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KLDC

1st WORKSHOP ON ECO-TANNING PROCESSES ALONG THE VALUE CHAIN IN KENYA AND THE EAST AFRICAN REGION

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THE FUTURE OF THE LEATHER INDISTRY IN KENYA AND EAST AFRICAN COMMUNITY

The future of the Leather Industry is based on respective livestock population of the East Africa Community countries. As national resource, Hides and Skins is derived from livestock as a by-product of meat industry.

PROJECTION OF LIVESTOCK POPULATION IN EAC (in Million Numbers)

SPECIES	Kenya			Tanzania			Uganda		
	2023	2024	2025	2023	2024	2025	2023	2024	2025
Cattle	21.20	23.30	24.80	25.00	27.50	30.00	14.20	14.62	16.04
Goats	24.80	27.30	29.80	16.70	18.40	20.00	16.00	17.6	19.20
Sheep	33.70	37.00	40.40	8.00	8.80	9.60	4.50	4.95	5.40
Camel	4.40	4.80	5.20	0.13	0.14	0.15	0.10	0.11	0.12

Source: MoALD, 2023

STEPS IN THE HANDLING OF RAW HIDES AND SKINS TO LEATHER FOR UTILIZATION;

Farm	Abattoir Traders	Tanning	Manufacturing
• Farmer/owner	Well equipped	Wet-blue	Leather Products
• Animal husbandry	Skill manpower/flayers	Crust	
• Nutrition		Finished Crust	

Where are we now?

Number of Tanneries: 15

PRODUCT	CAPACITY IN KENYA	BUSINESS CASE	VALUE ADDTION
Wet-blue	18,835 tons	Manufacturer aims at adding value to hides and skins to a stable state for subsequent value addition	• Forward integration dependent on availability of market for finished leather and crust
Crust	24,727,800 sqft	The manufacturer/tannery has an idea of what the finished leather would be used for based on the market needs and thus processes with some sight of the leather goods/footwear manufacturing market	
Finished Leather	14,865,600 sqft	The manufacturer/tannery has full sight of the finished goods and footwear markets	

Source: TANNERY CAPACITIES – KLDC 2023

PRODUCTS

Leather Products	Installed Capacity (Million/year)
Footwear (leather uppers)	9 Pairs
Footwear (with non-leather uppers including gumboots, canvas shoes)	55 Pairs
Military/Security Boots	0.7 Pairs
Leather Articles; belts, sandals, wallets, bags	2.5 Pieces

Source: Annual Report KAM (Projected)

- 10% imports of finished footwear and is increasing
  Leather and leather products imported by the sector Us Dollar 190,000; Ksh. 37,750,000

WHAT IS THERE FOR THE FUTURE?

- Key opportunities in the future of leather, footwear and leather products
- Increase in raw material uptake for processing
- Increase in processing units (Tanneries)
- High labour force availability
- Government will to facilitate Trade in the Leather Industry

KENYA OPPORTUNITIES IN THE FUTURE OF LEATHER, FOOTWEAR AND LEATHER PRODUCTS;

1. Develop local markets:

- Improve on government initiative on Buy Kenya Build Kenya, Buy East Africa Build East Africa
- Reduce/ban imports of leather and leather products by imposing high tariffs and enforce quality standards compliance
- Respective governments to do business with Leather and Leather Products Sector players by offering tenders strictly to the MSMEs for military/security boots

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2. Increase in Raw Material uptake for processing:

- Mopping of raw materials –hides and skins at aggregation centres
- Identify aggregation centres at each county
- Establishment of 2130 bandas for preservation
- Hides and skins improvement on quality
- Sensitization of managers, flayers at the abattoirs on raw material handling

3. Increase in Processing Units (Tanneries)

- Increase number of tanneries so as to increase production of leather for utilization to meet market demand
- Increase absorption rate of raw hides, skins
- Avail quality Leather for use by MSMEs for various articles manufacture
- Establishment of leather parks i.e.

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4. Readily available labour force;

5. Government Will to facilitate Trade in the Leather Industry

- Recent Presidential focus on the Leather Industry and directives given to improve the industry
- DVS and KLDC initiative on development strategies to improve the sector

Cleaner Production Technologies

The leather value chain is a high effluent emission process and there is need for cleaner production systems.

Essential for growth, sustainability and ethical consumption

Clean production technologies for Leather working group (LWG) certification;

- Use of organic extracts for the tanning process,
- Proper effluent and discharge treatment disposal,
- Proper handling of chemicals and efficient use of natural resource water

Use of Leather and non-leather materials

- The blending of leather and non-leather material on various products and articles has significantly contributed to the growth of the leather sector

THANK YOU !