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for meat and live animals, encouraging more supply into the abattoirs to increase capacity utilization thereby lowering costs, improving cost competitiveness and providing more raw material to leather producers; and introducing proper and improved feeding, fattening, animal health care and other services while encouraging foreign and domestic investment at all points along the value chain.

Hides, Skin and Leather

The hides, skin and leather is a critical strategic sector for the economic and industrial development of Ethiopia. It has an abundant and renewable resource base in Ethiopia's large population of cattle, sheep and goats. It is labor-intensive with the potential to be a major source of employment all along its value chain. The government of Ethiopia has identified the leather and leather products value chain as one of the top four most promising industries in the country due to its strong backward linkage to the rural economy, and potential for poverty reduction. To date, over 10,000 trained jobs have been created as here thousands of informal handicraft and tanning activities. The country has 25 commercial tanneries of which 23 are operational, 17 footwear and 8 leather goods producing factories.¹⁴ Out of the 17 large shoe factories, 14 are engaged in exporting. About 1,000 small and microenterprises are also engaged in the production of footwear. Today the sector consists of over 850 legal hides and skin traders, 6,315 workers in tanning, 5,400 workers in foot wear and leather goods factories.

The Ethiopian leather industry is one of the leading generators of foreign currency in the country and an important creator of jobs. Until 2006/07 exports of pickled sheepskin and wet blue goat skin ranked second only to coffee as a source of foreign exchange. However, with the advent of the law that applied a tax on the export of semi-finished leather, the exports of these products declined in 2006/07, and in 2007/08 no semi-finished leather was exported from Ethiopia – which coincided with the lowest level of leather and leather product exports from Ethiopia in nearly a decade. However, as the global economy recovered and the tanneries in Ethiopia began to invest more in finishing capability, the level of leather exports recovered and in 2010/12, reached a record of USD 112 million. Despite this rebound in the export levels of finished leather, tannery capacity is still significantly underutilized with most tanneries producing at well below 50% of their installed capacities.

The global market for leather and leather products is huge, yet Ethiopia has but a small fraction of the total global market for such products. In 2010 world imports of leather were valued at USD 19.9 billion, with USD 3.3 billion worth going to China (including Hong Kong), USD 2.3 billion to Italy and USD 1 billion to Vietnam.¹⁵ Ethiopia has direct and (in some cases) long-term links to many of these markets, including Italy, China, United Kingdom, Korea and Hong Kong, which collectively account for about 75% of all leather imported from Ethiopia.¹⁶

Meat consumption drives the supply of hides and skins to the market in Ethiopia and all over the world. Maintaining ever larger herds of animals is a traditional sign of prosperity, highlighting the social status of the owner while contributing to a continual shortage of hides and skins in the leather supply chain. In addition to a shortage of supply, the quality of sheepskin in Ethiopia is generally low due to poor flaying habits as well as the proliferation of ectoparasites, known as "okla" in Ethiopia. Nearly 90% of all sheepskin from the highland areas of Ethiopia is affected by okla, most of the rejected sheepskin is due to defects as a result of okla.

The leather and leather products industry is hobbled by supply, quality, market, skilled labor and finance constraints. The leather supply chain is characteristic of a non-integrated chain in which most participants operate independently instead of interdependently across the value chain. Prices do not

¹⁴ LEI, 2011.
¹⁵ UN Comtrade and Merchandise Trade Statistics.
¹⁶ ASPAC Investment 2010.

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