



# ALLPI QUARTERLY NEWSLETTER

Leather for Health, Wealth and Luxury!

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## LLPI was Re-branded to Africa Leather and Leather Products Institute (ALLPI)

In order to enhance its global outlook and to widen its mandate inline with the continental dynamics, for example the COMESA-EAC-SADC Tripartite, AUC Agenda 2063, Sustainable Development Goals(SDG), Rising Consumption of Synthetic based footwear and products, and Corporate Social Responsibility (CSR) among other factors, it was proposed to rebrand the LLPI to ALLPI.

The Board of Directors of LLPI recommended that the institution should in its effort to rebrand reflecting its Regional and International status, as stipulated under LLPI Charter 9(6), 27(1) to be known as African LLPI. The Board's recommendation to rebrand LLPI as Africa Leather and Leather Products Institute was approved by the COMESA Policy Organs Meeting that was held in Lusaka, Zambia, 26th October – 3rd November 2017.

The rebranding of the Institute will give a chance for non-COMESA countries to join ALLPI for the development of their respective leather sector.



Partial View of the Re-branding of Africa Leather and Leather Products Institute (ALLPI)

## ALLPI's Annual Regional Consultative Forum 2017 Concluded with Success!

Africa Leather and Leather Products Institute (ALLPI), formerly known as COMESA-Leather and Leather Products Institute, held its Annual Regional consultative forum from 13 to 14 December 2017 at David Livingstone Safari Lodge and Spa, Livingstone, Zambia.

The Forum organized under the theme "Hastening Technology Transfer & Trade promotion with a focus of Transforming from Commodity to Product Dependence" brought together 66 participants drawn from National, Regional

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MARCH 2018**



**Prof. (Dr.) Mwinyikione Mwinyihija, Executive Director of ALLPI**

*Dear Esteemed Readers,*

*Welcome to the last Quarter Newsletter of 2017!*

*With 2017 now behind us, I am pleased to share with you some of the milestones already accomplished during the ending year whilst highlighting of some of the major activities of the Fourth Quarter.*

*Some of our most impressive accomplishments during the year encompassed; the technical assistance given to 14 COMESA Countries, Sending ALLPI Team of Experts to each country to strengthen leather development activities; training of more than 500 personnel from private and public sectors in leather technology and related domains; Developed 29 course outlines designed to support the capacity building internal to ALLPI and across the region; signed and revised 8 MOUs with various Universities which include Bahir Dar University of Ethiopia, Kenyatta University of Kenya, Bahri University of Sudan and Sudan University of Science and Technology, Development Partner, Government Ministry and Leather Sector Association; Offered Consultancy services to DRC, ITC, Djibouti, Malawi and Madagascar; Submitted number of proposals to COMESA Countries and International Organizations; Participated in 6 Inter and Intra Trade Promotion both regionally and Internationally; Developed 3 Strategy and Policy documents to support Member States; publication and dissemination of ALLPI Quarterly Newsletters; Purchased equipment to support service centers in Malawi, Zambia and Zimbabwe; It was another milestone achievement for ALLPI after it was certified to QMS ISO 9001:2015 and EMS 14001:2015 status from Quality Management System ISO 9001:2008 and the Environmental Management System ISO 14001:2005 after a series of thorough auditing, etc....*

*In the final (fourth) quarter, we continued to heighten our activities as you may witness from the contents of this Fourth Quarter Newsletter.*

*We appreciate the support, feedback and information provided by those of you who participated in our activities, and kindly accept our appreciation for your collaboration with continued hard work and dedication. We value the insights you shared with us all through 2017.*

*Happy New Year to all of you and we look forward to seeing further strengthened collaboration and support in 2018!*

**Prof. Mwinyikione Mwinyihija, Executive Director**



*Partial View of the 11th Stakeholders Consultative Forum 2017, Livingstone, Zambia*

and International Partners in the leather sector from 14 Eastern and Southern African countries (Burundi, Democratic Republic of Congo, Eritrea, Ethiopia, Kenya, Malawi, Mauritius, Rwanda, Sudan, Swaziland, Tanzania, Uganda, Zambia and Zimbabwe) and Partner Organizations representatives from ITC, India, Italy, Turkey and UK.

H.E Dr. Abdo Daoud Suliman, The State Minister of Industry, Republic of Sudan and Mr. John Mulungoti, Director of Industry- Zambia representing H.E. Ms. Margaret Mwanakatwe, Minister, Ministry of Commerce, Trade and Industry, Republic of Zambia, graced the occasion by their presence and officially open the Forum after welcoming participants and delivering opening speech.



*Group Picture of participants with the Guest of Honor*

Prof. Mwinyikione Mwinyihija, Executive Director of ALLPI, also welcomed all the participants and gave highlights on the major activities that the Institute has implemented in 2017 that are geared towards the transformation of the leather sector in the region.

