



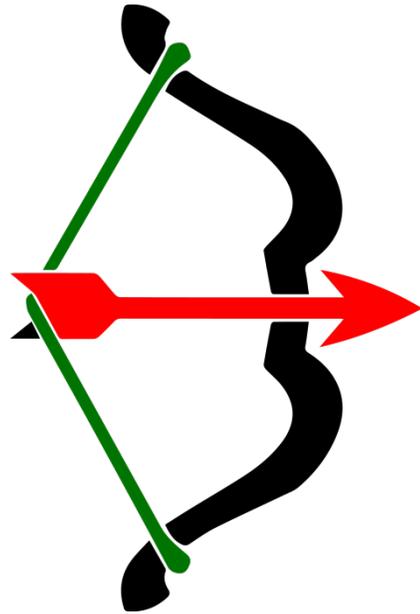
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# MISSION & VISION



## **Vision**

To transform Kenya into a top global Brand

## **Mission**

Brand Kenya, Export Kenyan, Build Kenya

## **Tagline**

Inspiring Global Trade





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# Key Services Offered by KEPROBA



Market  
intelligence



International  
market  
development  
and promotion



Product  
development



Export trade  
information  
services

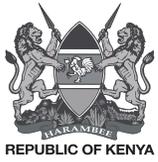


Advocacy for  
policy  
formulation  
and review



Nation  
branding





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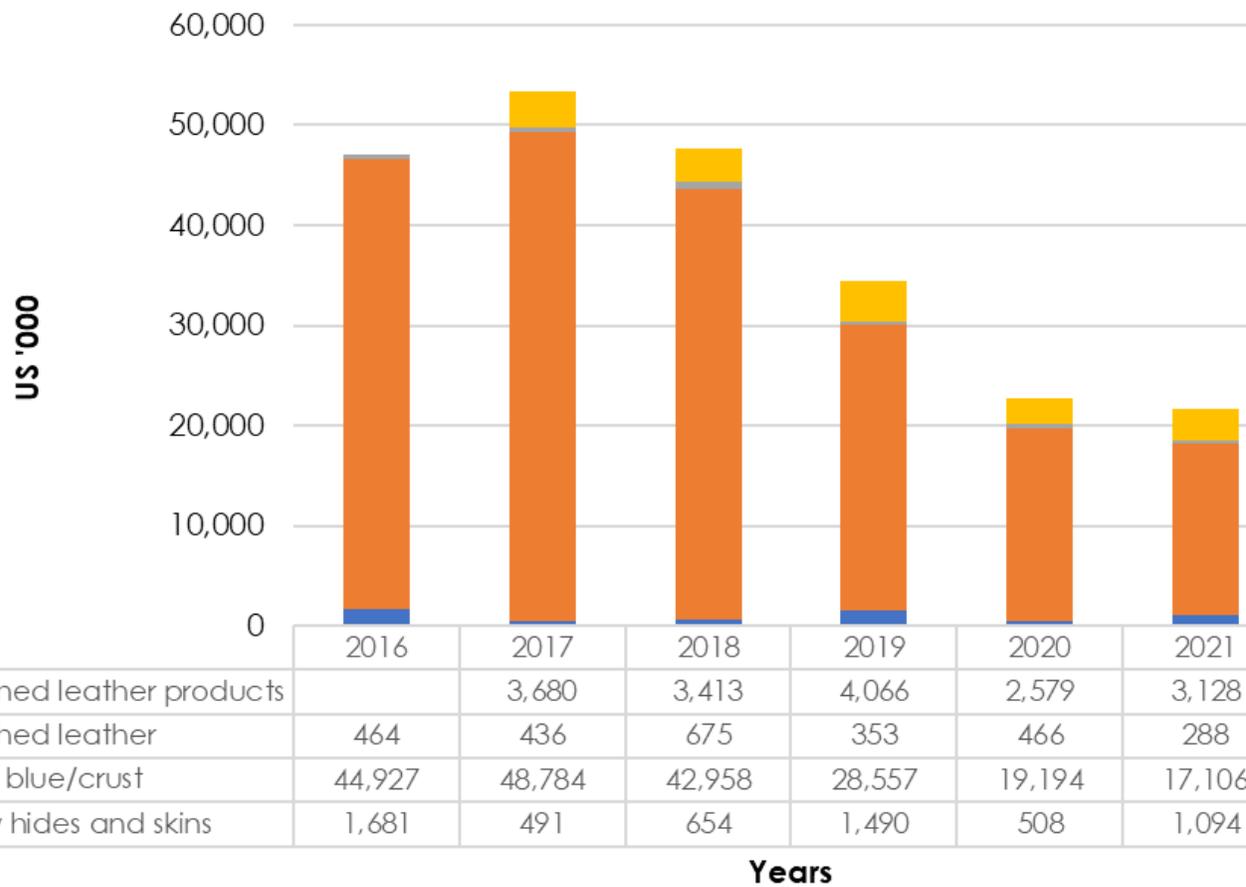
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# TRENDS AND PERFORMANCES OF EXPORTS OF LEATHER AND LEATHER PRODUCTS



