan and South Korea for lower priced merchandise; and Italy and France for higher priced goods. Imports of textile handbags and purses from major Asian suppliers continue to be convered by individual bilateral quotas under the M-FA; these quotas, in effect, restrain such imports.

The estimated value of handbag exports increased to $23.3 million in 1989; accounting for approximately 6 per cent of domestic product shipments. They remain a very small fraction of imports. Most overseas shipments to developing countries, such as Mexico - statistically the largest importer, include a large proportion of unfinished parts, which are assembled, finished and eventually exported back to the United States. The largest foreign market for finished United States handbags is Japan, which receives more than a third of all United States exports of handbags and purses.

Table V:

HANDBAG SHIPMENTS, IMPORTS, EXPORTS AND APPARENT CONSUMPTION

(Million dollars)

	1983	1984	1985	1986	1987	1988
Product Shipments	507	483	445	339	470*	497*
Imports	486	600	622	652	798	830
Leather	203	272	283	316	439	473
Textile	153	191	178	179	188	170
Plastic	130	137	161	157	171	187
Exports	9	11	7	9	11	16
Apparent Consumption	984	1,072	1,060	982	1,257*	1,311*

* Estimated

Source: United States International Trade Commission: United States Department of Commerce - Bureau of Census

3.6 Personal Leather Goods (Flatgoods)

Manufacturers in this industry group produce such items as wallets and billfolds; and eyeglass, cigarette, key and non-musical instrument cases; products often referred to as flatgoods because they fit in pockets or handbags. Flatgoods are made in whole or in part of plastic, textile materials, or leather, which alone accounts for more than 40 per cent of the value of materials inputs in this industry group.

In 1969, shipments of flatgoods declined to $374.8 million, and 8 per cent drop measured in constant dollars. Industry-wide and production worker employment declined 6.1 per cent and 3.8 per cent, respectively, undoubtedly due to the decrease in product shipments.

The value of United States imports of personal leather goods increased during 1989 to an estimated $394.7 million, brining the import penetration level to slightly more than one half of new supply. Principal foreign suppliers include South Korea, China and Taiwan, which together supplied two thirds of the quantity and 55 per cent of the value of flatgoods imports in 1989. Many of these imports are low priced and constructed of non-leather materials. Italy, the third largest supplier (by value) furnishes high-priced leather flatgoods.

United States exports of personal leather goods constitute only 5.2 per cent of domestic shipments. Although exports more than doubled in 1989, to $19.4 million, United States imports are more than 20 times that size. Canada, Hong Kong and Japan were the leading foreign markets for United States finished goods, and Mexico was the leading foreign market for parts to be assembled.

3.7 Leather and Sheep-Lined Clothing

United States manufacturers within this industry group mainly produce leather coats and jackets. Shipments also include pants, vests, skirts, and other leather clothing items, but these products are only a negligible portion of the total.

Demand for leather and sheep-lined clothing is more directly related to trends in fashion than is that for other luggage and personal leather products. As a result, consumption patterns for leather apparel can vary widely from year to year. In 1989, leather apparel continued to be an important fashion item. An estimated increase of 3.5 per cent in the constant dollar value of product shipments (to $198.3 million in current dollars) was a reflection of this fact.

Employment of production workers in this labour-intensive industry sector increased 11.8 per cent in 1989, on top of a 6.2 per cent increase in 1988. The 1989 average hourly wage for pdocution workers, $8.34, was the highest among the United States luggage and personal products industries.

South Korea, with a substantially lower wage scale, was far and away the principal source of leather and sheep-lined clothing to the United States market, capturing nearly three-quarters of the value and quantity of United States imports last year. Other important suppliers include Hong Kong, Taiwan, India and Argentina. The value of imports of leather and sheep-lined clothing continued to rise in 1989, furnishing 83.2 per cent of the new supply in the United States.

United States exports of leather and sheep-lined clothing also increased again in 1989 and accounted for more than one-fifth of product shipments. Japan, France and Italy were the principal export markets for United States made leather apparel.

3.8 Upholstery Leather

In 1987, upholstery leather shipments represented 21 per cent, by value, of all leather product shipments, up from 7 per cent in 1982.

Imports of upholstery leather increased substantially in 1989, reaching an estimated $136 million, or 25 per cent of total United States imports of bovine leather.

Increasing number of United States luggage and leather goods manufacturers are looking off-shore for new marketing opportunities. Many have already achieved notable success, and other firms are likely to follow. Ultimate success in the export arena will depend on a variety of factors, the most important of which is the relative stability of currency markets.

Imports also will grow, but at a slower rate than in the period since 1985. Domestically produced leather goods are becoming more competitive with high-end imports and are expected to capture some portion of expanded United States consumption during the 1990s.