Among the major activities conducted during the forum are presentations on Tanning clinic from raw hides and skins to high quality finished leather, ready for the premier fashion shows of Milan, Paris and New York; B2B Meetings, mini

exhibition of leather and leather products from ALLPI member States SMEs, sharing of the regional leather sector success stories; ALLPI supported research projects progress reports from three Universities (Dedan Kimathi University-Kenya, Makerere University Business School-Uganda and National University of Science and Technology-Zimbabwe), identifying key challenges and interventions towards achieving sustainable regional leather sector development, award giving and celebrating ALLPI re-branding and certification

Finally participants after making recommendations on areas of focus in 2018 ALLPI activities; vote of thanks and completing the workshop evaluation form the forum was officially closed.

The summary of the evaluation forms showed that 97% of the respondents ranked ALLPI's interventions towards leather sector development as very good and excellent; and 94% confirmed that the forum met their expectations.

BASF, Gruppo Biokimica Company and Ethiopian Airlines were silver sponsors of this (2017) forum.

## The 33rd Meeting of the Board of Directors of ALLPI Held



Partial View of the BoD Meeting of the Africa Leather and Leather Products Institute (ALLPI)

The African Leather and Leather Products Institute's (former COMESA/LLPI) Thirty-third Meeting of the Board of Directors was held in Livingstone, Zambia at David Livingstone Safari Lodge and Spa on 11th – 12th December, 2017. The Meeting was attended by the Board Members from Ethiopia, Malawi, Rwanda and Uganda.

The Board examined the Institute's January to November 2017 Budget Performance and Work Activities Report as well as the 2018 Proposed Budget and Work Plan. The Board took cognizance of the progress that ALLPI has achieved against its set annual targets that are informed by its Strategic Plan (2016 – 2025) and Annual Plan for 2017. The Board also noted that the Institute's 2018 proposed Budget and Work Plan that was discussed

and endorsed during the 32nd Board Meeting was further approved by the relevant Committee and gained the Council of Ministers endorsement.

The Board provided necessary Recommendations and Decisions for the Institute's consideration and guidance for further strengthened activities and achievements in 2018.

The Board also expressed its appreciation and satisfaction for the continued excellent performance that the Institute is registering as can be witnessed from the Performance Report and the very positive feedback given by Member States during the different COMESA Committees and Council Meetings.

## Africa Leather & Leather Products Institute participated in Africa 2017 Forum

Africa Leather & Leather Products Institute participated in Africa 2017 Forum held in Sharm El Sheikh, Egypt from 7th – 9th December 2017.

The Forum was held under the high patronage of H.E. Abdel Fattah Al Sisi, president of Egypt.

The forum was organized by Ministry of Investment and



Partial View of the Africa Investment Forum 2017, Egypt



International Cooperation of Egypt and the COMESA Regional Investment Agency (RIA).

Africa Leather and Leather Products Institute was represented by Mr. Nasir Mahmoud Talab, Regional Cluster Development Management Expert.

The 2017 edition builds on the success of the inaugural Africa 2016, which saw participation of 6 Heads of State and more than 1,000 delegates from 45 countries. This year the program has been enhanced with exclusive Presidential Roundtables with Africa leaders and CEOs as well as a Young Entrepreneurs Day.

#### Pillars of the forum:

The forum was driven by three major priorities:

##### 1. Investment for Sustainable Development :

This segment looked at how to bring about sustainable development that is by investing in a way that is geared for long term and delivering solutions that cater of the challenges of tomorrow.

##### 2. Job Creation:

Creating jobs for the people in general and youth in particular is the government s biggest challenge across Africa today and the governments have to gear up with what being tagged as the fourth Industrial revolution.

##### 3. Inclusive Growth:

This segment focus on solutions to ensure that prosperity is shared and that young rural women and lower income segments of the society all partake in the continent's growth story the entrepreneur segment of the forum will be key to harnessing the opportunity of Africa's young talent.

H.E. Sindiso Ngwenya COMESA Secretary General gave and overview on the investment opportunity in COMESA region and he point out to ALLPI as one of successful COMESA institutions and it tangible results in the region and he mentioned the leather sector as one of promising area in term of investment and trade.

#### Recommendations:

- » Strengthen the regional economic integration;
- » Encourage the new investments in Africa for economic growth and development;
- » Establishment of join infrastructure projects for consolidation of investment and the intra trade in Africa;
- » Engagement of the private sector and youth in formulation of the economic, trade and investment policies to reflect their interested in these policies;
- » Encouraging the role of the African private sector in increasing the investment in Africa;
- » Implementing incentive policies for entrepreneurs and youth and create flexible and affordable finance means, currently they mainstay of the African economy;
- » Enabling women in all economic activities because they consider as one of the active factor of development in Africa and economic stability;
- » Encourage the investment in education;
- » Develop new policies to attract the investment in the rural areas.

