AFRICA LEATHER AND LEATHER PRODUCTS INSTITUTE (ALLPI)

Technical Assistance

To further **enhance** the **development** of the leather value chain in Mauritius

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Acronyms

AfCFTA	African Continental Free Trade Area
AGOA	African Growth and Opportunity Act
AGP	Agricultural Growth Program
ALLPI	Africa Leather and Leather Products Institute
CAGR	Compound Annual Growth Rate
CECPA	Comprehensive Economic Cooperation and Partnership Agreement with India
COMESA	Common Market for Eastern and Southern Africa
EQM	Evaluation Question Matrix
EU	European Union
FGD	Focus Group Discussion
FiTEC	Fisheries Training and Extension Centre
GDP	Gross Domestic Product
GNI	Gross National Income
HS	Hides and Skins
IT	Information Technology
ITC	International Trade Center
KIIs	Key Informant Interviews
LVCS	Leather Value Chain Strategy
MCAF Ltd	The Mauritius Cooperative Agricultural Federation Ltd
MITD	Mauritius Institute of Training and Development
PTAs	Preferential Trade Agreements
QA	Quality Assurance
QC	Quality Control
REACH	Registration, Evaluation, Authorization and Restriction of Chemicals
RECAMP	Regional Enterprise Competitiveness and Access to Markets Programme
RECs	Regional Economic Communities
SADC	Southern African Development Community
SMEs	Small- and Medium Enterprises
TAF	Technical Assistance Facility
UK	United Kingdom
UMA	Arab Maghreb Union
UNCTAD	United Nations Conference on Trade and Development
WBCSD	World Business Council for Sustainable Development
WTO	World Trade Organization

Foreword

With the support received under the RECAMP–TAF, it is therefore with great pride and a deep sense of purpose that I present this report: Technical Assistance to Further Enhance the Development of the Leather Value Chain in Mauritius. This document represents not only the culmination of rigorous analysis and stakeholder engagement, but also the strength of collaboration between ALLPI and our valued partner, the Government of Mauritius, the Common Market for Eastern and Southern Africa (COMESA), and the European Union. We extend our sincere gratitude for the trust placed in ALLPI to serve as the technical partner for this important initiative.

At ALLPI, our mission is to empower Member States to realize the full potential of their leather sectors through sustainable industrial growth, technological upgrading, and regional integration. This report reflects those guiding principles and outlines a roadmap for transforming Mauritius's leather industry into a dynamic, competitive, and export-oriented subsector.

As Mauritius moves into the implementation phase, ALLPI reaffirms its commitment to providing targeted technical assistance, fostering strategic partnerships, and aligning interventions with global best practices and regional development goals. Our shared objective is to see the Mauritian leather sector emerge as a key driver of job creation, value addition, and economic diversification.

We look forward to working closely with all stakeholders to bring this vision to life. With shared commitment and coordinated action, we believe Mauritius can set a regional benchmark in quality, innovation, and sustainable leather production.

Thank you for your continued confidence in ALLPI and your dedication to this transformative journey.

Nicholas Mudungwe
Executive Director, ALLPI

Executive Summary

The Regional Enterprise Competitiveness and Access to Markets Programme (RECAMP) is an EU-funded initiative aimed at enhancing private sector participation in regional and global value chains within the COMESA region. The programme focuses on three priority sectors, agro-processing, horticulture, and leather and leather products, selected for their strong potential in value addition, job creation, trade expansion, and investment attraction. Implementation of RECAMP is carried out in close collaboration with COMESA institutions, including the Africa Leather and Leather Products Institute (ALLPI), which plays a central role in driving sector-specific interventions and supporting Member States in achieving the programme's objectives.

To support the implementation of RECAMP at the national level, the Technical Assistance Facility (TAF) was established. Funded by the EU and managed by the COMESA Secretariat, the TAF provides targeted technical and financial support to Member States for the implementation of activities aligned with RECAMP's objectives. Its overarching goal is to strengthen regional integration, enhance competitiveness, and facilitate trade with the EU and global markets.

Designed to be flexible and responsive, the TAF enables Member States to address specific bottlenecks to private sector growth through small, high-impact interventions. It also complements other EU-supported regional mechanisms, such as the Regional Integration Support Mechanism (RISM) and the Regional Integration Support Programme (RISP), further reinforcing COMESA's broader agenda for regional integration and trade competitiveness.

This report, commissioned under the COMESA-RECAMP Technical Assistance Facility (TAF), presents a comprehensive assessment of the leather value chain in Mauritius. It proposes targeted interventions to reposition the sector as a competitive, export-oriented contributor to national industrial diversification.

Building on the 2018 National Leather Value Chain Strategy developed with ALLPI, the study focuses on four strategic objectives:
(i) identify and profile reliable suppliers of high-quality hides and skins;
(ii) analyse regional and international markets for finished leather products;
(iii) recommend optimal sourcing of materials for local processors; and
(iv) facilitate B2B linkages between suppliers, manufacturers, and buyers.

Methodology

A mixed-methods approach was employed, comprising:

- Desk review of trade data, policy documents, and sector literature;
- Field visits to the Luxor Tannery and artisanal producers;
- Key informant interviews with over 20 sector leaders and institutions;
- Structured surveys targeting enterprises with an annual turnover of MUR 1 million and above;

- A national validation workshop with stakeholders from government, academia, and industry;
- Development of handholding and training modules for 30 SMEs based on identified capacity gaps.

Key Findings

- Global Market Dynamics: The leather industry reached a traded value of USD 294 billion in 2022, with a projected CAGR of 6.6% through 2030. Leading exporters include Italy, the USA, and Brazil (HS 41) and China, Italy, and France (HS 42/64).
- Mauritius Sector Profile: The country produces around 15,000 hides and skins annually—60% from modern abattoirs—yet much of the home-slaughtered output goes uncollected. The only tannery, Luxor, operates at just 10% capacity due to raw material constraints, outdated equipment, and skill shortages. Five export-oriented firms operate successfully, but most MSMEs lack finance, technology, and technical capacity.
- Supply and Market Linkage: Côte d'Ivoire, Ethiopia, and South Africa emerge as strong candidates for sourcing raw and semi-processed leather. Export opportunities are strongest within the COMESA and SADC regions, as well as in Western markets (EU, UK, USA).

Recommendations

1. Raw Material Collection
Establish decentralized, graded collection centers near slaughter zones and run awareness campaigns on proper flaying and preservation techniques.

2. Tannery Revitalization
Develop a full business plan to recapitalize Luxor Tannery, upgrade technical and managerial capacity, and implement a model that imports wet-blue/crust for local finishing.

3. SME Capacity Building
Provide short courses in tanning, design, and business development. Design revolving credit instruments with financial institutions to improve SME working capital.

4. Market Linkages and Promotion
Facilitate B2B matchmaking between suppliers and Mauritian processors and buyers. Promote institutional procurement of leather products for sectors such as the military and schools, and support international trade show participation.

5. Standards and Innovation

Equip the Mauritius Standards Bureau to test leather quality. Introduce traceability and eco-certification schemes, and establish a technology-upgradation fund.

6. Policy Enablers

Simplify the expatriate permit process to attract specialized talent. Strengthen leather industry associations and support SME clustering for joint marketing and procurement.

Conclusion

With coordinated investment and strategic execution, Mauritius can unlock the latent potential of its leather sector—creating jobs, reducing import dependency, and positioning itself as a regional leader in sustainable, high-value leather goods.

Chapter One:
Introduction

1.1 Background

Mauritius is an island nation of 2,040 sq. km. with a population of 1.3 million. It is a middle-income and open economy, with the service sector contributing 73.9% of the GDP[1]. Agriculture, including fisheries, was the mainstay of the economy in the past and now accounts for only 4% of the GDP[2]. World Bank consistently ranked Mauritius as the most accessible country to do business in across the entire Region.

The Mauritius Government, considering the risk to the sustainability of high reliance on the service sector, is providing support to potential industries to diversify the economy. Accordingly, a National Leather Value Chain Strategy was designed, validated and launched by the Ministry of Industrial Development, SMEs, and Cooperatives (SMEs Division) in collaboration with Africa Leather and Leather Products Institute in 2018. The strategy's mission is "To transform the Mauritius Leather Value Chain into a modern and competitive subsector specializing in producing value-added products for niche markets through the application of modern and cleaner technologies, collaboration, capacity building and resource mobilization".

The study titled “Enhancement of the Leather Value Chain in Mauritius” is being funded by the Regional Enterprise Competitiveness and Access to Markets Programme (RECAMP) -Technical Assistance Facility (TAF) to enhance the development of the leather value chain.

1.2 Objective of the Study

The overall objective of the study is to enhance the capacity of the Mauritius leather value chain to source quality hides and skins, process and produce Leather and associated products and export them to niche regional and international markets. The specific objectives are to:

i. Identify and profile national, regional and international suppliers from which Mauritius can source good quality raw hides and skins;

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[1]Index Mundi, http://www.indexmundi.com/mauritius/gdp_composition_by_sector.html

[2]World Development Indicators database

ii. Identify and analyze potential markets for the export of Mauritian leather and leather-products to Africa and across the world;
iii. Recommend sources of the best quality hides and skins/semi-processed hides available in the Region to operators of the leather value chain and
iv. Facilitate supply and market linkages with potential suppliers and off-takers of leather and leather products.

1.3 Methodology of the Study

The study employed desk research for secondary data collection and a cross-sectional survey for primary data collection. The ALLPI collaborated with the Ministry of Industrial Development, SMEs and Cooperatives (SMEs Division), leather sector stakeholders and sector associations, and enterprises and SMEs to deliver the objectives of this assignment.

1.3.1 Secondary Data Collection

The consultant conducted comprehensive desk research. The literature review depended on websites, records, reports and other relevant documents, peer-reviewed journal articles, papers and grey literature.

1.3.2 Primary data collection

The consultant collected primary data through cross-sectional quantitative and qualitative approaches, employing a purposive sampling method was used. The Ministry of Industrial Development, SMEs and Cooperatives (SMEs Division) identified enterprises with an annual turnover of more than 1 million Rupee (22,727.00 USD) to participate in the study.

The quantitative data was collected using a structured pre-tested questionnaire before administration. Their indicators, data collection methods and sources, organized in the form of an Evaluation Question Matrix (EQM), are presented in Table 20, which is found in Annex 5:

ALLPI conducted Key Informant Interviews (KIIs), Site Visits and Focus Group Discussions (FGD). Key informant interviews (KIIs) were conducted with more than 20 heads/owners of enterprises and organizations to gain an in-depth understanding of Mauritius's leather industry and identify gaps. The experts visited seventeen enterprises and organizations and visited five artisanal product selling points.

Focus Group Discussion (FGD) was conducted with leather sector entrepreneurs, the Ministry of Industry, the Mauritius Economic Development Board, and the Mauritius Bureau of Standards.

A survey in the Region was conducted through telephone and video conferences to identify potential suppliers of quality hides & skins, finished Leather, and markets for leather products.

Limitation of the study:

Less than 10% of the semi-structured questionnaire that was distributed through the Ministry of Industrial Development, SMEs and Cooperatives (SMEs Division) were completed. Thus, this report had an extensive desk review, key informant interviews (KIIs), site visits, and focus group discussions (FGD).

1.3.3 Validation workshop

A Participatory National Stakeholders Workshop will be organized by ALLPI, working with the Ministry of Industrial Development, SMEs and Cooperatives (SMEs Division) to validate the report—government, Private sector, Academia, and leather sector association). The proceedings of the workshop will enhance the quality of the final report.

1.3.4 Training and handholding of leather actors

Training and handholding of the enterprises to accomplish the fourth specific objective of the assignment is being structured in alignment with the findings of this study. The Training and handholding will target at least30 SMEs.

1.4 Organization of the Report

The report has an executive summary, five chapters and an Annex. The chapters details are as follows:

- **Chapter One:** Project background, objectives and methodology of the study
- **Chapter Two:** An overview of the global and regional leather value chain dynamics
- **Chapter Three:** Situational Analysis of the Mauritius leather chain
- **Chapter Four:** Detailed Responses to Specific Objectives i to iii of the assignment.
- **Chapter Five:** Thematic Recommendations.
- **Annexes:** Detailed methodology for identifying suppliers of inputs and potential leather products markets for the Mauritian Leather Sector.

Chapter two:

Global and regional leather value chains

2.1 The Leather Value Chain

The World Business Council for Sustainable Development (WBCSD) defines a value chain as "the full lifecycle of a product or process, including material sourcing, production, consumption, and end-of-life management such as disposal or recycling."

In the context of leather, the value chain encompasses all stages from animal slaughter and raw hides and skins collection, through processing and tanning, to manufacturing finished leather products and distributing them to end markets. It includes both formal and informal actors engaged in trading, transformation, design, and marketing.

Globally, the leather value chain is highly fragmented, with different segments often located in separate countries or regions. This geographic dispersion is driven by the search for cost-efficiency, specialization, and access to markets. For example, hides may be sourced from one continent, tanned in another, and manufactured into finished goods elsewhere—before being exported globally. This distributed model enables firms to remain competitive on the international stage.

At the regional level, the leather value chain offers unique opportunities for economic upgrading. The Regional Leather Value Chain model allows countries within a trade bloc or geographic region to specialize in different stages of the chain. This approach not only enhances intraregional trade but also improves collective competitiveness through shared infrastructure, harmonized standards, and trade facilitation.

According to UNCTAD, regional markets can yield higher earnings for exporters of leather and leather products compared to global markets. In many cases, reduced logistical costs, familiarity with buyer preferences, and simplified regulatory requirements make regional trade more profitable—particularly for MSMEs and emerging enterprises.

Figure 1 illustrates the generic structure of the leather supply chain, highlighting key nodes and flows from raw material sourcing to end-market delivery.

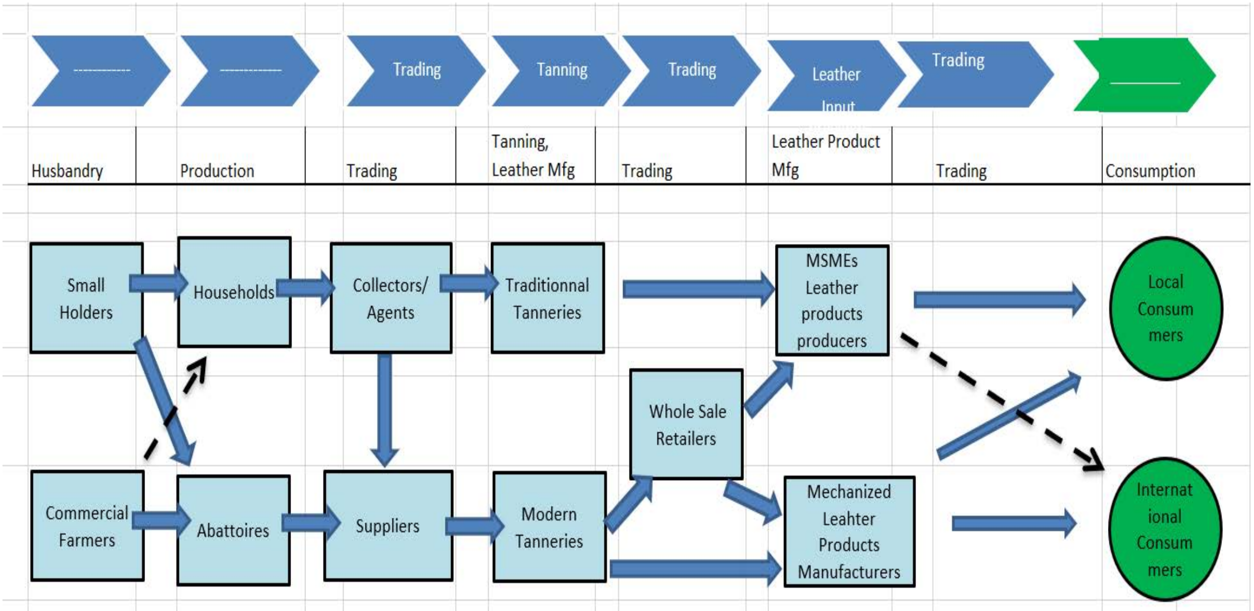

Figure 1: Marketing relationship in Hide and Skin Leather, Leather Goods and Footwear Supply Chain

Source: AGP-Livestock Market Development Project (2013)

As of 2022, the global leather value chain was valued at approximately USD 294 billion, with forecasts projecting a compound annual growth rate (CAGR) of 6.6% from 2023 through 2030. This robust growth reflects rising global demand for premium and sustainable leather goods, as well as increasing fashion and lifestyle consumption in emerging markets.

The leather market is typically segmented into three main categories based on the Harmonized System (HS) codes:

- **HS 41:** Hides & Skins and Leather – Valued at approximately USD 18.09 billion, this segment covers raw and semi-processed materials used in tanning.
- **HS 42:** Leather Goods – Worth an estimated USD 101.37 billion, this includes finished products such as bags, belts, and accessories.
- **HS 64:** Leather Footwear – The largest segment, valued at USD 175 billion, driven by global fashion trends and year-round demand.

These figures are illustrated in Figure 2, which provides a visual breakdown of global leather trade by value and segment.

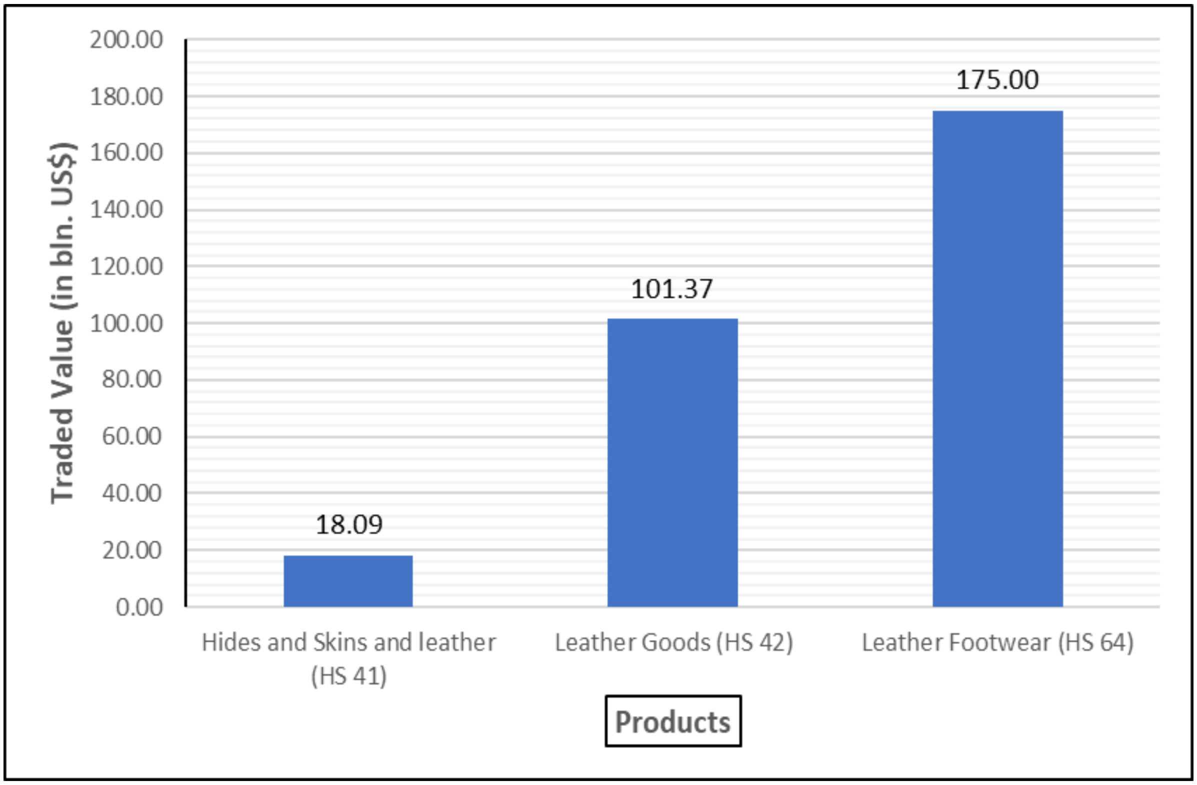

Figure 2: World Traded value of the leather industry at different HS codes

Source: Trade map and authors computation

Italy and the United States remain among the world's leading exporters of raw hides, skins, semi-finished, and finished leather—reflecting their strong tanning industries and global market integration (see Figure 3). These countries dominate the upstream segments of the leather value chain due to their advanced processing infrastructure and access to high-quality livestock.

In the downstream segment, China, Italy, and France are the top exporters of leather goods under HS Code 42, which includes handbags, wallets, and accessories. Their dominance is driven by a combination of large-scale production capacity, established luxury brands, and global distribution networks. Further details are presented in Figure 4.

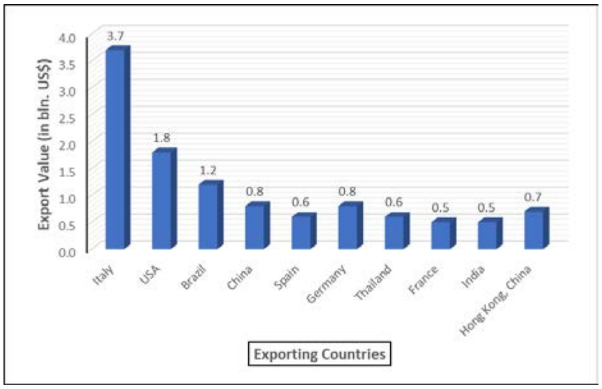

Figure 3: Global Top Ten Exporters of Hides and Skins, Semi-Finished and Finished Leather *(Source Trade Map)*

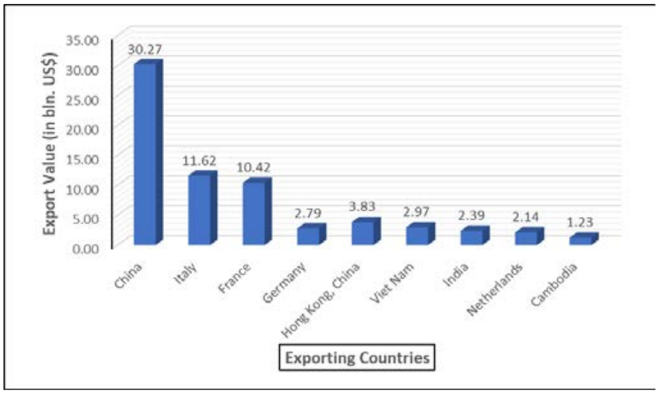

Figure 4: Global Top Ten Exporters of Leather Goods *(Source Trade Map)*

In the global leather footwear market (HS Code 64), China remains the dominant exporter by a significant margin, leveraging its scale, integrated supply chains, and cost-efficiency. Vietnam and Italy follow closely, reflecting their specialization in both mass production and high-quality, design-driven footwear. These rankings are illustrated in Figure 5.

