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PRESENTATION

The Transformational initiative of Africa's Leather Sector
Dependence from Commodity to Value Created Agro-based Products

By

Mwinyikione Mwinyihija, Executive Director,
COMESA-Leather and Leather Products Institute

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By Prof. Dr. Mwinyikione Mwinyihija,

Executive Director

COMESA – Leather and Leather Products Institute (LLPI), P O Box 2358 (Code: 1110),

Addis Ababa, Ethiopia.

Introduction

Commodity is a basic good used in commerce as an input in the production of services or goods. Minimal or no differentiation exists among commodities which are mainly taken from their natural state, and if necessary brought up to meet minimum market place standards. As such, no value addition is undertaken to the commodity. On the other side, a product can be differentiated and value can be added including its branding and marketing. Essentially, products are considered to have emanated from commodities. Characteristically, commodities have potential to experience market volatility. Products derived or processed from agricultural commodities are referred to as end points of agro-industrialization where value addition plays a fundamental role.

To comprehend fully on aspects of value addition of agro-based products it was imperative to review agro-industrialization. As such, Reardon and Barrett (2000) posits agro-industrialization as: “(1) The growth of agro-processing, distribution, and farm input provisions off-farm; (2) institutional and organizational change in the relation between agri-food firms and farms such as marked increase in vertical coordination; (3) concomitant changes in the farm sector, such as the changes in product composition, technology, and sector and market structures.” In a focused approach, Henson and Cranfield (2009) define agro-Industrial sector as the subset of the manufacturing sector that processes raw materials and intermediate products derived from agriculture, fisheries and forestry.

Importantly, it is with this background that a vital agro-industrial segment like the livestock sector is pursued. In particular, the leather industry whose primary raw material is derived from hides and skins, and is considered as a commodity. The intent of processing the commodity to intermediaries and final product of this commodity is to translate the material from putrescible (raw material) to non-putrescible material (semi-processed or finished leather) that currently use more environmentally friendlier technologies (Mwinyihija, 2010). As described by Sautier et al., (2006), the dilemma faced with most agro-industrial based entrepreneurial activities is that they are deemed as informal. This is especially relevant to enterprises at higher levels of the leather value chain such as leather goods and footwear stratum which are still considered as uncompetitive irrespective of the underlying potential (Mwinyihija, 2015a).

Methodology

The methodology adopted for this paper involves designed desk study and analysis of data sets accessed from FAO compendium (2010; 2011) which depicts various stratum of the value chain performance both at country level and globally. To further provide depth to the study, an extensive review and

analysis of the current relevant reports, papers, books and literature were carried with some primary data retrieved from previous research studies carried out by Mwinyihija (2014; 2015b) and Mekonnen et. al., 2014. This was for the purpose of supplementing the secondary information whose availability and quality was sometimes limited. Data was analysed by descriptive statistics. A situation analysis of selected African countries was also undertaken to provide indicators of the leather sector productivity and dynamics within the value chain as indicated in Annex 1.0.

Africa's Leather Sector Profile in a Global Perspective

The leather sector worldwide has depicted, on overall, an improved performance, out shadowing the occurrences in periods of 2009/2010, months of October –December, 2015 and also during the beginning of 2016 (January – May). The prices of raw material and semi processed leathers conspicuously declined leading to bulking of stock in Africa or if exported then done at very low prices. This has been the characteristic of raw materials in the leather value chain where volatility and price oscillation is the norm. However, the price of finished leather and products remained high and were unaffected. Interestingly, during the global glut in 2009-2010 period Africa and Asia as regional economic blocks were least affected during that period, with the domestic markets supporting the leather sector production chains particularly for those enterprises specializing in finished and leather goods domain (Mwinyihija, 2010; 2011). In retrospect, when the prices of the raw materials are highly priced and are beyond the comfort of operational tanneries, they also are exposed adversely to other factors of leather production. In particular affecting the competitiveness of the leather goods and footwear subsectors (National Productivity Center [NPC], 2010). Moreover, prices affect the dynamism of production when related to the supply chains of the leather sector in Africa which apparently has long chains in comparison to other agro-based commodities. For instance, the leather sector chain encompasses different stratum in its long chain such as producers, traders, tanners, manufacturers of leather-goods and footwear. Notwithstanding the pricing factor, Africa has continued to be the basis of raw hides and skins, irrespective of quality and this further complicates the market behavior and demans inherent government policies that encourage and domicile value addition in their development strategies. The oxymoron of Africa's productivity is that it seeks lower prices for leather and leather products when prices are getting even higher (Mwinyihija, 2011). As earlier mentioned, this contradicts global performance where other players of the sector continue to register improved performances.

