

Full Length Research Paper

Value chain analysis of hides and skin in Daura area of Katsina State, Nigeria

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The study examined value chain of hides and skin in Daura area, Katsina State. The socio economic characteristics of traders, organization of flow of hides and skin and profitability along the value chain were analyzed. Structured questionnaires were used to collect data from 147 respondents (60 small bulking traders also called collectors, 30 large bulking traders, 15 wholesalers known as sub-dealers, 2 dealers i.e tannery agents and 40 Butchers) using simple random sampling. Data elicited were analyzed using descriptive statistics, gross margin, and flow chart analysis. The findings of the study revealed that, leather value chain was male dominated (100%) and 96.25% of the respondents were married. Majority (50%) of the butchers were within the age of 41-60years with household size of 1-10 members. The study also showed that, 54% of the small bulking traders had informal education with mean age of 22 years in business; about 80% of small bulking traders do not belong to any association. Organization of flow of the commodity was fairly simple starting from the slaughter points, 100% of the skins went for processing while 83.7% of hides went for human consumption as 'Pomo'. Analysis showed that marketing of hides and skin were profitable with gross margin/week of ₦6, 882.7 for collectors, ₦13, 368.3 for large bulking, ₦134, 791.7 for wholesalers and ₦1, 329,731 for tannery agents. Return per Naira invested was also found to be 0.13, 0.12, 0.1 and 0.03 respectively indicating viability of the business. The study therefore recommends involvement of various stakeholders in the value chain to support in the area of funding/institutional credit facilities, advisory services and capacity building to hides and skins traders and also women should be encouraged to participate as this would reduce unemployment and could help in the women empowerment scheme.

Keywords: Hides, skin, Daura area, Katsina State, Nigeria.

INTRODUCTION

Background information

Leather has been tanned in Northern Nigeria where it formed an important trading commodity hundreds of years and possibly longer, production was started by the peasant traditional tanning industries which later became mechanized. The world cherished Morocco leather that was quoted in history books are being produced from Red Sokoto and Kano Brown goats found in northern Nigeria (Danbatta 1996, Aminu, et al., 2010). Hides and skin are the basic raw materials for leather production and Nigeria is known to possess a significant stock of animals from which these basic raw materials are

derived. The most important are cattle, goats and sheep (Ihuoma, 1993).

The leather industry utilizes a by-product of slaughter houses (meat industry) and transforms the raw materials into various types of leather and manufactured end products. The leather production – consumption chain has three (3) processing stages, each requiring different combinations of material inputs, labour and capital. The first stage is the recovery of raw materials that has direct links with animal production activities, hides and skin are recovered from animals from slaughter houses. Leather

tanning and finishing is the second stage that involves relatively capital-intensive operations while the third stage, which is the production of leather products is more labour intensive activity (www.factbook.net).

The investment and export drive of Nigerian administration to transform the Nation's economy, and generate employment and reduce poverty has received a boost through exportation of finished leather to some part of the world. Fata tanning company in Kano, the largest in Africa, according to Amakon (2006) has entered into a joint partnership with one of the biggest shoe manufacturing company in Italy – FILANTO to set up a shoe making factory in Nigeria all in the bid to exploit the bountiful opportunities in the Nigerian leather sector.

In an earlier study Ismail, (2005) indicated that Nigeria leather value chain constitutes complex multi layered trading system developed to connect the skin sources of supply to the tanneries and the value of skin transformed to finished leather increases by 113%. Nigeria is endowed with the third largest livestock population in Africa (Felsner and Schmel, 2002), and production has been on the increase according to FAO (2005). This has confirmed the importance of leather in the Nigerian economy. Unfortunately, however, the leather industry has been facing a lot of crises in the recent times ranging from declining number of marketable and mature livestock animals and incidence of pest and diseases attack on the skin especially in the relatively hotter regions of the country (Akanni and Ibrahim, 2008). Another problem confronting the Nigerian leather industry is the human consumption of the animal skin. Raw hides and skins worth millions of Naira are being consumed by man as "Pomo" on annual basis (FOS, 2001).

