



TERMINAL REPORT FOR THE PROJECT

Hides and Skins Improvement Scheme in Selected West African Countries (Burkina Faso, Mali, Niger and Senegal)

JANUARY 2005 - JUNE 2008

Project number: CFC/FIGHS/04 [PEA (UNIDO) Project Number: FC/RAF/04/088]

Date of Report: May 2008

Total Project Cost: USD 2,242,725 of which:

- CFC Financing (Loan/Grant): USD 1,555,725 (Grant)
- Co-financing: USD 60,000 (UNIDO)
- Counterpart Contribution: USD 627,200 (in kind) (Burkina Faso - USD 131,200; Mali - USD 174,100; Niger - USD 164,500, Senegal - USD 157,400)

Project Executing Agency (PEA): UNIDO

Project Implementing Agency (PIA): *Office Malien du Bétail et de la Viande (OMBEVI)*,¹ Mali

Location: Burkina Faso, Mali, Niger and Senegal

Starting Date: Inception Meeting held in Bamako, Mali from 6-10 September 2004

Expected completion date (month/year): June 2008²

Meetings of the Project steering committee (if any):

June 2005 (Senegal), September 2005 (Niger), February 2006 (Tanzania), October 2006 (Ethiopia), March 2007 (Kenya), June 2007 (Ethiopia), April 2008 (Senegal)

Note: *This terminal report has been based on the terminal reports prepared by the RPC and the four NPCs, (which have been enclosed as annexes) as well as on the various reports and progress reports and documentations produced during the course of the project implementation.*³

¹ In September 2005, the NPC of Mali informed that the restructuring of OMBEVI has been completed and the new name is: "Direction Nationale des Productions et Industries Animales" (DNPIA). The advantage of this new structure is that it covers the whole country through the "Directions Regionales des Productions et Industries Animales" (DRPIA), to which all the assigned agents are attached. The project falls now under the competence of this new body. An official letter was written to PEA, CFC and SB to inform about this change.

² The original completion date was September 2007. Upon request of PEA and PIA, the project was kindly extended by CFC to December 2007 and June 2008 respectively.

³ These reports and progress reports have not been included as annexes as they have been already distributed during the project implementation to all project partners.

1. MAIN ACTIVITIES CONDUCTED AND ACHIEVEMENTS

1.1 Project Background

During the FAO Sub-Group on Hides and Skins meeting held in Rome from 4 to 6 June 2001, the meeting endorsed the proposal "Development of Professional Partnership in the Hides and Skins Sector in Western African Countries", prepared by the "Office Malien du Bétail et de la Viande (OMBEVI)⁴", Mali. This programme takes into account the recommendation number 23 of the final report of the Seventh Session of the Sub-Group on Hides and Skins.

In light of the above, this programme, which falls within the framework of the UEMOA (Union Economique Monétaire Ouest Africaine), has been designed according to the different local needs, in order to harmonize the development of the Western Region. The livestock - meat-clusters have been identified as priority areas for Burkina Faso, Mali, Niger and Senegal. The livestock for its utilization for alimentation and for its by-products (hides and skins and wool), represents a priority objective of development in these four countries.

The potential of the hides and skins collection, and the leather sector in the four selected countries is based on a livestock positioned between the six most important of the Western area (in order of importance for cattle livestock in million heads: Nigeria 24,30, Mali 8,55, Burkina Faso 8,39, Niger 6,60, Mauritania 4,14, Senegal 3,59). The livestock population of Burkina Faso, Mali, Niger and Senegal, in total counts 16 million bovines, and 48 million goat and sheep heads.

This livestock wealth is generally dominated by domestic herds kept for traditional purposes rather than for effective production of meat, milk or other products. The animals, especially bovines are rather small and average hide area obtained from the African Zebu type bovine is about 20-24 sq ft or about one third less than that obtained from European cattle. The slaughtering of animals and subsequently the flaying of hides and skins is carried out under poor conditions and therefore they are often damaged. Poor conditions also apply during curing and conservation processes.

The quality of hides and skins in this region has been a major obstacle to the development of the leather sector. This programme aimed at improving the quality of the raw material (hides and skins) through the introduction of a grading and pricing system for raw hides and skins, which has been developed by UNIDO and FAO within a previous programme implemented in Eastern and Southern Region of Africa, in four countries in West Africa, namely Burkina Faso, Mali, Niger and Senegal, through professional associations in these countries. The programme was expected to ultimately improve and raise the quality standards of hides and skins so that the commodity and derived products could penetrate the international markets. Furthermore, the programme would seek for backward integration through the provision of training facilities for raw hides and skins producers and tanners as well as provision of tools and basic equipment.

The programme would also be based on the experience received through the CFC on-going

⁴ See Footnote 1

programme “Raw Hides and Skins Grading and Pricing System in Eastern and Southern African Countries” implemented in East Africa by ESALIA, a regional association coordinating the leather industry in this African Region.

Quality improvement of raw hides and skins by introducing appropriate grading of raw hides and skins and setting up a trading and marketing system. The project has sought to introduce a purchasing system that is based on grades and weight rather than on quantity. It has also sought to introduce quality marking of raw hides and skins.

It was expected that the main beneficiaries would be the primary producers of hides and skins (farmers and butchers), traders and exporters, as well as artisans and tanners (including small-scale manufacturers of semi-processed and finished leather). Tanners would also gain an opportunity to purchase better quality of hides and skins and thereby producing better quality leather.

The reason why UNIDO has been selected as PEA, is due to the fact that the organization has implemented highly successful technical assistance programmes in Ethiopia, Kenya, Malawi, Namibia, The Sudan, Tanzania, Uganda, Zambia and Zimbabwe. The selection of these countries is the result of a long sectoral development strategy started in the early 1980s. The Programme focused on targeting interventions at every level of leather production and marketing chain. In addition, it considered the associated environmental impact of leather processing. Of particular significance was the creation by the Programme of the Eastern and Southern Africa Leather Industry Association (ESALIA) in 1995, which has gradually intensified its importance to the point of being recognized at the international level as the only regional association in sub-Saharan Africa representing the interests of the leather sector. On the basis of the excellent results achieved by ESALIA through UNIDO support, UNIDO has tried to replicate this approach in West Africa in the four selected countries.

The main institutions involved and their roles in the project were:

- The Common Fund for Commodities (CFC). as the main donor
- FAO – Intergovernmental Sub-group on Hides and Skins as supervisory body.
- UNIDO as the Project Executing Agency
- The Office Malien du Bétail et de la Viande (OMBEVI) as implementing agency.