Many demographic factors suggest optimistic prospects for futrue growth in consumer demand for luggage and personal leather products. Rising white collar employment suggest increased purchases of business cases and other leather products for the office. Expanding number of retirees and steady increases in real personal disposable income hint at expanding travel opportunities and corresponding increases in luggage sales.

CHAPTER IV

UNITED STATES MARKET PENETRATION AND EXPORT PROMOTION

4.1 General problems of export marketing for Nigeria and Sub-Saharan African countries

Nigeria and, for that matter, all Sub-Saharan African countries spend a lot of money on export promotion, but the result so far has not been reflecting in the export of manufactured value-added to the United States (see Table VI).

Table VI

TRADE IN MANUFACTURE
(domestic and foreign merchandise)
(millions of dollars)

	1980	1981	1982	1983	1984	1985	1986	1987	1988
US Export to Africa	3,952	5,013	5,264	3,952	3,746	3,467	2,515	2,958	3,164
% Share	2,5%	2.9%	3.4%	2.7%	2.3%	2.1%	1.4%	1.5%	1.2%
US Import f. Africa	711	621	611	447	554	468	621	932	979
% Share	0.5%	0.4%	0.4%	0.3%	0.2%	0.2%	0.2%	0.3%	0.3%
US Exp. to Nigeria	276	950	765	457	232	356	258	247	306
% Share	0.5%	0.6%	0.6%	0.4%	0.3%	0.3%	0.2%	0.1%	0.1%
US Imp. f. Nigeria	19	16	8	10	15	6	4	16	16
% Share	4.4%	3.5%	2.9%	1.4%	0.8%	0.9%	0.7%	0.9%	0.7%

According to Table VI, the United States manufactured import from Africa between 1980 and 1988 was below 1 per cent of total import, except for 1980, when it was 0.5 per cent. For every year during the period, it was between 0.2 per cent and 0.4 per cent. For Nigeria, manufactured value-added never rose to 5 per cent of the total export to the United States. From 1984 to 1988, it ranged between 0.9 per cent and 0.7 per cent. If Africa and Nigeria's export of manufactured value-added (MVA) is negligible, United States export to Africa is equally very low. From 1980 to 1988, it was between 3.4 and 1.2 per cent, while during the corresponding period for Nigeria it was between 0.6 and 0.1 per cent.

The dollar amount also illustrates that the richest country and the poorest continent need to improve on their trade in manufacture. Africa stands to benefit more from such an improvement provided they pursue their export drive with some systematic planning and implementation. American consumers are educated, discriminating consumers, they buy because they want to buy not because they have to buy.

It follows that association between potential exporters and importers must be particularly close. This close association has a dual function: it allows the importer to show the exporter what is required in the market areas, while allowing the latter to show what products he can offer. The importer will then advise the exporter on how to adjust his production to suit market requirements. If he is to obtain orders, the exporter must satisfy the importer, that he can produce the right article at the right time and at the right price. Time is all-important, for patterns in trade and fashion vary rapidly. Exchange of advice and samples must be carried out quickly.

Unfortunately, this problem of establishing and maintaining close relations with importers remains one of the biggest and is most difficult to be overcome by the leather industries in Nigeria and other Sub-Saharan African countries. Few manufacturers are in close touch with importers. Many manufacturers who wish to export lack the necessary market information. Unless the manufacturer is fully aware of the market requirements, as regards currently fashionable style, colour, quality of material and workmanship, and prices, he is unable to offer a good sample. The potential importer, for his part, is naturally unwilling to commit himself, until he is satisfied that the manufacturer can produce, on time, goods of a consistent quality and of the right style and finish. Building up this confidence takes time.

Distance from customers is a further hinerance to prospective trade. African countries are often far from one to three months shipping distance from the more affluent of the customer markets. This time can be drastically reduced by using air freight, but, except for high-quality leather goods and top-grade leathers, the cost outweighs the advantage of time. The producer in the more distant African country is thus at a great disadvantage as compared with the producer in the developed country and might be better advised to avoid the production of fashion goods altogether and concentrate on the more conventional items, even though the profit margin in this sector is lower.

Leather and reptile skin products are manufactured in enterprises of various sizes. The larger units are usually equipped to produce goods meeting international standards of quality and are able to participate in the export trade. Small- and medium-size units, which, in many countries, have most of the production capacity, cannot, at present, enter the export field economically, since they are unable to produce good quality products in sufficient bulk, owing to their size and low level of mechanization. Most of the Nigerian and African manufacturers belong to this category.

Pooling of products might enable small manufacturers to become exporters. Until processes are more standardized in general, it will prove difficult to pool products.