This scenario has seriously increased the competition on the use of the animal hides and skin between man and tanneries. The situation has therefore called for better value addition to the available raw hides and skins so that they can further fetch higher income to the nation (Akanni and Ibrahim, 2008). Hides and Skin marketing being an old trade in the study area employed many actors, the performances in terms of organization, marketing and consumption need to be examined, against the foregoing background therefore, the study aimed at achieving the following objectives :-

Objectives of the study

The broad objective of the study is to analyze the hides and skin value chain in Daura area, Katsina state; the specific objectives are to;

- i. describe the socio economic characteristics of hides and skin traders along the value chain,
- ii. analyze costs and returns for hides and skin mar-

keters along the value chain,

- iii. examine the organization of flow of the hides and skin in the study area,

Literature review

Gereffi and Porter (1985) have been some of the leading thinkers on the concept of value chain analysis to determine industry competitiveness. In the late 1980's Porter produced his work on value chain for the firm showing inbound and outbound logistics. On the other hand, Gereffi and Kaplinsky's work (1994, 2000 and 2002) has made significant contribution on the study of global value chains.

Schemel (1998) and Magretta (2000) observed that marketing is the core of the modern leather products business and the principal main marketing agents have the necessary trade information and have established a wide network of sales channels that allow them to contract production, provide finance and serve the customer on time (within three to five weeks after placing order) managing the complex mechanism of supply chain within the strategy of buyer-driven commodity chains. The authors conclude that there are two markets, the local and the export market; the latter is usually managed within the rules of a buyer-driven commodity chain, supply chain and triangle manufacturing.

Leather production was started in Nigeria by the peasant traditional tanning industries in the northern part. Today's tanning industries exist in dualistic pattern (two types). The modern tanneries that produce leather for both domestic and export use and traditional tanneries that mainly produce leather for home consumption the traditional tanning activity has been predominantly in the hands of local tanners using traditional tanning methods. The modern tanning technology was introduced into Nigeria as early as 1949 when John Holt established a tannery in Kano. In 1959, northern Nigerian government established a tannery in Sokoto. Five years later (1964) another tannery called Great Northern Tannery (GNT) was established in Kano (Aminu et al., 2008).

According to chemonics international Inc. (2002), Nigeria demand of leather for shoe manufacturing is 4 million sq meters (43 million sq ft.), while total demand for leather products is estimated at 5.33 million sq meters (57 million sq ft.). Local tanneries supply less than 10% of the national demand for leather by the shoe manufacturing sector. Domestic production is estimated at not more than 4 million pairs per annum. The supply gap is 20 million pairs and is currently being met by imports.

Foot wear industries are the major end-users (consumers) of leather (FAO, 2005). In 1996, 65% of all

leather was converted into 4,539 million pairs of shoes with leather uppers, the remaining (35%) was used for the production of government furniture and travel goods (FAO, 1998) of the ten countries that were identified as the leading producers of footwear in 1998, China account for almost 50% of the world production with 5,520 million pairs, followed by India (685 million pairs), (Taresa, 2001).

The footwear industry in Nigeria was established about 43 years ago and since then it has grown into a credible manufacturing industry and increased significantly in the 1980 with notably a very high emergence of small and medium scale manufactures in Onisha, Aba, Lagos and Kano. Manufacture of handbags, purses, suitcase, straps and other travel goods is also well established in the country (Danbatta, 1996).

Iheanacho (1998) found out that, the marketing of hides and skins in Borno state was profitable because marketing margins were appreciable for the three categories of livestock he studied (cattle, sheep and goats).

According to Jibo (2010), marketing margin for beef, lamb and mutton marketing in Kano metropolis at wholesaling were 25.76%, 20.52% and 22.68% respectively. The existence of high marketing margin results from imperfectly competitive market.

Ismail, (2005) in his study, designing value chain/m4p programme in Nigeria, discovered that complex, multilayered trading system existed in leather value chain, developed to connect the skin sources of supply to the tanneries. Value of skins transformed to finished leather increases by 113%. The value increases from N22 million for salted Goatskins to N34.6 million for tanned leather to N46.8 million for finished leather. The skins are the largest cost item in each stage of processing, 64% in tanning and 54% in finishing - due in part to poor animal husbandry, careless handling and high rejection rates.

METHODOLOGY

The study area

The main area of study was Daura area in Katsina state where production of raw materials (Hides and Skin) and different traders were selected for detailed analysis. However, the study followed the chain outside the study area where mechanized processing of hides and skins and small scale foot wear production is taking place. The area constituted five (5) local governments (Daura, Maiadua, Zango, Sandamu and Baure) defined traditionally as one emirate. The area lies within latitude 12°30' and 13°30' North and longitude 8°19' and 9°2' East (Smith, 1978), and has a total population of 715,586 people as per 2006 population census (NPC, 2007). The area has an annual rainfall of 400mm-

560mm lasting for 4-5months. An ambient temperature ranges between as low as 13°C during harmattan period to 43°C in the hot season (www.sunmap.en/weather/katsina/Daura).