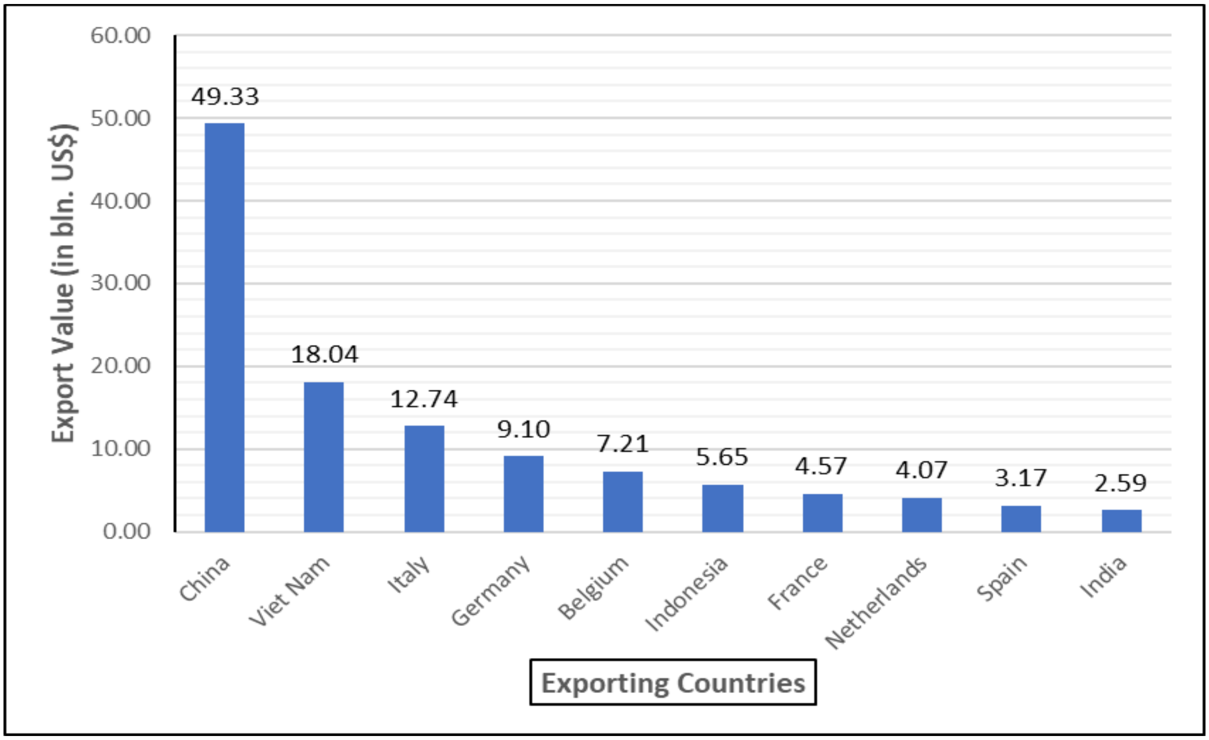

Figure 5: Global Top Ten Exporters of Footwear *(Source Trade Map)*

2.1 Livestock Population

Hides and skins—the foundational raw material for leather—are primarily derived from livestock such as cattle, sheep, goats, and pigs. However, the mere availability of livestock does not guarantee the success of a leather industry. A thriving leather sector also requires enabling policies, targeted skills development, robust processing infrastructure, and strong market linkages to drive sectoral growth and competitiveness.

As of 2022, the global livestock population was estimated at approximately 3.1 billion head. This includes around 940 million cattle, over 1 billion goats, and approximately 1.176 billion sheep. The United States remains the world's leading producer of beef and veal, having consistently slaughtered more than 33 million cattle annually since 2019. Despite minor fluctuations in numbers, the global cattle population has experienced a slight downward trend in recent years, influenced by land pressures, climate variability, and shifts in market demand.

On the African continent, livestock holdings are similarly substantial, comprising roughly 438 million goats, 384 million sheep, and just under 356 million cattle. Africa possesses nearly 25% of the global livestock population but contributes only 16% to global hides and skins production. This gap underscores a significant unrealized potential—largely due to poor flaying practices, inadequate collection systems, minimal value addition, and weak industrial capacity.

Figure 6 highlights the top ten cattle-producing countries in Africa, with Ethiopia, Chad, and Sudan emerging as the leading nations in terms of herd size and output.

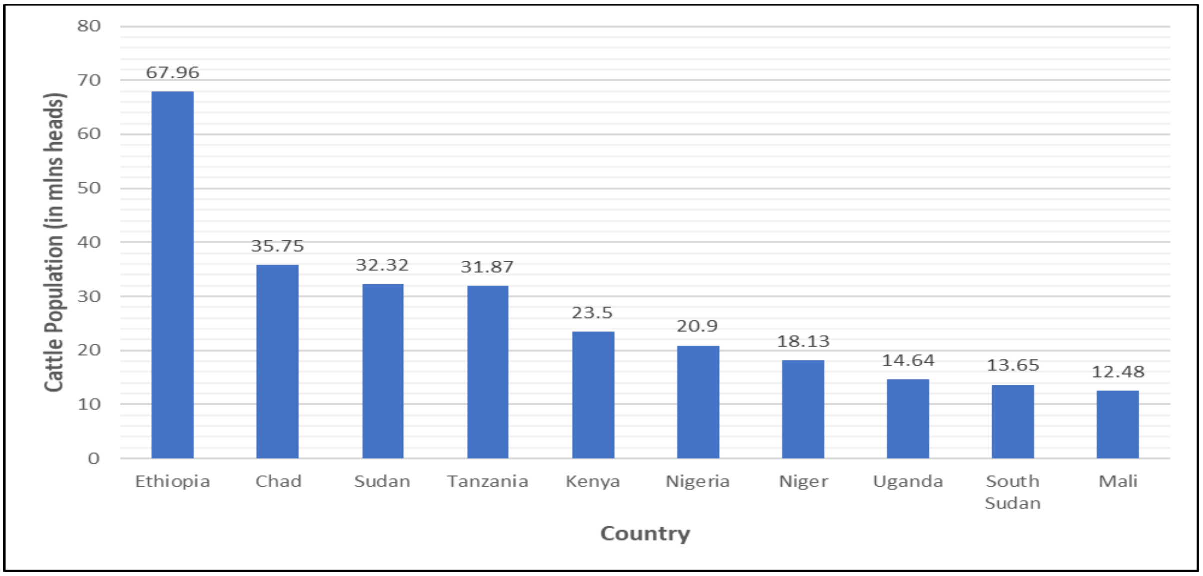

Figure 6: Top 10 cattle-producing countries in Africa 2023

Source:https://www.statista.com/statistics/1290046/cattle-population-in-africa-by-country/

The global hides and skins market was valued at approximately USD 124 billion in 2021, reflecting its significant contribution to international trade in agricultural and industrial commodities. The sector demonstrated resilience during the pandemic, recording a 25.2% growth in exports between 2020 and 2021, marking a robust recovery from COVID-19-related disruptions.

China remains the largest single exporter, accounting for around 25% of global hides and skins exports in 2021. Other major players include Italy, France, Vietnam, and Germany. Notably, developing countries are increasing their market share, with export volumes growing faster than those of developed economies—an indicator of shifting production and processing capabilities.

Market dynamics are evolving: while raw hides and skins still form a significant share of exports, there is growing global emphasis on value addition. Demand for tanned and finished leather products is on the rise, especially in emerging economies, spurred by rising incomes and consumer preferences for higher-quality and ethically sourced goods.

- *Asia leads as the largest market, with China at the center of both production and consumption.*
- *Europe remains a strong consumer but faces pressures from shifting fashion trends and sustainability concerns.*
- *Africa, despite holding a significant share of the global livestock population, continues to face bottlenecks in collection, processing, and market access, resulting in underutilized potential.*

Within Africa, South Africa, Nigeria, and Egypt are the leading exporters of semi-processed and finished leather products (see Figure 7), despite not being among the top livestock producers. Conversely, Tunisia, Nigeria, and Morocco are the continent's largest importers of hides, skins, and leather—illustrating a mismatch between resource availability and local processing capacity (see Figure 8).

Looking ahead, the hides and skins market is expected to expand, driven by urbanization, rising global incomes, and increased demand for sustainable leather alternatives. Industry actors are also investing in greener technologies, traceability systems, and cleaner tanning methods to meet evolving consumer and regulatory expectations.

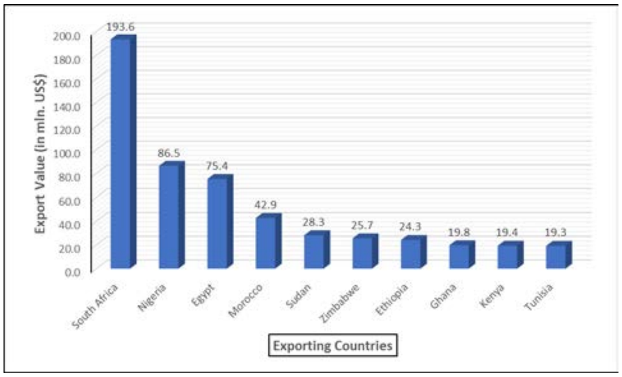

Figure 7: African Top Ten Exporters of Raw Hides & Skins and Leather (Based on HS-41) for the year 2022

Source: Trade Map accessed on January 2024

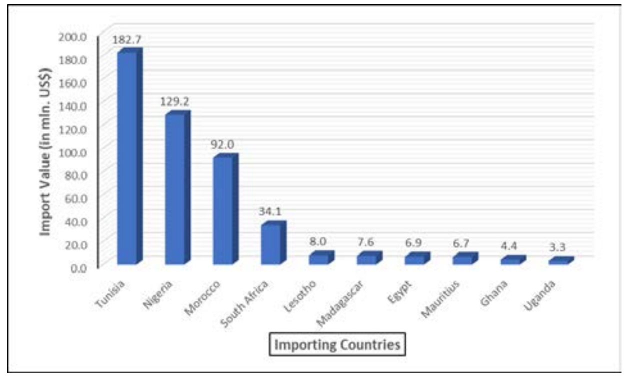

Figure 8: African Top Ten Importers of Hides & Skins and Leather (Based on HS-41) for the year 2022

Source: Trade Map accessed on January 2024

Tunisia, Morocco, and South Africa stand out as Africa's leading exporters of leather goods, as illustrated in Figure 9. Among them, only South Africa features prominently in the export of hides, skins, and semi-finished leather products. Tunisia and Morocco, by contrast, are not major livestock producers and are also not leading sources of raw hides or semi-processed leather.

This indicates a strategic reliance on global supply chains for sourcing raw materials—effectively decoupling domestic livestock production from leather manufacturing. The success of these countries in leather exports reflects the importance of importing quality inputs, investing in processing capabilities, and aligning with international market standards.

Further insights from Figure 10 reveal that South Africa, Ghana, and Morocco are also among the top importers of leather products in Africa. Notably, South Africa and Morocco appear both as major exporters and importers, underscoring their active participation in the global leather trade ecosystem. This dual role highlights the importance of integrated value chains, trade liberalization, and responsive market strategies in advancing sector competitiveness.

Together, these trends suggest that countries can position themselves as key players in the leather industry even without extensive livestock bases—provided they build robust infrastructure, processing capacity, and international trade linkages.

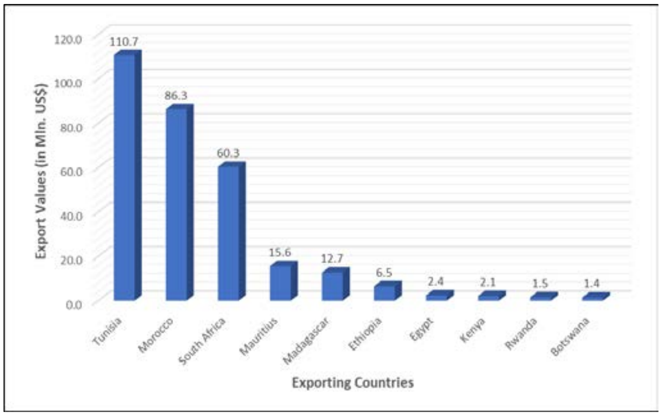

Figure 9: African Top Ten Exporters of Leather Goods (Based on HS-42) for the year 2022

Source: Trade Map accessed on January 2024

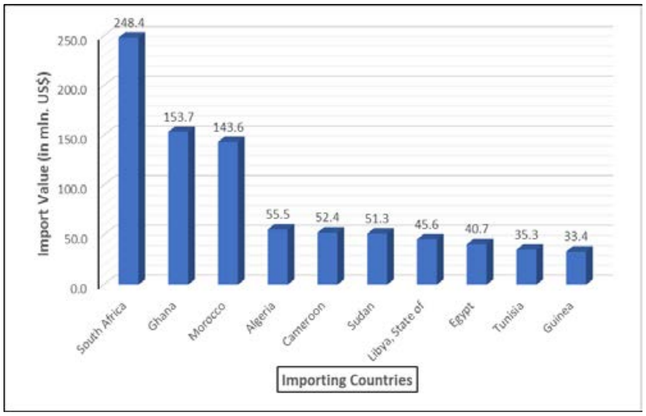

Figure 10: African Top Ten Importers Leather Goods (Based on HS-42) for the year 2022

Source: Trade Map accessed on January 2024

Tunisia, Morocco, and South Africa lead Africa in the export of leather footwear, demonstrating strong manufacturing capacity and market access within and beyond the continent (see Figure 11). Their success underscores the potential of strategic investment in value addition, branding, and export-oriented production—even in countries without the largest livestock populations.

On the import side, Figure 12 highlights the top ten African importers of leather footwear. The data reveals a significant and growing demand for leather shoes across the continent. Notably, Djibouti, despite its small population, imported approximately USD 223.6 million worth of shoes in 2022—a figure that illustrates both the scale and fragmentation of Africa's footwear market.

These trends highlight a critical opportunity: African countries can reduce dependency on imports by strengthening local manufacturing ecosystems, enhancing product quality, and tapping into regional and continental markets. With the right policy support, skills development, and investment in design and technology, the continent has the potential to become not just a consumer, but also a major producer and exporter of leather footwear.

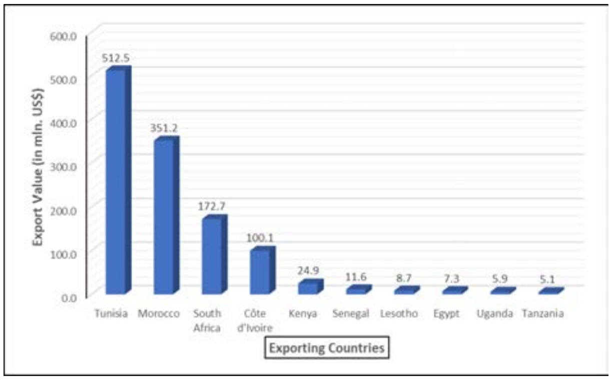

Figure 11: African Top Ten Exporters of Leather Footwear (Based on HS-64) for the year 2022

Source: Trade Map accessed on January 2024

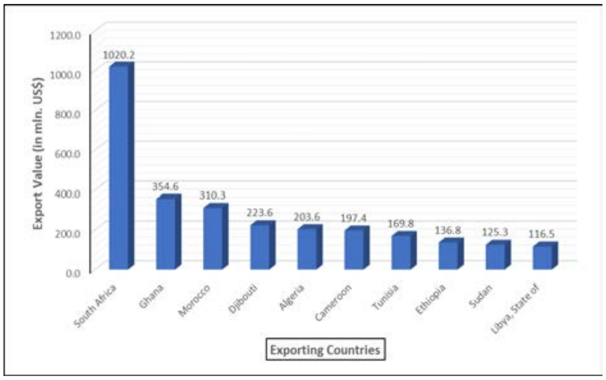

Figure 12: Top Ten Importers Leather Footwear (Based on HS-64) for the year 2022

Source: Trade Map accessed on January 2024.

Figures 13 to 15 illustrate the import–export dynamics of Africa's leather sector, categorized by the continent's main Regional Economic Communities (RECs) across three key Harmonized System (HS) codes: HS 41, which covers hides, skins, and leather; HS 42, which includes articles of leather such as saddlery, handbags, and travel goods; and HS 64, which comprises footwear, gaiters, and related items.

The data highlights UMA (Union du Maghreb Arabe) and SADC (Southern African Development Community) as the continent's most active regions in leather trade. UMA stands out as the largest importer of HS 41 items, demonstrating its strong integration into global raw material supply chains. It also leads the continent in exports of HS 42 and HS 64 products, signaling advanced domestic capabilities in processing and manufacturing leather goods and footwear.
SADC, on the other hand, is the largest exporter of HS 41 items—reflecting the region's relatively substantial livestock population and raw hides availability. However, it also emerges as a major importer of finished leather goods and footwear (HS 42 and HS 64), pointing to a significant value addition gap and underdeveloped downstream manufacturing capacity.

These contrasting trade profiles reveal important complementarities and underscore the potential for enhanced intra-African trade, especially under the African Continental Free Trade Area (AfCFTA). For countries like Mauritius, these findings present a strategic opportunity to address regional processing deficits and position themselves as niche producers of high-quality leather goods for both regional and global markets.

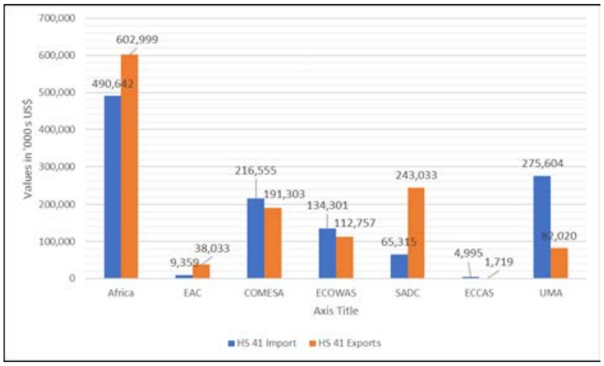

Figure 13: Africa and different RECs Import & Export Values of HS41 (Raw hides and skins (other than fur skins) and Leather) for the year 2022

Source: Developed based on Trade Map Statistics (accessed on January 30, 2024)

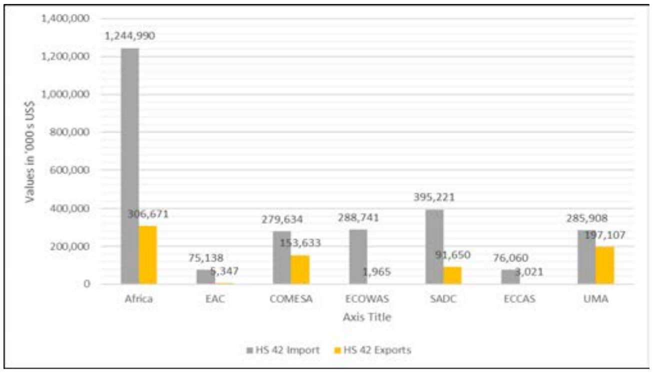

Figure 14: Africa and different RECs Import Export Values of HS42 (Articles of Leather; saddlery and harness; travel goods, handbags and similar containers; articles) for the year 2022.

Source: Developed based on Trade Map Statistics (accessed on January 30, 2024).

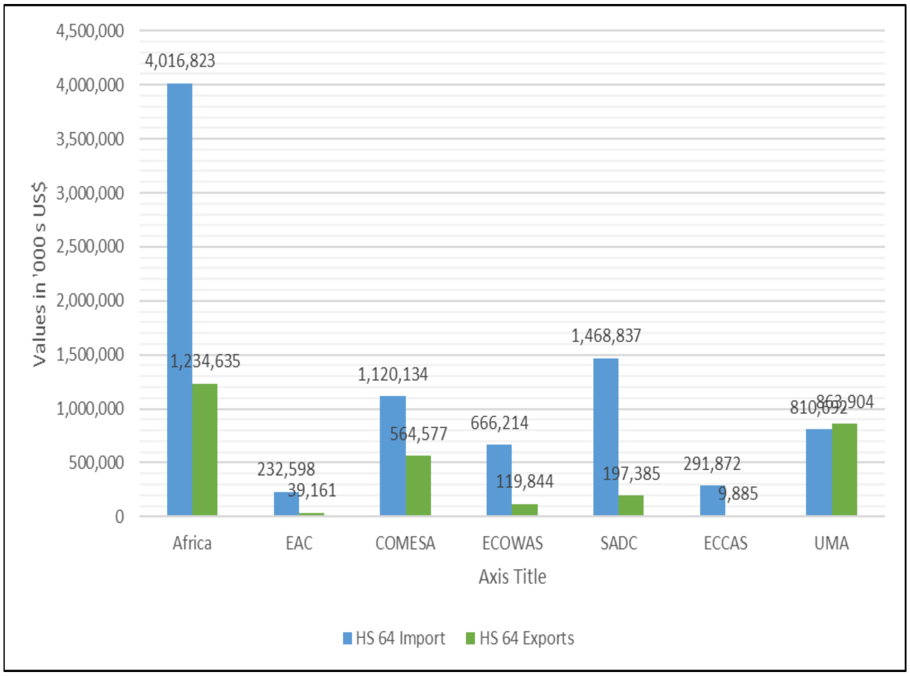

Figure 15: Africa and different RECs Import Export Values of HS64 (Footwear, gaiters and the like; parts of such articles) for 2022.

Source: Developed based on Trade Map Statistics (accessed on January 30, 2024).

As meat consumption continues to rise across Africa, so too does the volume of hides and skins—the primary raw material for leather production. This presents a timely opportunity for African countries to strengthen their position within the leather value chain by processing raw hides into finished leather and manufacturing high-quality leather goods for domestic, regional, and international markets.

Investing in value addition not only enhances trade competitiveness but also delivers substantial economic and social returns—generating higher incomes, creating jobs, and stimulating growth across related sectors such as logistics, retail, and fashion. The multiplier effects of a well-developed leather industry are especially important for inclusive industrialization and rural livelihoods.