At the global level, 60% of 23 billion square feet of leather production is directed towards footwear alone (Food and Agriculture Organization [FAO], 2011). Overall, the leather sector depicts a strong growth worldwide with increasing population and consumption per capita (Figure 1). Thus, reflecting on the global level, the graphical representation (covering 1950 to 2030) denotes a high production of shoes that could meet and have even more supplies than the human population growth. The result is conspicuously, increased shoe consumption per capita overtime. This is fundamental observation as it depicts that the demand for footwear continues to grow irrespective of the availability of leather paving way to synthetics covering the ever increasing gap. Currently, the world shoe demand is highly influenced by consumption trends per annum in Europe (>4.0), America (>4.5) and strong Asiatic countries (>2.5) (Mwinyihija, 2012). This is in contrast to Africa's trends whose shoe consumption per capita on average is estimated at 0.85. However, irrespective of the low consumption in comparison to

other advanced economic regions Africa's own production cannot meet the population demand on shoes, thereby, opening the continent to external market entry of cheaper and poor quality shoes (that includes second hand footwear).

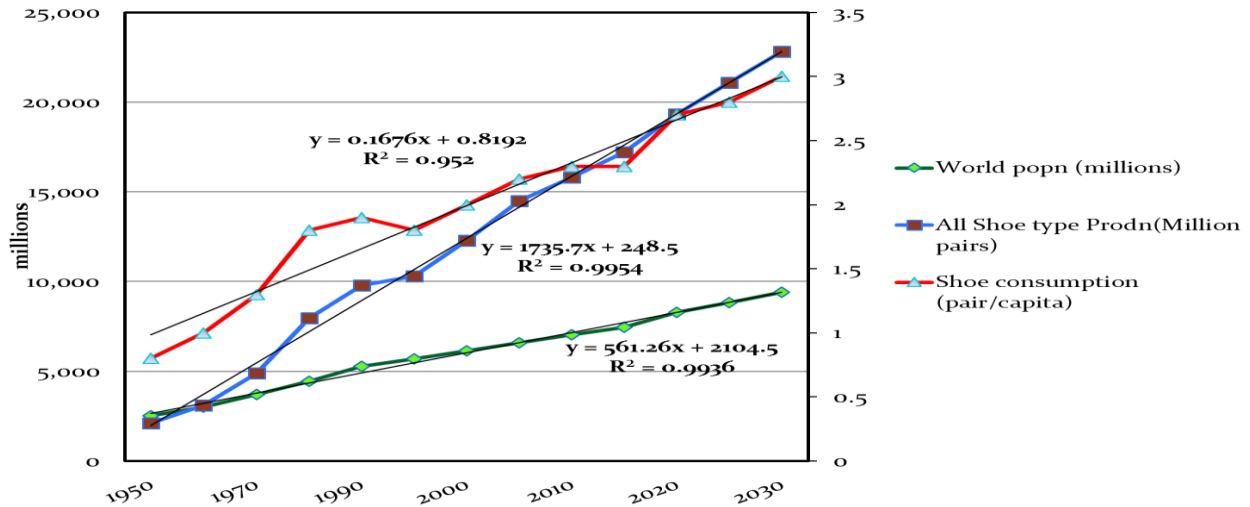


Figure 1: Review and forecasts to opportunities in the global leather sector based on past performances 1950 -2030 (Mwinyihija, 2012).

Global performance of the leather sector indicate an estimated total accruals from leather and leather products to be over US \$120 billion annually with Africa earning a paltry US \$4 billion irrespective of commanding 14% global raw hides and skins market (Mwinyihija, 2015b; FAO, 2012). Comparatively, at the continental level, Asia leads in both consumption of leather products and is currently supported with production levels estimated at slightly over 9 billion of the total of 13 billion pairs of footwear produced globally (FAO, 2011). The major players at this stage in Asia encompasses countries such as China, India, Pakistan, Thailand, and Vietnam whose footwear production is vibrant due the competitive edge that they have established.