Major rain fed crops grown in the area include millet, sorghum, cowpea, groundnut, sesame etc. while dry season irrigated crops are vegetables, wheat, rice, cowpea etc. the main occupation of the people in the area are farming, livestock rearing/pastoralism, blacksmithing, trading etc. The people in the area are predominantly Hausa – Fulani by tribe (Smith 1978).

Sample size and sampling procedure

Multistage sampling technique was adopted for the study. Four local governments areas out of five in the study area were purposively selected based on intensity of hides and skins activities, the areas were; Daura, Maiadua, Zango and Sandamu. A simple random sampling was used to select 40 Butchers and one hundred and seven (107) different categories of hides and skins traders; small bulking traders (collectors), large bulking traders, sub-dealers (wholesalers) and major dealers (Tannery licensed Agents). The study used a total of one hundred and forty seven (107) respondents.

Analytical tools

Tools of analysis used depended on data available and the study objectives. Accordingly data gathered for the study were analyzed using descriptive statistics, farm budgeting model (gross margin) and flow chart analysis.

$$GM = GI - TVC \text{ ----- (1)}$$

(Olukosi et. al., 2007).

GM = Gross margin in Naira ₦/ week of traders

GI = Gross income per week (value of hides and skins sold)

TVC = Total variable cost of traders per week, the variable cost of the traders includes:

Costs of Hides per Week

Cost of Goatskin ₦/ week

Cost of sheepskin ₦/ week

Labour cost ₦/ week

Preservation cost ₦/ week

Transportation cost ₦/ week

Storage cost ₦/ week

Communication cost ₦/ week

Taxes ₦/ week

RESULTS AND DISCUSSIONS

Age distribution

The age is the period or years of life of the respondents which affect nations key socio economic issues and can

Table 1: Socio economic characteristics of actors along the leather value chain

Variable	Butchers		Small bulking traders (collectors)		Large bulking traders		Wholesalers (sub-dealers)		Tannery agents	
Age(years)	Freq	%	Freq	%	Freq	%	Freq	%	Freq	%
21-30	8	20	9	15	6	20	1	6.7	-	-
31-40	10	25	18	30	12	40	4	26.7	2	100
41-50	15	37.5	20	33.3	7	23.3	7	46.7	-	-
51-60	5	12.5	5	8.3	4	13.3	2	13.3	-	-
>-60	2	5	8	13.3	1	3.3	1	6.7	-	-
Total	40	100	60	100	30	100	15	100	2	100
Min.	24		25		25		28		33	
Max.	68		82		75		65		37	
Mean	43		45		40		43		35	
Std	11		13.9		10.8		9.7		2.8	
Gender										
Male	40	100	60	-	30	100	15	100	2	100
Female	-	-	-	-	-	-	-	-	-	-
Total	40	100	60	100	30	100	15	100	2	100
House size	hold									
1-10	20	55.6	31	55.4	20	69	9	60	2	100
11-20	12	33.3	21	37.5	6	20.7	4	26.7	-	-
20-30	4	11.1	4	7.1	3	10.3	2	13.3	-	-
Total	36	100	56	100	29	100	15	100	2	100
Min.	5		4		3		4		6	
Max.	30		22		26		20		8	
Mean	10		11		10		12		7	
Std	6.4		5.3		5.6		7.1		4.2	
Level of education										
Quranic	17	42.5	27	45	6	20	3	20	-	-
Primary	11	27.5	19	31.7	6	20	3	20	-	-
Secondary	7	17.5	11	18.3	15	40	6	40	-	-
Tertiary	5	12.5	3	10	3	20	3	20	2	100
Total	40	100	60	100	30	100	15	100	2	100
Membership of association										
Yes	15	37.5	12	20	17	56.7	10	56.7	2	100
No	25	62.5	48	80	13	43.3	5	33.3	-	-
Total	40	100	60	100	30	100	15	100	2	100
Experience in business										
1-10 years	10	25	14	23.3	4	13.3	1	6.7	-	-
11-20 years	15	37.5	27	45	15	50	8	53.3	2	100
21-30 years	8	20	14	23.3	8	26.7	5	33.3	-	-
31-40 years	6	15	2	3.3	2	6.7	-	-	-	-
Above 40yrs	1	2.5	3	5	1	3.3	1	6.7	-	-
Total	40	100	60	100	30	100	15	100	2	100
Min.	7 years		3 years		8 years		10 years		16 years	
Max.	45 years		50 years		50 years		49 years		20 years	
Mean	22 years		20 years		19 years		21 years		18 years	

Source: field survey 2011

also be used to help predict potential political issues.