The next chapter presents a situational analysis of Mauritius's leather value chain, setting the stage for deeper strategic exploration. It informs two critical areas of opportunity:

- *Mapping of potential exporters of raw hides, skins, and finished leather that can supply Mauritius.*
- *Identification of viable export markets for Mauritian-made leather footwear and goods.*

This analysis provides the foundation for targeted interventions and partnerships that can position Mauritius as a competitive niche player in the regional and global leather economy.

Chapter three:

Overview of Mauritius Leather sector

This section presents a brief situational analysis of the Mauritius leather sector.

3.1 Livestock Population

Mauritius has a relatively modest livestock base, with a reported population of approximately 3,512 head of cattle and fewer than 24,000 small ruminants. The domestic supply of hides and skins is therefore limited in both volume and consistency.

Current estimates indicate that over 90% of animals slaughtered for meat in Mauritius are imported, primarily from regional and international suppliers. This heavy reliance on imported livestock underscores the structural constraints facing Mauritius in building a leather value chain based on local raw materials.

Table 1 presents the distribution of livestock by species and district, offering insights into the geographic concentration and scale of animal husbandry across the country.

Given these limitations, Mauritius's leather sector must focus on importing quality raw hides, wet-blue, or crust leather from competitive sources while investing in value-added processing, design, and export-ready product development.

Table 1: Details of Mauritius livestock population

Districts and large farms		Cattle (No of heads)	Goats (No of heads)	Sheep (No of heads)	Pigs (No of heads)
Districts	Pamplemousses	574	2,908	961	452
	Riviere du Rempart	711	4,785	811	279
	Flacq	425	4,711	508	1,677
	Grand Port	370	1,198	386	439
	Savanne	255	269	208	0
	PlaineWilhems	240	2,288	315	1,186
	Moka	182	2,120	542	274
	Black River / Port-Louis	452	2,831	491	10,793
Livestock breeding stations and prison farm		129	200	38	0
Large commercial farms		174	298	107	6384
Total		**3512**	**21,608**	**4,367**	**21,484**

Source: Mauritius Digest of Agricultural Statistics 2022

3.2 Hides and Skins Production and Collection

The production of hides and skins is primarily influenced by livestock population, slaughter rates, meat consumption patterns, and broader economic factors. In Mauritius, two main sources contribute to raw hide and skin availability: homestead slaughtering and mechanized slaughtering at modern abattoirs. Key species include bovines, goats, sheep, deer, and swine.

3.2.1 Homestead Slaughtering

Homestead slaughtering is a common practice across Mauritius, especially during religious ceremonies, weddings, and cultural festivities. While it contributes significantly to domestic meat consumption, it poses several challenges for the leather value chain.

According to the Mauritius Meat Authority, an estimated 8,400 animals are slaughtered annually at homesteads, yielding a corresponding number of hides and skins. However, the quality of these hides and skins is typically low due to poor flaying techniques, lack of preservation knowledge, and the absence of structured collection systems.

Additional constraints facing the leather value chain in Mauritius include the sporadic and decentralized nature of homestead slaughtering, which results in inconsistent volumes and quality of hides and skins. This irregularity makes post-slaughter collection economically unviable. Moreover, commercial tanneries show limited interest in purchasing hides from homestead sources due to visible defects and spoilage, which further reduces the utility of these raw materials. Consequently, a significant portion of hides and skins produced through homestead slaughtering is wasted—representing a substantial loss of potential value.

However, successful experiences from countries such as Ethiopia, Kenya, and Zambia show that even low-grade hides and skins can be converted into quality leather through small-scale, artisan-led processing methods. One promising avenue is vegetable tanning, a sustainable and eco-friendly process that accommodates imperfect inputs and adds environmental credibility to leather products. In this regard, ALLPI has assumed a leadership role in the region by promoting artisan tanning solutions that are both environmentally responsible and commercially viable. The Institute is currently working with the Ethiopia Leather Industry Development Institute to reverse-engineer affordable tanning equipment tailored to micro- and small-scale operators.

Such innovations could be adapted and piloted in Mauritius, offering a pathway to utilize currently underexploited raw material streams while fostering inclusive, green innovation in the country's leather sector.

Box 3.1: Capacity building training in Artisanal leather processing in Ethiopia

In 2022, ALLPI facilitated capacity-building Training in Artisanal leather processing in Bahir Dar, Ethiopia, where Artisans processed poor-quality hides and skins into leather. Sample pictorial presentation of the Training and the products thereof are shown below.

a. Trainees displaying a semi-processed vegetable-tanned leather

b. Various types of semi-processed (crust) vegetable-tanned Leather

c. Group photo of trainees at the end of the training program

3.1.1 The Modern Slaughterhouses/ Abattoirs

According to the Mauritius Meat Authority, approximately 9,000 bovines are slaughtered annually at the country’s modern abattoir, yielding an equivalent number of hides. The facility primarily provides contract slaughter services to cattle importers, and nearly 95% of the hides are exported to South Africa—the country from which the majority of these animals are sourced.

Figure 16 illustrates the import value of bovine, sheep, and goat livestock over the past five years. Notably, there was a temporary decline in 2020, attributed to disruptions caused by the COVID-19 pandemic.

In 2022, an estimated 9,000 bovines and 8,400 sheep and goats were imported and processed through the abattoir. These estimates are based on prevailing live-weight prices in South Africa, the primary source of Mauritius’s livestock imports.

Despite the large volume and high quality of hides produced—characterized by average weights of 32–35 kg per hide, significantly higher than the regional average of 20–25 kg—only 5% of these hides were supplied to the local tannery. The remainder were exported, representing a significant missed opportunity for local value addition.

These figures underscore Mauritius's potential to shift from raw material re-export to domestic leather processing and product manufacturing, which would retain more value within the local economy while also supporting job creation and enterprise development.

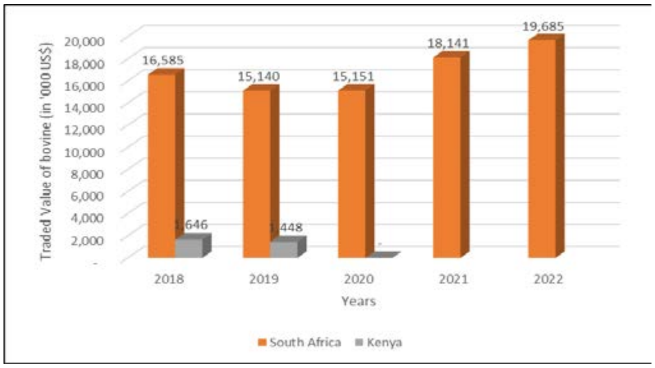

Figure 16 Details of imported animals (Cattle) to Mauritius for meat purposes (in terms of traded value) in the last five consecutive years, *Source: Compiled from Trade map Statistics*

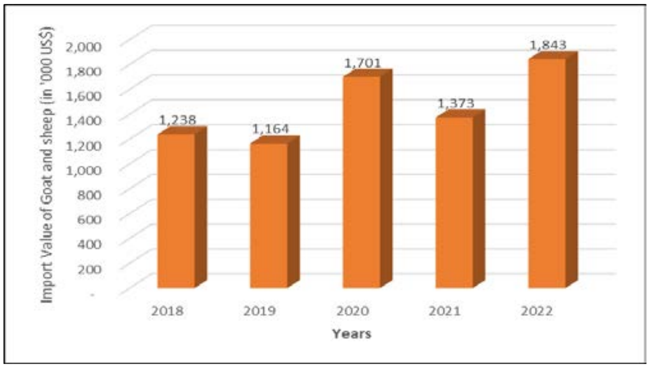

Figure 17: Details of imported animals (sheep and goats) to Mauritius for meat purposes (in terms of traded value) in the last five consecutive years,

Table 3 presents Mauritius's export performance for raw hides under HS Code 4101 over the period 2018–2022. Notably, the export value for 2022 is recorded as zero, despite official abattoir data indicating that approximately 9,000 bovines were slaughtered during the year.

According to officials at the Port Louis abattoir, the live animals are imported exclusively by a single private Mauritian company. The abattoir itself does not engage in trade but functions solely as a contract slaughter service provider, charging a fee of MUR 26.60 per kilogram of carcass weight.

This disconnect between slaughter volumes and recorded hide exports raises important questions about traceability, data capture, and value retention. It also points to an underutilized resource stream that could otherwise support local tanning, leather manufacturing, and export of value-added products.

There is a clear case for strengthening post-slaughter value chain integration, improving reporting systems, and creating incentives for local processors to access and upgrade available hides.

Table 2: The export value of raw hides (HS 4101) from Mauritius during the years 2018-2022 (in '000USD)

Importing country	2018	2019	2020	2021	2022
Hong Kong, China	19	0	0		
India	6	0	0		
South Africa	9	0	0		
Thailand	17	52	16	16	
Total	**51**	**52**	**16**	**16**	**0**

Source: Compiled from Trade map Statistics

3.1.2 Hides and Skins Collection

The collection of raw hides and skins in Mauritius operates through a fragmented supply chain, shaped by diverse slaughtering practices and a limited degree of coordination between upstream producers and downstream processors. The chain encompasses several channels of flow, ranging from homestead and abattoir slaughtering to either tanneries or export markets. Among these, Channel 2 (linked to homestead slaughtering) and Channel 5 (linked to modern abattoirs) stand out as the most prominent. Despite their significance, both channels suffer from substantial inefficiencies in collection and are heavily underutilized.

A major concern is that an estimated 99% of hides from animals slaughtered at homesteads go uncollected. This is largely attributable to poor flaying techniques, the absence of structured collection systems, and a lack of commercial interest from tanneries due to the poor quality of the hides. Moreover, 100% of sheep and goat skins obtained through modern abattoir slaughtering are not collected at all, resulting in a complete loss of potentially valuable raw material. This pervasive non-collection poses a serious economic loss to the country, depriving it of both export earnings and local value addition opportunities.

With appropriate systems in place—including decentralized collection points, basic grading practices, and public awareness campaigns—even low-grade hides could be harnessed through artisan tanning or processed into semi-finished leather for domestic and regional use. Table 4 provides a detailed overview of the current status of Mauritius's hides and skins sub-sector, identifying critical collection gaps and pointing to priority areas for strategic intervention.

The standard channels are:

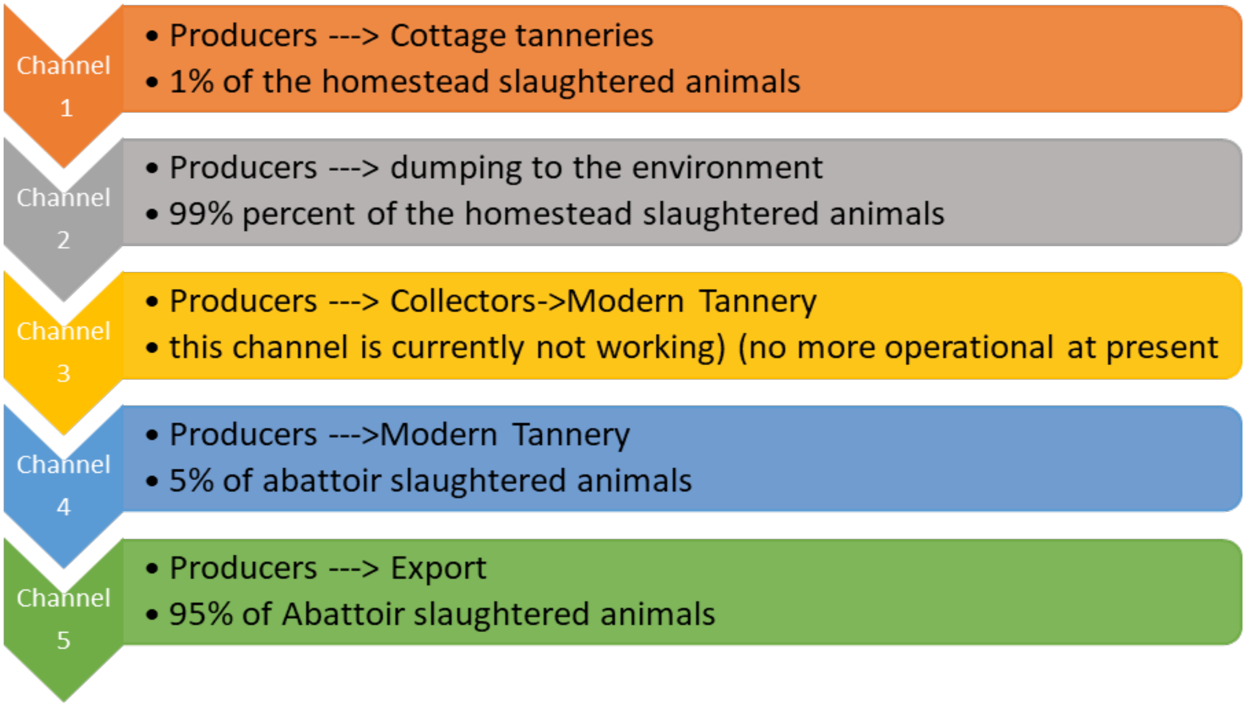

Figure 18: Channels of movement of raw hides and skins in Mauritius

Table 3: Hides and skins sub-sector profile in Mauritius

No.	Parameter	Quantity
1.	Quantity of Bovine Hides (From imported cattle)	9,000 pcs
2.	Quantity of Sheep/deerskins	8,400 pcs
3.	Quantity of Goatskins	
4.	Annual collection level of Hides	95%
5.	Annual collection level of Sheep/Deerskins	less than 1%
6.	Annual collection level of Goatskins	less than 1%
7.	Flaying Methods of Bovine	Mechanical in a slaughterhouse and Hand flaying in a homestead
8.	Flaying Methods of Sheep and Goat	Mechanical in a slaughterhouse and Hand flaying in a homestead
9.	Preservation Methods of Hides	salt preservation
10.	Preservation Methods of Skins	none

11.	Grading System of Hides and Skins	There is no established grading system, but the Tannery uses the Self-Assessment method to agree on a price.
12.	Market of Hides	Local market less than 5% and Export:95%
13.	Major Markets for hides	South Africa
14.	Annual export value of raw hides for 2022	0.00 USD
15.	Average market price of bovine hides at slaughterhouse gate in Mauritius	560 Rupee per piece of hide weighing 30-32 kg
16.	Average market price of Sheep/deerskins	None
17.	Average market price of Goatskins	None
18.	Processing capacity of Artisan Tanners per annum	Estimated to be less than 1% of hides and skins from homestead slaughtering

Source: Compiled from field survey and trade map statistics,

3.1.3 Quality of Hides and Skins

Grading of hides and skins is essential to guide slaughterhouses and collectors in meeting technical and market specifications. Currently, Mauritius lacks a formal hide and skin grading system, which limits quality control and traceability.

While mechanical flaying at modern abattoirs generally yields high-quality hides, approximately 40% of slaughtering still takes place at homesteads, where flaying techniques are often poor. This results in significant quality degradation, making most homestead-derived hides unsuitable for commercial tanning or export.

3.2 Leather Processing

Leather processing refers to the transformation of perishable hides and skins into durable, flexible, and long-lasting material. In Mauritius, both traditional/artisanal and modern commercial tanning practices coexist, albeit on a limited scale.

3.2.1 Traditional / Artisanal Leather Processing

Traditional leather processing in Mauritius is primarily focused on the production of hand-crafted items, such as the locally popular tambour (frame drum) and artisanal sandals or accessories. These products often integrate leather with other materials and are crafted at a small scale, largely for cultural, religious, or touristic purposes.

The tanning methods employed are vegetable-based, using plant-derived tannins from leaves, barks, pods, and wood. This approach is more environmentally sustainable compared to mineral-based tanning (e.g., chromium sulphate), which poses health and environmental risks if mishandled.

Globally, vegetable-tanned leather accounts for approximately 10% of the leather market, yet it commands a premium—typically three times higher than chrome-tanned leather (Tricia, 2023). Consumers increasingly value vegetable-tanned leather for its biodegradability, hypoallergenic properties, and unique aging characteristics.

Countries like Italy are global leaders in this space, with a strong export presence built on quality and sustainability.

There is a compelling opportunity for Mauritius to scale and commercialize artisanal leather production, not only as a means of preserving cultural heritage, but also for promoting eco-friendly, small-enterprise development.

3.2.2 Modern Leather Processing: The Luxor Tannery

Mauritius currently has one operational commercial tannery—Luxor Tannery—established in 1957 and now managed by a third-generation owner. The tannery specializes in chrome tanning and supplies finished leather primarily for the footwear and upholstery industries. Despite its historical presence and established infrastructure, the tannery operates well below its potential due to supply-side constraints.

Although Luxor Tannery has an installed capacity to process 200 hides per week, it currently functions at just 10% capacity, receiving only about 15 hides weekly. This significant underutilization is largely attributed to the limited and inconsistent availability of local raw hides, a challenge that also contributed to the earlier closure of the country's second tannery. Operational performance data reveals that the average hide weight received is 32 to 35 kilograms, which is above the regional average of 20 to 25 kilograms. The tannery yields approximately 900 square feet of finished leather per week, which it supplies to around 12 small and medium enterprises (SMEs). However, current production levels are insufficient to meet market demand.

The workforce has been significantly downsized, from 30 employees to just 12, reflecting the decline in throughput and economic viability. Compounding these challenges, the tannery generates approximately 5 tons of chrome splits annually, which remain unprocessed due to the breakdown of essential machinery.

Despite these limitations, Luxor Tannery retains both the technical expertise and industrial setup required to be a cornerstone of Mauritius's leather value chain. To unlock its full potential, strategic efforts such as importing raw hides or semi-processed leather from regional surplus countries—like Ethiopia, Côte d'Ivoire, and South Africa—should be prioritized. This would not only stabilize the tannery's operations but also bolster the development of downstream leather product manufacturing across the country.

3.2.3 Performance Assessment of Luxor Tannery

The ALLPI study team conducted an in-depth assessment of Luxor Tannery, led by an interview with the Managing Director, Mr. Beekum. The evaluation applied a performance scorecard based on six internationally recognized parameters used by the International Trade Centre (ITC).

Table 5 presents the scoring results, which provide insights into operational strengths, capacity bottlenecks, and strategic investment need

Table 4: Assessment of the Performance of Luxor Tannery

No.	Field of Assessment	Description of Assessment in Details	Score out of 5 (Highest possible Score)	
1	Raw material supply and quality	• The Tannery is facing an acute shortage of raw hides for its operation as the commodity is being exported, leaving the only Tannery in the country with no material to meet its customer's demands; • The Tannery only receives 15 hides in a week as 95 % of the 9,000 hides produced by the central slaughterhouse are sent back to where livestock for slaughter originated (South Africa) • There was no sign of the availability of raw hides in the Tannery, which was an indication of a shortage of the commodity; • Though the quality of 15 hides received from the abattoir per week is of good quality, networking with its suppliers is limited and needs to be enhanced to maintain the quality;	1.7/5	34%
2	Lack of experts and qualified technicians	Luxor Tannery has an acute shortage of skilled workers qualified in leather finishing, especially in areas of colour mixing and finish formulation, which are very critical in modern leather finishing.	1.8/5	36%
3	Lack of modern technology and infrastructure	The Tannery also needs more capable maintenance technicians to repair most of their broken-down machines. There is also no process control testing capability in the Tannery. The tannery owner also acknowledged that he could not have engaged a leather expert from outside as some of the machines needed to be in better working condition to maximize on him. They faced a challenge in sourcing leather experts from outside the country.	2.2/5	44%

4	Working Environment for Workers and Environmental Impact	The general working environment is poor, and the workers may be exposed to health hazards. They need to be protected from exposure to hazardous chemicals. The environmental impact system is fragile, and no established system of managing and disposing of solids to the authorized system	1.6/5	32%
5	Management capabilities	According to the owner, the management was willing to expand its supplies to new customers locally and expand to regional and international markets if the government could introduce a policy on raw hides and skin exports and encourage value-addition initiatives. He said he requires technical support to manage the transition to achieve his dream. He also said that the Tannery is looking forward to high-quality finished Leather to penetrate the regional and international markets	2.7/5	54%
6	Factory Premises	After the guided tour by the Management, the following observations were made: -- • There was no activity going on in the Tannery. • Most machines are out of operation as they are broken down; • The lighting system of the entire Tannery needs to be improved as most lighting gadgets are not working, causing poor lighting or no light at all in some critical areas; • The roof and ceiling, including the partitioning walls, are almost falling and require urgent repair; • The floor surface is worn out and requires urgent repair as it presents a hazard to health and the environment; • Raw hides and skins preservation section, storage of chrome splits are in one area where liming and tanning process are being carried out, and this exposes danger to workers and the surrounding environment; • The general condition of the Tannery is deficient.	2.0	40 %
		Average total Score awarded	**12/30**	**40%**

The performance assessment of the Luxor Tannery indicates an overall operational efficiency of approximately 40%, suggesting systemic challenges throughout its production cycle. This evaluation uncovers critical performance gaps in several core areas that require immediate and strategic attention.

In terms of workplace environment and environmental compliance, the tannery scores just 32%, reflecting shortcomings in occupational safety standards and ecological responsibility. The raw material supply and quality dimension fares slightly better at 36%, but still signals a fragile input base and inconsistencies in hide quality. Meanwhile, technology and infrastructure adequacy was rated at 44%, underscoring the need for modernization and equipment refurbishment.

These performance scores collectively point to the urgent need for a comprehensive intervention strategy. Such a strategy would need to include improvements in raw hide access, quality assurance protocols, and the introduction of cleaner, more efficient tanning technologies. Table 6 outlines the detailed results of the assessment, including the current functionality and condition of key machinery and equipment. This diagnostic snapshot is crucial for guiding targeted investments in repairs, technological upgrades, and capacity restoration.

Ultimately, the findings reinforce the importance of public-private partnerships in revitalizing the tannery. Coordinated support—through technical assistance, regional raw material sourcing, and enhanced environmental safeguards—will be essential to reposition Luxor Tannery as a reliable supplier of finished leather for both domestic consumption and regional trade within the COMESA market.

Table 5: Tannery Equipment and Machineries Working Conditions Status

No.	Name of the Machine	Condition	How does the prevailing condition impact the performance of the Tannery
1	Liming wooden drum	Old and leaking and requires repair/ replacement;	Many chemicals will go to waste due to leakage, and the final Leather will not meet the required standards
2	Tanning wooden drums	Leaking and require repair/replaced	As one (1) above
3	Fleshing machine	Old model. Need replacement with a new model	The output of the machine will be meagre
4	Splitting machine	Requires regular maintenance	Splitting of the Leather will only be of the required thickness if the machine is serviced correctly. The final product will be substandard and, hence, may not be accepted by both local and international markets
5	Shaving machine	Proper maintenance is needed	The final Leather will only be of uniform thickness if the machine is serviced regularly.