### ALLPI Upgraded its Certification to the 2015 Version of ISO QMS and EMS

It is to be recalled that ALLPI had been certified of the Quality Management System ISO 9001:2008 and the Environmental Management System ISO 14001:2005 in November 2015.

Due to the ever changing business and operational environment, there was a need to upgrade and adapt to the recently revised Quality and Environmental Standards. The current Environmental and Quality Standards mainly inculcates the risks and opportunities of our daily activities.



After the Certification/Surveillance Auditors intensive assessment of the Institute's operation against the new standards, they confirmed its validity for the new certification.

Therefore, ALLPI is now certified of QMS ISO 9001:2015 and EMS 14001:2015 since December 2017.

The certification will enable the Institute to facilitate its operations at its Headquarters level and at Member States level to facilitate its operations in

a better way.

#### Sudan Leather Development Experience Sharing Mission to Ethiopia

A Team led by Deputy Head of COMESA Coordinating Unit of Ministry of Trade of Sudan Visited Different leather development related institutions in Ethiopia and held a discussion from December 18-22, 2017.

The general objective of the visit was to share experiences and create Networking with different institutions focusing on leather development and COMESA related activities in Ethiopia.

The Mission visited and held a discussion with Leather Industry Development Institute of Ethiopia (LIDI) the first day to get experiences regarding the leather development policy and support areas of the Government of Ethiopia. The Team was hosted by the representative of Director General of LIDI and Visited the facilities of LIDI in supporting the industry like Model tannery, Model footwear factory, model Leather garment and accessories and research laboratory divisions in which the sector supported based on the demand and recommendations.

The visitors were impressed by the Government commitment to support the Leather industry. The Team also got information about African leather and Leather Product Institute activities in general and the Sudanese leather development support activities as a member states in particular. The Team held a discussion with Ethiopian Ministry of Trade to get information about the



fruitful discussion and visit to the premises in creating networking among Sudanese leather manufacturing industries. The Team also visited one of Ethiopian shoe producers that exports to different parts of the world and got information about the status and experience of Ethiopia in manufacturing and export of footwear.

In general, the team got information about the policies of the Government of Ethiopian towards leather sector development and the COMESA Free Trade Area (FTA) activities. The visit to different actors in the manufacturing of leather gave them information about the status of leather sector development in Ethiopia. At last, the Team



Partial View of the Sudanese Delegate Visit to Ethiopia and Africa Leather and Leather Products Institute (ALLPI)



COMESA Free Trade Area activities and WTO accession stage of Ethiopian and shared the status of Sudan at this particular time. The future plan in penetrating and create networking of the market in the region was in a discussion agenda. To get experience about Cluster development especially in leather sector in Ethiopia, the Team visited the Ethio-International Footwear Cluster Cooperative Society (EIFCCOS) and had a

was hosted by Executive Director of African Leather and Leather Product Institute Prof. Mwinyikione Mwinyihija for the observation and windup meeting and got the way forward message for the sustainable activities in the future.

#### COMESA/LLPI Conducts Mission to Mauritius to Undertake Situational Analysis of the Leather Sector



ALLPI Visit to Mauritius Assessing the Situational Analysis of the Leather Value Chain



COMESA-Leather and Leather Products Institute's Expert Team led by its Executive Director, Prof. M. Mwinyihija and composed of Prof. Mekonnen Hailemariam, Institutional Capacity Development and Consultancy Expert and Mr. Harrison Mungai Leather Value Chain and Tannery Expert, conducted mission to Mauritius from October 1 to 7, 2017 to undertake situational analysis of the leather sector, identify Mauritius competitiveness and its comparative advantage in the leather sector, identify key stakeholders of the leather value chain and analyze their interlinkage towards the development of the sector; assess the operational status of SMEs both in leather processing, footwear and garments and evaluate market dynamics in local, regional and global trade,

The Expert Team started its activities by an introductory meeting held at the Ministry of Industry, Commerce and Consumer protection. Participants of the discussion were officials from the Ministry of Industry, Commerce and Consumer Protection (Industry Division); Small & Medium Enterprises Development Authority (SMEDA); Ministry of Business, Enterprise and Cooperatives and Ministry of Foreign Affairs, Regional Integration Division. The discussions focused on Leather sector current performance at regional and global levels, the current status of the Mauritius leather sector development, lessons that can be learned from other COMESA countries experiences and interventions that could accelerate the growth of the Mauritius leather sector. The Team then conducted site visits to a commercial

tannery (Luxor Tannery- the only one in Mauritius), large and small leather sector enterprises, Small and Medium Enterprises Development Agency and Mauritius Institute of Training and Development in charge of all vocational and professional trainings.