Africa is estimated to contribute about 26% (rising from 21% as estimated by FAO in 2011) of the livestock production and 3.5% of the global leather (irrespective of a global share of 14% supply of raw hides and skins mentioned earlier). At most, Africa's export is predominated in addition to raw hides and skins with semi-processed leather (mostly chrome tanned 'wet-blue') annually. Coupled to this scenario, the continent registers high losses within its production and supply chain estimated at 30% (Mwinyihija, 2014). Thusly, Africa conspicuously exhibits missed opportunities for its value addition pathways and creation of positive socio-economic indicators (Decreux & Spies, 2012). Despite the missed opportunities, forecasts are positively indicating that consumption potential in the next 20 years in leather goods and footwear in Africa depicts positive growth potential (Hattingh, Russo, & Sun-Basorun, 2013). However, for this to be realized, Africa's leather sector requires to pay attention to the performance and support of small- and medium-sized enterprises (SMEs). In the leather sector this will revert to fruition towards poor trickling down effect for its hides and skins producers, improve and expand on its market entry, develop appropriate designing skills, attract investment and enhance

technology transfer to explore on 'quick wins' potential in this important agro-based industry. The leather sector has vast unexplored opportunities as a panacea to sustainable development.

In an effort to sustain developmental momentum, African Union Commission (AUC) through its recently launched Strategic Plan (1915-2063) and other related regional economic bodies (e.g. COMESA - Common Market for Eastern and Southern Africa, SADC -Southern African Development Community, ECOWAS - Economic Community of Western African States etc.) have pursued developmental agenda intended to transform Africa towards growth of its agro-based sectors.

Transformational Initiative from Commodity to Product Dependence

Henson and Cranfield (2009) positively assert that there are profound changes taking place with the emergence of agro-industrial enterprises as part of a broader part of agribusiness. This they deem fundamental as the transformation of agro-processing from the informal to formal sector has critical implications for those engaged at various phases of the supply chains including those from primary to the tertiary markets.

Earlier Cook et. al., (2001) indicated that agro-industrialization has the basis of enhancing economic growth, institutional reforms and socio-economic activities for emerging economies such as those of the developing countries. However, Africa is experiencing deficiencies in building strengths to global value chains (GVC) with trading with its own neighbours showing only 11% as compared to Latin America (21%), Asia (50%) and Europe (70%) of the same. Indeed, according to an African Review of Business and Technology journal (April, 2016) with higher level of GVC integration there is potential of 'boosting employment and diverting resources from less productive activities to newer ones.

The African development Bank (AfDB) asserts that for African countries to create 10 – 12 million new jobs every year to absorb the young people entering the job markets, Governments can attract foreign investments lead firms and integrate into the global value chains. To optimize on the functionality of the GVC's, certain limitations are requisite and need to be addressed. This includes infrastructure, technical-managerial skills, operational environment for entrepreneurs encompassing a well-designed platform for intra-trade in Africa. Thusly, by establishing firmer ground to the mentioned limitations Africa can bolster its industrialization initiatives by strengthening its intra-trade by all its members towards a virtuous tied-up link to trade and investments whilst creating value chains.

According to the Africa Report magazine (May, 2016), the potential of value creation based on the four principal economic zones provide the basis of transformation towards emancipation of most countries in Africa from commodity dependence to product processing and trade. For instance, with improving consumption levels and increasing population in the continent and very low production levels, deficits in footwear availability are experienced (Figure 2).