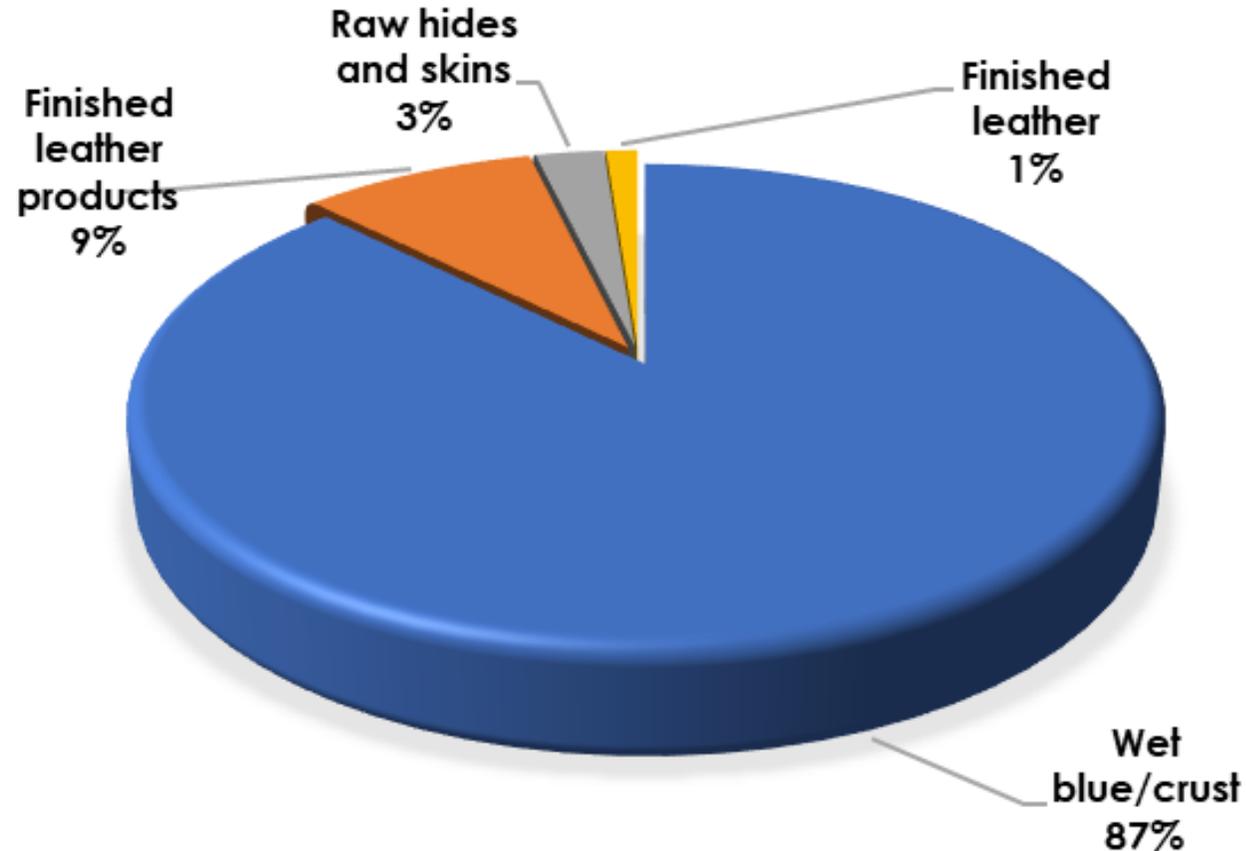
## Exports of Kenyan leather and leather products (2006-2021) (thousands of US\$)