Table 1, revealed that majority of the butchers (37.5%) and small bulking agents (33.3%) were within the ages of 41-50 years. The result also showed that majority

(40%) of the large bulking traders were between 31-40 years of age, this implied that, butchers, small and large bulking traders were within their active and ages defined by FAO 1990 as economically productive, they could

handle manual labour and cope with other challenges. The average age of wholesalers was 44 years while tannery agents were within the age of 31-40 years, implying that they were also within their productive age. Dealers handle large volume of hides and skins from different states and have direct access to tanneries.

Gender

Gender represents the sex of the respondent, whether the respondent is male or female. Table 1, showed the result of the survey, hides and skins trading was found to be gender biased, all the respondent (100%) interviewed were male (Butchers, collectors, large bulking traders, wholesalers and major dealers). This may be attributed to the nature of the area where religion, culture, norms and values restrict women from outdoor activities while allowing men to compete in strenuous activities outside home, this tally with Bello (2010).

Marital status

Marital status entails whether the respondent is married or single. Table 1 revealed that 90% of the butchers, 93.3% of small bulking and (96.7%) of large bulking traders were married. It could be inferred from the result that majority of the respondents are responsible. According to Amina (2010), marriage makes an individual more responsible and takes relatively technical decisions more accurately. UN, (1973) found that, different ethno-religious groups continue to attach prestige to marriage as an indicator of social responsibility.

Household size

Household size indicates the number of people or the size of the family that are under the control of the respondent. They are members of a family leaving together and relatively taking part in some economic decision. Analysis in table 1 revealed that, Butchers and large bulking traders had a mean of 10 members per household, a mean of 11 members was determined for small bulking traders while, Wholesalers and dealers (tannery agents) had an average family sizes of 12 and 7 members respectively. Larger family size could be attributed to the religion, culture and norms of the society, the implication here could be seen from the perspective of supplying cheap available labour to the business. Bello (2010), opined that large family members is commensurate with the polygamous nature of the society, and this indicates more prone to challenges of fending for the family (Sokomi, 2011). This

could be the reason why some traders had other businesses apart from hides and skins trading.

Level of education of the respondents

Level of education is an indicator of the ability of individual to read or write both in a formal and informal way. Different level of educational attainment existed among the actors of the value chain in the study area. An individual level of education should usually enhance his social and economic decision for optimum performance and efficiency (Bashir, 2011). The study revealed that virtually (100%) of the respondents were literate (Having either formal or informal education)

Experience in hides and skin business

Experience entails duration of stay of the respondents in the business. Experience in business to a larger extent effects managerial decision as well as performance. It was found from table 1 that, majority of the butchers (37.5%) had 11-20 years in the business implying that they have acquired the necessary butchering or flaying skills to give the best grade of hides and skin that would attract good prices. Among the traders, the study also shows that majority (45%, 50%, 53.3% and 100%) of the collectors, large bulking traders, sub-dealers and dealers sampled had between 11-20 years experience in the business implying a positive bearing on performance output and ability to face marketing challenges as also reported by Abdullahi, (2010).

Membership of Association

Table 1 showed whether or not the respondents belong to an association. Participation in association help actors to be more organize and have power to pursue common goals, the table revealed that majority of the butchers 62.5% and 80% of the hides and skins collectors do not belong to any association. This implied that there was deprivation of the benefit connected with association whereas the few that belonged to the cooperative complained of its viability. Interview further revealed that sub-dealers (wholesalers) and dealers (tannery agents) were the only traders belonging to National association of hides and skins dealers.