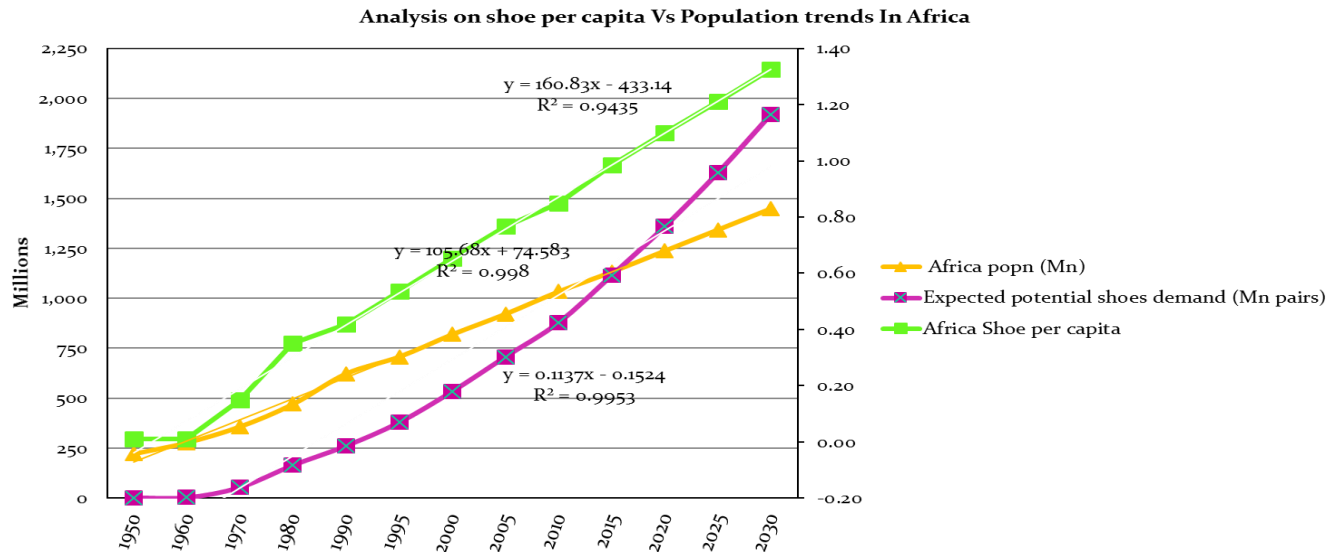


Figure 2: Africa’s Review and Forecasts to opportunities in the global leather sector based on past performances 1950 -2030 (Mwinyihija, 2012)

Africa’s Performance, Innovation and Product Development

Africa has a huge natural resource base which at most remains unexplored as export of raw material remains the norm. However, this observation reflects on the vast opportunities available for Africa and encouragingly, many member states of African Union Commission (AUC) through the regional economic communities have embarked in developing appropriate policies that encompass industrialization, trade and migration (Klavert, 2011). These factors are important in steering towards the realization of regional integration. For example, according to The African Report (2016, May) the four main economic zones spearheading such a venture and operating in Africa encompass the following details (covering 2013 & 2007-11 period):-

- i.) African Maghreb Union (AMU) - population of 53.2million, regional GDP US\$ 340.8 billion with 3% trade in the region.
 - ii.) Economic Community of West African States (ECOWAS) – population of 325 million, regional GDP US\$ 311.7 billion with 9.4% trade in the region.
 - iii.) Economic Community of Central African States (ECCAS) – population of 46.6 million, regional GDP US\$ 81.7 billion with 3% trade in the region.
- and
- iv.) The progressing tripartite free trade area arrangement of Common Market of Eastern and South African States (COMESA) – East African Community (EAC) – Southern Africa Development Community (SADC) – population of 625 million, regional GDP US\$ 1.0 trillion with 10.4% trade in the region.

Indeed, according to World Bank (Press release, 2014), Africa is expected to have a GDP of US\$ 2.39trillion (over the US\$ 1.7 billion registered by 2011) and a growth average of 5% in 2014 and anticipated growth increase of 5.2 % during 2015-16 period.

In Africa, more countries are redefining their economic status (through review of their national GDP's) from low to middle and high performing economies. According to Cilliers, Schünemann and Moyer (2015) only six countries in Africa had economies with GDP larger than US\$ 100billion measured in real market exchange rates which are: Nigeria (536Billion), Republic of South Africa (454 ,Egypt (263 Billion), Algeria (233Billion), Angola (126Billion) and Morocco (116Billion). Others such as Kenya (2015/16), Uganda (2015/16), Tanzania and Ethiopia (2018) etc. are prospecting on reviewing or have already initiated the process of re-evaluating their GDPs towards middle income levels. With such reviews in place, all indications are displaying signs of increased wealth and affluence in most parts of Africa.

The continent draws its strength from a strong agro-based commodity sector which as indicated earlier requires a well strategized value addition initiative with an equally strong regional integration prospective. However, appropriate measures are required for successful value addition initiatives to be attained in Africa (Assey Mbang, 2013). Thusly, the need to harmonize and refocus on specific sectoral policies for development, such as, the leather sector due to its high 'trickling down' effect. These policies which COMESA-Leather and Leather Products has managed to achieve in its member states has provided solid ground in mainstreaming the leather value chains into Government plans effectively. This initiative is in tandem with thoughts expressed earlier by Wilkinson and Rocha (2009) who equally indicated that policies related to agro-industry development should be main streamed with special attention whilst formulating country strategies. Subsequently, efforts by COMESA/LLPI on the matter is starting to yield results with some of the member states beginning to develop budget lines specific for the leather sector development.