<b>Kenyan leather/leather products</b>	<b>2016 Export (USD)</b>	<b>2017 Export (USD)</b>	<b>2018 Export (USD)</b>	<b>2019 Export (USD)</b>	<b>2020 Export (USD)</b>	<b>2021 Export (USD)</b>	<b>% increase between 2017 &amp; 2021</b>	<b>Average % increase 2017 to 2021</b>
<b>Raw hides and skins</b>	1,681	491	654	1,490	508	1,094	27.94%	115.35%
<b>Wet blue/crust</b>	44,927	48,784	42,958	28,557	19,194	17,106	-16.11%	-10.88%
<b>Finished leather</b>	464	436	675	353	466	288	-1.02%	-38.20%
<b>Finished leather products</b>	-	3,680	3,413	4,066	2,579	3,128	-0.85%	21.29%
<b>Total</b>	47,072	53,391	47,700	34,466	22,747	21,616	-12.79%	-4.97%



- **Kenya's leather industry exports (2016-2021)**

## AVERAGE COMPOSITION OF LEATHER AND LEATHER PRODUCTS: 2016 - 2021



Kenya's leather production consists of:

- Mainly (87 percent) of semi-processed tanned "wet blue" and some crust leather.
- Leather footwear and handbags, travel ware, and other leather products (9 percent)
- Raw hides and skins (3 percent)
- Finished leather (1 percent)



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# Current Leather Export Strategy INEDPS 2018-2022

	Products	Target 2022 USD million( 5% share of export opportunity)	Current Perfomance 2022 (USD million)	Export Markets
HS 42	Articles of leather Saddlery and Harness; Travel Goods, Handbags, and Similar Containers, Articles of Animal Gut (Other than Silkworm Gut)	1543	2061	<ol style="list-style-type: none"> <li>1. Italy</li> <li>2. USA</li> <li>3. Germany</li> <li>4. UK</li> <li>5. Rwanda</li> <li>6. Burundi</li> <li>7. South Sudan</li> <li>8. Belgium</li> <li>9. Sweden</li> <li>10. France</li> </ol>
HS 64	Footwear, Gaiters and the like parts of such articles	2307	24,878	<p><b>Africa</b></p> <ol style="list-style-type: none"> <li>1. Uganda</li> <li>2. Rwanda</li> <li>3. Tanzania</li> <li>4. Burundi</li> <li>5. DRC</li> <li>6. South Sudan</li> </ol> <p><b>Niger, Somalia</b></p>

It is important to note there were no exports to Japan, the Middle East, UAE, and COMESA

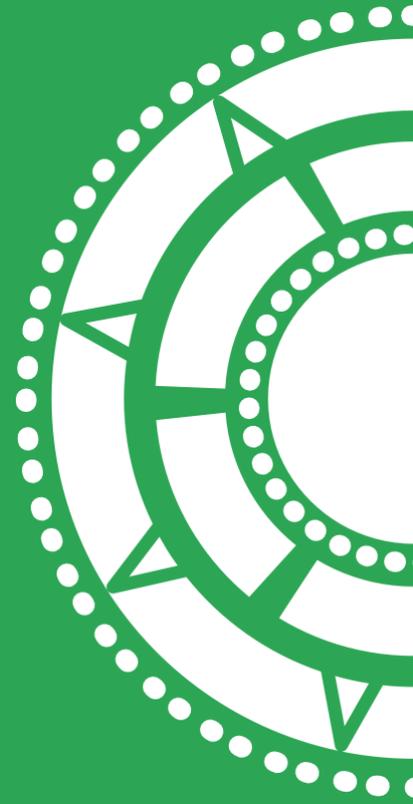




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# FINISHED LEATHER PRODUCTS

**HS 42**-Articles of leather Saddlery and Harness; Travel Goods, Handbags, and Similar Containers, Articles of Animal Gut (Other than Silkworm Gut)