			The final product will be substandard and, hence, may not be accepted by both local and international markets
6	Conveyor Electronic Measuring machine for finished Leather	Good working condition	The efficiency and effective operation of this section will be maintained
7	Embossing/Plating machines with five plates	Good, but it requires servicing	Leather produced will not have required print if the machine is not in good working condition
8	Spraying machine	Fairly good	The colour or shade of the Leather will not be evenly distributed on the Leather if the machines are not in good working condition
9	Toggling machine	The old model and need to get the latest model	Old model machines have a metal (iron) frame, which stains the Leather when it comes into contact with the frame during drying. This affects the quality of the final Leather. The new model has a frame of stainless steel that does not stain Leather when in contact with it.
10	Staking machine	Requires regular maintenance	The final Leather will not have the required softness if the machine is not regularly maintained
11	Buffing/de-dusting machine	Proper maintenance is needed	The imperfections or defects on the grain surface of the Leather are not cleared. When the machine is not maintained regularly, the quality of the final Leather will be affected as the defects will still be visible.
12	Retaining wooden drums	Old and leaking and requires repair/replacement;	The chemicals used in this section (re-tanning) improve the final Leather's physical properties. If the drum is leaking, it means that some substances will go to waste with water, and the final Leather will not meet some of the required physical properties
13	Milling drum	Old and leaking and requires repair/ replacement;	This drum is meant for softening specialized Leather. If not in good working condition, some of the physical properties will not be achieved
14	Tunnel drying unit	maintenance is needed	This facility is used for mass production and is faster in drying. When it is not in good working condition, productivity will be slowed as the drying time will be longer than anticipated.
15	Roller coating machine	The old model and need to get the latest model	The application of a pigmented finish on the Leather takes a longer time, and this affects productivity.
16	Generator	Proper maintenance is needed	It assists as an alternative source of power supply in case of power failure

17	Compressor	Proper maintenance is needed	This is very critical and commonly used in a specialized unit, especially leather sample development
18	Boiler	Proper maintenance is needed	It is essential to provide an alternative source of heat/steam required for drying Leather in case the main power supply fails.
Missing machines which are critical and recommended to improve efficiency			
1	Liming paddles	Not available	Commonly used for liming skins instead of using the big drums
2	Sammying machine	Not available	Facilitate in reducing the excessive water from the Leather, thus shortening the drying time of the Leather
3	Sam/set-out machine	Not available	This type of machine assists in spreading the leather while at the time assisting in area yield
4	Vacuum drier	Not available	Flatten the Leather and fasten the drying time of the Leather
5	Overhead drying unit	Not available	Reduces production cost as the Leather is dried in the open air
6	Curtain Coater machine	Not available	It assists in the application of pigment finish onto the Leather, thus enhancing some of the colour fastness of the final Leather
7	Conveyor electronic measuring machine for wet-blue Leather	Not available	Give accurate measurement of Leather, thus giving customers confidence in the Tannery
8	Rotary electronic spraying machine	Not available	Provides even distribution of finish onto the leather surface
9	Impregnation unit	Not available	This process is critical as the looseness of the Leather is improved
10	Small Laboratory for quality control	Not available	assists in controlling/maintaining parameters required along the production process
11	Leather conditioning unit	Not available	It assists in conditioning or regulating the moisture content of dried Leather
12	Forklift truck for loading	Not available	It improves the artistry (efficiency), especially in loading the heavy hides into the drums
13	Sample preparation unit	Not available	It is a small unit used for sample trials/preparation before going to total production
14	Store for raw hides and skins	Not available	Storage room for hides and skins in a tannery is essential as selection and sorting of materials need to be done before taking them for processing
15	Store for chemicals	Not available	Some of the tannery chemicals are corrosive and must be stored in a secured place
16	Hides and Skins preservation unit	Not available	Hides and skins are sometimes received in the Tannery when they are not adequately cured/preserved. Maintaining them in the store is

			always necessary if they are meant for more than immediate processing.

Based on the summary presented in Table 4 above, the tannery's current state—marked by outdated and poorly functioning machinery—severely limits its capacity to produce finished leather at the quality and scale required to support competitive footwear and leather goods manufacturing for both domestic and export markets.

3.3.4 Projections of Domestic Leather Demand

According to Statistics Markets Insights, Mauritius consumes an estimated 4,589,000 pairs of shoes annually, translating to a per capita consumption of 3.53 pairs per person per year. This high demand is further reflected in the country's footwear import bill of USD 54.2 million, underlining a significant reliance on external supply.

To assess domestic production potential and future planning needs, a simulation was conducted using the following assumptions:

- *2.8 square feet of leather is required to produce one pair of shoes*
- *Mauritius manufactures between 10% to 100% of total domestic footwear demand*
- *Between 10% to 100% of imported shoes contain leather uppers*

The simulation addresses a central planning question:

• *How many hides and how much processing capacity would Mauritius require to meet between 10% and 100% of its national footwear leather demand?*

To meet just 10% of national leather demand, Mauritius would need to import approximately 23,000 hides annually and operate two fully functional tanneries of similar capacity to the current Luxor Tannery. At full self-sufficiency—meeting 100% of national demand—the country would require the equivalent of 22 Luxor-scale tanneries and the importation of around 239,000 hides per year. These projections, detailed in Table 7, underscore the substantial scale of investment required to achieve leather self-sufficiency.

Strategically, rather than investing heavily in large-scale raw hide processing, which would bring significant environmental and infrastructural challenges, Mauritius could adopt a modular and cleaner strategy. This would involve establishing smaller, modern tanneries focused solely on finishing imported semi-processed leather such as wet-blue or crust. Additionally, a comprehensive feasibility study should be undertaken to assess the financial, environmental, and technical implications of the various scaling scenarios.

This phased, sustainability-conscious approach would allow Mauritius to incrementally expand its leather manufacturing capacity while managing ecological risks and maintaining economic viability.

Table 6: Simulation Model for Mauritius Leather Sector Demand

1	2	3	4	5	6
The proportion of leather footwear produced in Mauritius	Est. number (pairs) of shoes to be produced	Amount of Leather Required (Sq.ft)	Amount of Leather Required (Sq.ft) (25% waste included)*	Number of hides (Pcs) required to produce the finished Leather	Equivalent Weight in Kgs needed to produce the finished Leather
0.1	458,900	1,147,250	1,434,063	23,901	717,031
0.2	917,800	2,294,500	2,868,125	47,802	1,434,063
0.3	1,376,700	3,441,750	4,302,188	71,703	2,151,094
0.4	1,835,600	4,589,000	5,736,250	95,604	2,868,125
0.5	2,294,500	5,736,250	7,170,313	119,505	3,585,156
0.6	2,753,400	6,883,500	8,604,375	143,406	4,302,188
0.7	3,212,300	8,030,750	10,038,438	167,307	5,019,219
0.8	3,671,200	9,178,000	11,472,500	191,208	5,736,250
0.9	4,130,100	10,325,250	12,906,563	215,109	6,453,281
1	4,589,000	11,472,500	14,340,625	239,010	7,170,313

ALLPI Computation: Note: Columns 5 and 6 - in the Figure above represent the number of hides in pieces and Kgs; respectively, taking one piece of hide is equivalent to 30 kgs or 45 Sq.ft. 1 pair of shoes consumes 2.5 sq. ft of Leather without including waste, 1 kg. of wet-salted hide can produce two sq. ft of finished Leather.

From the above ALLPI Computation, it has been noted that (taking into consideration shoe demand for Mauritius as 4,589,000 pairs of shoes per year), the Luxor tannery, in the current situation, cannot be able to supply finished Leather for shoe production in Mauritius, even if the hides (9000 pieces) which are being exported out of the country are made to be processed by the Tannery. Still, there would be a need for more finished Leather for shoe production. It should also be noted that finished Leather for other leather goods production has not been considered.

Tannery waste

The following critical areas should be addressed to reduce the negative environmental impact:

- *There are chrome splits that have accumulated in the Tannery for a couple of years due to a lack of market, as the proprietor of the Tannery informed the study team. These will only interfere with the smooth running of the Tannery if they are processed for the local market or disposed of if the market is available.*

- *Environmental policy instruments with respect to process standards, economic instruments, and eco-labelling schemes have to be given serious attention to positively influence environmental protection measures.*
- *As the leather industry is considered one of the most polluting industries with a high negative impact on the environment, the Mauritius tanning sub-sector needs to put in place mechanisms to achieve the primary goal of value addition and product quality development through adopting sustainable, clean technologies.*

3.4 Footwear and Leather Goods Production

The production of footwear and leather goods marks the final, value-adding stage of the leather value chain, utilizing finished leather as the principal raw material. This segment is not only labour-intensive but also more environmentally sustainable compared to earlier stages such as tanning. In Mauritius, the product range typically includes footwear such as sandals, formal shoes, and security or safety boots. It also extends to leather goods like bags, wallets, belts, gloves, aprons, and hats, as well as crafts and upholstery items.

Industry Players and Capacity

As part of this study, 15 small and medium-sized enterprises (SMEs) engaged in the manufacture of footwear, leather goods, and garments were evaluated. According to the Economic Development Board (EDB) of Mauritius, five enterprises in the sector are oriented toward exports. Among these, two firms—Caleage Limited & Hemisphere Sud and Nylex Shoes & Cie—were examined in greater detail. Caleage Limited & Hemisphere Sud specializes in the production of leather goods under contract for a French client, while Nylex Shoes & Cie manufactures men's and women's shoes for both the domestic and international markets. These two companies operate modern, well-equipped factories that set them apart from most local SMEs. However, both firms rely heavily on imported leather, mainly from Italy, India, and Spain.

Export-oriented companies cited several key constraints hampering their growth. These include the growing demand for traceability and carbon footprint reporting in premium global markets, bureaucratic delays in hiring expatriate technical staff due to Ministry of Labour regulations, and inefficiencies in export facilitation procedures.

Constraints Facing Domestic-Oriented Enterprises

Feedback gathered from local enterprises revealed a broad array of challenges. Based on 115 individual citations grouped into 20 categories, and subsequently ranked by the participants, the most pressing constraints emerged. The top five issues were the shortage of skilled labour—particularly trained designers, technicians, and production staff; unfair competition caused by the influx of inexpensive imported goods; outdated machinery and inadequate production technology; restrictive policies and regulations, including labour laws; and limited access to high-quality raw materials.

These challenges underscore the need for a comprehensive industrial upgrade strategy. Such a strategy should prioritize workforce development, modernization of production equipment, regulatory reform, and improvement in the local supply of raw materials in order to enhance the competitiveness and sustainability of Mauritius's leather goods sector.

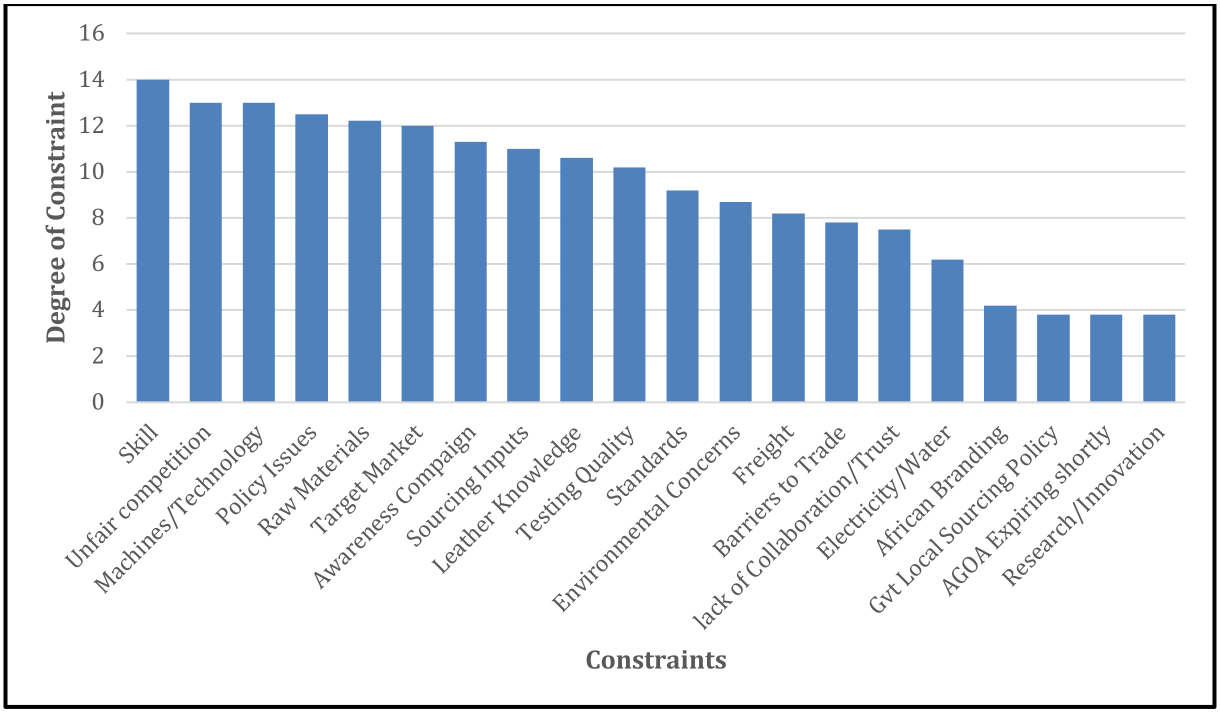

Figure 19: Mauritius leather sector constraints as cited and ranked by the survey participants

The consultant conducted a gap analysis of the leather footwear and goods manufacturing sector, with findings summarized in Table 8. The assessment examined eight critical success factors, drawing on a combination of secondary data and field-level observations. A five-point scoring scale was applied to each factor, where a score of 5 indicates an ideal scenario for efficient enterprise operation, and a score of 0 reflects the worst-case scenario, pointing to substantial gaps or systemic deficiencies. This analytical framework offers a concise yet comprehensive snapshot of the sector's current performance and identifies key areas where strategic interventions are needed to boost productivity, competitiveness, and readiness for market expansion.

Table 7: Gap Analysis of the Mauritius leather products manufacturing segment

No.	Critical success factors	Problem	Mauritius current reality Score (out of 5)	Mauritius Desired state score (out of 5)	Gap	Comment regarding the desired state
1	Market position of domestic footwear production	Locally produced footwear represents 10-15% of the domestic market	1.5	5	-3.5	There is room to increase domestic footwear production
2	Visibility of locally produced leather products	Leather products (footwear and leather goods) displayed in different shops in 3 big malls that were visited during the field survey were all imported ones	1.5	5	-3.5	Need to promote the visibility of locally produced products at national trade fairs. There is a need to enhance the production of fashionable products to attract local consumers.
3	Technology, machinery and equipment	Except for a few producers, the majority use old equipment, machinery and technology	2	5	-3	Acquisition of modern technology, equipment and machines for producing high-quality products with new series and models is required.
4	Supply of raw materials (finished Leather and accessories)	Of the total hides and skins produced in Mauritius, only 5% is transformed into finished Leather, which is also indicated as of low quality by many SMEs. Almost all (100%) of accessories are imported	1	5	-4	Easy access to raw materials (finished Leather and accessories) in required quantity, quality and variety
5	Skilled workforce	There is a severe shortage of skilled workforce	1	5	-4	We need to address this constraint by attracting skilled workers from other countries.

6	Collaboration between enterprises (SMEs)	Little or no cooperation and lack of trust between SMEs.	1.5	5	-3.5	Promote collaboration through joint action (clustering) on importing commonly used inputs, e.g. Leather and accessories.
7	Support structure and development institutions	Lack of measures and public policies in the leather sector to: encourage local value addition connect with the education system establishing quality systems	2	5	-3	Enabling policy environment for the leather industry growth and significantly improved support structure
8	Finance	Limited access to affordable finance and lack of information on available financial schemes are significant constraints pointed out during the field survey.	2	5	-3	Significantly improved access to affordable finance and awareness of available schemes
	Total		12.5	40	31.25%	

Nb: Score 1= poor or unacceptable; 5 = superior conditions; Source: ALLPI gap analysis based on secondary data and field survey

The overall score from the gap analysis reveals a significant disparity between the current performance of critical success factors and the ideal benchmarks required for efficient, competitive operations. Bridging these gaps—particularly in areas such as skills development, machinery, policy support, and raw material access—will be pivotal in unlocking the full potential of Mauritius's leather and footwear industry.

In 2022, Mauritius imported footwear worth USD 54.2 million, while exporting footwear valued at only USD 0.248 million. Using the average global export price of USD 10.37 per pair, this equates to the importation of approximately 5.2 million pairs of shoes annually. This figure exceeds the previously reported per capita consumption estimate of 3.53 pairs per year (Statistical Market Insight), indicating growing domestic demand and dependence on imports.

If Mauritius were to domestically manufacture all 5.2 million pairs, it is estimated that this would generate approximately 6,500 shop-floor jobs. In addition to direct employment, such a shift would stimulate upstream demand for finished leather, soles, adhesives, and other inputs, creating indirect job opportunities across related value chain segments.

For detailed assumptions and job creation calculations, refer to Table 9.

Table 8: Parameters Used to Determine Annual Footwear Demand and Job Creation Capacity

No	Description of Parameters	Value
1	Africa's average footwear consumption per person and year	1.1 pairs of shoes
2	Mauritius' average footwear consumption per person and per year	3.53
2	Mauritius population size	1.3million
3	2022 Total Import values	54,235million USD
4	2022 Total Export values	0.248 million USD
5	Worldwide export price of footwear	10.37 USD per pair
6	Estimated Local production of footwear	0.6 million pairs
7	Mauritius' average productivity of footwear per person per day	Four pairs
8	Considering 200 working days per year, one person's annual production will be 200 X 4	800 pairs
9	The workforce required to produce 5.2 million pairs (5.2million /800)	6,500 jobs

Source: ALLPI estimation based on Mauritius's average SME productivity and total footwear consumption for the year 2022.

Figure 20 highlights the priority intervention areas identified and ranked by stakeholders for advancing leather sector development in Mauritius. A total of 87 citations were recorded across 14 thematic areas, reflecting a diverse yet focused understanding of the sector's critical needs. The top-ranked priorities included training of technicians to bridge skills gaps in production and finishing; increased awareness of existing support schemes and available resources; efforts to enhance the visibility of locally produced leather products in both domestic and export markets; the formulation of conducive policies to improve the regulatory and business environment; and the certification of leather products to meet quality standards and build market confidence. Collectively, these priorities underscore the industry's call for integrated action across capacity building, policy reform, and market development to unlock the sector's full potential.

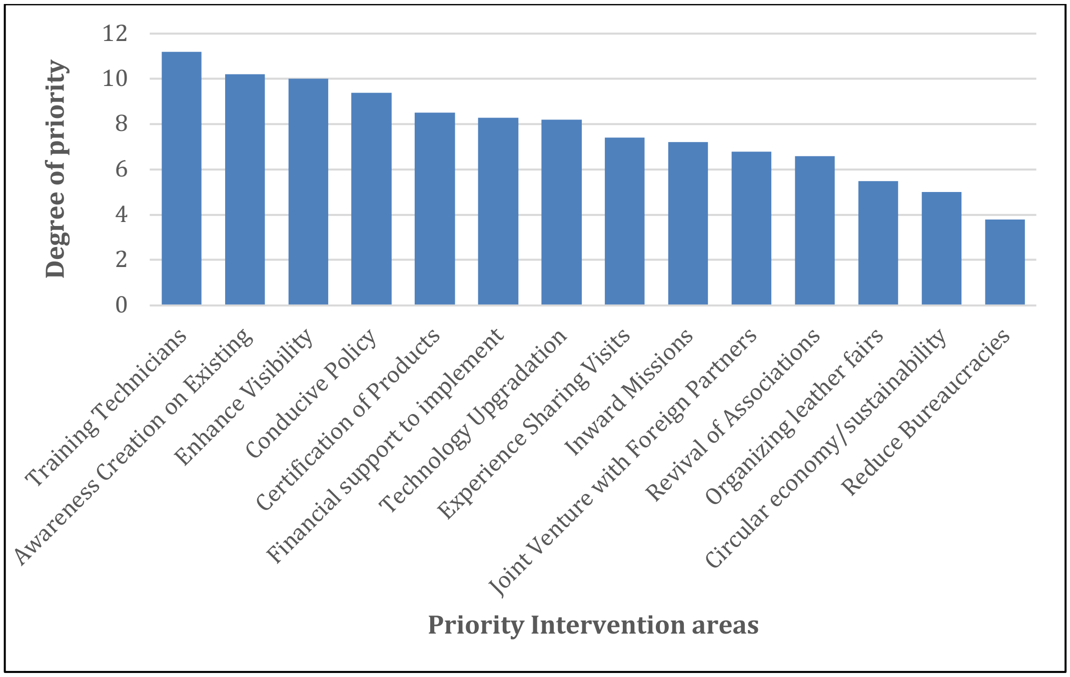

Figure 20: Priority intervention areas as cited and ranked by respondents

3.2 Trade of leather footwear and other goods

Mauritius maintains liberal economic and trade policies, with a trade-to-GDP ratio of 98% according to the latest available World Bank data. As a member of the World Trade Organization (WTO) and key regional blocs including COMESA, SADC, and the Indian Ocean Commission (IOC), the country has positioned itself as an open and globally connected economy. Mauritius's trade policy is geared toward full integration into the world trading system, with minimal trade restrictions. The government imposes few trade barriers, and customs duties remain low, with a weighted average applied tariff of only 0.92%.

In 2021, the country's leading exports were clothing (24.4%)—mainly t-shirts, shirts, and suits—followed by prepared or preserved fish (13.5%) and sugar (10%), the latter supported by sugarcane cultivation across 85% of Mauritius's arable land. Key imports included petroleum products (17.2%), machinery (6.9%), vehicles (6.1%), and electrical equipment (6%), according to data from the International Trade Centre (ITC).

Footwear and leather goods are naturally complementary to the clothing sector, with overlapping retail and distribution channels. Many apparel importers and retailers also stock footwear, representing a strategic opportunity for domestic leather enterprises to tap into existing supply chains and expand product offerings.

Mauritius's major trading partners include South Africa (13.8%), France (13.4%), the United Kingdom (9.2%), the United States (8.3%), and Madagascar (7.7%), while imports primarily come from China (17.7%), India (15.6%), the United Arab Emirates (8.8%), South Africa (8%), and France (6.7%).