Africa's Potential

The productivity of Africa's leather and leather goods market is low whilst the demand for footwear continues to increase annually and projected to respond positively towards 2030 as indicated in Figure 2 above. The lack of servicing this demand is equally demonstrated in the COMESA region that currently requires over 350million pairs per annum with a production of 85million pairs from within its member states (Mwinyihija & Quiesenberry, 2013). The balance of what is not produced is, therefore, sourced from outside the region as illustrated in Figure 3.

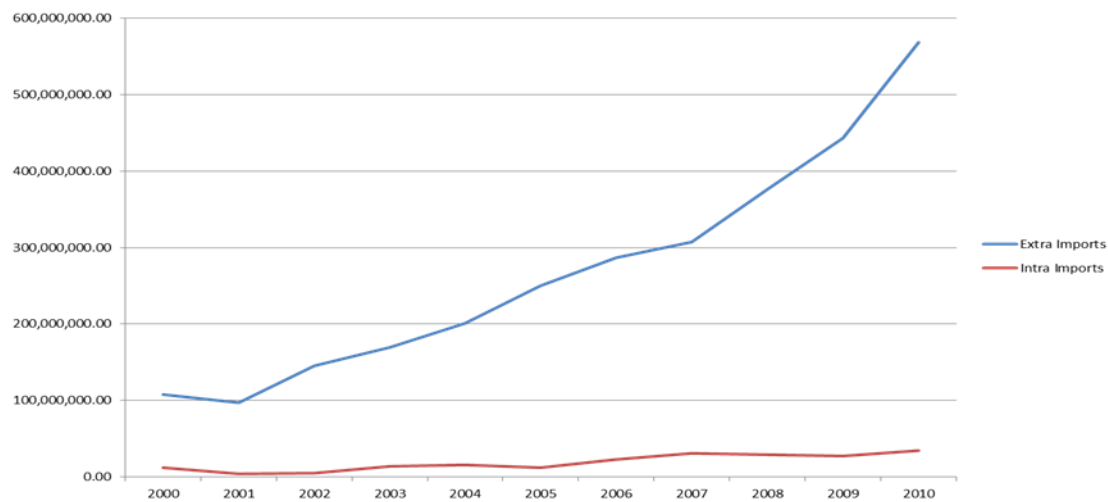


Figure 3. Intra and Extra imports of footwear in COMESA region (2000-2010)

The emerging socio indicators in Africa depict a strong human activity inclined towards sustainable development and growth. For example, studies by Mwinyihija (2013; 2014b) indicated that the prospects of Africa's processing of leather and manufacture of leather goods lies in its strongly engaging youthful entrepreneurs aged between 30 – 39 years old. In contrast, producers who are mostly livestock owners or buyers, butchers (or slaughterhouse owners) and traders (who form the majority of the middleman in the supply chain) are between 49 – 59 years old (Figure 4). Importantly, prowess to entrepreneurship based on age is also dependent to appropriate educational levels and linked potential of acquiring appropriate skills.

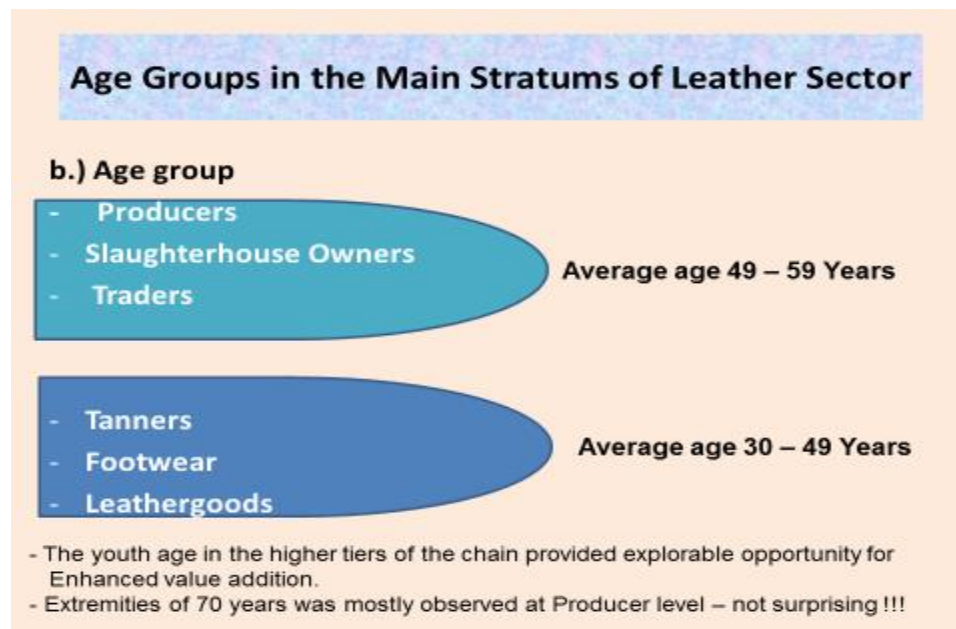


Figure 4: Depiction of Age groups characterized in different stratum of a sample population in Africa's leather sector (n=280).