The channels through which imports are distributed in the United States vary from company to company. Most purchases are done by bulk-buying agencies representing retail chains, co-operatives or syndicates. Others are handled through smaller importers and agents. These differences in purchasing systems should be of some interest to potential exporters; bulk-buying agencies usually arrange for their representatives to tour the manufacturing areas, whereas the smaller importers and agents generally conduct their business by post, cable, telex, telephone or fascimile.

As the United States constitute the largest markets available for potential exporters, close association with importing groups in the United States is essential for any production unit wishing to enter the export market from Nigeria and the Sub-Saharan Africa. Such close co-operation would be necessary to ensure that manufacturers receive samples and advance notice of changes in time for the product to be manufactured and shipped to these markets.

Many leather goods manufacturers face extreme competition from the products from the New Industrialized Countries (NIC) of Asia and Latin America, which have lower wage rates. Some manufacturers would undoutedly like to combine with manufacturing groups in Nigeria and Sub-Saharan African countries that would be willing to manufacture to exact specifications. The manufacturer in the United States would save labour costs; the manufacturer in Nigeria and Africa would have the advantage of having ready made patterns and styles to suit the current tastes and the sales organization of the American manufacturer at his disposal. This might seem a poor way to enter the market, as obviously the manufacturer in Nigeria and Africa would not get a large share of the profits. He would essentially be a supplier of cheaper labour and material. But, if he could establish himself and his products on the basis, it might be possible, after a few years of operation, to branch out and work independently. The standard of skills of his workers would have risen to acceptable levels, and he would have seen what markets he might enter, whom to contact and what prices he might obtain for his products.

For Nigeria and African countries trying to break into the export market to the United States, establishment of showrooms and warehouses in markets in the United States could go a long way towards promoting exports of leather goods. This could be done either on a governmental, co-operative or individual company basis. This approach has many advantages and disadvantages. On the advantageous side: an interested buyer can receive his stocks immediately; he can see the quality of the workmanship being offered; he may accept a type of product on display, subject to certain alterations. The long delay between ordering and receiving the goods from African countries is one of the reasons that deters many potential importers. For example, during the fact-finding tour across Africa by the representativee of Global Mart, Inc., some samples ordered in one of the East African countries in October 1988 did not arrive in Atlanta until April 1989.

Importers are also wary of receiving one product sample, on the basis of which they are expected to order thousands more. When they can see bulk merchandise in a warehouse, some of their doubts may be removed. However, for the African manufacturers, the disadvantages might outway the advantages. It will not be possible to open showrooms and warehouses in all the major markets in the United States. It will be counter-productive because it will not be cost-effective.

By far the most potentially promising routes to penetrate the United States market would be either for Nigeria and the Sub-Saharan African countries to have an American leather goods manufacturer as a joint-venture partner in the manufacturing process or to enter into an agreement with a wholesale distributing company. Alternatively, Nigeria and, for that matter, the rest of the Sub-Saharan African countries, should pool and estalbish a distributing company in the United States. This type of arrangement, we understand, is now being negotiated between Global Mart, Inc. of Atlanta, Georgia, and the sponsors of GLO-PHOENIX Export (NIG.) Ltd., a proposed leather and reptile skin goods manufacturing industry for Nigeria. The relationship between these two companies is an experiment that deserves close monitoring. It might be one of the answers to a persistently nagging question: "How to get African manufactured value-added (MVA) to the main stream of American markets?"

Of course, the beginning of the answer would be, first and foremost, to bring Nigerian and African manufactured value-added (MVA) consumer goods to an internationally competitive quality level at reasonable prices. Unless this is done, the results of export promotion will always be dwarfed by the resources allocated with good intentions and commitments.

CONCLUSIONS

The leather and leather products industry, going into the 1990s, is an extremely healthy industry in the United States. The facts found in the previous pages support the view that this industry, as a whole, will continue to grow and in most sectors steady increases in both value and quantity of raw materials and product shipments are expected.

Leather and leather products are here to stay. Indeed, many of the products are considered staples for personal use. As the industry continues to grow in dollars and volume, the international market-place will continue to protect markets as well as seek new ones.

The United States has always influenced the rest of the world through its decisions in politics, economics, education, human rights and foreign trade. In the last decade, the United States experienced an increased need for co-operation among nations in order to enhance its position. In the decade to come, interdependence among nations will increase as the global economy takes precedence over individual sovereign concerns.

It can be concluded that conditions in the United States are such that Nigeria and the Sub-Saharan African countries should readily be able to market their leather goods products, provided they produce the correct design and quality goods at realistically competitive prices and organize their trade channels and communications.

INDUSTRY ASSOCIATIONS

American Luggage Dealers Association

Industrial Fabrics Association International

International Luggage Repair Association

Leather Industries of America, Inc.

Luggage and Leather Goods Manufacturers of America, Inc.