The other local institutions involved were:

- Burkina Faso: *Ministère des Ressources Animales, Secrétariat Général, Direction des Productions et des Industries Animales*
- Niger: *Ministère des Ressources Animales, Direction de la Production Animale et de la promotion des Filières:*
- Sénégal: *Ministère des Ressources Animales et de la Pêche, Direction de L'Élevage*

This programme falls under the following MDG goals, and was expected to contribute to the efforts of the four selected countries in their realization of the following specific goals:

MDG 1 (Poverty/hunger eradication)

- Income generation
- Sector strategy and policy advice, process optimization
- Technology and quality upgrading, product development (with a view of increasing exports)

MDG 7 (Environmental sustainability)

- By-products utilization, and
- Renewable raw materials

MDG 8 (Global partnership for development)

- Strengthening CSOs
- Oriented training for employment creation

1.2 The Development Objective

To improve the quality and image of African raw hides and skins through the introduction of an incentive scheme for primary producers to improve the quality their product and apply objective grading criteria. The project seeks to introduce an incentive based buying system linked to quality and grades instead of the currently operated buying system that is based on quantity.

1.3 Specific Objectives

The specific objectives of the project are:

- a) *Introduction of a pricing system based on quality grades.*
- b) *Design and implement a system of quality marking and certification for raw hides and skins according to the established quality standards.*
- c) *To set up the marketing and trading system of hides and skins linked to the international trading system including web based trading.*
- d) *Provision of Technical Assistance to support the setting up of the field grading system and market access.*

1.4 Project Components

Component I: Setting up a Grading and Pricing System in the pilot countries

Main Activities:

- a) *Establishment of Regional and National offices;*
- b) *Recruiting experts and agents; establishing contacts with government departments responsible for animal husbandry and livestock extension.*
- c) *Establishing grading standards and best practices for flaying and preservation techniques.*
- d) *Training of extension officers on grading, flaying and preservation techniques.*
- e) *Training on and dissemination of grading system and market requirements to all stakeholders.*
- f) *Capacity building of National Leather Associations and Livestock Producers to adopt and disseminate improved techniques.*

Component II: Improving Market Access of Raw Hides and Skins and Leather

Main Activities:

- a) *Marketing the established quality grades to international markets.*
- b) *Organise and conduct local seminars on market requirements, quality constraints and upgrading techniques.*
- c) *Establish a quality certification system acceptable to the international market.*
- d) *Establish a web based marketing system.*
- e) *Setting up and strengthening of Traders and Exporters Associations.*

Component III: Provision and co-ordination of Technical Assistance to Component I & II

Activities of Component III are already accounted for in the list of activities of component I and II.

Component IV: Project Management and Co-ordination

Main Activities:

- a) *Setting up administrative and financial systems for project resources management.*
- b) *Preparation of Technical and Financial Reports in accordance with the Project Agreement.*
- c) *Facilitation of the project supervision and evaluation by the SB and the Fund.*
- d) *Overall co-ordination of project implementation through liaison with Governments, farmers, traders, exporters and importers.*

1.5 Major Achievements

It should be noted that the leather industry is based on a renewable raw material, i.e. hides and skins, which has a particular nature being a “by-product”. This raw material being a “by-product” is strongly influenced by the “life” of the animal, the way it is bred and the way it is slaughtered, and how, after the removal, it is collected and preserved. There are a number of pre-mortem and post-mortem defects affecting the quality of this “by-product”.

Hides and skins improvement activities include, among others, appropriate animal husbandry (e.g. dipping, proper vaccinations, proper feeding etc.), suitable slaughter facilities, collection based on grading by quality and proper preservation methods. All these activities are usually carried out by well-functioning and organized extension services, which work in close cooperation with primary producers and the leather association.

Therefore, hides and skins improvement activities are to be implemented on a continuous basis, as if they are stopped, the results obtained can immediately vanish. Furthermore, they need to be essentially integrated with similar development activities concerning the meat industry.

This Programme supported the development of the leather sector in the Western Africa Region, as it was felt that this activity could provide a boost for the overall leather industry to

become competitive in the global market due to availability of local raw materials, technology which can be mastered, technology-related skills, knowledge and tradition, and growing domestic market.

This support was provided to this sector through the adoption of a set of interventions, demonstrating appropriate methods of hides and skins improvement and production as well as strengthening the institutional capabilities through the creation of a Regional Association.

Governments in the participating countries strongly supported this project to the extent of having established steering committee (e.g. Niger) as well as Project Agency, providing support to the project not only in kind (e.g. Mali).⁵

At the beginning of the project implementation in September 2004, PEA, PIA and the NPCs, due to the ambitious project design compared to the resources available as well as the time frame (i.e. three years), decided to concentrate the project activities on the two following main areas:

1. The introduction of a well-functioning Hides & Skins Improvement System in the selected target areas through the elaboration and the introduction of hides and skins grading based on quality, extensive capacity building for the primary producers, butchers, collectors and agents, rehabilitation of infrastructures and distribution of tools and the realization of appropriate technical literature.
2. The Creation and /or strengthening of existing professional associations such as ASOAC and the national associations, which could sustain the development of the sector.

1.5.1 The Introduction of a Well-Functioning Hides & Skins Improvement System

- At the beginning of the project, a paper⁶ entitled: *“Situation de Référence dans les Pays du Projet Régional D’Amélioration de la Qualité des Cuirs et Peaux : Burkina Faso, Mali, Niger, Sénégal”* was prepared in order to provide the baseline data and the situation of the leather industry in the countries for comparison and evaluation of the outcome at the end of the project.
- In each of the four countries project target areas were selected to introduce proper H&S Improvement Schemes and demonstrate that through the rehabilitation of infrastructure and utilization of appropriate tools, a certain level of quality improvement can be achieved and better income for primary producers⁷.

⁵ Information on Governments contribution is enclosed in each of the NPCs’ Terminal Reports, Annexes 2.1.-2.5.

⁶ Please refer to Annex 3.

⁷ Target areas in BF: Boromo, Pâ, Ouaga, Kienfingué, Tandin, Saaba, Kaya, Kongoussi, Bobo- Dosso, Bama, Toussiana, Dori, Gorom Gorom; Mali: District de Bamako, Koulikoro (Kati), Kayes, Sikasso, Ségou, Mopti; Niger: Dosso, Maradi, Tahoua, Zinder, Tondibia, Niamey; Senegal: Dakar, Kaolack, Thies, Louga, St. Louis.