The Team held a debriefing session on October 6, 2017 with officials from the Ministry of Industry, Commerce and Consumer Protection (Industry Division); SMEDA; Ministry of Business, Enterprise and Cooperatives, Mauritius Bureau of Standards, Mauritius Enterprises Association, and others, during which major findings of the Team were presented and an in-depth discussion was held including the way forward. The Team pledged to submit a complete final report in one week time. As a closing remark of the debriefing session, Mr. Marcel Lan Pin Win, Principal Analyst, Ministry of Industry, Commerce and Consumer Protection (Industry Division), thanked COMESA/LLPI for all the support LLPI has given to the Ministry. In his remarks, the Executive Director of COMESA/LLPI Prof. Mwinyihija expressed his heartfelt appreciation and gratefulness for the exemplary hospitality and efficient organization of the mission activities by the Ministry. He reaffirmed COMESA/LLPI's continued support for the Mauritius leather sector development including the formulation of country's leather sector strategy that will serve as a roadmap for enhanced value addition, increased productivity, quality improvement and market access in the leather sector.

#### ALLPI Mission to Sudan

The Team of Experts of ALLPI led by Executive Director went to Khartoum Sudan from 12th – 22th November 2017.

The objective of the visit was:

To conduct advanced Cluster and Incubation Management Training Workshop for Stakeholders in Sudan;

- » To Give Leather value chain Traceability system training
- » To Review Sudan Leather Value Chain Strategy document and plan next activities
- » To Visit and discuss the implementation issues in different government institution of Sudan

Among the activities conducted, Advanced Clustering and business Incubation design and implementation Training was given to more than 26 participants from different government institutions (National Leather Technology centre (NLTC), Federal Ministry of Industry, Ministry of Industry and investment – Khartoum, Ministry of HR and Labour-Khartoum State, Leather Incubator, Karari Vocational Training Centre, Sudan University, Sudanese Standards and Metrology Organization, Footwear designer, North Kordufan State - community college, Sudanese standards and Metrology) participated in this particular workshop and the certificate was issued for each participants.

was conducted by participating the institutions from Academia, Government and private sector and the way forward activities were planned.

During the mission, visit and discussion with different support institution was also conducted Some of the visited institution:

- » Meeting with General Manager of IRADA
- » Meeting with the Director General Ministry of Human development and Labour
- » Meeting with the Director of Africa City for Technology
- » Visiting Karari Vocational Training Centre
- » Discussion with HE. State Minister of Human Development & Labour- Khartoum State
- » Discussion With HE State Minister of Industry & investment - Khartoum State
- » Discussion with Deputy Dean Sudan University of Science and Technology
- » Discussion with the Director General of National Leather Technology Centre ( NLTC)
- » Discussion with HE state Minister of the Federal Ministry of Industry
- » Visiting Sudan University of Science and Technology Incubator



H.E Eng. Abdela Hamid, Minister, Ministry of Industry and Investment - Khartoum State, during the conclusion of the Advanced Cluster Management Workshop

Leather Value Chain Traceability System training was conducted also to the same institutions and including officials from Ministry of Livestock, Animal Resources and Fishery of Sudan.

Revision of Sudan Leather Value Chain strategy

The meeting conducted with IRADA which is the Micro Finance Arm for Bank of Khartoum have some kind of contact with SMEs in all Sudan States. The Team came to know that the role of IRADA in leather sector by helping some SMEs in marketing their products. During the discussion in relation to cluster development activity ALLPI promised to help in technical and IRADA can support in financial term.

During the Meeting with the Director General of Ministry of Human development and Labour, the discussion was mainly about the RISM support to Karari Vocational Training Centre in terms of the tender of purchasing the equipment and tools. The director general of the ministry made a proposal to make Karari Vocational Training Centre for leather and leather products training.

The Meeting with the Director of Africa City for Technology focused on the development SMEs in all sectors including

leather sector. The director informed the existence of informal cluster in west Omdurman (Abu Zaid Area). The justification behind the formulation of this cluster is to help the people move from their original areas due to various reasons. They specialized in making MARKOOB the traditional shoes in SUDAN and the city wanted to train these people to improve their production quality and to increase their productivity and provide them with the needed equipment.

During the discussion made with Kerari Vocational Training Centre The Director of Kerari informed about the update regarding the recommendations of ALLPI in developing curriculum and to make link between Kerari and the Africa Leather City by offering them the training they request. SMEs focal point is Kerari and it will be the training for the cluster, increasing the number of the trainers in Kerari. The Centre will also work to create link with the Incubator and NLTC.