Luggage and Leather Goods Salesman's Association of America, Inc.

National Fashion Accessories Association

National Luggage Dealers Association

National Retail Merchants Association

SOURCES

Bureau of Census (Foreign Trade Information and Analysis Office)

Bureau of Labor Statistics

Department of Commerce

International Business Surveys, 1989/1990

Leather Industries of America

Moody's Industrial Manual

Survey of Current Business, January 1990

Travelware Directory of Luggage, Leather Goods and Handbag Component Suppliers, 1989/1990

Travelware Directory of Luggage, Leather Goods and Travel Accessories Resources, 1990

(D) Distributor, (E) Exporter,
(I) Importer, (M) Manufacturer

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LEONARDI MANUFAC. CO. INC. (IEM) 2728 Erie Drive Weedsport NY 13166
Ezio Leonardi, Pres. . . . . (315) 834-6611/(800) 356-7354

A. Lewis Thread Mfg.Co.Inc. (MD) 476 Broadway New York NY 10013
Eddie Lewis, President . . . . (212) 226-7937

Loewengart & Co. (M) 3 Park Avenue New York NY 10016
Mr. Marten Lowengart . . . . (212) 686-7666

Long Manufacturing Co.,Inc. (M) 1135 Commerce Street Petersburg VA 23803
Thomas M.Long, Pres. . . . . (804) 732-8444

Louis G. Freeman 1369 Cox Avenue Erlanger KY 41018
Carl Dragan, Sls.Mgr. (606) 371-4433/TX:241485

L. Travis Textiles/Putnam Mill (MD) 469 7th Avenue New York NY 10018
Marie Cangialosi . . . . (212) 736-6664

Luggage & Handbag Supply Co. (ID) 1216 W. Olympic Blvd. Los Angeles CA 9001[illegible]
Henry Fukutani, Pres. . . . . (213) 749 [illegible]

L[illegible], Inc. P.O. Box 109 Hamptonville NC 27020 . . . . (919) 468-8522

Magic Novelty Co.,Inc. 308 Dyckman Street New York NY 10034
Steve LaStella, Sls. Mgr. . . . . (212) 304-2777
Manufacturers Supplies Co. 730 North 18th Street St.Louis MO 63103
Robert Goellner, Exec.V.P. . . . . (314) 231-7886
Maynard H.Moore Jr.,Inc. (M) 430 Main Street P.O. Box 152 Stoneham MA 02180-0152
David M.Foley . . . . (617) 438-1300
Merchant Overseas (I) 41 Bassett Street Providence RI 02903
Mindy Wachtenheim, Sales . . . . (401) 331-5603
Middlesex Research Mfg., Co. P.O.Box 444 Hudson MA 01749-0004
Sara E.Coldwell, V.P.Cust.Serv . . . . (508) 562-3697/(800) 321-MRMR
MINCO PRODUCTS CORP. (M) 69 Washington Street Brooklyn NY 11201
J.Minkow, Pres. . . . . (718) 624-6874
Minival Ltd. 207 Kentish Town Road London England
Mr.Albert/Mr.Sass.Dir. . . (01)267-2816/7/8/Easylink:19018175/TX:946240(CWEASYG)
Mohawk Fabric Co. (M) 96 Guy Park Avenue Amsterdam NY 12010
Gregory Needham, Pres. . . . . (518) 842-3090

MORBERN INC. 1967 46th Avenue Lachine, Quebec H8T-2P1, Canada
Jack Greenblatt, V.P.Sls.&Mktg . . . . (514) 631-2990/FAX: (514) 631-3249
M. SIEGEL CO., INC. 120 Pond St. Ashland MA 01721
Wayne Siegel . . . . (508) 881-5200