- Initial training in hides and skins improvement based on the H&S Manual elaborated by the project⁸ and later on the Grading Norms on hides and skins, has been provided to the Hides and Skins Agents. A total of 21 H&S Agents (BF: 5; Mali: 6; Niger: 5; Senegal 11) were assigned to the project. The project agreed to pay incentive for 18 months for their involvement, considering that the first year and half would be the most crucial one⁹.
- The project has carried out extensive training in hides and skins improvement in the target areas in the four countries for a total of 2742 persons as summarized in the following table. Furthermore, and in addition to the work of the H&S Agents, the RPC and the four NPCs conducted training course in hides and skins improvement based on the H&S Manuals prepared by the project.

	Burkina Faso	Mali	Niger	Senegal
H&S Field Agents	5	6	5	11
Operators		110	895	212 ¹⁰
Apprentice Butchers	657 ¹¹	160 +248		
H&S Collectors		63 +32	344	
Graders		5		
Total	662	618	1244	223

- Referring to the *Infrastructure*¹², the following table summarized the output carried out by the project in the target areas selected in the four countries. It should be noted that this infrastructure - even if insufficient for the overall needs of the four countries, serves as demonstration and didactic purposes.

⁸ In March 2005, a Hides and Skins Expert (Mr. M. Mansouri, Tunisia) for a period of 2-w/m to assist in the preparation of the Grading Norms (Annex 4), the H&S Manual (document entitled: “*Manuel sur le Conditionnement et les classement des Cuirs et Peaux a l’Usage des Agents de terrain*”) and the list of hides and skins tools to be purchased (copy of the report is included as was already sent to FAO and CFC in 2005). Furthermore, the Hides and Skins Expert, was re-fielded in August 2005 to carry out the training of Hides and Skins Agents in the four countries.

⁹ A solution for the other remaining time was to pay for some fuel as incentive during the third year of project implementation.

¹⁰ Including Apprentice Butchers as reported in the terminal report by the NPC Senegal

¹¹ Including H&S Collectors as reported in the terminal report by the NPC BF

¹² During the Project Coordination Meeting held in Niamey, Niger in September 2005 (see report of the event), the NPCs informed that in certain cases, the rehabilitation of slaughter slabs and abattoirs is preferred to the installation of dryers (foreseen in the project) as it depends on the way the hides and skins are collected and preserved (green, salted or dried). In light of the above, it was agreed that the NPCs would make a proposal to PEA on the utilization of the budget allocation earmarked for this activity (US\$ 16,000 per country) backed-up with all necessary justifications. Photos of the rehabilitated infrastructures are enclosed to this report in the terminal reports of the NPCs.

COUNTRY	NUMBER OF INFRASTRUCTURE
Burkina Faso	2 Slaughter slabs rehabilitated; 2 workshops constructed
Mali	2 Slaughter slabs constructed , 1 salting area constructed
Niger	2 dryers et 1 Slaughter slabs rehabilitated,
Senegal	4 Slaughter slabs rehabilitated

- During the project Coordination Meeting held in Addis Ababa¹³, Ethiopia in October 2006, the project team had an extensive discussion on how to make sustainable the interventions for the rehabilitation of the infrastructures. In this regard, it was felt that there was the need to introduce an “HIDE -PULLER SYSTEM”¹⁴ similar to the one promoted by *Sam Setter, Leather International*, known as Static Flaying Frame (SFF).
- After discussing with the donor, CFC, it was clear CFC would not support the recruitment of such an expert as it was thought to be too expensive¹⁵. On the contrary,

¹³ The location has been selected by the PEA representative in view of the fact that PEA has been assigned to UNIDO Regional Office in Ethiopia. The project team accepted this proposal, which resulted in a very useful experience, as there was the possibility to meet with local entrepreneurs and the representative of the leather association as well as visit the facilities of the Leather and Leather Products Technology Institute (LLPTI) and Association. This was highly appreciated by the project team as Ethiopian Leather Industry is highly developed

¹⁴ PEA/SB requested the RPC to submit an official request with three names of potentials experts who could undertake this assignment, including the JD should be also prepared by RPC.

¹⁵ Summary of the Justifications on the Recruitment of a Hide Puller Expert provide to CFC during Project Coordination Meeting held in Nairobi, Kenya in March 2007:

Quote: 1) The SFF has been installed now in a number of places. Some successfully, others have taught lessons. The construction and the installation of the hide puller is relatively easy, but experience has shown it cannot be done by an inexperienced person. It has been tried in India and Ethiopia. Both attempts have failed. Those who tried have not been able to take into consideration the extensive experience required, both on the basis of practical matters like the prevailing circumstances in abattoirs in terms of social and work relations, and in terms of technical matters.

To name a few experience matters: some pipes that were bought locally were bending due to bad metal strength. In other places the social factor was extremely important, as butchers feared the loss of their jobs, or the loss of wages. Some abattoirs are not suitable unless they are prepared to change their work method. All situations that need to be judged before one can go ahead with the manufacturing and installation of the hide puller.

2) Since the hide puller is installed in existing abattoirs, each has to be adapted to each single situation. Important roles are played by work procedure and by architectural circumstances like the height of the building and the strength of the slaughter floor. This experience and knowledge can be obviously transferred, and that is why it would be extremely important if the expert would be assisted by one person following him through all 4 countries as well as the local contact in each country. To judge the situation It was agreed to devise the fact-finding trip which would allow the expert to plan forward, have the pullers built while the expert was back in Europe and install them together with the local counterparts upon his return training them “the what's and why's”. Once the pullers are installed the personnel would be trained in their use.

CFC would support the training of two persons in one of the countries where the SFF is working (e.g. Burundi or Rwanda) who would act as trainers and install the SFF in the four countries. Unfortunately, due to the political environment in both these countries, the study tour could not be organized and remains one of the activities which could not be implemented.

- Referring to the tools, 1500 flaying knives were distributed as per photo below. It should be noted that also in this case, these tools were for demonstration purpose only¹⁶ and meant to avoid cutting and holes in the raw material.



- The *approval and the harmonization of the grading norms*¹⁷ among the four countries and further on by the UEMOA countries represent one of the major achievements of this project. The process for their approval has indeed taken a certain time (about two years) and finalized only in May 2008. However, it should be noted that this project has created a dynamic to the process of the elaboration of the grading norms at the level of UEMOA.

3) The quantity of hide pullers that can be installed totally depends on the collaboration in the field. Normally in one week two pullers can be installed if everything is ready and set. After that the local contact will be able to manufacture and install as many pullers as necessary. Unquote

¹⁶ With regard to the knives, PEA reiterated that even if local purchase and local production should be encouraged in order to support project sustainability, an international bidding for the purchase of knives would be launched as it was not possible to manufacture them locally due to the lack of proper steel. A Brazilian supplier, which already supplied the same type of knives (with a rounded top-end) to other CFC-funded project in Eastern and Southern Africa, would be contacted. At the completion of the purchase process, a German company was selected to provide 1500 knives as per available budget (US\$ 10,000). It should be also noted that there are three types of knives required for ripping and flaying activities. In this particular case, the project team opted for those with a rounded top-end in 3 sizes, particularly suitable for flaying activities.