Discussion with H.E. Minister of Human Development & Labour- Khartoum State was mainly focused on the efforts done by ALLPI and wish all the programs for Sudanese leather sector will take place and promise of his personal support to ALLPI as leading body of development of Sudan's leather sector.

Discussion with H.E State Minister of Industry & investment - Khartoum State mainly focused on Promotion of the Khartoum State leather park for FDI by ALLPI and ALLPI will going to promote this park to some

investors in Turkey and India.

Meeting with Deputy Dean Sudan University of Science and Technology mainly focused on the networking activities with the ALLPI mission to Sudan and the meeting with Africa City of Technology.

Discussion with the Director General of National Leather Technology Centre (NLTC) mainly focused on the objectives and mandate of NLTC and the main activities regarding R&D and it can follow the incubator model in creating revenue by providing services in R&D and the tests in leather sector all through the leather value chain. ALLPI can support in designing the layout of the tannery if you request that as well as we can help in the formulation a strategy for NLTC.

During the discussion with HE State Minister of the Federal Ministry of Industry importance of the leather sector and the role it can play in Sudan National Economy was raised and the Federal Leather Council and the role it can play in developing this sector and they discussed about the good practice in the region and the ideal model in this regard is Kenya Leather Development Council (KLDC).

Visiting Sudan University of Science and Technology Incubator as one of the important entities in the leather sector in Sudan particularly for the SMEs and the incubator has shown progressive development from the previous visit.

### Chemical Analysis Report for the Tanning Industry in Kenya Validated

Africa Leather and Leather Products Institute (ALLPI) under the Switch Africa Green project had requested the Kenya National Cleaner Production Centre (KNPC) for collaboration in the implementation of some activities under the project Promoting Sustainable Consumption and Production Practices and Eco-entrepreneurship: Greening SMEs Leather Clusters and Leather Tanning in Kenya to be supervised by the Executive Director of Africa Leather and Leather Products Institute in collaboration with the Cluster Development Expert (Focal point of the project in ALLPI).

To achieve the set objective, KNPC was tasked to assess and establish chemicals usage inventory for the participating tanneries and interrogate them in line with the REACH Directives on aims to improve the protection of human health and the environment through the better and earlier identification of the intrinsic properties of chemical substance in the leather development and develop a roadmap for guiding the enterprises in the Kenya Leather Value Chain to meet minimum national environmental regulations.

The objective of the workshop was therefore to present the KNPC finding to stakeholders and charting the way forward.

The workshop was held on 29th November 2017 at Utalii Hotel, Nairobi and was co-organized by Africa Leather and Leather Products Institute (ALLPI) and Kenya Leather Development Council (KLDC)

The Executive Director (ED) of Africa Leather and Leather Products Institute Prof. Dr4 Mwinyikione Mwinyihija was represented in the event by Mr. Harrison Mungai who is ALLPI Leather Value Chain and Tannery Expert who conveyed Director's greetings and shared ALLPI's Vision, Mission and Mandate with the participants (Stakeholders). Kenya Leather Development Council was represented by Mr. Charles Mwangi and Mr. Onyango G.J. Mr. Charles Mwangi gave a welcoming address.

Mr. Evans Nangulu represented the Kenya National Cleaner Production Centre (KNPC) and was the key presenter of the report.



Partial View of the Validation Workshop

## Recommendations and the way forward made by stakeholders during the validation workshop.

### Management of solid waste, water and energy in the leather processing for the assessed tanneries

For the participating tanneries to remain competitive in the emerging markets for quality leather and environmental friendly, there is need for the management to implement various options generated during the assessment. These are outlined as follows:

#### 1. Solid waste from the tanning process.

- » Tanneries under the support of the KLDC should partner with slaughter houses and create awareness on proper flaying to avoid the pre-slaughter defects.
- » Tannery management to be trained on tannery operations to reduce wastages at different levels.
- » Tanneries to engage a qualified and experienced Leather Technologist (for Production) and Chemist (for Environmental Management);
- » Raw hides and skins trimmings and fleshings should be quantified various purposes i.e. sold for animals (dogs) feed production and for production of gelatin.
- » Replace current lime fleshing with green fleshing which is lime free.
- » Enhance quality checks at source on the hides and skins before procuring them and create awareness to the farmers on good animal husbandry practice.
- » Tanneries to develop and actualize an internal policy on waste management