N

National Die Works (MIE) Rt.1 Box 3 Hwy.76 Lynchburg SC 29080
James A.Bircher, Pres. . . . . (803) 437-2141/TX:821350
National Felt Company (M) P.O. Box 150 Easthampton MA 01027
Pat Sliva, Mktg.Dir. . . . . (413) 527-3445/(800) 234-1039
National Molding Corp. (M) 5 Dubon Court Farmingdale NY 11735
Joseph Anscher . . . . (516) 293-8696
National Webbing Products 77 Second Avenue Garden City Park NY 11040
Edward Glassgold, V.P.Sales . . . . (516) 741-9660
Nebo Thread Mills Corp. 476 Broadway New York NY 10013
Irving Henkus, Pres. . . . . (212) 226-7037
Newberger Brothers,Inc. (MIED) 2108 West Fullerton Avenue Chicago IL 60647
Michael Newberger, Pres. . . . . (312) 489-4100/TWX 910-221-1129
Newcastle Fabrics (M) 80 Wythe Avenue Brooklyn NY 11211
John Morelli, V.P.Sales . . . . (718) 782-5560
New Directions in Leather, Ltd P.O.Box 2297 S. Portland ME 04106
Michael Turkanis . . . . (207) 767-3337
The New Jersey Wire Stitching (M) Machine Co. 10th Street & Newtown Ave. Camden NJ
08103. F.William Storck, Pres. . . . . (609) 365-0196
Newman Leather Corp. (D) 2101 Ross Avenue P.O.Box 331 Cincinnati OH 45212
James O. Newman, Pres. . . . . (513) 731-9888
New York Cutting & Gumming Co. 150 Wesley Street South Hackensack NJ 07606
Dave Mann, Sls. Mgr. . . . . (201) 487-3093/(212) 563-4146
Noveltybias-Novelty Plastics 11 Webster Ave. Chelsea MA 02150
John Ratto, V.P. . . . . (617) 884-7900
Nylon Molding Corporation (MD) 1617 S. California Monrovia CA 91017
Gary Fraze . . . . (818) 358-2305/(800) 321-1243

O

OHIO TRAVEL BAG MFG. CO. (MIED) 811 Prospect Avenue Cleveland OH 44125
Austin E.Oppenheim, Pres. . . . . (216) 621-5963/TX 980164
Oliner Fibre Co. (MED) 170 North Fifth Street Brooklyn NY 11211
A.W.Oliner, Pres. . . . . (718) 782-9370/TX:226611 FIBRE UR
ONTARIO DIE CO. OF AMERICA (M) 2735 20th St. P.O.Box 610397 Port Huron MI
48061. David J. Lees, V.P.Sls. & Mktg . . . . . . (313) 987-5060/FAX: (313) 987-3688

Optima Import, Co. (I) 4825 College Avenue Room 207 San Diego CA 92115
Andrew Braun, Pres. . . . . (619) 583-9240

Pan Industries 13101 Washington Blvd. Los Angeles, CA
Dick Koroki . . . . (213) 516-8580 FAX: (213) 324-0941
Paramount Thread (ME) 29-02 Borden Avenue Long Island City NY 11101
Shelly Marks, Pres. . . . . (718) 482-0500/(800) 221-0082
Parimco Products (IE) 100 East 42nd Street New York NY 10017
Thomas Zielinski, V.P.Mktg. . . . . (212) 286-9595/TX:220 824
PHC Industries (M) 1643 Haddon Avenue Camden NJ 08103
George Bussh . . . . (609) 966-0980
PHILMAR FABRICS, INC. (S) 158 W. 29th Street New York NY 10001
Harvey Drucker, V.P. . . . . (212) 239-1551
Phipps-Faire Int.,Ltd. Riverside Way,Bedford Road P.O.Box 1 Northhampton England
Mr. C.P.Roach, Export Dir. 0604/21200/TX:31310
Pierre-G Leather,Inc. 112 West 9th Street #1212 Los Angeles CA 90015
Max Gezerse, Pres. . . . . (213) 624-5907/TX:755623
P.J.Considine Inc. 118 Brook Street Scarsdale NY 10583
Bob Considine . . . . (914) 725-4880

Plascal Corp. (ME) 361 Eastern Parkway Farmingdale NY 11735
Henry Chozick, V.P. . . . . (516) 356-6836
Prestolock 100 Outwater Lane Garfield NJ 07026
Roland Dumas, Sales Executive . . . . (201) 340-1007/TX:139352
Prima Die Co.,Inc. (MI) 3546 East 15th Street Los Angeles CA 90023
Michelle Nipp, Sls.Mgr. . . . . (213) 268-3434/TX:287771 PRIMA UR
Princeton Case Co.,Inc. (M) 667 Lehigh Avenue Union NJ 07083
Steve Parker, Pres. . . . . (201) 687-1750
Progressive Service Die Co. (M) 2720 Clark Street St.Louis MO 63103
Ken E.Stum,V.P.Sales . . . . (314) 531-4300/(800) 325-8109
Puritan Industries, Inc. (MED) P.O.Box 172 122 Powder Mill Road Collinsville CT 06022
A.P. Papanek, Pres. . . . . (203) 693-0791

Q

Q-Eximtrade (ID) 1133 Broadway Suite 928 New York NY 10010
Sonny Quisumbing, Pres. . . . . (212) 243-4990

R

Rainbow Leather Inc. 14-15 112th Street College Point NY 11356
Richard Lipson . . . . (718) 939-8762