Figures 21 and 22 present Mauritius's export and import trends from 2018 to 2022. The data reveals that footwear exports experienced growth in the initial years, dipped sharply in 2020 due to pandemic disruptions, recovered in 2021, but then declined significantly again in 2022. On the import side, figures have fluctuated, with record-high imports recorded in 2022, reaffirming Mauritius's status as a net importer of footwear and leather products throughout the five-year period.

These trends underscore an urgent need to strengthen domestic leather sector enterprises, both to narrow the trade deficit and to better meet local market demands. Expanding the sector's capacity for production, quality improvement, and market access will be critical in reversing current trade imbalances and creating sustainable economic opportunities.

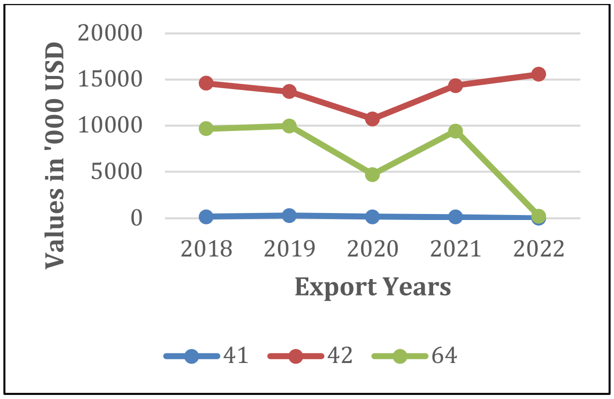

Figure 21: Export of Hides and skins, finished leather and Leather products (Value in thousands USD)

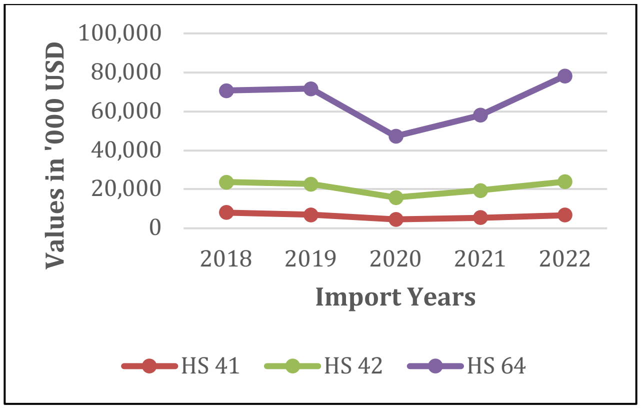

Figure 22: Import of leather and Leather products (Value in thousand USD)

Mauritius imports a higher volume of leather and leather products than larger regional peers such as Madagascar, Zambia, and Zimbabwe, despite having a significantly smaller population base. With a population of just 1.3 million, Mauritius surpasses Madagascar (29.1 million), Zambia (16.6 million), and Zimbabwe (20.5 million) in import value—highlighting the strength of its domestic demand and purchasing power. This contrast, illustrated in Table 8, points to a substantial market opportunity for local production to substitute imports, reduce trade deficits, and develop value-added enterprises capable of serving both local and regional markets.

Table 9: Import of hides and skins, finished leather and Leather products

			Import value in 1000USD				
No.	Products	Population	2018	2019	2020	2021	2022
1.	Mauritius	1.3	70,691	71,614	47,236	57,949	78,153
2	Madagascar	29.1	22,457	23,967	15,463	17,459	20,879
3	Zambia	16.6	33,336	30,443	18,747	26,016	34,101
4	Zimbabwe	20.5	18,884	12,601	12,062	19,303	20,374

Source: ITC Trade Map

If Mauritius's leather sector is effectively supported—through investments in quality, skills, and technology—there is strong potential for import substitution and a corresponding reduction in foreign currency outflows. By producing high-quality leather products domestically across the leather value chain (LVC), the country can begin to meet internal demand while positioning itself competitively in regional markets.

Table 11 compares Mauritius's livestock population and leather export performance with three neighbouring countries. Despite having a very limited livestock base, Mauritius outperforms both Zambia and Madagascar in terms of leather product exports. This reinforces an earlier point made with reference to Vietnam—that countries need not rely solely on raw material abundance to succeed in the global leather industry. Instead, success can be driven by value addition, strategic sourcing, and manufacturing excellence, enabling even resource-constrained nations to thrive in both regional and global markets.

Table 10: Export of leather and Leather products in 000'USD

No.	Countries	Livestock population (in millions)	Export of Leather and Leather products				
			2018	2019	2020	2021	2022
1	Mauritius	0.029	24,481	23,981	15,678	23,952	15,810
2	Madagascar	11.7	8,403	10,001	9,982	9,710	13,389
3	Zambia	5.65	7,033	5,388	5,859	6,750	6,645
4	Zimbabwe	10.52	39,884	36,424	32,153	32,321	27,541*

Source: Trade Map

The above analysis confirms that Mauritius has a limited resource base in terms of livestock availability and constrained tanning capacity. However, the country's performance in the manufacturing and export of value-added leather products shows promising growth potential. Mauritius's leading export—clothing—offers a strategic entry point for scaling the leather sector, given the natural complementarity between apparel and leather goods, which are often imported, marketed, and sold through the same retail and distribution channels.

Building on this synergy, the leather sector can leverage Mauritius's existing export infrastructure, technical capacity, and market linkages in the garment industry to develop integrated value chains.

The following chapter profiles potential suppliers of raw materials and key importing companies into Mauritius, applying a systematic methodology to identify viable sourcing and partnership opportunities.

Chapter Four:

Potential suppliers and importers

4.1 Supply and Market Opportunities

This chapter addresses the three specific objectives outlined in the Terms of Reference (ToRs) for this assignment:

- *Identify and profile national, regional, and international suppliers from which Mauritius can source high-quality raw hides and skins;*
- *Identify and analyze potential markets for the export of Mauritian leather and leather products across Africa and globally;*
- *Recommend the best available sources of hides and semi-processed leather within the region for use by Mauritius's leather value chain actors.*

Together, these objectives aim to equip the Mauritian leather business community with actionable intelligence to:

- *Efficiently source inputs—including raw hides, semi-processed leather, and finished leather—from a vetted pool of suppliers; and*
- *Expand into regional and international markets with competitively positioned, value-added leather products.*

The profiling of suppliers and target markets is grounded in a strong understanding of four foundational pillars:

- *Global leather value chain dynamics (covered in Chapter 2), which influence business cycles across borders due to interconnected supply chains and multilateral trade agreements;*
- *A detailed situational analysis of the Mauritius leather value chain, identifying key constraints and opportunities that determine both sourcing needs and marketable outputs;*
- *Insights from the Mauritius Industrial Policy, which underscores growing trade ties with Sub-Saharan Africa—particularly with South Africa, Madagascar, and Kenya—and highlights Mauritius's strategic position as a member of SADC, COMESA, and a signatory of the African Continental Free Trade Area (AfCFTA). Notably, markets within these blocs represent over USD 5 billion in annual footwear and leather goods imports (Trade Map);*
- *The Mauritius Industrial Policy and Strategic Plan (2020–2025), which identifies key regional opportunities across the Indian Ocean Commission (IOC) islands, South Africa and its neighbors, and the East African Community, particularly* Kenya and Tanzania.

Building on this context, the consultant adopted a stepwise methodology to identify and profile relevant suppliers and target markets. A multi-criteria decision-making framework was applied, incorporating 10–15 sub-criteria categorized into four strategic groups: market potential, supply chain efficiency, strategic alignment, and risk management.

This systematic approach ensures that the supply and market recommendations are not only evidence-based but also aligned with Mauritius's broader industrial and trade strategy.

4.2 Summary of the Status of the Domestic Leather Value Chain

The Mauritian leather sector operates within the context of a limited livestock base, distinguishing it from many other African countries whose leather industries are resource-driven. Consequently, Mauritius's growth trajectory will depend less on raw material abundance and more on its ability to innovate, leverage technology, and produce high-value, design-led leather products targeted at fast-growing and high-income global markets. This shift from input-driven to innovation-driven growth aligns with Mauritius's broader industrial positioning and its competitiveness in value-added exports.

A summary of the sector's current status is presented in Table 12, highlighting key indicators that inform the development strategy going forward.

Table 11: Summary of Status of the Domestic Leather Value Chain

Value Chain Node	Status	Relationship to the Objectives
Livestock	3512 and 25975 cattle and small ruminants, respectively	There is a business case for importing raw hides, skins, and semi or finished leather to support the production of leather footwear and goods in Mauritius.
Hides and Skins production & trade	6,000 different species of livestock slaughtered per annum at homesteads: • Hides and skins are generally of poor quality • Most, if not all, of the hides and skins are not entering the processing chain. • Nine thousand cattle are imported and slaughtered annually at a modern Abattoir, and the hides are exported.	Assuming the 6000 hides are a combination of bovine and small ruminants slaughtered at homestead per annum, it entails the following: • 500 skins are available per month across the Country • An average of 71 skins per district per month • Setting up a collection centre in each district may not be financially viable, considering labour, rent, transport and security costs. Thus, home slaughter may not be a viable option to feed a centralized commercial tannery; however, the skins may be channeled to the local artisan tanning.
Leather Processing	• One commercial Tannery operating with an installed processing capacity of 200 hides per week • Currently operating at 10% capacity (processing 15 hides per week) • Established in 1957, most of the machinery and buildings are in a deplorable state • Limited technical personnel in production and machinery maintenance.	• In its current state, importing raw hides and skins is not viable. • A detailed marketing, technical, environmental and financial feasibility study should inform the tannery recapitalization. • The machinery and equipment are at 40% performance, implying that the leather quality is inferior.
Leather Footwear and Leather goods production	• 88 Enterprises operating in leather footwear and leather goods production • Depend on imported leather from Italy, India and Spain • Five enterprises produce and export leather footwear and leather products	• The enterprises did not submit the landing cost of leather; this is an information gap, and the consultant could obtain the data during the validation workshop. The landing cost values are critical to determine whether regional suppliers are more competitive than those from Italy, India and Spain.

	• The gap analysis positioned the sector at 31%, implying stakeholders should undertake significant work to close the gaps.	• The export-oriented leather footwear and goods demand high-quality leather, as reflected by where they are currently sourcing leather:
		  ○ This implies they should only be linked by the best suppliers from the Region if they offer a cost and logistic advantage versus the current leather sources.
		  ○ The local Tannery may need help to meet the quality standards of these enterprises, given its state of machinery and lack of technical expertise.

Footwear and leather goods demand	• 4,589,000 pairs of shoes are consumed each year in Mauritius based on the population size of 1.3 million and footwear per capita per year of 3.53 pairs • Import value of 54.2 million USD and export of 0.248 million USD per annum	• The market size of footwear is relatively big, given the population size of the Country: ○ There is an opportunity to increase the production of footwear to take care of the domestic market • Exports of footwear and leather products to France imply that the Mauritian factories produce high-quality products. Hence, the expansion of such an enterprise would be able to capture domestic shelf space and also export to other countries in the Region, e.g., South Africa. • Connection with quality and competitively priced finished leather suppliers would also boost the Industry. • Improved access to recruit foreign technicians and skilled shop floor workers could also enhance the sector's competitiveness.

International Trade of the Value Chain	Total Leather Value Chain exports: annual average exports between 2018 to 2022 – 20,780,000 USD, broken down as follows: • Raw hides and skins, finished leather - average exports per annum between 2018 to 2022 – 198,000 USD • Leather garment and articles - average exports per annum between 2018 to 2022 – 13,797,000 USD • Footwear average exports per annum between 2018 to 2022 – 6,825,000 USD Total imports – average imports per annum between 2018 to 2022 – 65,128,000 USD, broken down as follows: • Raw hides and skins, finished Leather – average imports per annum between 2018 to 2022 – 6,311,000 USD • Leather garment and articles – average imports per annum between 2018 to 2022 – 14,810,000 USD • Footwear – average imports per annum between 2018 to 2022 – 44,006,000 USD	• Mauritius's import of leather and leather products is higher than that of some African countries like Madagascar, Zambia, and Zimbabwe. The population of Mauritius is tiny (1.3 million) compared to the respective countries, which have 29.1, 16.6 and 20.5 million population: ○ There is an excellent domestic market base for leather and leather products; hence, it is critical to support the development of the leather sector. ○ A tannery focusing on importing wet blue and finishing in Mauritius could be a more environmentally friendly and cost-effective option. However, they should be qualified through a detailed feasibility study.

4.3 Methodology – For Selecting Foreign Suppliers and Buyers

To identify optimal countries and companies for sourcing inputs and exporting finished leather products, the consultant employed a multi-criteria analysis (MCA) framework. This structured approach was used to evaluate and rank potential foreign suppliers and buyers based on their suitability for Mauritius's leather sector needs.

The analysis incorporated four key categories of evaluation criteria: strategic considerations, such as trade agreements, geopolitical alignment, and bilateral relations; marketing potential, including demand size, market access conditions, and consumer preferences; supply chain efficiency, referring to logistics, production capacity, and geographic proximity; and risk factors, such as political stability, currency volatility, and regulatory challenges. Each criterion was assigned a priority weight to reflect its relative importance in the selection process. The scoring model allowed for an objective comparison of countries and companies, ensuring alignment with both short-term commercial goals and long-term sector strategy. The summary of the framework is presented in Table 11, while full methodological details are provided in Annex 4.

Regional Market Focus

The Mauritius Industrial Policy and Strategic Plan (2020–2025) emphasizes the importance of targeting specific regional markets as part of a broader value chain development strategy. According to the policy, the most promising regional opportunities for Mauritius's leather sector include the Indian Ocean Commission (IOC) countries, which offer proximity and niche market access; South Africa and its neighboring states, presenting a blend of raw material sourcing and high-end consumer markets; and the East African Community (EAC), particularly Kenya and Tanzania, which provide both supply chain linkages and export demand potential. This regional focus is essential to consolidating Mauritius's role as a value-adding node within the African leather ecosystem.

Table 12: Summarizes the following Selection criteria, which were used by the consultant to address objectives (i) to (iii) of the assignment:

The islands of the Indian Ocean Commission (IOC)	South Africa and its immediate neighbors,	East African Community
• The Union of the Comoros, • France, on behalf of Reunion, • Madagascar and • Seychelles.	• South Africa • Namibia, • Botswana, • Zimbabwe; • Mozambique and • Eswatini	• Kenya • Tanzania

a. Framework for Analysis of County Attractiveness for Sourcing Raw Hides and Skins

b. Criteria for rating companies from selected regional countries for sourcing raw hides and skins
c. County attractiveness analysis for importing finished leather and accessories
d. Criteria for rating companies from selected regional countries for sourcing finished leather

Criteria A		Criteria B		Criteria C		Criteria D		This applies to A to D	
								*b. Rating on a scale of 1-4	Overall score a x b
Variables	Weights (a)	Variables	Weights (a)	Variables	Weights (a)	Variables	Weights (a)		
Whether it was allowed at low to export raw hides and skins	If the answer for any of the two criteria is No, the Country will be excluded from further assessment	Availability of complete company profile information	3	Political stability	3	Availability of complete company profile information	3		
Availability of transport from source markets to Mauritius		Company capital	3	GDP growth	2.5	Company capital	2		
Political stability	3	Company years of experience	2	Monetary inflation	2	Company years of experience	2		
The volume of production (capacity to supply the new market)	3	Has the company been audited in the last three years	2	Enforceability of contracts	1.5	Has the company been audited in the previous three years	2		
Quality of hides and skins	3	Has the company any quality standards that it is certified for	2	Bureaucratic delays	1.5	Has the company any quality standards that it is certified for	2		
FOB price of hides and skins	3	Previous export history of the company	3	Communications: phone, fax, internet/email access	1.5	Previous export history of the company	2.5		

Monetary inflation	2	Has the company any market linkage and trade with Mauritius	3	Production level and estimated growth rate of the finished leather	2.5	Has the company any market linkage and trade with Mauritius	2		
Enforceability of contracts	1.5	Availability of Communications means (phone, fax, internet/email)	2	Geographical position (proximity)	1.5	Communications mean (phone, fax, internet/email)	1.5		
Bureaucratic delays	1.5	Selling price of raw hides and skins	3	Existing market linkage and trade agreement	2	Quality of finished leather	2		
Communications: phone, fax, internet/email access	1.5	The infrastructure (logistics)	2	The infrastructure (logistics)	2.5	Selling price of finished leather	2		
Geographical position (proximity)	1.5					The infrastructure (logistics)	2		
Easy access to logistics	1.5					Terms of Trade	2		
Freight costs	1.5								
Existing market linkage and trade agreement	2								
Total for each Criterion									
Key for all the Criteria: *: 1= unacceptable/poor; 2 = average conditions; 3 = above average conditions; 4 = superior conditions.									

A detailed breakdown of each evaluation criterion—ranging from strategic alignment to market access, supply chain efficiency, and risk considerations—is provided in Annex 4. This annex also contains the computational framework used to identify and rank both suppliers of raw hides and finished leather and potential international markets for Mauritian leather products. The methodology ensures transparency, consistency, and strategic relevance in the selection process. A summary of the recommended countries and company profiles emerging from this analysis is presented in the next section.

4.4 Recommended Countries and Companies – Supply of Hides, Skins and Finished Leather

The sole tannery in Mauritius is currently operating under significant constraints, including outdated equipment and machinery, limited human resources, weak management structures, and insufficient working capital. In its present state, it is unable to produce the volume and quality of finished leather required to adequately support upstream segments of the leather value chain. As such, the importation of raw hides and skins can only be considered a viable strategy in the medium to long term, contingent upon the successful revitalization of the tannery.

Table 14 presents a list of recommended suppliers of raw hides and skins, primarily from South Africa, Kenya, Tanzania, and Eswatini, selected for their potential to meet Mauritius's quality and supply requirements.

Table 13: Potential suppliers of rawhides and skins from the Region

Country	Company	Contact	Quality of hides	Average price	_ogistics	Term of Trade
South Africa	Rosslyn Tannery, 23 Stefaan Viljoen street, Rosslyn	gerrie@rosstan.co.za +27 125418667	Good 30-35kg	45USD/piece	Yes	LC/COD/ Xworks/FOB/CIF
Eswatini	Eswatini Leather Association-collection cluster,	+268 76083634	14-15 kg	0.85/kg	Yes	Cash in Advance Letters of Credit (LC)
	Manzini Hide Collectors & Exporters (Pty) Ltd,	+268 2518 6325	14-15 kg	0.85/kg	Yes	Cash in Advance Letters of Credit (LC)
	Ngwane Hides & Skins (Pty) Ltd	+268 2505 5761	14-15 kg	0.85/kg	Yes	Cash in Advance Letters of Credit (LC)
Kenya	Leecan Investment Ltd,	+254 722 388 397 leecaninvestment@gmail.com	Weighing 20-30kg Average 25	0.35-0.60USD/kg	Yes	Cash in advance (confirmed wire transfer)

	Central Hides and Skins Association,	+254 722 851 311 njoroge979@gmail.com	Weighing 20-30kg Average 25	0.35-0.60USD/kg	Yes	Cash in advance (confirmed wire transfer)
	Geemo Firm Ltd,	+254 725 027 834 geemofirmlimited@gmail.com	Weighing 20-30kg Average 25	0.35-0.60USD/kg	Yes	Cash in advance (confirmed wire transfer)
Tanzania	Eliya Food Overseas Ltd Supplier - Tanzania,	+225753786666 info@eliyafood.co.tz	Weighing 20-30kg Average 25	0.3-0.5USD/kg	Yes	Letter of Credit
	Zawadees Supplier from Dar es Salaam, Tanzania,	+255 759 615 255 https://www.go4worldbusiness.com	Weighing 20-30kg Average 25	0.3-0.5USD/kg	Yes	Letter of Credit
	Regent Trading Co. Ltd (1.3 Supplier from Dar Es Salaam, Tanzania,	+255 22 215 3296 https://www.go4worldbusiness.com	Weighing 20-30kg Average 25	0.3-0.5USD/kg	Yes	Letter of Credit

Table 15 shows the countries and companies identified for the supply of finished leather.

Table 14: Potential suppliers of finished leather from the Region

Countries	Companies	Years of experience	Export history	Quality of finished leather	Selling price	Terms of Trade
South Africa	Fusion Leather World,info@fusionleather.co.za 021 577 1080	20	Zimbabwe / Zambia / China / Hong Kong / Pakistan / United Kingdom	Excellent	2.034USD/ Sqf	CNF / FOB
	OR Leathers (Pty) Ltd	7	Zimbabwe, Italy	Grade ABC	12 USD per sqft for upholstery	50% On Order, 50% On Collection
Ethiopia	Batu tannery, 251-114421451/52/56 batutannery@gmail.com tateky@gmail.com	24	Europe, Asia, Africa	TR, Grades 4, 5 and 6	Hide USD 1.60/sqft	LC (Irrevocable letter of credit)
	Elico Tannery, +251-114422525, +251-114708988 elicodmdtannery@gmail.com, elicoawashtannery@gmail.com; woldmigo@yahoo.com	70	Europe, Asia, US, Africa	TR, Grades 4,5 and 6	Hide 1.6 USD sq fit, skin 1.8 USD sq fit	LC (Irrevocable letter of credit)
	Kolba tannery, 251-911210754 +251-911212886 imex@colbatanplc.com factory@colbatanplc.com	22	Europe, Asia	Bovine leather Grades 4,5,6	1.5 USD/sqft	LC (Irrevocable letter of credit)
Kenya	Aziz Tanneries Ltd, aziztanneries@yahoo.com +254 722 511 348	30	Pakistan, India and Uganda	Excellent	Depends on type and quality	LC. Cash in advance (confirmed wire transfer)
	Alpharama Ltd., pvsrao@alpharama.co.ke +254 722 515 499	19	20 years globally	Excellent	Depends on type and quality	LC. Cash in advance (confirmed wire transfer)
	Nakuru Tanners Ltd, +254722 564 040 infor@nakurutanners.co.ke ntwetblue@africaonline.co.ke	51	China/India/Italy/Mexico	Excellent	Depends on type and quality	LC. Cash in advance (confirmed wire transfer)

4.5 Opportunities of the Global Leather Market

While Mauritius's leather industry remains relatively small compared to those of other African countries, it has demonstrated proven capacity to export to several high-income, large-economy markets. Countries such as France, the United Kingdom, Australia, China, the United States, New Zealand, Italy, Hong Kong, and Canada have all featured as destinations for Mauritian leather products. This track record underscores the importance of maintaining existing market linkages while actively exploring new international opportunities to expand export volumes and diversify market risk.