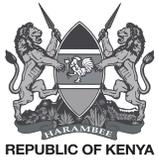




	Importing Countries	Value Imported in USD 000 in 2022	Rank in Global Market	Global Market Share	Leading source markets (World)	Leading Source markets Africa	KENYA'S PERFORMANCE
1	USA	17,447,423	1	18.7%	<b>China-</b> Rank-1 Market share-37.5% Value-4,468,607 Tariff: 9.5% Others: Italy, Cambodia, Vietnam	<b>Ethiopia</b> Value: USD 7,463 Rank: 35 Market Share 0.00% Tariff 2.2% <b>Others:</b> Tunisia, Morocco, Mauritius	Value:1,056 000 USD Rank: 65 Market Share:0.00% Tarrif:0
2	CHINA	6,008,157	2	6.4%	<b>Italy</b> Rank-2 Market share 42.6% Value-2,557,344 Tariff: 7% Others: France, Vietnam, Spain	<b>Tunisia</b> Value: USD 7750 Rank: 24 Market Share 0.1% Tariff: 7% <b>Others:</b> Morocco, Mauritius, Ethiopia	Value:513, (000) USD Rank: 44 Market Share:0.00% Tarrif: 7
3	Others: 3 Japan 4 France 5 Italy 6 Germany 7 South Korea 8 UK 9 Hongkong 10 Singapore 11 Netherlands						



	Importing Countries	Value Imported in USD 000 in 2022	Rank in Global Market	Global Market Share	Leading source markets (World)	Leading Source markets Africa	KENYA'S PERFORMANCE
1	South Africa	248,420	45	0.3%	<b>China</b> Rank-1 Exporter Market share-68.7% Value-170,613 Tariff: 28.7% <b>Others:</b> Italy, India, Vietnam	<b>Lesotho</b> Value: USD 438 Rank: 21 Market Share 0.2% Tariff: 0% <b>Others:</b> Tanzania, Nigeria, Madagascar	Value:16 000 USD Rank:55 Market Share:0.00% Tarrif:28.7%
2	Ghana	153,280	54	0.2%	<b>China</b> Rank-1 Market share 97.3% Value-149,133 Tariff: 16.3% <b>Others:</b> Korea, Italy, India	<b>South Africa</b> Value: USD 202 000 Rank: 8 Market Share 0.1% Tariff: 16.3% <b>Others:</b> Ethiopia, Senegal, Botswana	Value:1,000 USD Rank: 41 Market Share:0.00% Tariff: 16.3%



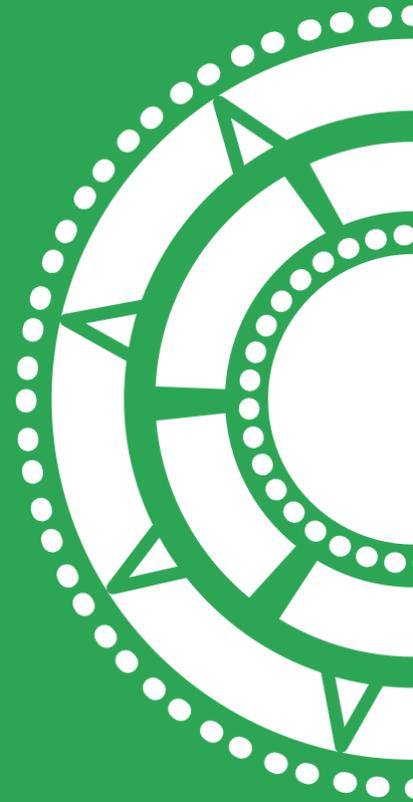
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# FINISHED LEATHER PRODUCTS