RALPH STEINBERG, Inc. 50 Pocono Road P.O.Box 249 Brookfield Center CT 06805
Pat Morgera . . . . (203) 775-8500/TX:643138
RANDALL LEATHER MACHINERY (MD) 33-01 Hunters Pt Avenue Long Island City NY 11101. Jon Katz, V.P . . . . . (718) 361-2427/(800) 223-6018/FAX: (718) 706-6576
RANDOLPH-RAND CORP. 176 Madison Avenue New York NY 10016
M. Medina, Pres. . . . . (212) MU5-8080
RAU FASTENERS, INC. (M) 102 Westfield Street Providence RI 02907
John Connor, V.P. Sales . . . . (401) 861-7100
Ready Cut Leather 145 Essex Street Haverhill MA 01830
Jim Metz, Gen.Mgr. . . . . (508) 374-1994/FAX: (508) 374-8518
Rector International Equipment Corp. 9 West Prospect Avenue Mt.Vernon NY 10550
Harold P.Stern . . . . (914) 699-5755/TX:131435
Regent Mfg. Co. 259 Second Street Saddle Brook NJ 07662
Hal Simkowitz, V.P. . . . . (201) 478-9200
Reiner Textiles Inc. (ED) 1270 Broadway New York NY 10001
Max Reiner,Pres. . . . . (212) 736-7145
R-H Products Co.,Inc. (M) P.O.Box 301 308 High Street Acton MA 01720
M.L.Filiurin, Sls. Mgr. . . . . (617) 259-9464
Richard Joner & Co.,Inc. 5 Burr Street P.O.Box 542 Gloversville NY 12078
Richard Joner,Pres. . . . . (518) 725-4622
RINGS WIRE INC. (M) 24 West 25th Street New York NY 10010
Brian Goldsmith, V.P. Sales . . . . (212) 741-9779

Robinson Thread Co., Inc. 19 McKeon Road Box 273 Worcester MA 01613-0273
Chris Ginnane, Pres. . . . . . . (508) 756-5726/(800) 641-0606

ROBUS LEATHER INC. (M) 8 Lincoln Street Box 408 Biddeford MA 04005
Thomas S. Robinson, Gen. Mgr. . . . . . . (207) 282-6141

Romanoff Rubber Company 9 DeForrest Street Amityville NY 11701
Bob Romanoff . . . . . . (516) 842-2400/(800) 221-7448

ROME FASTENER CORP. (M) P.O.Box 213 Milford CT 06460
Howard Reiter, VP Mfg. . . . . . . (203) 874-6719/FAX: (203) 877-0201

ROME FASTENER SALES CORP. (M) 24 West 25th Street New York NY 10010
James Reiter, V.P. Sales . . . . . . (212) 741-9779

Rospatch-Lenoir Div. (M) P.O.Box 735 Lenoir NC 28645
Diane Safford . . . . . . (704) 758-2338

ROSSLEY MACHINE CO. (M) 43 West 24th Street New York NY 10010-3205
Willie Candelario, Pres. . . . . . . (212) 989-5250

Rothchild Printing Co.,Inc. 7900 Barnwell Avenue Elmhurst NY 11373
Herbert Rothchild,Pres. . . . . . . (718) 899-6000/(800) 238-0015

RUBY SILBERMAN STAPLE CO.,INC. (ID) 138 West 25th Street New York NY 10001
Ruby Silberman,Pres. . . . . . . (212) 684-0295

S

Salwen Paper Company,Inc. 151 Fieldcrest Avenue P.O. Box 4008 Edison NJ 08818
Edward S. Salwen, Pres. . . . . . . (201) 225-4000/(800) 255-8600/TX:704326 SALWEN

Salz Leather,Inc. (ME) P.O. Box 1840 Santa Cruz CA 95061
Jeremy S.Lezin, V.P. Mktg. . . . . . . (408) 423-4470

Samuel Bobker & Son, Inc. 530 W. 23rd Street New York NY 10011
Bert Bobker, Pres. . . . . . . (212) 989-1270

Schaefer Machine Co., Inc. (M) Boston Post Road P.O.Box 934 Clinton CT 06413
John V. Ketcham, V.P. . . . . . . (800) 243-5143/FAX: (203) 669-8478

SCHER FABRICS, INC. 119 W. 40th St. New York NY 10018
Sidney Yaroslawitz . . . . . . (212) 382-2266/FAX: (212) 382-0076

Schwarz Leather Co. (IE) P.O. Box 6500 400 Gotham Parkway Carlstadt NJ 07072
Harry Lorch, Pres & Treas . . . . . . (201) 869-8100/(212) 594-9060/TX:130048

Scovill Apparel Fasteners Inc. P.O.Box 44 Clarkesville GA 30523
Mr. Jerard Duffy . . . . . . (404) 754-4181

Sea Island Thread Co. 476 Broadway New York NY 10013 . . . . . . (212) 226-7037

Seal-O-Matic Co. 900 Passaic Avenue East Newark NJ 07029
Mel Ortner, Pres. . . . . . . (201) 481-6500/(800) 631-2072