To support global market expansion, a three-stage selection process was employed to identify high-potential international buyers:

- *Stage One involved shortlisting countries from an initial pool of 174 based on their historical trade relationships with Mauritius.*
- *Stage Two applied a multi-criteria evaluation model encompassing six categories, including market demand, tariff regimes, logistics, political-economic stability, buyer profiles, and alignment with Mauritius's export capabilities.*
- *Stage Three classified the selected countries into two distinct groups:*
    - *Group One consists of countries that are already importing leather products from Mauritius.*
    - *Group Two includes markets with limited or no current imports of Mauritian leather products, representing untapped or emerging opportunities.*

Table 16 provides a detailed overview of countries that have consistently imported significant volumes of leather goods from Mauritius over the past five years. Strengthening and expanding trade with these markets should remain a strategic priority for the sector.

Table 15: List of top ten countries that are significant buyers of Mauritius leather goods

Unit: US Dollar thousand

Importers	Exported value in 2018	Exported value in 2019	Exported value in 2020	Exported value in 2021	Exported value in 2022
France	7725	7612	7219	7789	7869
United Kingdom	3264	1604	930	1421	2398
Switzerland	719	621	485	1551	2239
United States of America	664	1172	659	1394	1524
China	169	150	396	377	454
Portugal	0	0	0		201
Seychelles	167	180	62	77	146
Macao, China	30	44	28	54	132
New Zealand	270	34	47	169	114
Qatar	0	0	1	18	104

Tables 17 and 18 highlight countries and major global companies from large economies that maintain strong trade relationships with Mauritius across various sectors, yet have demonstrated little to no engagement in importing Mauritian leather products over the past five years. Despite this gap, these countries and companies are among the world's leading importers of leather goods, representing untapped market potential.

Given their existing commercial ties with Mauritius and their substantial demand for leather imports, these markets present a strategic opportunity for the Mauritian leather industry to initiate targeted engagement, build relationships, and position itself as a credible supplier within their procurement ecosystems.

Table 16 Countries identified as new potential markets for the Mauritius leather products

Countries	H -42 Importing Countries		H - 64 Importing Countries		Average Distance KMs	LPI	C/A Deficit %age GDP
	Average (2018 -2022	CAG R	Average (2018 - 2922)	CAGR			
Spain	1,907,739	12%	3880575	33%	13427	3.9	1.7
Italy	3,977,934	11%	7362543	34%	17146	3.9	0.7
Vietnam	215,777	16%	1122053	4%	8654	3.3	5.8
India	331,193	23%	692417	-6%	4667	3.4	6.3
Belgium	1,253,540	5%	4835469	9%	5114	4	0.9
Germany	4,732,497	6%	13445190	14%	15529	4.1	0.9
United Arab Emirates	1,311,371	23%	1996607	47%	5056	4	4
Canada	1,760,595	15%	2424445	34%			1.6
Japan	5,720,398	4%	5018577	-2%	14303	3.9	1

Table 17 Global brands for establishing market linkage with the Mauritius leather industry

No.	Country	Products traded	Address	Countries presence	Remark
1	Inditex	Apparel and shoe	Edificio Inditex Avda. de la Diputación s/n 15143 - Arteixo A Coruña – Spain Telf: +34 981 185 400 inditexinfo@inditex.com	Spain, Portugal, Morocco, Turkey, India, Bangladesh, Pakistan, Vietnam, China, Cambodia, Argentina and Brazil.	Has market linkage with Mauritius Textile and apparel
2	Calvin Klein	apparel, handbags, footwear, underwear	205 West 39th Street, Fourth Floor, New York, NY https://www.calvinklein.us	US	Has market linkage with Mauritius Textile and apparel
3	Benetton Group	Clothing, shoes, bags, accessories	www.benettongroup.com	Present in the most important markets in the world with a network of about 4,000 stores.	Has market linkage with Mauritius Textile and apparel
4	Reebok International Limited	An American fitness and clothing brand	1895 J. W. Foster Blvd. Canton, MA 02021 Phone: (781)401-5000	North America, Europe, the Middle East, Africa and Asia Pacific.	Has market linkage with Mauritius Textile and apparel
5	NafNaf	Retail Apparel and Fashion, Apparel & Accessories Retail,	+33 899 27 75 07 http://www.nafnaf.com	Italy, France, Benelux and Spain	Has market linkage with Mauritius Textile and apparel
6	ESPRIT	Esprit Fashion for Women, Men & Kids	130 Greene Street, New York NY Esprit's headquarters are located in Germany and Hong Kong	in 40 countries around the globe	Has market linkage with Mauritius Textile and apparel
7	La Redoute,	Women's Clothing & Shoes	57 rue de Banchemaille, 59100 ROUBAIX - FRANCE	In more than 150 countries	Has market linkage with Mauritius Textile and apparel

Opportunities of the Regional Leather Market

The regional leather market presents significant growth opportunities for Mauritian leather products, driven by rising disposable incomes, increasing urbanization, expanding tourism, and a largely untapped demand for premium leather goods across Africa. The growing appetite for luxury leather items—including handbags, luggage, briefcases, and wallets—signals a maturing consumer base seeking quality, style, and durability.

To assess Mauritius's export potential within the region, a two-stage screening methodology was applied. In the first stage, a shortlist of 16 African countries was generated, ranked in descending order by the volume of leather product trade. In the second stage, these countries were evaluated using a scorecard-based ranking approach, assessing them against three key criteria: population growth, GDP per capita growth, and geographical proximity to Mauritius. This dual-filtering process enabled the identification of high-potential regional markets where Mauritian leather products can be competitively positioned, both in terms of consumer demand and logistical access.

The criteria details and scoring matrix used for this analysis are presented in Annex 4, while Tables 19 and 20 provide a summary of the regional countries and companies identified as priority market destinations for Mauritian leather exports.

Table 18: African countries identified as potential markets for the Mauritius Leather Products

Countries	HS -42 Import situation		HS -64 Import situation		Average Distance KMs	Logistics Performance Index! (LPI) (1=low to 5=high)	C/A Deficit %age GDP
	*Average (2018 – 2022)	CAGR	*Average (2018 – 2022)	CAGR			
Africa Aggregation	988,346.6	2.23 %	3,240,738	3.4 %			
South Africa	217,090	-0.32 %	872,967.8	1.77 %	3637	3.7	-0.4
Egypt	51,281.6	-4.31 %	117,598.2	-3.6 %	5981	3.1	-2.2
Tanzania,	16,008.2	6.6 %	44,221.4	7.91 %	2894	3	-1.7
Kenya	22,604.2	-3.24 %	58,065.6	4.27 %	3109	2.81	-5.1
Namibia	13,233.2	-1.22 %	45,828.2	0.74 %	4033	2.9	-12.7
Botswana	18,163.4	13.89 %	40,650	1.48 %	3403	3.1	3
Zambia	4,036.4	2.94 %	24,463.2	0.12 %	3255	2.26	3.7
Zimbabwe	1,473.6	-14.68 %	13,331	4.14 %	2771	2.5	5.1
Rwanda	8,041.4	4.32 %	29,537.4	-3.3 %	3633	2.8	-9.8
Madagascar	6,041.4	-3.35 %	8,132.6	-5.7 %	1132	2.3	-5.4

**: Unit: US Dollar thousand*

Table 19: Companies identified as potential importers of the Mauritius Leather Products in the identified regional countries

Countries	Company	Product traded	Address	Countries presence	Remark
South Africa	Mr. Price Group's	Footwear, Belts and wallets Clothing and other products	+27 31 310 8000 mrpricegroup.com	South Africa, Namibia, Botswana, Lesotho, eSwatini, Kenya, Ghana, and Zambia.	Has a market link with Mauritius
	Edcon Limited	Clothing, footwear and textiles	+27114956000 edgarsenquiries@rcsgroup.co.za	South Africa, Botswana, Namibia, Eswatini, Lesotho, Ghana, Zimbabwe and Zambia	Has a market link with Mauritius
	The House of Busby	Handbags, luggage, and small leather goods	+27115552300 info@busbyhouse.com	Throughout South Africa.	
Egypt	Egyptian Italian Leather Company	Leather products - leather wallets - leather bags - leather shoes - leather belts	https://sphinxdirectory.com +201 223892440	Egypt, Middle East, Africa, and Europe	
	Nour El-doha	Leather and Leather Products	https://noureldoha.netTelephone: 2590490 (048+), Fax: 2590519 +20 1129671777	Egypt, Middle East, Africa, and Europe	
	Cairo Center-Hassan Sabry & Co.	Clothing and footwear	Villa 163, Banafseg 8, Shabab Sq. Tagamoa Awal, New Cairo, Egypt, 11473 Tel.: +2 02 2306 0315 / 16 / 17 / 19 Fax: +2 02 2306 0314 Mobile: +2 011 1119 9993	Egypt, Middle East, Africa, and Europe	
	Aseel Company for Import and Export	Leather goods - natural leather shoes - natural leather bags	https://www.egyptianindustry.com +201 227868847	Egypt, Middle East, Africa, and Europe	

	Bell Color Leather Tanning and Finishing & Union for Laser, Hisham Abdel Halim Jazar	Abattoir products, non-processed	https://www.lecegypt.org/index.php/ar/exporterss/leather-tanneries pcolor@pielcolorsae.com +201 0122 2103611 Fax: (048+)2590519 2590490	Egypt, Middle East, Africa, and Europe	
	Egyptian Italian Leather Company	Leather products - leather wallets - leather bags - leather shoes - leather belts	https://sphinxdirectory.com +201 223892440	Egypt, Middle East, Africa, and Europe	
Tanzania,	Afro Leather Industries Ltd	Leather and Leather Products	Location: Mbagala, P.O. Box: 4382, Dar Es Salaam, Tanzania Contact number: +255 (22) 211 +2557860784786013 info@africanleather.co.ke.	Tanzania,	
	Liberty Leather Shoes Ltd	All types of high quality products	Contact number +255 22 2865061 Dar Es Salaam, Tanzania	Tanzania	
	Leather Land Ltd	Specializes in shoes and leather polishe	Contact number :+255 22 2111100 Dar Es Salaam, Tanzania	Tanzania, Uganda	
Kenya	ADELE DEJAK	Leather Jackets, Hand bags	125 Mushroom Rd, Kiambu, Kenya	Kenya	
	Phirdos Kenya Limited	Multi-brand retailer, fashion industry branded shoes.	+254 794 683536	Kenya	
	Woolworths Kenya		+254111040 600 Email: info@saritcentre.com.	East Africa and Europe	
	Nairobi Sport House	All types of Sport Items including Apparel	+254729589180 enquiries@nairobisporthouse.com	East Africa	
Namibia	Mbambangandu Conservancy	Contact Number.	Tel:081-2008874. Joseph Mbambangandu Namibia. Location (Town, City, District or Region). Rundu. Postal Address (Main Contact). P.O. Box 702, Rundu.		

	LEATHERS UNLIMITED CC	Leather products	1601 W Lafayette Blvd. Detroit, MI 48216; (313) 964-0051; Visit Website. http://www.reedsportswear.com (313) 964-0051		
	A.M.C Collections	Established: 2008 Bannof Road Block A Rehoboth Erf1009 Namibia			
Botswana	Awocet Proprietary Limited				
	Kang Agri	Clothing Shoes and footwear	+26774900652\ shop@kangagri.co.bw Plot 37, Kang , Botswana	Botswana ,	
	Bon Connections (proprietary) Limited	Articles of apparel and clothing accessories, of leather or of composition leather		Botswana , South Africa	
Zambia	Orca Deco Zambia	Furniture covered with leather	+260 971231919 contact@orcadecozm.com	Zambia	
	Komu Handcrafts leather products	Leather	17 Nagwenya Road, Off Addis Ababa Drive, Lusaka, Zambia +260 955980708	Zambia	
	Lightfoot Zambia	Leather Bags and accessories	+260 977 874 771 e: marketing@lightfootzambia.com	Zambia	
Zimbabwe	NUVERT TRADING (PVT) LTD trading as TRIPLE TEE FOOTWEAR	Leather Footwear Producers Leather products wholesellers	+263 781 829 128	Zimbabwe	
	Samuneti Leathers	laptop bags of leather and colours	WhatsApp or call +263 771 021 092. Harare	“	

	Moredawear	Bags	216 The Chase, Harare, Zimbabwe Phone: +263 78 433 9477	"	
Rwanda	Dokmai Rwanda	Leather goods store Kigali	Lemigo Hotel, KG 622 St, Kigali, Rwanda +250 783 451 278	Zimbabwe	
	Dreamright Ltd	Shoes and leather accessories	Shoes salining building Kanziga Agness Gensi LTD +250788230308	Rwanda	
	Saint Rita shop Ltd	Shoes and leather accessories	Down Town-shoe selling Building +250788489117	Rwanda	
Madagascar	Crush Leather Goods	Leather Bags	info@crushleathergoods.com	Madagascar	
	artimada	Leather bags	1341 W.Mockingbird Lane Suite 600W, Dallas, TX 75247 Call us at +1-214-306-7737	"	
	OIM Omnium Industriael de Madagascar	"	24 Rua Radama 1TsaralalanaPO Box 207AntananarivoMadagascar1 Marketing Manageroim@oimjb.com +261 20 22 223 73 +261 20 22 223 73		

This chapter has comprehensively addressed the three core objectives of the assignment, namely the identification of suppliers, analysis of market opportunities, and recommendation of sourcing strategies for Mauritius's leather sector. The insights provided are intended to inform both strategic planning and operational decision-making across the value chain. The next chapter builds on this foundation by presenting a set of actionable recommendations aimed at addressing the critical gaps identified in Chapter Three – Situational Analysis of the Mauritius Leather Value Chain, and charting a path toward a more competitive, inclusive, and sustainable leather industry in Mauritius.

Chapter five:

Recommendations

The leather sector in Mauritius faces several constraints that continue to limit its growth and competitiveness. These include a shortage of skilled labor, intense competition from imported synthetic and low-quality leather products, limited access to modern technology and innovation, and various policy-related challenges. Additionally, the sector struggles with a scarcity of raw inputs—particularly hides and skins—an information gap due to low awareness, a lack of quality standards and certification infrastructure, and weak collaboration and coordination among stakeholders.

Despite these challenges, the sector has demonstrated strong potential for growth, particularly in exporting to high-value markets such as the European Union, United Kingdom, United States, and other international destinations. Notably, Mauritius's success in the textile and apparel industry provides a valuable precedent; it has built a robust manufacturing and export capability, achieving global competitiveness. Given the complementarities between leather and clothing—in design, production processes, and end-use—the leather sector can draw important lessons from the development trajectory of the textile industry.

A summary of broad strategic recommendations to address these constraints and unlock the sector's potential is presented in Table 21.

Table 20: Summary of Recommendations/Actions to be taken for Enhancement of the Leather Sector in Mauritius

Segment of the value chain	Problems	Causes	S. No.	Recommendations/ Actions to be taken	Resources Required	Actors (*lead actor)	Time Frame*
Hides and Skin Production and Collection	Homestead-produced hides and skins are not collected	The scattered and periodic nature of homestead slaughtering, not allowing profitable long-distance marketing	01	Conduct a feasibility study to set collection centres with infrastructure (physical facilities) in strategic locations	Space and infrastructure		Short-Medium term
		Lack of awareness of the value and quality of hides and skins	02	Conduct awareness campaigns on the value of hides and skins and the importance of proper flaying and preservation techniques to local people, butchers, and flayers.	Coordination		Short Term
			03		Coordination		Short Term
			04		Coordination		Short-term
Leather Processing	Artisanal/cottage or vegetable tanning practices not developed	Limited or lack of skill in vegetable tanning, business management and marketing	05	Benchmark with countries like Ethiopia, Kenya, and Zambia, which have succeeded in cottage tanning and manufacturing handcrafts for the tourism industry. Organize short-term skills development training for artisans in vegetable tanning, business management, and marketing.	Trainer and training inputs		Short-term
		Working capital problem	O6	Awareness creation to MSEs on available schemes for SME assistance Create innovative Cluster Revolving fund by designing specific financing	Fund, Coordination		Short to medium Term

				instruments in collaboration with Finance Houses to serve the financing needs of Artisans effectively			
	The only Tannery in the Country (Luxor Tannery) has outdated machines and is experiencing a shortage of raw hides The Tannery is in serious trouble and at a very low capacity utilization	Weak management Outdated technologies & worn-out equipment Working capital problem Skilled workforce problem Difficulty in getting raw hides Tannery waste management problem	07	Prepare a detailed revitalization Business Plan that will be used: To solicit support from the government Presented to domestic and foreign investors for possible joint venture To access affordable finance	Expert		Short-term
			08	Implement the revitalization Business plan with strict M&E and periodic review.	The fund, Staff, Equip. and machinery		Medium to Long Term
Leather Products (footwear and leather goods) Manufacturing	Cheap synthetic and low-quality leather products are flooding the market	No quality testing or any other control measure	09	Improving quality management infrastructure for the leather sector	Coordination		Short Term
			10	Mauritian government should amplify the visibility of local leather products through facilitation and support of trade fair participation in targeted markets.	Coordination, fund		Short to medium-term
			11	Promote local purchase and use of leather products (footwear and leather goods) by national institutions such as the army, police, prisons and schools as a way of promoting local consumption of locally produced leather products	Coordination		Short Term

	Limited capacity for innovation to diversify the range of leather products	Limited SME's capacity to regularly upgrade their available technologies and machines with modern ones	12	Create of a technology up-gradation fund that the leather industry players could access	Fund		Medium to long-term
		Skilled workforce problem	13	Make the existing expatriate permit process easier and faster to allow firms to respond to their urgent needs	Coordination		Short Term
			14	Opening training programs in leather technology in at least one of the Vocational Technical Training Centers,	staff, funds, training inputs, workshops,		Medium to long-term
	High cost of production	The rising wage rate associated with the Country's increased wealth Weak or lack of horizontal and vertical collaboration among value chain agents Raw material/ inputs cost	15	Strengthen leather associations and facilitate mobilization of SMEs into Cluster groups that enhance networking and collaborative activities for improved production efficiency by optimizing available resources and conducting joint procurement, joint marketing and similar activities.	Coordination		short to medium term
	Working capital problem	Limited or no access to affordable finance Lack of awareness of availability schemes for SMEs	16	Create innovative Cluster Revolving funds by designing specific financing instruments in collaboration with Finance Houses to serve the financing needs of SMEs effectively.	Fund, coordination		Medium to long-term
Trending leather products that Mauritius can venture in	Mauritius' high potential in fish skin production is not exploited	Lack of awareness, technical skill and know-how	17	The Fisheries Training and Extension Centre (FiTEC) situated at Pointe aux Sables can serve for knowledge and skills development in fish skin processing and value addition to finished products.	Coordination		Medium Term
Cross-Cutting Issues	Policy related issue	Weak institutional backup in providing necessary services, support and	18	The government should create an enabling policy framework for leather sector development in the Country that	coordination		Short to medium-term

		professional training needed for leather industry development		may include reviewing and enforcing the existing laws, regulations, guidelines, standards and codes of practice to enhance the sustainable growth of the leather sector in Mauritius. ·Encourage value addition of hides and skins produced within the country creation of a technology up-gradation fund which the leather industry players could access			
	Market Information related issues	Limited or no access to market information	19	Liaise with the local export promotion Authority to get market-related information. Establish a business information system to assist leather sector enterprises to improve market access and Industry best practices	Staff, IT facilities,		Medium-term
			20	Awareness creation of the existing regional and global market information sources	Coordination		Short Term
	Key market access standards-related issues	Limited or no awareness of existing export market access standards	21	Awareness creation on the existing market access standards by sharing links, eg. https://leatherpanel.org/content/acceptable-quality-standards-leather-and-footwear-industr	Coordination		Short Term
		The Mauritius Standards Bureau is poorly equipped with leather and leather products testing equipment and qualified workforce	22	Strengthen the Mauritius Standards Bureau with leather testing equipment and capacity building training	Fund, capacity building and equipment		Medium to long-term

		Lack of certification facility in the Country	23	Develop domestic certification capabilities for domestic and international market supply	Coordination		Medium-term

**: Short term=1 year; Medium Term= 2-3 years; Long Term = 4-5 years*

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ANNEXES

Annex 1:

Details of Key Informants

Table 21: List of Key Informants

Organization	Representative	Designation
Ministry of Industrial Development, SMEs and Cooperatives (SMEs Division).	Hon. Soomilduth BHOLAH	Minister
	Mr. Raj Kishore BUNJUN	Acting Permanent secretary
	Ms. Heista Seeboruth	Senior Industry Analyst
	Mrs. V. Veeramah Ramiah	Business and Enterprise analyst
	Mr. L. Sornum	Business Development Officer-SMEs Registration Unit
	Mrs J. Noormahomed Nauthoo	Management Support Officer, SMEs Division
	Ms M.L.E. Chaumiere	Management Support Officer, SMEs Division
SME Mauritius LTd	Mr. Ravin Rampersad and his team of three senior staff	CEO
Ministry of Agriculture, Animal Production Division		Animal Production Division head
Mauritius Standards Bureau	Mrs. Deveena Boygah	General Manager
	Mr. Rajmant R. Gumnsd	
Economic Development Board (EDB) of Mauritius	Mr. Geerish BUCKTOWONSING and his team of two senior staff	Director of the Division of Industry
Firms		
Banker Shoe Ltd, (Niclay Road, Port Luis)	Mr. P. SINNAPPAN-	Director
	Mr. AjaganSinnappan	Deputy

Luxor Tannery Ltd	Mr. Beekun Jabeer	Managing Director
	Mr. Junaid Beekun	Deputy
Mauritius Meat Authority	Mr. Veer Bhageerutty	General Manager
NylexNylex Shoes & Cie	Mr. Raouf Dookhoo	Manager
Mac' Allan Ltee	Mr. Jean Claude IP MAN PUN	Owner and Manager
CaleageLimitted& Hemisphere Sud	Mr. Guy Fletcher	Director
Manisa co Ltd	Mr. A.DevSantchurn	Managing Director
Amenties Products Resources Ltd	Mr. Eric Guillaume Eleonore	Company Director
	Mrs. Eleanore Janis	Deputy

Annex 2:
Terms of Reference of the Study

TERMS OF REFERENCE

1. BACKGROUND

1.1. Introduction

The Common Market for Eastern and Southern Africa (COMESA) Secretariat and the European Union (EU) signed an agreement in November 2019 of EUR 8.8 million for the implementation of the COMESA Regional Enterprise Competitiveness and Access to Markets Programme (RECAMP). EU supports COMESA in implementing and advancing the regional economic integration in various areas. RECAMP assists in the implementation of the objective 3 under the Regional Indicative Programme aimed at the development of Regional Value Chains and support to the private sector. The RECAMP is focusing on challenges that affect value chain actors, both small and large enterprises, and that are relevant to regional economic integration and to efforts to increase intra-regional and international trade of value added and manufactured products. The following three value chains were selected: (i) horticulture; (ii) leather and leather products; and (iii) agro-processing- as having potential to contribute to the region's industrialization drive as espoused in the COMESA Industrialization Strategy.