#### 2. Chemicals from tanning process

- » Recycle liming liquor for reuse rather than discharge after one-time use.
- » Evaluate the possibility of reusing the chrome liquor before releasing it to the drying beds or chrome recovery plant.
- » Ensure good housekeeping in chemicals stores
- » Install a quantification system for chemicals used in different stages of leather processing.
- » Consider replacement of chemicals classified under REACH directive.
- » Ensure elimination of spillage and leakages
- » The tanneries should continuously train and retrain staff on chemical safe use management
- » Tanneries to develop and actualize an internal policy on sustainable chemicals management

#### 3. Water management and waste

- » Evaluate the possibility of application of Emerging India's waterless tanning technology developed by Central Leather Research Institute of Centre for Science and Industrial Research
- » Measure and monitor water use in inflow, effluent, different production areas and equipment.
- » Understand, calculate and benchmark the water footprint of the tannery.
- » Use water-efficient production processes such as low float length (for example use 83% instead of 100%), fewer washing processes (check it by conductivity); and use modern drums instead of paddles and pits.

- » Install water-efficient machines and technology (good drums and machines for splitting, sammying).
  - » Use high-pressure cleaners and cleaning machines for floors, drums and equipment.
  - » Optimize chemical consumption (no overdosing), use of biodegradable chemicals
  - » Have a material-overlapping view for innovative and sustainable treatment technologies for water reuse and recycling. Use methods with low energy consumption, low chemical use, less sludge and lower air emissions.
  - » The tanneries should continuously train and retrain staff on water and wastewater management.
  - » Tanneries to develop and actualize an internal policy on water management
- #### 4. Energy management
- » There is need for installation of photo sensors to switch Off/On the lights when necessary
  - » There is need to install translucent iron sheets in the production floor in order to increase the amount of light and act as the source of light during day time.
- 
- » The tanneries should evaluate the use of occupancy sensors and /or come up with lighting awareness campaigns and training with appropriate labeling for panel to switch of lights whenever not in use.
  - » There is need for tanneries to carry out motor loading survey for the whole facilities within
  - » A detailed survey of the Power factor and installation of correction units on the motor panels (at source) should be done for especially those old motors whose plate have been corroded by salt.
  - » There is need for Installation of Variable Frequency Devices on the existing big motors
  - » Management should put in place a motor rewinding policy and replace the old motors with more energy efficient motors
  - » The tanneries should continuously train and retrain staff of energy management
  - » Tanneries to develop and actualize an internal policy on energy management
  - » The workshop was attended by 19 participants with majority drawn from tanneries within Nairobi and its environs.

### COTANCE Demands Protection for the Term 'Leather'

COTANCE has written to the European Commission to complain about companies' misuse of the term leather in their statements to consumers about synthetic materials. The companies that come in for criticism include sports brand Nike for the coated leather fibre material it has called 'Flyleather'.

Writing to Elzbieta Bienkowska, the European Commissioner for the internal market, industry, entrepreneurship and SMEs, COTANCE secretary general, Gustavo Gonzalez-Quijano, enclosed a statement that his organisation had drafted with trade

union organisation industriAll-Europe.

He told the commissioner: "There are countless examples of the abusive use of the term 'leather', and the imagination of abusers has no limits. The threat is real and the risks for our businesses, workers and consumers cannot be ignored."

<http://www.aplf.com/en-US/leather-fashion-news-and-blog/news/37505/leather-cotance-demands-protection-for-the-term-leather>

## Leather falls behind: Dr. Mike Redwood Comment

At the recent Leather & Sustainability in Retail conference which ILM and BLC co-hosted in London on November 16, one of the delegates

was quoted "we would like to see much greater levels of transparency from our suppliers (tanners) in terms of the chemicals used in the manufacture of leather. The industry falls behind other industries, such as the cosmetics sector for example, where there is much more openness about what is contained in each product."

This was from a major brand which mostly sources in Europe, where we are regularly told we have the best tanneries in the world with respect to ethics and integrity. I have heard similar comments from other brands about transparency in raw material supply, where some European tanners will not disclose the origin of the raw material being used.

There are a couple of excuses for this. On the one hand, some European tanners fear that advertising their hide sources would let aggressive competitors jump in and buy them. On the other hand, when I was hired into Santa Croce a long time ago part of the rationale was that if I left the company, as a foreigner, I would be less likely to go to a local competitor, taking their sourcing secrets. They had spent years building up complex supply chains and wanted to protect them.

Frankly, some decades on I do not believe either argument works. Relationships have simplified and strengthened, and if that is not the case then there is a management failure. Good suppliers of merit should by now be secure and trusted, be they in Europe and elsewhere. Equally customers should be trusted.

Icebreaker merino barcodes

In the merino world Icebreaker showed the way forward

*"we would like to see much greater levels of transparency from our suppliers (tanners) in terms of the chemicals used in the manufacture of leather. The industry falls behind other industries, such as the cosmetics sector for example, where there is much more openness about what is contained in each product."*

in 2009 with their "Barcodes" where on every garment the merino used could be traced back to each of their sheep stations, with all of whom they had long term supply deals. I had the chance to stay a few nights on one and found

it outstanding, with a great family, so I know what I am looking for when I buy.