Seroussi Sales Corp. 9 Cayadutta Street P.O. Box 251 Gloversville NY 12078
Abraham V.Seroussi . . . . . . (518) 725-6164/(518) 725-8114

Seton Name Plate Corp. (MD) P.O. Box Druver 1331 New Haven CT 06505
Ask For "SALES" . . . . . . (203) 488-8059/(800) 243-6624

S.G. Sales Co. 934 Stuyvesant Union NJ 07083
Stu Goldsmith . . . . . . (201) 686-1221

SIGMA LEATHER, Inc. (MIED) 50 Pocono Road Brookfield Ctr. CT 06805
Ralph M.Steinberg, Pres. . . . . . . (203) 775-8500

Silverman Products & Textiles (IE) 205 West 39th Street New York NY 10018
Lester Silverman, Treasurer . . . . . . (212) 944-8200

Singer Sewing Co. 135 Raritan Center Parkway Edison NJ 08837
J.J.Kiernan,Mktg.Serv.Coor. . . . . . . (201) 632-6700

S.I.R. WEBBING INC. (M) P.O. Box 163 Wood Ridge NJ 07075
Samuel Reiner, Pres . . . . . . (201) 777-8833/FAX: (201) 471-9821

S.Kaplan Sewing Machine Co.Inc 107 West 25th Street New York NY 10001
Steven L.Kaplan . . . . . . (212) 691-4900

Sommers Plastic Prod.Co.,Inc. 81 Kuller Road Clifton NJ 07015
Fred Schecter, V.P. . . . . . . (201) 777-7888/(800) 225-7677

Spencer Laminating Corp. 3275 Victory Blvd. Staten Island NY 10314
Spencer Rosenberg . . . . . . (718) 494-3802

Sprayway Inc. (M) 484 Vista Avenue Addison IL 60101
J.Barrie Blackburn, V.P. Sals. . . . . . . (312) 628-3000

STARENSIER, INC. Five Perkins Way P.O. Box 408 Newburyport MA 01950
Louis A. Rubenfeld, Pres. . . . . . . (508) 462-7311/FAX: (508) 465-6223

Starlight Industries,Inc. 39 Front Street Brooklyn NY 11201
Marton Silber . . . . . . (718) 643-3400/FAX: (718) 935-0885

Sterling Leather Goods Co. 1407 59th Street Brooklyn NY 11219 . . . . . . (718) 851-6310

STIMPSON CO., INC. (S) 900 Sylvan Avenue Bayport NY 11705
M.J. Sacco, Asst. Sls. Mgr. . . . . . . (516) 472-2000/TX:ITT:497-2370

Stitchcraft Thread Mills (MI) 1437 Santee Street Los Angeles CA 90015
Charles C. Caine, Pres. . . . . . . (213) 749-3106

Stoffel Seals Corp. P.O. Box 825 400 High Avenue Nayack NY 10960
Ron Voorhees, Sales Mgr. . . . . . . (914) 353-3800/FAX: (914) 353 3800

Stormy Leather Ltd. (M) 555 8th Avenue New York NY 10018
Betsy Title . . . . (212) 629-5092.5093
SUDHAUS OF AMERICA, INC. (I) 8 Rt 22 E, Unit 4 Lebanon NJ 08833
Richard J. Rekuc, CEO . . . . (201) 236-7117/FAX: (201) 236-7691
SUPERIOR LEATHER CO. 50 Pocono Road P.O.Box 249 Brookfield CT 06805
Tony Miodonka . . . . (203) 775-8500/TX:643138
SX Industries,Inc. (M) 142 Will Drive Canton MA 02021
Michael Fink, V.P. . . . . (617) 828-7111
Synthetic Thread Co.,Inc. (M) 825 12th Avenue Bethlehem PA 18018
Neil Forgosh, V.P. Sls. . . . . (215) 868-8575

T

Talon, Inc. (M) 1350 Broadway Rm: 212 New York NY 10018
Steven Zambito, Exec. V.P. . . . . (800) 458-6685
TAPE-CRAFT CORP. P.O. Box 2027 Anniston AL 36202
Robert A.LoMonaco, V.P. Sales . . . . (205) 236-2535/(800) 521-1783
Taylor Importing Co. (I) 24A Fourth Street Valley Stream NY 11581
James Taylor III, Partner . . . . (516) 825-5100
Tele-Sonic/Packaging Corp. (M) 46 Crown Lane Greenwich CT 06831
Mr. B. Katz, Pres. . . . . (203) 625-0073