Under RECAMP, a Technical Assistance Facility (TAF) was established to enhance a structured cooperation between the COMESA Secretariat and Member States. The TAF is expected to contribute to the improved implementation of the RECAMP activities components by Member States through submission of project proposals to the Secretariat. Mauritius submitted a project proposal through the TAF and was awarded to implement a project to further enhance the development to the leather value chain.

1.2. Background to the Project

As part of the Mauritius Government's objective to develop new sectors and opportunities for SMEs to tap into, a National Leather Value Chain Strategy was commissioned by the Ministry of Industrial Development, SMEs, and Cooperatives (SMEs Division) in 2018. The Strategy was developed with support from the African Leather and Leather Products Institute (ALLPI). Among others, the strategy drew attention to the following:

- *The system for hides and skins collection is weak with no proper grading standards. The absence of such grading standards, combined with poor slaughtering techniques result in the poor supply of leather to the local tannery. Statistics revealed that only 15% of the raw hides and skins are supplied to the sole local tannery in Mauritius while the bulk is exported.*
- *The slaughtering of animals for raw hides and skins is still at a low stage of development with poor grading standards. The current slaughter house which is the Mauritius Meat Authority has no guidelines for it to adhere to in the flaying process. As a result, most hides and skins produced in Mauritius are of a lower grade; and*
- *In addition to the poor quality of raw hides and skins, Mauritius also has a weak collection system especially from animals slaughtered in back yards. Consequently, the sole tannery in Mauritius is usually faced with an acute shortage of raw hides and skins for processing.*
-

It was further noted that with regards to export earnings, the Mauritian leather sector is currently not benefiting much on the foreign plat form due to its low level of participation in regional and international markets. According to a survey conducted in year 2020, there are 88 SMEs operating in the leather sector. However, very few are export ready even though leather products generally can fetch premium prices on international markets.

In this context, with a view to yielding high quality finished leather products to serve both the local and international markets, and in line with their commendations of the Strategy Report, it is imperative that Mauritius draws up an implementation plan and addresses the following, with funding from the 11 EDF RECAMP TAF:

a) *To address the constraints of the leather value chain with a view to improving supply of consistent good quality hides and skins; and*
b) *To map and profile potential markets/buyers for export of Mauritian leather and leather-related products at regional and international levels.*

1.3. PURPOSEAND OBJECTIVE OF THEPROJECT

The overall objective of the project is to enhance the leather value chain from the sourcing of quality skin and hides to export of quality leather and leather-related products to niche regional and international markets.

The specific objectives are to:

i. *Increase the quantity and quality of hides and skins to convert in to usable finished leather products;*
ii. *Increase the number of suppliers of hides and skin; and*
iii. *Gather information to access the various standards prevalent in the export markets.*

2. OBJECTIVES OF CONSULTANCY

The overall objective of the consultancy is to support the development and transformation of the Mauritian Leather sector into a vibrant and competitive sector through facilitating supply and market linkages. Specifically, the consultancy aims at:

a) Identifying and profiling national, regional and international suppliers from which Mauritius can source good quality raw hides and skins;
b) Identifying and analyzing potential markets for the export of Mauritian leather and leather- products to Africa and across the world;
c) Recommending sources of the best quality hides and skins/semi-processed hides available in the Region to operators of the leather value chain; and
d) Facilitating supply and market linkages with potential suppliers and off-takers of leather and leather products respectively.

3. SCOPE OF WORKS

Key tasks include the following:

a) Assess the existing structure and state of the system for the collection of hides and skins at national level and share best practices at regional level.

b) Conduct an overall assessment of the local leather sector to identify lead leather enterprises and SMEs specifying the quantity of leather required to produce quality leather products.

c) Map and profile at least 5 leather suppliers from the African Continent which Mauritius can source good quality raw hides and skins.

d) Develop a database which should comprise (i) at least 5 leather suppliers within the African Continent and (ii) major leather products export destinations, including in Africa categorizing them in terms of quality, quantity, pricing and quality standards (e.g. EU standards and regulations).

e) Carry out an analysis of the 5 identified leather supply chain models in the region as well as potential markets for exports of Mauritian leather products in terms of quality, quantity, pricing and quality standards

f) Provide recommendations to increase the competitiveness of local leather goods.

g) Establish possible synergies between regional large firms and domestic SMEs

h) *Identify and profile potential buyers/markets for Mauritian leather products indicating key market requirements* (prices, quality, quantities, etc).

i) Assess and profile key market access standards that exporters of leather and leather related products are to meet and propose any appropriate interventions to meet the *requirements.*

j) *Facilitate supply and market linkages for the Mauritian SMEs and large firms with identified potential suppliers*

k) *Provide recommendations to capturing larger share of the global leather market including* trending value added leather and leather product that Mauritius can venture into.

4. PROPOSED METHODOLOGY/APPROACH

To achieve the intended objectives of the assignment, the firm should collect and make use of all available information and apply sound technical practices and methods in carrying out the assignment. The methodology selected by the team and approved by the oversight team must comprise both quantitative and qualitative approaches to appropriately respond to the purpose and scope of work for this assignment to produce the intended deliverable(s). The firm is expected to use the following methods and approaches but not limited to:-

1. *Literature Review and Gap Analysis: Review key documents which are relevant to assignment to identify gaps and recommend best practices.*
2. *Assess current state: assess current state of the system for collection of hides and skins at national and regional levels.*
3. *Conduct assessments: Including where necessary, primary data collection in the field through focus group discussions and key leather sector actors in Mauritius.*
4. *Consultation with Stakeholders: Carry out consultation with leather value chain stakeholders in the local and international arena to understand key issues relevant to the assignment.*
5. *Analyze successful supply chain models: Carry out an analysis of supply chains in regional countries for possible synergies between regional large firms and domestic SMEs.*
6. *Capacity Building Workshops: Conduct a capacity building exercise to support and hand hold SMEs to be able to get supply and market linkages.*
7. *Documentation: Documentation of key reports and databases of export destinations by developing a database of international* leather suppliers in terms of quality, quantity, pricing, and quality standards.

5. DELIVERABLES

The following are the expected deliverables:

a) *Inception Report outlining understanding of the ToR and the proposed approach to the assignment including annotated outline of the report;*

b) *Assignment Report addressing the assignment specific objectives in English;*

c) *Database of key leather and leather products suppliers and export destinations in excel format;*

d) *Two Stakeholder validation workshops; and*

e) *Training and hand holding of at least 30* SMEs.

6. TIME FRAME AND DISBUSRSMENT PLAN

Disbursement to the Consultant(s) will be effected upon submission of the here under deliverables:

Deliverables	Timeline	Disbursement
Submission of Inception Report to include work plan, data collection and analysis methods, Stakeholders to be consulted	By 21st August 2023	30%
Submission of Draft Report This should summarize the findings from desk reviews and the interaction with various stakeholders	By 15th January 2024	20%
One workshop for stakeholders to discuss the design and the outcomes of the assignment and verification of the resulting design and one validation workshop. The results will be incorporated in the final report and	By 9th February 2024	30%
Submission of Final Report. This will include a full report of the work done as per the Terms of Reference and a completed template of the Implementation plan Training and hand holding of leather actors	By 15th March 2024	20%

7. BUDGET ESTIMATE

NO.	ITEM	BUDGET
1	Lump sum (includes consultancy fees, travel and perdiem)	Euro 89,505
2	Validation workshop, training and SMEs handholding	Euro 10,316
	Total	Euro 99,821

PRICE PROPOSAL

The contract price is fixed regardless of changes in the cost components. Payments will be effected based on the specified deliverables.

8. REQUIREMENTS FOR CONSULTANTS

Only consulting firms are eligible for this call. The Consulting firm should be comprised of a multi-disciplinary team of professionals having expertise, and experience to carry out the assignment. The selected institution shall provide a Consulting Team comprising a Team Leader who will supervise the assignment, ensuring that work is conducted in an integrated way. He/She will be supported by relevant experts that ensure concrete deliverables of the assignment are met. The Consultant firm should clearly specify how they would structure and provide the above referred skills, competence, resources, and services for this assignment. The curriculum vitae of staff who would work on the assignment should be submitted. Desired skills for the assignment are as follows:

Team leader

- *Team leader should hold a relevant advanced University degree i.e., Masters or Doctorate in Agricultural Economics or Agribusiness Development or Marketing or Value Chains Development or Animal Science or any other relevant advanced degree;*
- *At least 2 years of experience in analysis and development of regional agricultural value chains particularly focusing on markets, trade issues, and engagement with value chain players;*
- *Have knowledge and experience of the leather value chains (key markets and suppliers, challenges, opportunities, and policy issues);*
- *Have knowledge and experience in conducting similar studies for organizations at national, regional or international levels;*
- *Excellent writing, research, analysis, capacity building and presentation skills.*
- *Excellent networking skills;*
- *Fluency in English with excellent written and oral communication skills; and*
- *Ability to produce high quality outputs in a timely manner while understanding and anticipating the evolving client needs.*

Other Experts (Market Development Specialist and SPS/TBT Specialist)

- *The experts should hold a relevant advanced University degree in Agricultural Economics or Agribusiness Development or International Trade or Value Chains Development or any other relevant advanced* degree;

- *Proven experience in undertaking assignments relating to the leather sector would be an advantage;*
- *Understanding of leather value chain supply systems, markets and trade, including key market standards; and*
- *Excellent drafting and Technical Report writing skills.*

9. MONITORING AND SUPERVISION

A Monitoring and Supervision Committee under the chairmanship of the Ministry of Industrial Development, SMEs and Cooperatives (SMEs Division) will be set up too verse and monitor the assignment. The Monitoring and Supervision Committee will comprise representatives of the Ministry of Finance, Economic Planning and Development, Ministry of Agro-Industry and Food Security, Industrial Development Division, SME Mauritius Ltd, Mauritius Standards Bureau, Luxor Tannery and Association of Leather and Leather Related Products. The Monitoring and Supervision Committee will also be responsible to examine the reports submitted and make recommendation for approval by the Contracting Authority within a maximum of three weeks after submission of the reports by the Consultant/consultancy firm. The Monitoring and Supervision Committee will recommend disbursement of funds following effective completion of deliverables.

The COMESA Secretariat EDF and RECAMP team will be part of the M&E team as observers and ensure that the implementation is indeed taking place in line with the TAF requirements.

10. PROPOSAL SUBMISSION

The proposal for the consultancy should include the following: Consulting firm profile:

a) *Profiles and related experience of the Team Leader and other experts proposed for the assignment;*
b) *Technical proposal for achieving all expected objectives within mentioned timeframe;*
c) *Financial proposal; and*
d) *Samples of a similar assessment.*

Annex 3:

Evaluation Matrix

Table 22: Matrix of evaluation questions and data source

Evaluation questions	Measures or Indicator	Data collection methods	Data source/stakeholders
Current state of the system for collection of hides and skins	Data on livestock resource Potential and off take rate, Animals slaughtered in organized slaughterhouses or abattoirs, availability of training in slaughtering and flaying skills and in grading and standards, presence of absence of legislation and enforcement, Awareness of the population which reside in rural areas, identification of defects on raw hide and skins at collection centers, recent prices of acquiring raw rides and skins, Availability of transport and modern marketing facilities, proper selection, collection and, reservation of hides and skins, pre-storage measures as well as good storage practices.	• Field visit (selected enterprises and institutions) and observation • Upfront and online questionnaire survey • Telephone/video conferencing with key informants and focus groups • Participatory workshop	• SMEs • Large firms • leather sector associations, • Rural and urban hides and skins traders • exporters in hides and skins • Luxor Tannery Ltd • Slaughter houses • Rural and urban hides and skins traders • exporters in hides and skins • relevant stakeholders, • key informants • AfCFTA • COMESA Statistics • ALLPI • ITC/ Trade Map • Statistics Mauritius • FAO documentation • Ministry of Industrial Development, SMEs and Cooperatives (SMEs Division) • SMEs Mauritius Ltd.
Leather Enterprises and SMEs in Mauritius	• Data on Enterprises and SMEs in Mauritius (Quality and quantity of leather required) • Employment; • Production capacity		
Successful supply models in the regional countries	• Data on supply models in the regional countries • Analysis of the Supply models • (Order to deliver lead time, Perfect order fulfillment, Freight transport efficiency)		

Quality raw hides and skins suppliers from the African Continent	Data on quality raw hides and skins suppliers from Africa (Past Supply and Present Demand, Years of experience, Customer feedback)	• Interviewing key respondents • Focus group discussion	• Ministry of Cooperatives • Mauritius - Ministry of Environment, Solid Waste Management and Climate Change • Ministry of Finance, Economic Planning and Development • Ministry of Foreign Affairs, Regional Integration and International Trade • Ministry of Industry, Commerce and Consumer Protection • Economic Development Board • Procurement Policy Office • Corporate & Business Registration Department • State Trading Corporation Mauritius • Ministry of Labour Human Development and Training • Ministry of Agro Industry & Food Security • Mauritius Institute of Training and Development (MITD) • Meat Authority • Chamber of commerce representatives • Investment offices • Mauritius Standards Bureau • Business Mauritius • Education and training institutions imparting leather technology training • Government officials responsible for control and inspection of meat, and hides and skins production • The Mauritius Cooperative Agricultural Federation Ltd (MCAF Ltd)
Major leather products export destinations	Data on major leather products export destinations (Freight transport efficiency, Quality and quantity requirements of leather products, Price setting)		
Leather supply chain models in the region	• List of leather supply chain models in the region • Analysis of the leather supply chain models (Quality, quantity, pricing, quality standards, etc..)		
Increasing competitiveness of local leather products	List of factors increasing competitiveness of local leather products (forms of leather processing (modern and traditional), backward and forward linkages, Access to appropriate technology, Environmental issues, etc..)		
Establishing possible synergies between regional large firms and domestic SMEs	Data on possible synergies established between regional large firms and domestic SMEs (quality, quantity, pricing, quality standard, etc.)		
Key market access standards that exports of leather and leather related products are expected to meet	Data on key market access standards that exports of leather and leather related products are expected to meet		
Appropriate interventions to meet the requirements	Suggested/recommended interventions to meet the market access requirements		
Supply and market linkage for the Mauritius SMEs and large firms with identified potential suppliers	Data on linkages established for the Mauritius SMEs and large firms with identified potential supplier		
Capturing a larger share of the global leather	• Recommendations for capturing a larger share of the global leather market including trending value-added		

market including trending value added leather and leather products that Mauritius can venture into.	leather and leather products (Available manpower in the industry, Existing investment and macroeconomic policies, Supporting public policies on finance and credit, taxes and duties, investment and trade, legal and regulatory framework, which would safeguard domestic industry from unfair competition, Cost of production)		
Training and handholding of 30 SMEs	Data on number of SMEs trained and coached (Need assessment report, Number of SMEs Trained, Number of SMEs linked to suppliers of leather and markets)		

Annex 4:

Framework and criteria for selection of potential countries and companies for market linkage with the Mauritius leather Industry

The study team used a multi-criteria analysis method for selection of countries and companies from the regional and international leather markets.

The Team identified different variables/criteria for considerations covering strategic, marketing, supply chain and risk considerations. Each criterion was also assigned a priority weight that shows its relative importance. The details of the frameworks used for the selection of countries and companies from the region and globally are as presented below.

1. Regional Market

As per the Mauritius Industrial Policy and Strategic Plan (2020-2025) it is essential that Mauritius target specific regional market (and associated value chain development). The biggest regional market opportunities indicated in the policy document are:

Indian Ocean Commission (IOC),-	South Africa and its immediate neighbors,	East African Community, centered around
• the Union of the Comoros, • France on behalf of Reunion, • Madagascar and • Seychelles.	• Namibia, • Botswana, • Zimbabwe; • Mozambique and • Eswatini	• Kenya and • Tanzania

Table 23: Framework for Analysis of County Attractiveness for Sourcing Raw Hides and Skins

Criteria	a. Weights	*b. Rating on a scale of 1-4	Overall score a x b
Whether it was allowed at low to export raw hides and skins	Yes	No	
Availability of transport from source markets to Mauritius	If the answer for any of the two criteria is no, the country will be excluded from further assessment		
Political stability	3		
Volume of production (capacity to supply the new market)	3		
Quality of hides and skins	3		

FOB price of hides and skins	3		
Monetary inflation	2		
Enforceability of contracts	1.5		
Bureaucratic delays	1.5		
Communications: phone, fax, internet/email access	1.5		
Geographical position (proximity)	1.5		
Easy access to logistics	1.5		
Freight costs	1.5		
Existing market linkage and trade agreement	2		
Total			

**: 1= unacceptable/poor; 2 = average conditions; 3 = above average conditions; 4 = superior conditions.*

Table 24 Criteria for rating companies from selected regional countries for sourcing raw hides and skins

Criteria	a. Weights	*b. Rating on a scale of 1-4	Overall score a x b
Availability of full company profile information	3		
Company capital	3		
Company years of experience	2		
Has the company been audited in the last 3 years	2		
Has the company any quality standards that it is certified for	2		
Previous export history of the company	3		
Has the company any market linkage and trade with Mauritius	3		
Availability of Communications mean (phone, fax, internet/email ..)	2		
Selling price of raw hides and skins	3		
The infrastructure (logistics)	2		
Total			
The highest score is	25	4	100

**: 1 = unacceptable; 2 = average conditions; 3 = above average conditions; 4 = superior conditions.*

Table 25: County attractiveness analysis for importing finished leather and accessories

	Criteria	a. Weights	*b. Rating on a scale of 1-4	Overall score a x b
1	Political stability	3		
2	GDP growth	2.5		
3	Monetary inflation	2		
4	Enforceability of contracts	1.5		
5	Bureaucratic delays	1.5		
6	Communications: phone, fax, internet/email access	1.5		
7	Production level and estimated growth rate of the finished leather	2.5		
8	Geographical position (proximity)	1.5		
9	Existing market linkage and trade agreement	2		
10	The infrastructure (logistics)	2.5		
	Total			
	The highest score is	25	4	100

: 1 = unacceptable; 2 = average conditions; 3 = above average conditions; 4 = superior conditions.

Table 26: Criteria for rating companies from selected regional countries for sourcing of finished leather

Criteria	a. Weights	*b. Rating on a scale of 1-4	Overall score a x b
Availability of full company profile information	3		
Company capital	2		
Company years of experience	2		
Has the company been audited in the last 3 years	2		
Has the company any quality standards that it is certified for	2		
Previous export history of the company	2.5		
Has the company any market linkage and trade with Mauritius	2		
Communications mean (phone, fax, internet/email ..)	1.5		
Quality of finished leather	2		
Selling price of finished leather	2		
The infrastructure (logistics)	2		
Terms of Trade	2		
Total			

**: 1= unacceptable; 2 = average conditions; 3 = above average conditions; 4 = superior conditions.*

Table 27: Profile of Countries Shortlisted for raw hides and skins supply

						Raw hides and skins potential supplier countries							
Countries	**Raw hides and skins export allowed or not (Yes or No)**	**Availability of transport from source markets to Mauritius (Yes or No)**	**Political stability**	**Volume of Export (Trade Map)**	**FOB price of hides and skins**	**Monetary inflation (inlation rate)**	**Enforceability of contracts**	**Bureaucratic delays**	**Communications:**	**Geographical position (proximity)**	**Easy access to logistics**	**Freight costs**	**Existing market linkage and trade agreement (Yes or No)**
The Union of the Comoros	Yes	yes	39.15	No Export (Country Excluded)		1.1	179	160	43.5				
France on behalf of Reunion,	Yes	yes	56.13	No Export (Country Excluded)		3.1	16	33	89.4				
Madagascar and	Yes	Yes	25.94	383	0.99USD/kg	7.2	136	161	26.4	1132.81 km	7 days	2013 per 40 foot cont	Yes
Seychelles.	Yes	Yes	72.64	No Export (Country Excluded)		-2.02	128	100	80.9	1756.4 km			Yes
South Africa	Yes	Yes	19.81	193550	0.86USD/Kg	5.1	102	84	80.5	3638.97 km.	express shipping	2013 per 40 foot cont	Yes
Namibia,	yes	yes	64.15	10,215	2.01usd /Kg	5.4	64	104	68.1	4,033 km	Transit time estimate: 23	2013 per 40 foot cont	Yes
Botswana,	yes	yes	87.26	1,728	2.69USD/kg	3.5	137	87	74	3,403 km	Transit time estimate: 13.4	2013 per 40 foot cont	Yes
Zimbabwe;	yes	yes	16.51	25,674	1.75usd/kg	34.8	169	140	42.7	2971 km	Ship (Beira port	2013 per 40 foot container	
Mozambique	yes	yes	11.32	188	0.99 USD/Kg	5.3	168	138	25.8	2313 km	12 days	2013 per 40 foot container	
Eswatini	yes	yes	38.21	132	0.85 USD/Kg	4.3	172	121	71.7	2755 KM	connection. total transit	2013 per 40 foot cont	yes
Kenya	yes	yes	15.09	19378	0.5usd/kg	6.9	89	56	54.2	3191KM	(easy)3 days maximu	2013 per 40 foot container	yes
Tanzania	Yes	Yes direct flight	36.79	4286	0.74 USD/kg	3	71	141	37.2	2896KM	27 days for cargo	2013 per 40 foot container	yes

Political stability (The Percentile Rank indicates each country's level of stability compared to other countries. Higher percentages indicate greater stability and lower percentages indicate less stability

Enforceability of contracts (Enforcing Contracts rank)https://archive.doingbusiness.org/en/data/exploretopics/enforcing-contracts https://archive.doingbusiness.org/en/data/exploretopics/enforcing-contracts

Political stability, https://worldpopulationreview.com

Monetary inflation (inlation rate), https://tradingeconomics.com/country-list/inflation-rate

Bureaucratic delays (ease of doing business rank)World Bank, Doing Business project for the year 2019https://archive.doingbusiness.org/en/data/exploretopics/enforcing-contracts

Communications: phone, fax, internet/email access, (High IDI values equate to greater proliferation and use of communications and information technology within a country.)https://worldpopulationreview.com/country-rankings/ict-development-index-by-country