¹⁷ Referring to the grading norms and the involvement of the local Standards Authorities and local stakeholders in order to build consensus and elaborate norms suitable for the local conditions, this has been done within the UMOA project implemented by UNIDO and funded by EU, and in particular through the technical committee on Hides and Skins chaired by Niger.

- With regard to the introduction of the *pricing system*, even if there are some encouraging signals in the four countries where hides and skins collectors area paying a better price as they have seen an improvement in the raw material, it cannot be stated that there has been an effective change in the H&S purchasing system, thanks to this project. This is due to the fact that the elaboration, approval and harmonization of the grading norms has been achieved at the project completion.
- Referring to the improvement of the *H&S Quality*, the project has achieved a very important result in terms of improving the quality of **ovine and caprine skins** (X marking the situation of reference in 2005 and X the improvement) in the four countries as summarized in the following tables¹⁸:

Summary of the Quality Improvements in the Four Countries in %				
Country		2005	2006	2007
Burkina Faso	• Hides	11,1	36	35,1
	• Skins	67,3	88,1	95,9
Mali	• Hides	14,5	88,5	93,5
	• Skins	81,6	91,6	92,5
Niger	• Hides	26,6	55,1	67
	• Skins	60,8	89,5	88,5
Senegal	• Hide	44	72,4	89
	• Skins	90	94,6	95
Average	• Hides	24	62,2	71,1
	• Skins	74,9	90,9	92,9

- Referring to the **hides (bovine)**, the quality had achieved a certain level of improvement even if it was hindered by the problem of hides' consumption for human alimentation, especially in three of the four countries, i.e. Burkina Faso, Mali and Niger.
- It should be noted that in **BF, Mali and Niger** extensive training has been conducted in hides' improvement. The figures marked with X show indeed an improvement in the hides' quality compared to the situation of reference in 2005 marked in X. However, all efforts have not reached the impact desired and could not keep the momentum, due to the fact that the situation of the market for the bovine hides has not facilitated the sustainability of the dynamism created by this project.
- **Senegal** represents indeed an exception as the quality has increased from 44% (X average at the beginning of the project) to 89% (X average at the completion of the project) as highlighted in the table above.

¹⁸ Source: Terminal Report Regional Project Coordinator, April 2008

BURKINA FASO				
Target Areas	H&S	2005	2006	2007
Boromo	• Hides	25	25	27
	• Skins	75	94	95
Pâ	• Hides	25	21	20
	• Skins	75	92	95
Ouaga	• Hides	10	7	7
	• Skins	70	64	85
Kienfingué	• Hides	10	7	7
	• Skins	70	100	97
Tandin	• Hides	10	0	0
	• Skins	70	86	97
Saaba	• Hides	10	0	0
	• Skins	70	91	98
Kaya	• Hides	10	78	96
	• Skins	60	91	100
Kongoussi	• Hides	10	84	98
	• Skins	60	91	100
Bobo - Dsso	• Hides	5	81	72
	• Skins	75	96	93
Bama	• Hides	5	80	72
	• Skins	75	97	93
Toussiana	• Hides	5	85	--
	• Skins	75	95	
Dori	• Hides	10	0	15
	• Skins	50	63	99
Gorom Gorom	• Hides	10	0	10
	• Skins	50	86	99

MALI				
Target Areas	H&S	2005	2006	2007
District of Bamako	• Hides	7	87	97
	• Skins	70	95	96
Koulikoro (Kati)	• Hides	7	80	96
	• Skins	70	95	97
Kayes	• Hides	14	96	98
	• Skins	85	95	97
Sikasso	• Hides	20	83	97
	• Skins	80	92	98
Ségou	• Hides	24	92	94
	• Skins	90	95	93
Mopti	• Hides	15	76	79
	• Skins	75	78	74

NIGER				
Target Areas	H&S	2005	2006	2007
Dosso	• Hides	15	38	60
	• Skins	55	85	85
Maradi	• Hides	30	65	76
	• Skins	65	97	98
Tahoua	• Hides	25	58	63
	• Skins	55	84	74
Zinder	• Hides	40	69	96
	• Skins	70	99	100
Tondibia	• Hides	30	58	62
	• Skins	60	93	97
Niamey	• Hides	20	43	45
	• Skins	60	79	77

SENEGAL ¹⁹				
Target Areas	H&S	2005	2006	2007
Dakar	• Hides	20	52	80
	• Skins	90	92	95
Kaolack	• Hides	40	78	95
	• Skins	90	95	95
THIES	• Hides	40	77	90
	• Skins	90	95	95
LOUGA	• Hides	60	79	90
	• Skins	90	96	95
St LOUIS	• Hides	60	76	90
	• Skins	90	95	95

1.5.2 The Creation of ASOAC²⁰ and/or the Strengthening of Existing Professional Associations

- The Establishment and official launching of the West African Leather Industry Association, ASOAC with its main seat in Bamako, Mali, took place on 28 March 2006, at the presence of the Minister of Livestock of Mali (person with glasses in the photo next page).
- The creation of ASOAC has boosted project implementation especially its internationalization, thanks to the enormous efforts done by the RPC. This was done at no cost to this project but through the support received by international organizations

¹⁹ X represents the situation at the beginning of the project; X represents the situation at the end of the third year.

²⁰ ASOAC: *Association Sous Régionale des Professionnels de Cuirs et Peaux de l'Afrique de l'Ouest* – Copy of the Statute and related documents are enclosed to this report as Annex 5.

such as COTANCE²¹, ASSOMAC, PISIE, ESALIA and other UN organizations such as ITC/UNCTAD/WTO.



- A particular mention deserves the establishment of the WEB site www.asoac-cuir.org²² that will certainly assist in the commercialization of the raw –material as well in creating awareness worldwide about the leather industry potentialities in West Africa.
- Furthermore, a brochure²³ on ASOAC has been produced highlighting the potentialities and the status of the leather industry in the four countries.
- With regards to the National Associations, in all four countries either they have been revitalized (i.e. Mali) or newly established (i.e. Burkina Faso, Niger and Senegal). It should be noted that in all the countries, the national associations have created sub-groups in each of the regions and target areas. Special awareness sessions including a competition for the best flayers have been organized in each of the countries²⁴.