Average quantity of hides and skins handle per week bytraders

Average quantities of hides and skins were determined by the number of pieces handled by each category of

Table 2: Average Quantities Handle per Week - Normal Period (Pieces)

Traders	Goatskin		Sheepskin		Hides		Total hides and skins handled
	Mean	Std	Mean	Std.	Mean	Std.	
Small Bulking Traders	30	30.6	13	9.3	8	7.3	51
large Bulking Traders	121	120.3	60	54.1	27	50.0	208
Wholesalers (Sub-Dealer)	1032	803.3	384	273.0	22	22.1	1438
Dealers (Tannery Agent)	20,000	7071.1	17,500	17677	1,500	-	39,000

Average Quantity Handle During Festivities (Eid-Elkabir)						
Traders	Goatskins		Sheepskin		Hides	
	Mean	Std.	Mean	Std.	Mean	Std.
Small Bulking Traders	163	162.1	175	195.4	27	37.7
large Bulking Agents	1,236	1476.8	861	1061.5	110	149.9
Wholesaler (Sub-Dealer)	9,357	6233	6,507	5963.4	163	109.7
Dealers (Tannery Agent)	200,000	70710.6	300,000	28284	5,000	-

Table 3: Costs and returns for traders per week

Items	Collectors (small bulking traders)	%	Lager bulking	%	Wholesalers (sub-dealers)	%	(Tannery Licensed Agents) (Dealers)	%
revenue components:	Amount (N)	%	Amount (N)	%	Amount (N)	%	Amount (N)	%
Hides	28,032	44.8	117,180	42.1	110,000	7.7	7,500,000	15.1
Goatskins	20,820	33.3	87241	31.3	790,512	55.0	16,000,000	32.2
Sheepskin	13,702	21.9	73,860	26.6	535,680	37.3	26,250,000	52.7
Gross Revenue/Wk	62,554	100	278,281	100	1,436,192	100	49,750,000	100
Variable Costs components:								
Labour	588.9	1.1	1,232	0.5	3,980	0.3	46,000	0.1
Preservation (Salt)	824.1	1.5	2,458.6	0.9	6,985.7	0.5	207,500	0.4
Transportation	591.4	1.1	1,586.7	0.6	7473.3	0.6	32,000	0.1
Taxes	268.7	0.5	768.1	0.3	1,016.3	0.1	1,500	0.003
Storage	166.6	0.3	245.8	0.1	553	0.04	679	0.002
Communication	519.6	0.9	762.5	0.3	1720	0.13	7,500	0.2
Hides Cost	23,200	41.7	98,361	39.8	88,000	6.8	6,750,000	13.9
Goatskin Cost	18,150	32.6	82,038	33.2	725,496	55.7	16,000,000	33.0
Sheepskin Cost	11,362	20.4	59,460	24.1	466,176	35.8	25,375,000	52.4
Total VC/Wk	55,671.3	100	246,912.7	100	1,301,400.3	100	48,420,269	
Gross Margin/ Wk	6,882.7		31,368.3		134,791.7		1,329,731	
Return on Naira	0.12		0.13		0.1		0.03	

Source: Field Survey 2011

trader per week on normal days and during festivities especially Eid-Elkabir celebrations, as shown on table 2. It is worthy to note that some large bulking agents and wholesalers (sub-dealers) obtained some of their supply outside the area of study. A significant percentage of the supply drifted in from the neighbouring Niger Republic while others from neighbouring local governments outside Daura area. Similarly quantities handled by

licensed agents include those from other states like Jigawa, Kano, and some part of Katsina, Bauchi, Zamfara states.

Estimation of costs and returns for traders

Table 3 showed the variable components of hides and skins traders and the accrued revenue per week in the

study area. The raw materials constituted more than 90% of the variable costs, while marketing costs like labour, preservation, transportation, taxes, storage and communication contributed less than 10% in all the categories of the traders. The profit computed on per week basis depends on the quantity of hides and skins handled by each category of trader. The profit margin obtained per week (gross margin) were N6,882.7, N31,368.3, N134,791.7 and N1,329,731 for small bulking traders (collectors), large bulking traders, wholesalers (sub-dealer) and tannery agents (Dealers) respectively. This clearly indicated that hides and skins business was profitable in the study area. The return per capital invested was found to be N0.12, N0.13, N0.1 and N0.03 respectively inferring that for every Naira invested there is a return of 12 kobo, 13 kobo, 10 kobo and 3 kobo for collectors, large bulking sub-dealers and dealers respectively.

Total marketing costs include both purchase costs as capital cost and the variable cost incurred in the course of value addition. Tannery licensed agent(dealers) has the highest variable costs of N48,420,269 per week, wholesalers had N1,301,400.3 and collectors had N55,671.3 per week. Wide differences of total variable costs of the traders were largely due to number of hides and skins handled (sold). Preservation cost (salt) was also found to be the highest in all categories of traders, (N824.1 for small bulking, N2, 458.6 for large bulking, N6985.7 for wholesalers and N207, 500 for tannery agents) followed by transportation and labour costs.