HS 64 -Footwear, Gaiters and the like parts of such articles





	Importing Countries	Value Imported in USD 000 in 2022	Rank in Global Market	Global Market Share	Leading source markets (World)	Leading Source markets Africa	KENYA'S PERFORMANCE
1	USA	37,966,987	1	21.8%	<b>China</b> Rank-1 Market share-38.9 % Value-14,779,539 Tariff: 12.2% Others: Vietnam, Indonesia Italy	<b>Morocco</b> Value: USD 11,837 Rank:35 Market Share 0.00% Tariff: 0% <b>Others:</b> Tunisia, South Africa, Ethiopia	Value:1,299,000 USD Rank:67 Market Share:0.00% Tarrif:0.1%
2	Germany	14,457,350	2	8.3%	<b>China</b> Rank-1 Market share 27.4%% Value-3,958,915 Tariff: 10.7%	<b>Tunisia</b> Value: USD 156,418 Rank: 18 Market Share 1.1% Tariff: 0% <b>Others:</b> Morocco, Namibia, Zimbabwe	Value:583,000USD Rank: 61 Market Share:0.00% Tariff: 0%



	Importing Countries	Value Imported in USD 000 in 2022	Rank in Global Market	Global Market Share	Leading source markets (World)	Leading Source markets Africa	KENYA'S PERFORMANCE
1	South Africa	10,020,188	31	0.6%	<p><b>China-</b> Rank-1 Exporter Market share-57.6% Value-587,772 Tariff: 28.2%</p> <p><b>Others:</b>Vietnam, Indonesia, Italy</p>	<p><b>Lesotho</b> Value: USD 8363 Rank: 8 Market Share 08% Tariff: 0% Others: Zimbabwe, Morocco, Mauritius</p>	<p>Value:11,000 USD Rank:65 Market Share:0.00% Tarrif:28.2%</p>
2	Ghana	353,502	59	0.2%	<p><b>China</b> Rank-1 Market share 86.2% Value-304,851 Tariff: 15%</p> <p><b>Others:</b>,Turkey,</p>	<p><b>Ivory Coast</b> Value: USD 32,205 Rank:2 Market Share 9.1% Tariff: 0%</p> <p><b>Others:</b> South Africa, Nigeria, Botswana</p>	<p>Value:0 USD Rank: 47 Market Share:0.00% Tariff: 15%</p>



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# Proposed Interventions/ activities aimed to increase Kenyan leather products exports





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- **Advocate** for the improvement of the raw material base (especially the quality of hides and skins), boosting the tanning subsector, producing leather goods, and marketing.
- **Export awareness program** - Improving the production process, technology adoption and adaptation, and access to changing tastes and preferences. Professional certification programs within the industry could be improved and extended to assure that critical skills and competencies remain current and competitive through post-graduate, continuous training. This would also encourage quality and standardization.
- **Advocate** for the sustainability of the leather cluster working group and strategy implementation process.
- **Global marketing campaign:**
  - ✓ International marketing to increase global awareness of Kenyan leather, coordinate the **branding of Kenyan leather**, and promote exports.
  - ✓ **Origin Trip** to showcase our capability in the Leather Sector specifically to meet international leather buyers and sector players
  - ✓ An important mechanism for achieving the basic goal of value addition and product quality enhancement is the adoption of **sustainable, clean technologies**. Developing a 'clean', uniquely Kenyan brand will help in this regard.
- Organizing **matchmaking between** international buyers of finished leather products and Kenyan producers and leveraging global business-to-business (B2B) **e-commerce platforms (e-portal)**.
- Manufacturing end of the value chain, leather quality awards and recognition programs (Kenya Exporter of the Year Awards) can be developed to induce innovation and foster competition based on distinct quality and design.



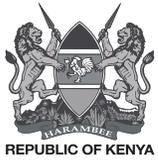


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# Planned interventions...

- Collaborate with global brands on the design and production of footwear and leather products
- Develop Kenya leather brand strategy
- Facilitate market access through BTAs, Regional and Multilateral agreements
- Export training and product adaptation to International markets
- Buyer Persona for each product
- Promote leather products in international trade fairs exhibitions
- Conduct a comprehensive leather and leather products global market survey





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## Market Research

- Who are the buyers of Leather?
- Where are they?
- How do they buy? Which channels do they use?
- When do they buy?
- How often do they buy?
- Who are they buying from?
- What are their pain points?
- Who are the **Kenya Export Ready** Companies and what is their current capacity.