²¹ COTANCE (European Tanners Association): a MoU was signed between COTANCE and ASOAC in June 2006 to facilitate H&S export in EU countries; ASSOMAC/PISIE (Italian Association for tannery and leather products machinery manufacturers; Training and Services Institute): assistance provided for the mechanization of leather products artisans through the organization of two workshops in Mali and Senegal in August 2006; participation in Leather Bridge, *Linea Pelle*, Bologna, Italy, April 2007; ITC/UNCTAD/WTO: utilization of project personnel and technical information for the preparation of the “Cadre Intégré” for 7 countries including Mauritania, Benin and Guinea, in addition to the four covered by this project; ESALIA: participation in two events organized in Ethiopia and in Kenya in March 2005 and 2007 respectively; preparation of the ASOAC strategy (see para 1.5.3)

²² ITC/UNCTAD/WTO provided assistance to ASOAC to establish a link with the www.leatherline.org and created an online platform for West African countries as done for ESALIA.

²³ ASOAC brochure is enclosed to this report as part of Annex 5.

²⁴ Details on the activities of each association are included in the terminal Reports of the NPCs.

1.5.3 Other Project Support Activities

During the course of project implementation and in occasion of the Project Coordination Meetings, the project team has identified technical areas, which would require the support of external expertise. The following three studies²⁵ have been prepared:

1. *ASOAC Strategy and Business Plan 2008 – 2012 - prepared by Dr. S. Kiruthu, Institution Building Expert and Secretary General, ESALIA – March- April 2008* - This document was intended to devise a strategy in form of a Business Plan for ASOAC providing basis of long term sustainability of the Association²⁶.
2. *Evaluation of the impact on leather industry of the utilization of hides for human consumption in the four countries - prepared by Mr. Valentin Post, Hides and Skins Commodity Expert – March-April 2008* - The purpose of this paper was to collect information on the utilisation of hides for human consumption, its impact on the tanneries and leather sector in general and evaluate the impact in the four countries including recommendations and proposals for policy makers.
3. *“Application of Environmental-friendly Curing Methods for Hides and Skins” – prepared by Mr. Giuseppe Clonfero, Leather Industry Environment Expert – May 2008* - The purpose of this paper was to undertake a comparative study to assess different curing methods used in the pilot countries and propose environmentally-friendly alternatives and acceptable products to be used as curing agents for the storage of air dried hides and skins²⁷.

Generally speaking, the purpose of these studies was meant to create the basis for a way forward, and especially to devise a strategy for the sustainability of the project results and in general for the development of the leather industry in these four countries. Furthermore, it should be noted that:

- The three studies have been conducted in close cooperation and extensive consultations with all stakeholders in the four countries;
- Two of the studies (no.1. and no.2) have been discussed with the two consultants during the Project Coordination Meeting held in Dakar in April 2008;

²⁵ The first two studies have been decided during the Project Coordination Meetings: in Addis Ababa, Ethiopia October 2006, and in Nairobi, Kenya, March 2007 respectively.

²⁶ The strategy proposes to outline means of strengthening the Association financial resources to enable it to meet the expectations of the stakeholders within the sector. It also recognizes the need to strengthen the lobbying capacity of the Regional Association and national affiliates. The association should also be enabled to improve the information flow within the sub sector as well as raise the quality of this information. It should also be in the fore front in initiating the improvement and harmonization of sector policies and legislation. In addition capacity building initiatives should be part of the strategic focus.

²⁷ This technical paper was actually foreseen as Output 3 – Component III of this project. In view of the decision to concentrate on two main areas of interventions, it was decided to conduct this study at the end of the project.

- Upon receipt of the final draft of the documents, the project team decided to consider these papers as technical working papers - without formal editing - to be circulated among the most important stakeholders to get an immediate feed-back ;
- After official endorsement, the papers will be refined and partly translated in French²⁸ and will be presented in the final dissemination meeting planned to take place in Ouagadougou, Burkina Faso in September 2008.

1.6 Project Activities NOT implemented

As already mentioned under paragraph 1.5, in September 2004, in view of the very ambitious project design, the project team took the fundamental decision to concentrate the activities on two strategic main outputs²⁹ in order to maximize the resources available within the time frame of the project.

Furthermore, due to the fact that the approval of the H&S Grading Norms has taken longer than expected (two years) some related outputs could not be implemented within this project phase. These are:

- A purchasing system based on the grading norms, which foresees a change in the prices structure and a payment of a bonus/premium for the better grades³⁰;
- Introduction of a Label Standard including the organization of seminars and awareness meetings as well as the introduction of an auction system;
- On-line commercialization through the newly-established web-site;
- Organization of seminars about Environment Protection³¹.

In any case, with the exception of point number 4 (i.e. *environment protection*), before including these un-achieved outputs in a new programme, an in-depth analysis should be conducted to

²⁸ An executive summary will be prepared in French to facilitate their dissemination

²⁹ i.e.: 1) The introduction of a well-functioning Hides & Skins Improvement System in the selected target areas through the elaboration and the introduction of hides and skins grading based on quality, extensive capacity building for the primary producers, butchers, collectors and agents, rehabilitation of infrastructures and distribution of tools and the realization of appropriate technical literature; 2) The Creation and /or strengthening of existing professional association such as ASOAC and the national associations, which could sustain the development of the sector.

³⁰ Even if there are some encouraging signals in the four countries where hides and skins collectors area paying a better price as they have seen an improvement in the raw material, it cannot be stated that there has been an effective change in the H&S purchasing system, thanks to this project.

³¹ The technical paper entitled: "*Application of Environmental-friendly Curing Methods for Hides and Skins*" - prepared by Mr. Giuseppe Clonfero, Leather Industry Environment Expert -has been finalized in May 2008.

study their effectiveness and sustainability also against the results, lessons learned and experience of similar outputs in other CFC-funded projects in the ESALIA countries³².

1.7 Main Problems Encountered and Measures Taken

1.7.1 Administrative Problems

The main problem encountered has been caused by the variation of the rate of the dollar and the increasing inflation on the costs of equipments and logistics foreseen in the project.

In January 2005, a mission of the RPC took place at PEA's HQs in Vienna, to discuss about project administrative and substantive matters. After discussing with the RPC, it was decided that a budget revision was required in order to accommodate those requirements, occurred by the fact that this project was formulated in 2002 and finally approved in April 2003 and all legal procedures finalized in May-July 2004 (CFC, UNIDO, and FAO agreement; MOUs between UNIDO and the four countries). The budgetary revision would not affect the objectives of the project and was done by adjusting other budget lines according to the requirements.