A friend of mine suggested something similar in Germany and in 2012 when Meindl boots launched their Identity range. The leather used to make each boot can be checked back to the local farm in Bavaria where it originated and through the identity number they provide complete information on all suppliers and partners. Each of the boots and shoes in the Identity range thus have a unique "fingerprint". This move from secrecy to openness jumps from mystery into a marketing advantage, and drives forward the business culture of continuous improvement in every aspect. It is really refreshing.

One starts to wonder if those who still choose to be secretive really have something to hide, and whether the response from the brands should actually be not to buy.

One thinks something similar regarding the chemicals. It is very curious as a laboratory test will uncover most things in detail. In fact, the problem with a chromium VI test is that the test can create it, so care is needed. What is the point of secrecy in chemicals? Perhaps the tanners are so dependent on chemical suppliers they do not know. If I were a brand and thought that, again, I would not buy.

This is 2017. It is not 1967. Then we did not understand the issues for the workers with many chemicals nor recognise the harm being done to the environment of many of our activities. The world has moved on, so must the last few tanners that have not been keeping up.

SOURCE : INTERNATIONAL LEATHER MAKERS

#### Manufacturing - Chinese manufacturing may not be moving to Africa all that soon

The promise of Chinese manufacturing moving to Africa increasingly seems like a real possibility. Chinese car factories assemble in South Africa. Mainland footwear companies have expanded into Ethiopia. Chinese entrepreneurs have opened textile plants in Rwanda and other operations across the continent.

But it may be too soon to proclaim Africa the world's next factory. According to a new study by researchers at Peking University's Center for New Structural Economics, few Chinese manufacturing firms are relocating as a result of rising wages in China. And if they are relocating overseas, Southeast Asia, rather than Africa is their preferred destination.

The survey, released this month, "suggests a need for realism on the potential for jobs transfer to low-income host countries," according to the authors Jiajun Xu, Stephen Gelb, Jiewei Li and Zuoxiang Zhao.

The researchers surveyed 640 Chinese firms producing home appliances, garments, footwear, and toys, and employing about 16 million workers. Rising wage costs—wages grew between 9% to 11% from 2005 and 2014 at the factories—were the most cited challenge.

The most common response to rising wages, however, was not relocating to countries with cheaper labor but turning to automation. Almost a third of firms said upgrading technology was their first strategy and more than half said it was among their top three responses.

*"suggests a need for realism on the potential for jobs transfer to low-income host countries,"*

Chinese manufacturers are expected to have the world's largest number of installed industrial robots, about 600,000, by 2018, according to the Industrial Robot Statistics.

Only 6% of firms said relocation of production was their most likely response, and only half of those said they would relocate to areas outside of China. Among 62 firms that had invested abroad or planned to, only two named Africa as a preferred destination. Southeast Asia was a far more likely destination.

Others have also pointed out the obstacles to manufacturing moving from China to Africa. Indermit Gill, director of Duke University's Sanford School of Public Policy points out in a recent blog post for Brookings that the global share of manufacturing value in 2015 was still split evenly between high-income and developing countries, with China accounting for more than half of the contribution of developing countries. Between 1994 and 2015, China's share continued to grow while Africa's has barely budged.

Another commonly stated reason for manufacturing's move to places with cheaper labor like Africa is China's aging population. But China's workforce is still sizable: in 2025 the population of Chinese between the ages of 15 and 64 will be a billion, and will still be almost that number in 2050, Gill points out. "Don't bet on China giving back manufacturing jobs any time soon," he concludes.

#### 8 Countries that Produce the Most Leather in the World

If you're interested in getting to know the 8 countries that produce the most leather in the world, look no further. This list should take care of that. Leather production industry is among the most important industries in the world. We simply depend on leather if nothing else, then for our footwear which is often a direct product of the leather industry. Of course, leather has much more widespread use in our daily lives than that, but our shoes or boots are the simplest and most common examples. And, if you like to read about top producers of various products, including agricultural, be sure not to skip our article on countries that produce the most kiwi fruit in the world!

In order to compile this list of 8 countries that produce the most leather in the world, we have resorted to this World Statistical Compendium for raw hides and skins,

leather and leather footwear 1993-2012. Note that leather production statistics start from page 96. Although any report from 2012 should be considered somewhat outdated, this report is the most complete and up-to-date collection of data currently available to everyone. For our list, we have only considered 2010 preliminary data and 2011 estimates. In other words, we have calculated the average figure for the two years expressed in millions of square feet. Furthermore, we have taken both heavy and light leather from bovine animals, and light leather from sheep and goats into account.