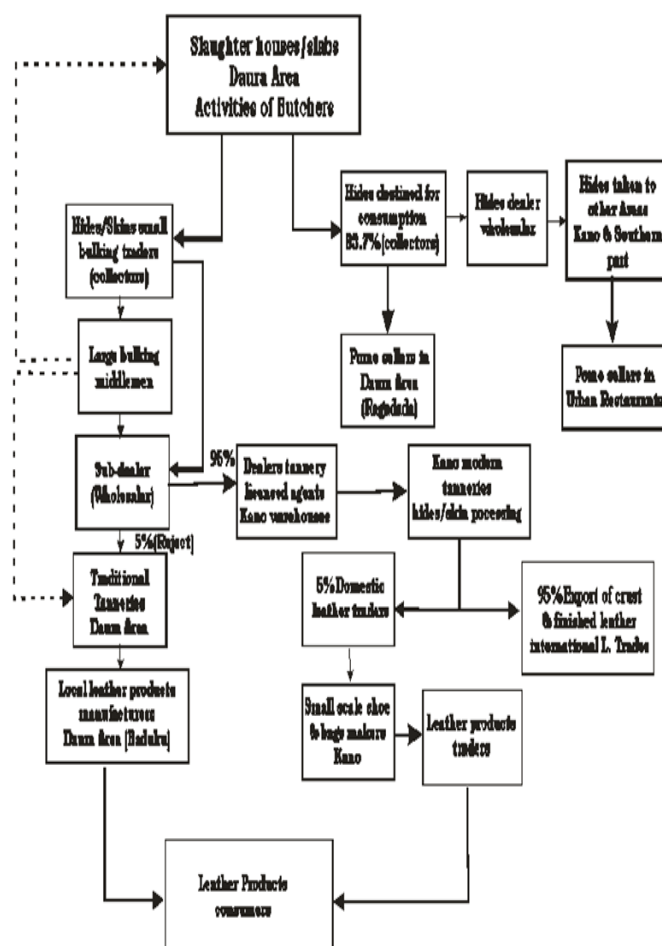
Organization of flow of hides, skin and leather along the value chain

The flow of hides, skins and leather along the value chain is fairly simple as shown in fig. 1. The animal mostly (sheep, goats and cattle) at the abattoirs and slaughter slabs were handled by butchers who play the role of primary source of raw materials in the upstream, as hides and skins are considered a by-product of meat industry. Value addition started at the abattoir, slaughter houses or slabs where skins/hides passes through many hands (traders) before reaching the tanneries. This coincides with the findings of Ismail, (2005). Skin produce in the study area goes to tanneries for processing while 83.7% of hides recovered were destined for human consumption.

At the tanneries flows continues after selection/grading by hides and skins inspectors through various stages of processing until hides/skins are converted to wet blue, crust, or finished leather. Best grade of leather (grade 1 and 2) are exported through international leather traders mostly to Spain, Italy, China and US, while lower grades are sold within the country. The domestic trade here is unidirectional from north to South, marketing channel in

this regards is not too long, and traders from the south usually place orders with tanneries according to specification, the traders then transport the leather to the south for retail to footwear and other leather products manufacturers. About 95% of the leather produced by modern tanneries is for export only about 5% is meant for domestic use. Similarly 99% of leather produced by traditional/local tanneries is for domestic use.

The flow of leather products is also simple; about 80-90% of leather for domestic use goes into footwear production while others to production of bags, purses, wallets, upholsteries and other local products. The flow is from producer/manufacturer to wholesaler to retailer and then the final consumer. The supply of hides and skins to traditional tanneries is weak as shown in the figure, only 5% are utilized by this cluster and were mostly rejected skins from the tannery (Grade 3) Figure 1.



CONCLUSION AND RECOMMENDATIONS

The study has shown that leather value chain was gender sensitive (a male domain business) and that

majority were in their active ages. Most of the respondents do not have association and have non-formal education. The organization of flow of the commodity was fairly simple, the research also made it clear that, marketing of hides and skins was a profitable businesses and recommended that, various stakeholders should be involved in the value chain to support in the area of funding/institutional credit facilities especially to hides and skins traders, women should be encouraged to participate as this would reduce unemployment and could help in the women empowerment scheme. Stakeholders (public and private) to per take in the area of research, advisory services and capacity building especially designed for marketers.

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