The approval of CFC of the budget revision submitted by PEA in May 2005 and the decision taken by PEA to advance the entire project budget allocation were highly welcomed by all counterparts and have contributed to increase confidence within the four participating countries that the project would ultimately achieve its objectives.

In view of the fact that the two main problems, i.e. the approval of the budget revision and the availability of project funds, were solved, the project team made all efforts to recover the delay accumulated during the first 6 months of project implementation in order to show the first project results by end of 2005.

1.7.2 Substantive Problems

The design of the project was too ambitious compared to the resource available³³ and the time frame. Furthermore, an in-depth-analysis on the feasibility of certain outputs (e.g. introduction of a label standard as well as of an auction system) should have been carried based on the experience of similar programmes implemented in East Africa.

In light of the above, PEA, PIA and the NPCs, agreed to focus project activities on the two following main areas:

- The introduction of Hides & Skins Improvement System in the selected target areas;
- The Creation and/or strengthening of existing professional associations.

³² If possible, CFC should distribute the evaluation report of the ESALIA projects related to the introduction of a pricing system as well as of a labelling system.

³³ It should be noted that the US dollar devaluated by almost 40% in the course of the project implementation.

More over, due to the fact that the approval of the H&S Grading Norms has taken longer than expected (two years) some related outputs (e.g. the introduction of a purchasing system based on the grading norms) could not be implemented within this project phase.

1.8 Project Dissemination Activities

Since its Inception Meeting held in Bamako, Mali in September 2004 under the auspices of the Ministry of Livestock of Mali, this project has enjoyed an enormous publicity and visibility both in the four countries as well as at the international level.

This is thanks to the high professionalism of the RPC and the four NPCs who have kept the local authorities fully informed on the project progress and activities through the livestock departments. Furthermore, the monthly meetings of the national associations were another mean to evaluate the impact of the project in term of improvement of the quality of the raw material.

The role of ASOAC - even as a young regional association - should not be underestimated especially the efforts made by the RPC for its internationalization³⁴.

Of particular mention, is the participation of the project team in the following international events, which have given the opportunity to exchange experience as well discuss of common problems and constraints and way forward:

- Workshop on Hides and Skins pre-slaughter defects organized by COMESA LLPI and ESALIA in Addis Ababa Ethiopia in March 2005;
- FAO Sub-Group on Hides and Skins in Arusha, Tanzania , February 2006;
- CFC-funded Projects Dissemination Workshop organized by ESALIA and COMESA, in Nairobi, Kenya in March 2007;
- Participation of ASOAC in the All Africa Leather Fair 2008 (AALF) in Addis Ababa, Ethiopia in January 2008.

During the last Project coordination meeting held in Dakar in April 2008, it was decided that a video should be realized for the dissemination of the project results and distributed during the project dissemination workshop planned to take place in Ouagadougou, Burkina Faso in September 2008.

³⁴ Kindly refer to Footnotes 20, 21 & 22

1.9 Project Monitoring and Coordination Activities³⁵

The project has been subject of a close monitoring by PEA, PIA and the NPCs, through monthly reporting prepared by the NPCs³⁶ and compiled by the RPC on a 3-monthly basis and transmitted to PEA. Progress reports to be prepared every six months and through project coordination meetings which have been regularly organized twice a year also in connection with international events. Below is a list of the project coordination meetings.

During the project life, a strong and functional project team has been created, which has been instrumental to a conducive and smoother implementation.

- Project Inception Meeting, Bamako, Mali, September 2004
- Project Coordination Meeting in Dakar, Senegal, June 2005
- Project Coordination Meeting in Niamey, Niger, September 2005
- Project Coordination Meeting in Arusha, Tanzania, February 2006
- Project Coordination Meeting in Addis Ababa, Ethiopia, October 2006
- Project Coordination Meeting in Nairobi, Kenya, March 2007
- Project Coordination Meeting in Dakar, Senegal, April 2008
- Final Project Coordination Meeting in Ouagadougou, BF, June/July 2008

- Mission of RPC to Vienna, UNIDO HQs February 2005
- Mission of RPC to Addis Ababa, Ethiopia, June 2007 and January 2008

An In-Depth Evaluation has been organized by CFC in June 2008 and the preliminary findings have been presented during the final wrap-up meeting held in Burkina Faso from 29 June to 1 July 2008.

³⁵ Reports on Project Coordination Meetings were prepared and distributed in the course of the project life to all project partners.

³⁶ Based on the reports provided by the H&S Agents

1.9 Percentage of Achievement of Outputs and Activities

Planned Activities	Tasks to be carried out	Percentage of achievement	Remarks
Component I: Set up a grading and pricing system in the four selected countries			
Output 1: The Set Up Outline and approval of the work plan Contract the experts, the agents and brief them about the programme tasks and objectives Set up of the infrastructure facilities at all level, regional and local offices, including buildings, equipment and supplies.			
Activity 1: Outline and approval of the work plan.	Meetings between the management of the regional co-ordination office and local project coordinators, acknowledge of the strategic papers of the programme.	100% Activity fully completed	Work-plans for 2005, 2006, 2007 and ½ 2008 prepared sent to SB and CFC for endorsement. Project Coordination Meetings have been regularly held at least twice a year between PEA, RPC and NPCs. Furthermore, weekly meetings by e-mail and or telephone conversation took place between PEA, RPC and the NPCs.
Activity 2: Contract national experts and brief and train them in the new systems to be established.	Activity designed to train new staff on the project services.	100% Activity fully completed	The RPC and the NPCs have been contracted for the whole project duration and trained during the Inception Meeting in September 2004 (see Inception Meeting Report available with all project partners).
Activity 3: Set up project offices fully equipped with necessary facilities.	Set up project offices fully equipped with necessary facilities	100% Activity fully completed	All project offices are fully set-up with appropriate office facilities. List of all equipment purchased is annexed to this report as Annex 1.2.
Component II: Improve Market Access of Raw Hides and Skins and Leather			
Output 1: Market Promotion through a Physical Information System Know how transfer from ESALIA about the pricing and labelling system promotion. Support to internationalization through technical assistance on demand to participate to some important international events of the sector. Disseminating the grading and price structure to traders and tanners contacted by the project.			
Activity 1: Local seminars about market & Quality constraints	Local team will prepare and attend seminars in co-operation with the ESALIA experts.	100% Activity fully completed	At the beginning of the project, project launching meetings with professionals have been organized and held thereafter on regular basis when associations have been established to build awareness on project activities. Establishment of