Texon,Inc., Div.of Emhart Corp (ME) Canal Street South Hadley MA 01705
J. Craig Scotland . . . . (413) 536-1610
Thomaston Mills 115 E Main Street Thomaston GA 30286
David Wright, Rec. Fab. Mgr. . . . . (404) 647-7131/TX:203-804511
Thomson Natl.Press Co.(M) 115 Dean Avenue Franklin MA 02038
Karen K. Lapre, Adv. Dir. . . . . (617) 528-2000/TX:5106014267
Toko Ferrite Co., Ltd. (MID) 342 Madison Ave Suite 1418 New York NY 10173
Mr. Yuji Hoshina, Gen. Mgr. . . . . (212) 599-2779/TX:ITT:420071 TTCNY
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Transfer Monogram Co.,Inc. 2614 W. North Avenue Chicago IL 60647
Chuck Weisz, V.P. . . . . (312) 772-5200
Trans World Tanning Co. P.O. Box 27 Mercersburg PA 17236
Kurt H.Schuchardt, Pres. . . . . (717) 328-5458
JOHN G. TREACY & CO. INC. (M) Rte 611 P.O. Box 175 Mt. Bethel PA 18343
John Treacy,Pres. . . . . (717) 897-7101/(800) 451-1852
TRIDENT IND. PRODUCTS 8555 West McNab Road Tamarac FL 33321
Nancy Sinram, Sales . . . . (305) 726-0270
TRW Fasteners Division (M) 265 Third Street Cambridge MA 02146
F.A.Wright, Product Mgr. . . . . (617) 494-5500/(800) FASTEN-1

U

United States Box Corp. (M) 1296 McCarter Hwy. Newark NJ 07104
Tom Kossof, V.P. . . . . (201) 481-2000/(718) 387-1510

United Thread Mills Corp. (D) 250 Maple Avenue Rockville Centre NY 11570
Ira Henkus, Sls.Mgr. . . . . (516) 536-3900
Universal Strap Inc. (M) Industrial Drive P.O.Box 40 Jackson WI 53037
John Seidler, V.P. Sales . . . . (414) 677-3641/(800) 558-1709

V

Velcro Usa Inc. 406 Brown Avenue Manchester NH 03103
Donald B.Torbich,Mktg.Mgr. . . . . (603) 669-4892
Vinex Corp. 119 West 25th Street New York NY 10001
Peter Zierer, Pres. . . . . (212) 463-8326
VOLUNTEER LEATHER CO. (M) Kefauvier Drive Milan TN 38358
Tom Griffin, VP Sls/Mktg . . . . (615) 367-8261

W

Waterbury Buckle Co. (S) 952 S Main Street Waterbury CT 06795
David Dalton, Gen Sls Mgr . . . . (203) 753-1161/TX:962484
Wellington International,Inc. P.O. Box 923 Newburyport MA 01950-5623
Joseph Smidt, Pres. . . . . (617) 462-2288/TX:95-1322 SIRVAL
West Coast Laminating Corp. 1820 Embarcadero Oakland CA 94606
Nick Balas,Technical Mgr. . . . . (415) 534-0944
Western Plastics 1020 East 14th Place Los Angeles CA 90021
Henry Kaufman, Pres. . . . . (213) 748-7388
Western Supplies Co. (M) 2920 Cass Avenue St. Louis MO 63106
A.W. Altvater, Jr., V.P. . . . . (314) 531-0100
Wickett & Craig Ltd. 100 Bayview Avenue Toronto Ontario M5A 3R6 Canada
Peter Stewart/Brian Andrews . . . . (416) 364-8205
The Wirewright Corp. (MIED) 528 N. Fries Avenue Wilmington CA 90744-5597
Ron Winger, Pres. . . . . (213) 637-7400/FAX (213) 835-7771
Wood & Hyde Leather Co.,Inc. (M) 68 Wood Street Gloversville NY 12078
Paul Cordone, Sls.Mgr. . . . . (518) 725-7105
Worcestor Tool & Stamping (M) 10 Hankey Street Rochdale MA 01542
Karen Magnuson, VP . . . . (508) 892-8194
WORLD TRADING INC. (IED) 121 Spencer Plain Road Old Saybrook CT 06475
Paul Bazzano, Pres. . . . . (203) 399-5962/(800) 777-7707/FAX: (203) 399-5714
Worthen Industries Inc. 3 E. Spit Brook Road Nashua NH 03060
Irene Maslanka,Cust.Serv.Mgr. . . . . (603) 888-5443/(800) 258-1757
W. PEARCE & BROS. INC. (I) 38 West 32nd Street, #604 New York NY 10001
Chandler S. Lowell, Jr. . . . . (212) 244-4595/FAX: (212) 564-0263

Y

YKK U.S.A. INC. (M) 1306 Cobb Industrial Marietta GA 30066
Mr. Kitano, Pres. . . . . (404) 427-5521