#### 8. USA

Considering 2010 and 2011, total US leather production came to 669.1 million square feet. 61.7 million square feet went on light leather from sheep and goats, while 21.3 million went on heavy leather from bovine animals.

It's clear that US leather industry emphasizes on light leather from bovine animals since 586.2 million square feet of US leather was exactly of this type.

#### 7. Argentina

Like the US leather industry, Argentinian too emphasizes on light leather from bovine animals. They have produced 651.4 million square feet of this type of leather, while only producing 35.1 million square feet of light leather from sheep and goats. Heavy leather production from bovine animals is even less widespread in Argentina as it only amounts to 28.6 million square feet. Total Argentinian leather production amounted to 715.1 million square feet.

#### 6. South Korea

South Korea follows the similar pattern, albeit with even larger discrepancies. Koreans only produce 10.6 and 19.9 million square feet of heavy bovine and light sheep and goats leather respectively. Of their entire leather production which amounts to 1,083.1 million square feet, 1,052.5 million falls off to light leather from bovine animals.

#### 5. India

The fifth spot on this list of 8 countries that produce the most leather in the world belongs to India, but judging by current trends India might soon surpass the country from spot number 4 (if it hadn't already). Indian leather industry produces a total of 1,397.5 million square feet of leather – 52.4 million of which fall off to heavy bovine leather. Unlike previous countries, however, India produces roughly equal amounts of bovine, and sheep and goats light leather. 674.25 million and 670.85 million square feet respectively.

#### 4. Russia

Russian leather production has been declining ever since the early nineties. Russians are still a powerhouse in the leather industry, however, since they produce 1,460.3 million square feet of leather a year. Needless to say, most of it (1,304 million) goes on light leather from bovine animals. On the other hand, light leather from sheep and

goats production only amounts to 118 million square feet, and heavy bovine leather production comes to 38.3 million square feet.

#### 3. Italy

Italy is still the undisputed European leader when it comes to leather production. Italians produce 1,573.5 million square feet of leather a year and 1,119.3 million of that sum goes on light leather from bovine animals. They also produce 401.5 million square feet of light leather from sheep and goats, and 52.8 million of heavy leather from bovine animals.

#### 2. Brazil

Brazil holds a high second spot in the world by leather production. Their entire industry produces 1,832.7 million square feet of leather and almost everything falls off to light leather from bovine animals – 1,721.5 million square feet. Brazil only produces 44.1 million square feet of heavy bovine leather and 67.1 million square feet of light sheep and goats leather, but even that's more than what most other countries in the world make.

#### 1. China

Surprise, surprise! Number one spot on this list of 8 countries that produce the most leather in the world goes to China. Chinese leather industry creates a turnaround of no less than 3,913.1 million square feet of leather – double the amount of Brazilian leather industry. Most of that goes on light bovine leather which is being produced in quantities of 2,364.7 million square feet a year. However, light sheep and goats leather production in China isn't to be trifled with as well. After all, they produce 1,347.3 million square feet of this type of leather. Finally, China also produces 201.2 million square feet of heavy bovine leather – most in the world.

<https://www.insidermonkey.com/blog/8-countries-that-produce-the-most-leather-in-the-world-444872/>



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accessible and convenient for our regional and international partners and clients.

### **ALLPI Vision:**

To be Africa's premier leather sector centre of excellence in the global arena.

### **ABOUT ALLPI**

Africa Leather and Leather Products Institute (ALLPI) was chartered in 1990, with the endorsement of 17 COMESA Heads of State. ALLPI's main Mandate is to support the development of the leather sector in the Region. Over the years the Institute has created strong strategic linkages with Public and Private Sector Institutions in member countries. In addition to this, ALLPI has signed several Memoranda of Understanding (MoUs) with global institutions, in its pursuit to improve competitiveness of the leather sector in Africa in line with global dynamics.

ALLPI is headquartered in Addis Ababa, Ethiopia; and currently its membership encompasses ten countries, namely Burundi, Eritrea, Ethiopia, Kenya, Malawi, Rwanda, Uganda, Sudan, Zambia and Zimbabwe. The Institute has short term plans to expand its operations to Swaziland, Egypt, the Democratic Republic of Congo (DRC) and Madagascar.

The location of its office is strategic, as Addis Ababa is the capital city of Africa, where the African Union and other International Development Partners are located. Furthermore, Addis Ababa is the African gateway to any global destination, which makes ALLPI highly

### **ALLPI Mission:**

To facilitate MSs and connect partners, enterprises and institutions for value addition and competitiveness in the leather sector through Sharing of Knowledge, Adaption and Adoption of innovations at various value chain levels.

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