			ASOAC gave boost to Internationalization of this project. Due to the resource available, cooperation with ESALIA has been limited to the participation of the project staff in two seminars organized by ESALIA in cooperation with COMESA LLPI and CFC in Addis Ababa (March 2005) and in Nairobi (March 2007) . In March 2008, the project requested ESALIA to assist ASOAC in the preparation of a Strategy for its Sustainability. Kindly refer to Footnote 21.
Activity 2: Internationalization	Assistance on demand, participation at the Bologna leather fair, visits to linked Italian companies.	100% Activity fully completed	Kindly refer to paragraph 1.5.2 and Footnote 21 as well as to paragraph 1.8
Activity 3: Training on pricing and grading system	Set up of seminars.	50% Activity partly completed	The activity has been completed with regard to the training in the grading but not with regard to the introduction of a pricing system. Kindly refer to paragraphs 1.5.1 and 1.6
Activity 4: Monitoring of results, feedback and reports to UNIDO.	A monitoring system in place	50% Activity partly completed	As above
Output 2: Web Based Information and Communication			
Activity 1: Basic Organization Principles	- Know how transfer from Africa-Leather. - Preparation of the web site linked with Africa-Leather.	100% Activity fully completed	WEB site established and operational. Kindly refer to Footnote 22.
Output 3: Web Site Management			
Activity 1: Network Start Up: Commence network management	Start up of network	100% This activity has been completed	As above
Activity 2: Network Management	Network management and maintenance		
Activity 3: Network Evaluation - Audit	Technical audit and feedback monitoring		
Output 4: Technical Assistance and Training on Demand			
Activity 1 Organize Activities in Africa and the EU	-Prepare proposals, final briefing monitoring and reporting. - Implementation according to demand	100% This activity has been completed	The RPC after the establishment of ASOAC has been very active (at no cost to this project) in initiating cooperation with various international associations such as COTANCE and ASSOMAC.

			Furthermore, he was able to receive assistance from other UN organizations such as ITC/UNCTAD/WTO for the establishment of an ICT platform for WA countries. In this regard Kindly refer to Footnotes 21 & 22 and Paragraph 1.8
Component III: Provision and Co-ordination of T. A. to Components 1 & 2			
Output 1: Improved Quality of Raw Hides and Skins			
Activity 1: Identification of Agents from Slaughterhouses - Areas in selected countries	- Briefing of agents and selection for the bonus incentive - Preparation of the rest of Intervention areas	70% Activity <u>partly</u> completed	This activity is completed for the Grading Norms. Due to the fact that the approval of the H&S Grading Norms has taken longer than expected (two years) some related outputs <u>could not be implemented</u> within these project phase. In this regard the establishment of a purchasing system based on the grading norms, which foresees a change in the prices structure and a payment of a bonus/premium for the better grades could not be implemented. Kindly refer to paragraph 1.5.1, 1.6 and Footnote 30
Activity 2: Training of Agents	Training agents	100% Activity <u>fully</u> completed	
Activity 3: Training of Operators	Coaching activity	100% Activity <u>fully</u> completed	
Activity 4: Distribution of Tools	Distribution of flaying tools	100% Activity <u>fully</u> completed	
Activity 5: Training the Butchers	Training to flay.	100% Activity <u>fully</u> completed	
Activity 6: Introduction of the Bonus for Quality Flaying	- Briefing with operators about the bonus and set up control committees within slaughterhouses to control the distribution of the bonus - Preparation and management of the system to distribute the bonus for flaying	Activity <u>not</u> implemented	
Activity 7: Monitoring and Reporting	Reporting on set up of raw hides and skins improvement activities	70% Activity <u>partly</u> completed	This activity is completed for the Grading Norms.
Output 2: Diffusion of Grading and Pricing System			
Activity 1: Labelling	Labelling	Activity <u>not</u> implemented	For the same reasons provided for the establishment of a pricing system, the introduction of a Label Standard including the organization of seminars and awareness meetings as well as the introduction of an auction system could also not be implemented. Kindly refer to paragraph 1.6
Activity 2: Introduction of Label Standard	Briefing with operators	Activity <u>not</u> implemented	
Activity 3: Expansion of Labelling	Set up of seminars and meetings by the national projects	Activity <u>not</u> implemented	
Activity 4: Grouping Associations to Finance the Project	- Introduction of bonus on voluntary bases. - Introduction of an auction system, through the organization of seminars.	Activity <u>not</u> implemented	

Activity 5: Evaluation of the Grading and Pricing System Diffusion -Audit	Technical audit and feedback monitoring	Activity <u>not</u> implemented	A above
<p>Output 3: Application of Environmental-friendly Hides and Skins Storage Methods</p> <p>To introduce alternative environmentally friendly and acceptable products to be used as curing agents for the storage of air-dried hides and skins.</p> <p>Products and processes to be used as a temporary cure to cut down putrefaction during the time lag between flaying and preservation, and as preservation against insect and mould.</p> <p>Undertake a comparative study in the pilot countries to assess different curing methods used</p> <p>Introduction of acceptable products for the purposes of curing on a pilot basis.</p> <p>Promotion of appropriate methods in the four pilot countries.</p>			
Activity 1: Set Up of Seminars about Environment Protection	Outline together with budget limits.	50% Activity <u>partly</u> completed	<p>The paper entitled: "Application of Environmental-friendly Curing Methods for Hides and Skins" - prepared by Mr. Giuseppe Clonfero, Leather Industry Environment Expert - May 2008</p> <p>- The purpose of this paper was to undertake a comparative study to assess different curing methods used in the pilot countries and propose environmentally-friendly alternatives and acceptable products to be used as curing agents for the storage of air dried hides and skins. In view of the decision to concentrate on two main areas of interventions, it was decided to conduct this study at the end of the project.</p> <p>In light of the above these seminars could not be implemented.</p>
<p>Output 4: Co-ordination & Reporting</p> <p>Coaching of teams to run technical assistance and training about grading and preservation systems. Preparation of intervention programmes</p> <p>Constant monitoring of improved quality of raw materials by increasing 1st grades and reducing lower grades. The expected results to be obtained will be based on quality assessment and audit at the start of the project in each country. Reporting, by means of a MIS (Managing Information System) shared between all offices involved.</p> <p>Final reporting.</p>			
Activity 1: Coaching local teams about new grading system and preservation methods, and to set up the programmes of intervention.	Constant coaching during the phases of activity.	100% Activity <u>fully</u> completed	Kindly refer to paragraph 1.5.1