Scrutinizing closely, levels of age, skills and education in the leather value chain participants is an important factor in demonstrating the prospects of Africa's potential to growth and development. This observation was also shared by Holland et. al., (2013) who attested that there are positive correlations within nurtured relationships related to educational levels, relevant specialization and economic development. Indeed, in Africa it is worthy to consider the prospects of moving away from commodity to product (value added) dependence. The platform for such a transformation is already in place as demonstrated by Mwinyihija (2014) who observed good literacy levels (>80% with minimum of high school education) amongst the youthful practitioners currently practicing in the higher stratum of the leather value chain (tanning, footwear and leather goods). This quantum provides an important ingredient to developing highly skilled manpower and improved perceptible levels. Moreover, the same study indicated that the majority of the core stakeholders within the leather value chain have acquired experience varying between 5 -30 years which further solidifies their strength in their practice and prepares them for enhanced value addition initiatives that is required in the anticipated transformation.

The ultimate result will, therefore, be ease of facilitating technology transfer and capacity building to explore on innovation and product development.

In further characterizing the structural set up of the leather sector stratum, the same research study by Mwinyihija (2014) elucidated that Africa is reminiscent to potentially setting-up lucrative businesses. Indeed, most enterprises are between small to medium level and are managed as individual or family administered units in the leather sector in Africa. As such, not surprisingly, the focus on Africa's development of the leather sector is geared towards strengthening of SME's. According to Fjose et al., (2010) the majority of successful enterprises at the global arena are SMEs. The potential within SMEs, if well managed, indicate positively on their potential to stimulate rapid economic growth, employment opportunities, generation of revenue and bring about rural development (Reddy, 1991; Priyanath, 2006). In particular, Mekonnen et al., (2014) studied the performance of leather sector SMEs in selected COMESA member states and identified machineries, availability of raw material (finished leather), finance and market access as the major constraints in the region (Figure 5).

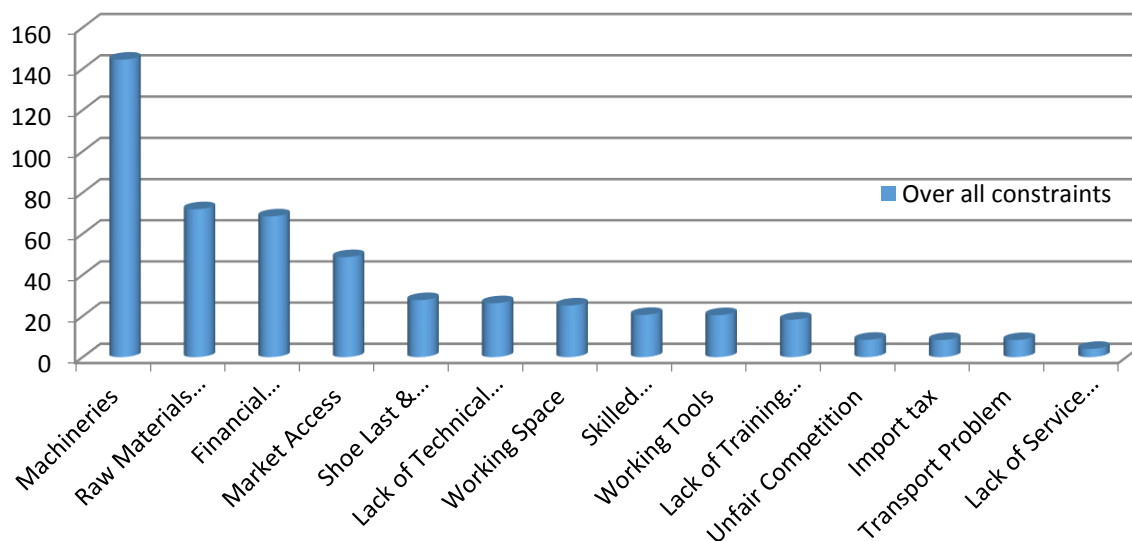


Figure 5: Survey results on constraining factors experienced by SMEs in selected COMESA Member States (Mekonnen et al., 2014).

In relation to the several factors mentioned, efforts towards Africa's performance, zeal towards innovation and product development is key to unleash the unexplored potential. Moreover, the leather sector in Africa is already characterized with high literacy levels amongst its youth in the operational SME's as demonstrated earlier. According to Mwinyihija (2013) the continent can manage its unexplored opportunities in the leather sector through stratified approach towards value addition which takes cognizance of factors such as; innovation, branding, optimal performance, research and development support, post-production activities, knowledgeability, investment, distribution potential, comprehension towards nature and magnitude of competition. It is with this background that the need to overcome commodity dependence and transform to product development becomes a panacea to

Africa through the establishment of a regional design studio (RDS) supported by designated satellite studies encompassing already operational SME incubators at Member State levels.

Focused Approach towards Overcoming Commodity Dependence

The leather sector is posed to immensely benefit from overcoming commodity dependence in Africa and resort to product development through value addition. Such a maneuver, is ripe for Africa as Banga et al. (2014) in their study on 'identifying and promoting regional value chains in leather and leather products in Sub-Saharan Africa' attested that the most significant challenge is to trigger structural transformation in the regional economies in the region. They further envisaged that through value addition most of the pertinent socio-economic indicators such as poverty reduction, employment and wealth creation could be addressed. In line with the Leather and Leather Products Institute (COMESA/LLPI) mandate and strategy, another study by Banga (2013) alluded to the strengthening of the regional value chains (RVCs) as preamble to ultimately linking with the global value chains (GVCs) whose current focus is establishing links into global production sharing by supplying primary inputs which is characterized with minimal benefits. The latter is thought to have slower gains in terms of stimulating value addition in exports, increase industrialization and employment generation.

COMESA/LLPI, thusly, has laid a strong foundation of necessary policy frame work at member states level to prepare for the transformation of the leather industry at the regional level. Some countries have even gone a notch higher and instituted appropriate legal frame work to support the government in its quest to pursue value addition initiatives e.g. In the COMESA region Rwanda, Kenya, Sudan, Zimbabwe, Ethiopia & Zambia with all EAC (East African Community) members following suite in 3 years' time as explained in the introductory remarks above. However, the pivotal issue is to harness the potential to value add at a regional level and use the available instruments of integration to set the necessary projectile to sustainable development. This opportunity was realized through the partnership of COMESA/LLPI and COMSec (Common Wealth Secretariat) where through a well-structured ideation process a novel approach was enveloped to establish a Regional Design Studio (RDS) to support the evolvement of the SME's as the key drivers of development in Africa as highlighted earlier.

Regional Design Studio (RDS)

Through the partnership of COMESA/LLPI and COMSec the establishment and launch of the RDS became a reality on 9th May 2016. This historical milestone to the continent first of its own was graced by the Kenya's Cabinet Secretary for Industry, Trade and Cooperatives, Hon. Adam Mohammed, the Secretary General of COMESA Mr. Sindiso Ngwenya and Dr. Rashmi Banga representing COMSec whose valuable support will remain a corner stone of this noble cause in Africa. It is envisaged that the establishment of the RDS will promote value addition, increase productivity and competitiveness, market access, regional integration and transform the continents zeal from commodity to product dependence. All these factors through RDS will be contextualized in a manner to stimulate innovation as a prerequisite to embed design into business to accrue the benefits of both productivity and competitiveness. These are

ingredients which will in return produce sustainable outcomes to aspired socio-economic indicators previously highlighted.

Ultimately, the intent is to transverse the continents potential and explore on its abundant resources particularly in the livestock agro-based sectors. It is anticipated with optimism that through collaborative initiatives of all leather value chain players, the governments and academia through a 'triple helix approach' developed by COMESA/LLPI the aspiration of attaining renaissance through SME's is highly feasible. RDS will as such, through a participatory approach highlighted and partnership from all developmental oriented organizations, prepare the SME's to match style, design and productivity, competitiveness and market entry through tangible links from a strengthened regional platform into the global value chains with optimal results.