Activity 2: Monitoring and reporting achieved results in terms of quality improvement, and final report at the end of the project.	Visits to intervention sites, preparation of proper reports and milestone remarks by means of constant inputs update of the MIS.	100% Activity fully completed	Kindly refer to paragraph 1.5.1
Component 4 - Project co-ordination and management			
Output 1: A well-managed project within the approved budget limits and the foreseen time schedule.			
Activities: 1. Setting up administrative and financial systems for project resources management. 2. Preparation of Technical and Financial Reports in accordance with the Project Agreement. 3. Facilitation of the project supervision and evaluation by the SB and the Fund. 4. Overall co-ordination of project implementation through liaison with Governments, farmers, traders, exporters and importers. 5. Monitor and report on project progress as per reporting schedule.		100% Activity fully completed	Kindly refer to paragraph 1.9

2. LESSONS LEARNED

The regional project has been implemented when the four countries needed a boost to revitalize the leather industry and has achieved a number of important milestones:

- The design of the project has been very ambitious and has not always taken consideration important issues (e.g. the hide consumption as food) which should have been addressed from the beginning. Furthermore, an in-depth-analysis on the feasibility of certain outputs (e.g. introduction of a label standard as well as of an auction system) should have been carried based on the experience of similar programmes implemented in East Africa.
- The decision taken by the project team to concentrate on two main streams of intervention has proven to be very effective, although some activities such as the preparation on the three studies should have been conducted at least 6 months before the closing of the project as the stakeholders could not fully benefit of the recommendations included in these papers.
- The presence of a technically-strong and functional project team created through this project has been very conducive to a smoother implementation.
- The rehabilitation of H&S Infrastructures, the distribution of the tools (knives) as well as the extensive capacity building programmes carried out through the project developed Manual on H&S and the introduction of a system of collection based on quality (i.e. the Grading Norms) are among the major outcomes of the programme and have greatly contributed to enhance the visibility of the project. This also resulted in the improvement of raw materials both in quality and quantity for the skins and to a certain extent to the hides (particularly in Senegal), which suffer of the problem of being consumed as food by population of Ghana, Benin and Nigeria (RPC's & NPCs' reports refer).
- The results obtained in the H&S target areas have shown that important and noticeable results can be obtained if appropriate tools and suitable infrastructure is provided. Furthermore, the cooperation with the tanning industry, the ultimate beneficiary of the improved raw material, is essential to make the system sustainable as tanners should be ready to pay a better price for better quality of H&S³⁷.
- The establishment of ASOAC provides a good opportunity to the professionals to involve themselves more and more in the development of the overall value chain, Furthermore the creation of ASOAC and the project itself have facilitated the dialogue among the different stakeholders.

³⁷ This is the case of *TanAliz* in Burkina Faso whose Manager was praising the project for the improvement of the quality of skins (the tannery processes 15,000 skins per day). The same person was very sceptical at the beginning of the project as there was a fear that the market would be distorted by the introduction of quality norms which would not fit the local conditions.

- The experience sharing with ESALIA has not been as expected due to the language barrier and above all lack of resources. In future programmes, this activity needs to be more structured in order for ASOAC to be able to fully benefit from ESALIA long-term experience in the implementation of similar programmes.
- The approval and the harmonization of the grading norms among the four countries and further on by the UEMOA countries represent the major achievement of this project. The process for their approval has indeed taken a certain time (about two years) and finalized only in May 2008. However, it should be noted that this project has created a dynamic to the process of the elaboration of the grading norms at the level of UEMOA.
- Moreover, the grading norms developed by the project will be a point of reference in the countries of UEMOA and will contribute to enrich the process in this area and also “implant” the culture of H&S quality improvement in UEMOA countries.

3. FINANCIAL IMPLEMENTATION OF THE PROJECT

Please refer to Annex 1.1.

4. CONCLUSIONS AND RECOMMENDATIONS

- There is no doubt that this project is producing important results in spite of the limited resources as well as it are improving the Image of the West Africa Region as supplier of good quality raw material.
- This is due to a very committed team including the RPC and the four NPCs who have utilized their own knowledge and resources to the benefit of the project. The number of international experts utilized in this project has been limited to four persons only, which indicates the high level of education of the project team.
- In all four countries there is an improvement of the quality of the raw material as well as it is noted more and more an involvement of the stakeholders, including abattoirs and tanneries. This is due to the extensive training carried out in the target areas, the provision of tools as well as the introduction of the grading norms and the rehabilitation of the infrastructures.
- The Creation of ASOAC and the strengthening (in certain cases the creation of see BF and Senegal) of the National Associations has given a boost of the sector. The collaboration with other development partners such as ITC and ASSOMAC is also worth-mentioning has it has provided additional resources to the project.
- The adoption of the grading norms in the four countries as well as at the UEMOA level is definitely a major outcome for this project as it will be influencing the whole region as well as complement the efforts of other projects being implemented in this area.

- A challenge is represented by the consumption of hides as food especially in countries such as Ghana and Nigeria. This problem needs to be properly tackled and articulated activities need to be built in future programmes, based on the recommendation of the study prepared by Mr. Post within CFC/FIGHS/04, in order to create the appropriate awareness at the institutional level and find solutions which could please both the leather industry and the hides consumers.
- In spite of the initial delays registered, all counterparts in the four countries were fully engaged in this project. This is also reflected in the reports of the launching of the project as well as in the progress reports prepared by the NPCs for the Project Coordination Meeting held in Senegal in June 2005.
- In this context, the approval of CFC of the budget revision submitted by PEA in May 2005 and the decision taken by PEA to advance the entire project budget allocation were highly welcomed and have contributed to increase confidence within the four participating countries that the project will ultimately achieve its objectives.

In light of the above, it is recommended that a new programme be designed in line with the areas of intervention indicated by the stakeholders in the four countries through the National Leather Associations and ASOAC. These areas would include:

- 1) Control of *Pre-mortem* defects in particular, limitations of defects deriving from poor branding practises as well as proper animal husbandry through professional dipping to avoid ticks bites;
- 2) Expansion of hides and skins improvement scheme introduced in target areas to the national level to all regions in the four countries;
- 3) Application of the grading norms as well as of a pricing system including the introduction of a label standard and an auction system after in-depth analysis is conducted on their feasibility.
- 4) Creation of awareness at the institutional level on the problem of hide consumption as food, trying to find solution to please both the leather industry and the consumers of this commodity;
- 5) Strengthening linkages between tanneries and raw material suppliers through a *mise en niveau* of the major tanneries present in the four countries providing technical assistance in the production of semi-processed leather (wet-blue) for export;
- 6) Continuous support to ASOAC to serve as real platform to the major stakeholders in the leather and leather products industry (including governments, professional associations, and technical institutes among others) for the elaboration of leather-based industry strategies to support the development of this key sector in the WA Region.

The proposal for a new programme will be presented in the project dissemination meeting planned to take place in Ouagadougou, Burkina Faso, in late September 2008, pending approval and availability of the donor.

Annexes