Conclusion

A five pointer conclusion suffices for this pursuance;-

- Africa's renaissance has arrived with development of agro-based commodities and technological growth.
- A case of unexplored opportunities in value addition irrespective of vast endowment of resources should be a basis of concern.
- That a youthful, literate and well experienced base of leather strata players be the drive towards tangible development of the sector.
- A pulsating entrepreneurship in well-structured strategic and results oriented frameworks be adapted to stimulate growth.
- Triple helix approach as a panacea to regional leather development forms the platform towards sustainability and sustainable entry to global value chains.

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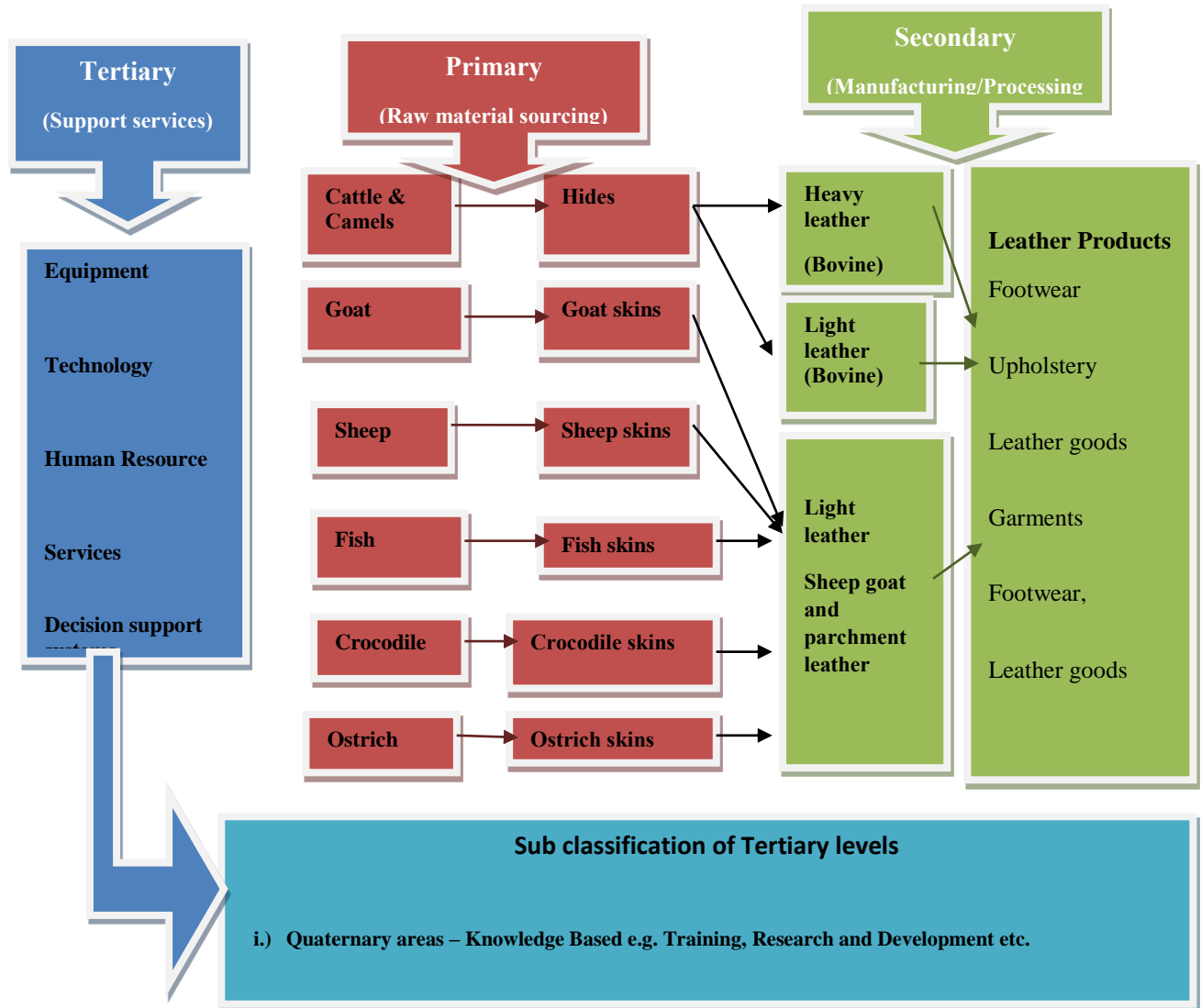
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Annex 1 Generic Leather Value Chain Depicting Primary, Secondary and Tertiary Classification



Source: Developed by Mwinyihija, M. (2015)