Scoring for identification of potential supplier countries of raw hides and skins															
Countries	Political stability (The Percentile Rank indicates each country's level of stability compared to other countries.			Volume of production (capacity to supply the new market) use trade map statistics			FOB price of hides and skins			Monetary inflation (inlation rate)https://tradingeconomics.com/country-list/inflation-rate			Enforceability of contracts (Enforcing Contracts rank)https://archive.doingbusiness.org		
	Weight (a)	Score (1-4) (b)	Result (aXb)	Weight (a)	Score (1-4) (b	Result (aXb)	Weight (a)	Score (1-4) (b)	Result (aXb)	Weight (a)	Score (1-4) (b)	Result (aXb)	Weight (a)	Score (1-4) (b)	Result (aXb)
Madagascar	3	2	6	3	1	3	3	2	6	2	2.5	5	1.5	1.5	2.25
South Africa	3	1.5	4.5	3	4	12	3	2.5	7.5	2	2.75	5.5	1.5	2	3
Namibia,	3	3	9	3	2.5	7.5	3	1	3	2	2.75	5.5	1.5	3	4.5
Botswana,	3	3.5	10.5	3	1.5	4.5	3	1	3	2	3.5	7	1.5	1.5	2.25
Zimbabwe	3	1.5	4.5	3	3	9	3	2	6	2	1	2	1.5	1	1.5
Mozambique	3	1	3	3	1	3	3	2.5	7.5	2	2.75	5.5	1.5	1	1.5
Eswatini	3	2.5	7.5	3	1	3	3	2.5	7.5	2	3	6	1.5	1	1.5
Kenya and	3	1.5	4.5	3	2.5	7.5	3	3	9	2	2.5	5	1.5	2.5	3.75
Tanzania	3	2.5	7.5	3	2	6	3	3	9	2	4	8	1.5	2.75	4.125
Selected Countries on the bases of total score are South Africa, Kenya, Tanzania, Namibia and Eswatini															

Table 28: Scores of County Attractiveness for Sourcing Raw Hides and Skins

Continuation of Table 25

						Raw hides and skins supplier potential countries						
Countries	**Company**	Availability of full company profile information	Company capital	Company years of experience	Has the company been audited in the last 3 years	Has the company any quality standards that it is certified for	Previous export history of the company	Has the company any market linkage and trade with Mauritius	**Communications:**	**Quality of raw hide**	Selling price of raw hides and skins	The infrastructure (logistics)	**The terms and conditions of Trade**
South Africa	ROSSLYN TANNERY23 Stefaan Viljoen street, Rosslyn	Yes	R75millio	20	yes	Iso 9001, Iso14001, Iso45000, LWG Gold, Social Audit, Supplier Audits	Italy, Nederland, China, Zimbabwe, Botswana, Namibia	Indirect	Yes	Good	45USD/piece	yes	LC/COD/Xworks /FOB/CIF
Eswatini	Eswatini leather Association-collection cluster,	Partial						No	Tel:+268 76083634 Email:	14-15 kg	0.85/kg	Yes	Cash in Advance Letters of Credit (LC)
	Manzini Hide Collectors & Exporters (Pty) Ltd,	Partial						No	Phone: +268 2518 6325 Email:	14-15 kg	0.85/kg	Yes	Cash in Advance Letters of Credit (LC)
	Ngwane Hides & Skins (Pty) Ltd ,	Partial						No	Phone:+268 2505 5761 Email: Website:	14-15 kg	0.85/kg	Yes	Cash in Advance Letters of Credit (LC)
Kenya	Leecan Investment Ltd, +254 722 388 397 leecaninvestment@gmail.com	YES	$466,667	18 Years	YES	NO	China and India	NO	Phone: +254 722 388 397 Email: leecaninvestment@gmail.com	Weight: 20 to 30 kgs Average weight: 25 kgs	0.35-0.60USD/kg	Yes	Cash in advance (confirmed wire transfer)
	Association, +254 722 851 311 njoroge979@gmail.com	Yes						No	Phone: +254 722 851 311 Email: njoroge979@gmail.co	Weight: 20 to 30 kgs Average weight: 25 kgs	0.35-0.60USD/kg	yes	Cash in advance (confirmed wire transfer)
	Geemo Firm Ltd, +254 725 027 834 geemofirmlimited@gmail.com	Yes						No	Phone: +254 725 027 834 Email: geemofirmlimited@gmail.com Website:	Weight: 20 to 30 kgs Average weight: 25 kgs	0.35-0.60USD/kg	yes	Cash in advance (confirmed wire transfer)
Tanzania	Eliya Food Overseas Ltd Supplier From Tanzania, +255 787 786 012 https://www.go4worldbusiness.com	Partial	7.4 million USD	2020		ISO Certified	China, DRC	No	Phone: +255 787 786 012 Email: info@eliyafood.co.tz Website:	Weighing 20-30kg, Average 25	0.3-0.5USD/kg	Yes	LC
	Zawadees Supplier FromDaressalaam, Tanzania, Call 1-800-114-649 https://www.go4worldbusiness.com	Partial		2001				No	Phone: +255 759 615 255 Email: Website:	Weighing 20-30kg, Average 25	0.3-0.5USD/kg	Yes	LC
	Regent Trading Co. Ltd (1.3 Supplier From Dar Es Salaam, Tanzania, P.o.box 11563 Dar Es Salaam Tanzania	Partial		1989				No	Phone: +255 22 215 3296 Email: Website:	Weighing 20-30kg, Average 25	0.3-0.5USD/kg	Yes	LC

Table 29: Potential Companies identified for the supply of raw hides and skins

Bureaucratic delays (ease of doing business rank)World Bank, Doing Business project for the year 2019,			Communications: phone, fax, internet/email access, (High IDI values equate to greater proliferation and use			Geographical position (proximity)			Easy access to logistics			Freight costs			Existing market linkage and trade agreement (Yes or No)			Total Score
Weight (a)	Score (1-4) (b)	Result (aXb)	Weight (a)	Score (1-4) (b)	Result (aXb)	Weight (a)	Score (1-4) (b)	Result (aXb)	Weight (a)	Score (1-4) (b)	Result (aXb)	Weight (	Score (1-4	Result (aXb)	Weight (a)	Score (1-4) (	Result (aXb)	
1.5	1	1.5	1.5	1.5	2.25	1.5	4	6	1.5	4	6	1.5	4	6	2	4	8	52
1.5	2.75	4.125	1.5	4	6	1.5	2.5	3.75	1.5	4	6	1.5	4	6	2	4	8	66.375
1.5	2.5	3.75	1.5	2.75	4.125	1.5	3	4.5	1.5	2.5	3.75	1.5	4	6	2	4	8	59.625
1.5	2.75	4.125	1.5	3	4.5	1.5	2.75	4.125	1.5	3	4.5	1.5	4	6	2	4	8	58.5
1.5	1.5	2.25	1.5	2.5	3.75	1.5	2.75	4.125	1.5	3	4.5	1.5	4	6	2	4	8	51.625
1.5	1.5	2.25	1.5	1.5	2.25	1.5	3.5	5.25	1.5	3	4.5	1.5	4	6	2	4	8	48.75
1.5	2	3	1.5	3	4.5	1.5	3	4.5	1.5	3	4.5	1.5	4	6	2	4	8	60.5
1.5	3	4.5	1.5	2.75	4.125	1.5	2.75	4.125	1.5	4	6	1.5	4	6	2	4	8	66.625
1.5	1.5	2.25	1.5	2	3	1.5	3	4.5	1.5	2	3	1.5	4	6	2	4	8	65.875
Selected Countries on the bases of total score are South Africa, Kenya, Tanzania, Namibia and Eswatini																		

Table 30: Finished Leather supplier countries profile

Countries	Finished Leather supplying Potential Countries Profile									
	Political stability	GDP growth	Monetary inflation (inflation rate)	Enforceability of contracts	Bureaucratic delays	Communica tions:	Total Export value for 2022 (million) usd	Geographical position (proximity)	Market linkage with Mauritius	Infrastructure (logistics)
South Africa	19.81	4.9	5.1	102	84	80.5	194	3,637 km	Yes	Yes
Namibia	64.15	2.7	5.4	64	104	68.1	10.2	4,033 km	Yes	Yes
Zimbabwe	15.09	8.5	40.7	169	140	40.7	25.674	2,971 km	Yes	yes
Egypt	29.8	3.3	29.7	166	114	75.8	75.3	5981KM	yes	yes
Ethiopia	28.7	5.6	28.7	67	159	33.8	24.303	3771KM	yes	yes
Kenya	15.09	5.3	6.9	89	36	54.2	19.378	3,109 km	Yes	yes
Tanzania	35.79	4.6	3	71	141	37.2	11.5	2894 km	Yes	yes

Political stability, Higher percentages indicate greater stability and lower percentages indicate less stability. https://worldpopulationreview.com/

Bureaucratic delays (ease of doing business rank)World Bank, Doing Business project for the year 2019 https://data.worldbank.org/indicator/IC.BUS.EASE.XQ?locations=MG

Communications: phone, fax, internet/email access, (High IDI values equate to greater proliferation and use of communications and information technology within a country.) https://en.wikipedia.org/wiki/ICT_Development

Enforceability of contracts (Enforcing Contracts rank) https://archive.doingbusiness.org/en/data/exploretopics/enforcing-contracts

Table 31: Finished Leather supplier countries scoring based on selection criteria

Countries	Finished Leather supplying countries scoring base on selection criteria																															
	Political stability			GDP growth			Monetary inflation			Enforceability of contracts			Bureaucratic delays			Communications:			Geographical position (proximity)			Total Export value for 2022			Existing market linkage			The infrastructure (logistics)			Total Score	
	Weight (a)	Score (1-4) (b)	Result (axb)	Weight (a)	Score (1-4) (b)	Result (axb)	Weight (a)	Score (1-4) (b)	Result (axb)	Weight (a)	Score (1-4) (b)	Result (axb)	Weight (a)	Score (1-4) (b)	Result (axb)	Weight (a)	Score (1-4) (b)	Result (axb)	Weight (a)	Score (1-4) (b)	Result (axb)	Weight (a)	Score (1-4) (b)	Result (axb)	Weight (a)	Score (1-4)	Result (axb)	Weight (a)	Score (1-4) (b)	Result (axb)		
South Africa	3	2	6	2.5	3	7.5	2	3	6	1.5	2.5	3.75	1.5	3	4.5	1.5	4	6	1.5	4	6	2.5	4	10	2	4	8	2.5	4	10	67.75	
																					3											
Namibia,	3	4	12	2.5	2	5	2	3	6	1.5	3	4.5	1.5	2.5	3.75	1.5	3	4.5	1.5	3	4.5	2.5	1.5	3.75	2	4	8	2.5	4	10	62	
Zimbabwe	3	1	3	2.5	4	10	2	1	2	1.5	1	1.5	1.5	2	3	1.5	2.5	3.75	1.5	4	6	2.5	2.5	6.25	2	4	8	2.5	4	10	50.5	
Egypt	3	3	9	2.5	2.5	6.25	2	2	4	1.5	1	1.5	1.5	3	4.5	1.5	3.5	5.25	1.5	2	3	2.5	3	7.5	2	4	8	2.5	4	10	64.25	
Ethiopia	3	3	9	2.5	3.5	8.75	2	2	4	1.5	3	4.5	1.5	1.5	2.25	1.5	2	3	1.5	3.5	5.25	2.5	2.5	6.25	2	4	8	2.5	4	10	61	
Kenya	3	2	6	2.5	3.5	8.75	2	3	6	1.5	2.5	3.75	1.5	4	6	1.5	3	4.5	1.5	4	6	2.5	2	5	2	4	8	2.5	4	10	64	
Tanzania	3	3	9	2.5	3	7.5	2	3	6	1.5	3	4.5	1.5	2	3	1.5	2	3	1.5	4	6	2.5	1.5	3.75	2	4	8	2.5	4	10	60.75	South Africa
																																Egypt
	Political stability, Higher percentages indicate greater stability and lower percentages indicate less stability.																															Kenya
	Bureaucratic delays (ease of doing business rank)World Bank, Doing Business project for the year 2019																															Ethiopia
	Communications: phone, fax, internet/email access, (High IDI values equate to greater proliferation and use of communications and information technology within a country.)																															Namibia

Enforceability of contracts (Enforcing Contracts rank)

Table 32: Finished Leather Supplier Companies profile

Countries	Company	Availability of company profile information	Company capital	Company years of experience	Has the company been audited in the last 3 years	Has the company any quality standards that it is certified for	Communications:	Previous export history of the company	Quality of finished leather	Selling price of finished leather	Market linkage with Mauritius (Yes No)	The infrastructure (logistics)(Yes No)	Terms and conditions of Trade
	Finished Leather supplying Potential Companies Profile												
South Africa	Fusion Leather	Yes	NA	20 years	Yes, every year	None	Phone: +27 21 577 1080 Email: tanya@fusionleather.co.za Website: https://www.fusionleather.co.za/	Export to: Zimbabwe / Zambia / China / Hong Kong / Pakistan / United	Excellent	ZAR 39 or 2.034USD/Sqf	None	CNF or FOB via sea for full containers or courier service for smaller orders.	CNF / FOB
	OR LEATHERS (PTY) LTD	Yes	NA	7 years	No	None	Phone: +27 12 940 2252 Email: willem@britsvelle.co.za, hendrik@britsvelle.co.za, marilyn@orleathers.co.za	ZIMBABWE, ITALY	GRADE A,B,C	upholstery 1.2-1.4 substance grade c corrected gran , Grade B $14 per sqft upholstery	None	ROAD/SEA FREIGHT	50% ON ORDER, 50% ON COLLECTION
Ethiopia	Batu tannery,	Yes	3.4 million dollar	24 Years	yes	ISO certi	Phone: 251-114421451/52/56 Email: batutannery@gmail.com tateky@gmail.com Website:	Export to Europe, Asia, Africa		Hide USD 1.60/sqft FOB	None	yes	Wire transfers and credit cards
	Elico tannery,	Yes	6.2 million dollar	70 years	yes	yes Quality magt, environment al magt,	Phone: +251-114422525, +251-114708988 Email: elicodmdtannery@gmail.com,	Europe, Asia, US, Africa (Ghana, Cameroon etc)		Hide 1.6 USD sq fit, skin 1.8 USD sq fit average	None	yes	LC and TT are commonly used means of payment
	Kolba tannery,	Yes	8.9 million USD	22 years	yes	yes ISO certified	Phone: +251-911210754 +251-911212886 Email: imex@colbatanplc.com factory@colbatanplc.com	Export to Europe, Asia etc		The average selling price per square foot for sheep, goats, and cows is (1.2	None	yes	LC and TT are means of payment:
Kenya	Aziz Tanneries Ltd, Kangundo Road Njiru, Nairobi	Yes	NA	Since 1983			Phone: +254 722 511 348 Email: aziztanneries@yahoo.com Website:	Pakistan, India and Uganda	Excelent	WET BLUE LEATHER OF COW. Hides and skins. Price: 1.25 US D PER SQ FT	None	Yes	FOB
	Alpharama Ltd.,	YES	40 million USD	Since 2005	Audited on yearly basis	YES, by LWG, Gold rated for	Phone: +254 722 515 499 Email: pvsrao@alpharama.co.ke	20 years globally	Excelent	COW. Hides and skins. Price: 1.25 US D PER SQ FT	NO	YES	FOB
	Nakuru Tanners Ltd,	YES	$200,000.00	51 Years	Yes	YES,	Phone: +254722 564 040 Email: infor@nakurutanners.co.ke ntwetblue@africaonline.co.ke	China/India/Italy/Mexico	Excelent	COW. Hides and skins. Price: 1.25 US D PER SQ FT / Depend on type and	NO	YES	FOB

Table 33: finished leather supplier companies scoring

Finished Leather supplying countries selection criteria

Countries	Companies	Availability of full company profile information			Company capital			Company years of experience			Has the company been audited in the last 3 years			Has the company any quality standards that it is certified for			Communications:			Previous export history of the company			Quality of finished leather		
		Weight (a)	Score (1-4) (b)	Result (aXb)	Weight (a)	Score (1-4) (b	Result (aXb)	Weight (a)	Score (1-4) (b)	Result (aXb)	Weight (a)	Score (1-4) (b)	Result (aXb)	Weight (a)	Score (1-4) (b)	Result (aXb)	Weight (a)	Score (1-4) (b)	Result (aXb)				Weight (a)	Score (1-4) (b	Result (aXb)
South Africa	Fusion Leather World,info@fusionleather.co.za021 577 1080	3	4	12	2	2	4	2	4	8	2	4	8	2	1	2	1.5	4	6	2.5	4	10	2	3	6
	OR LEATHERS (PTY) LTD	3	4	12	2	2	4	2	3	6	2	1	2	2	1	2	1.5	4	6	2.5	4	10	2	3	6
Ethiopia	114421451/52/56 batutannery@gmail.com tateky@gmail.com	3	4	12	2	4	8	2	4	8	2	4	8	2	4	8	1.5	4	6	2.5	4	10	2	4	8
	+251-114708988 elicodmdtannery@gmail.com, elicoawashtannery@gmail.com, woldmigo@yahoo.com	3	4	12	2	4	8	2	4	8	2	4	8	2	4	8	1.5	4	6	2.5	4	10	2	4	8
	Kolba tannery, 251-911210754 +251-911212886 imex@colbatanplc.com factory@colbatanplc.com	3	4	12	2	4	8	2	4	8	2	4	8	2	4	8	1.5	4	6	2.5	4	10	2	4	8
Kenya	Aziz Tanneries Ltd, aziztanneries@yahoo.com +254 722 511 348	3	4	12	2	2	4	2	4	8	2	1	2	2	1	2	1.5	2	3	2.5	4	10	2	3	6
	Alpharama Ltd., pvsrao@alpharama.co.ke +254 722 515 499	3	4	12	2	4	8	2	4	8	2	4	8	2	4	8	1.5	4	6	2.5	4	10	2	4	8
	Nakuru Tanners Ltd, +254722 564 040 infor@nakurutanners.co.ke ntwetblue@africaonline.co.ke	3	4	12	2	3	6	2	4	8	2	4	8	2	4	8	1.5	4	6	2.5	4	10	2	4	8

Companies	Selling price of finished leather			Market linkage with Mauritus (Yes No)			The infrastructure (logistics)			Terms of Trade			Total Score
	Weight (a)	Score (1-4) (b)	Result (aXb)	Weight (a)	Score (1-4) (b)	Result (aXb)	Weight (a)	Score (1-4) (b)	Result (aXb)	Weight (a)	Score (1-4) (b	Result (aXb)	
Fusion Leather World,info@fusionleather.co.za021 577 1080	2	3	6	2	1	2	2	4	8	2	4	8	80
OR LEATHERS (PTY) LTD	2	2.5	5	2	1	2	2	4	8	2	4	8	71
114421451/52/56 batutannery@gmail.com tateky@gmail.com	2	4	8	2	1	2	2	3	6	2	4	8	92
+251-114708988 elicodmdtannery@gmail.com, elicoawashtannery@gmail.com, woldmigo@yahoo.com	2	4	8	2	1	2	2	3	6	2	4	8	92
Kolba tannery, 251-911210754 +251-911212886 imex@colbatanplc.com factory@colbatanplc.com	2	4	8	2	1	2	2	3	6	2	4	8	92
Aziz Tanneries Ltd, aziztanneries@yahoo.com +254 722 511 348	2	3	6	2	1	2	2	3	6	2	4	8	69
Alpharama Ltd., pvsrao@alpharama.co.ke +254 722 515 499	2	3	6	2	1	2	2	3	6	2	4	8	90
Nakuru Tanners Ltd, +254722 564 040 infor@nakurutanners.co.ke ntwetblue@africaonline.co.ke	2	3	6	2	1	2	2	3	6	2	4	8	90

2. Global market

2.1 Maintaining existing market linkage

Although Mauritius's leather industry is relatively modest in scale compared to other African nations, it has successfully developed export experience in several high-income global markets. Countries such as France, the United Kingdom, the United States, China, Australia, and others have received leather goods from Mauritius, reflecting both product quality and trade readiness. It is therefore imperative to preserve and strengthen these established market linkages, as they serve as important anchors for sustained export performance and future market diversification.

2.2 **Exploring New Market Opportunities**

To expand Mauritius's leather export footprint, a structured assessment was undertaken to identify new and high-potential markets. The analysis sought to determine which countries merit closer investigation as viable export destinations for leather and leather products.

The methodology was executed in two stages:

In Stage One, a longlist of 174 countries with historical trade relationships with Mauritius (across all sectors) was compiled using data from Trade Statistics Global Edge. Countries were evaluated based on their contribution to Mauritius's total trade volume. Forty-three countries with insignificant export activity were screened out, leaving 131 countries deemed worthy of further exploration. This filtering approach was based on the rationale that existing trade relationships (e.g., in garments and textiles) provide a foundation—such as logistics, transportation routes, and preferential trade agreements—that could be leveraged by the leather sector.

In Stage Two, these 131 countries were evaluated using import data specific to leather articles and footwear, drawn from the ITC Trade Map (2018–2022). Countries were ranked based on their share of global imports for HS categories covering leather goods and footwear. The analysis showed that the top ten importers accounted for 64% of leather article imports and 66% of footwear imports globally. Based on this, the following countries were proposed as priority markets: the United States, Germany, France, China, Japan, Belgium, Netherlands, Canada, Italy, and Switzerland.

In addition to global players, South Africa, Madagascar, and Kenya were recommended as regional targets due to geographical proximity, existing trade ties, and market compatibility. These countries also offer logistics advantages and cultural familiarity that could ease entry and expansion for Mauritian exporters.

The key selection variables—beyond import volume—are detailed in the accompanying table and include market accessibility, trade policy alignment, and logistics infrastructure.

Table 34: Variables considered in the selection process

Variable	Country Situation
Top importers of Leather articles and footwear	USA and Germany were the two top importers of articles of leather and footwear during 2018 – 2022. In total the top ten countries accounted 64% and 66% of the total world imports of Articles of leather and footwear.
Apparent consumption: Domestic production plus imports minus export. This is a proxy measure for consumption reflects the true measure of the market size in a given industry.	Top ten countries: USA, Germany, UK, France, Japan, Canada, Belgium, Netherlands, Spain, UAE have relatively bigger market size for leather articles and footwear.
Import as percentage of apparent consumption: A high ratio import imply market openness and low domestic producer competitiveness implying market opportunity.	95.9 percent of USA of footwear and leather products are imported.
Origin Advantage: Mauritius's share in target total markets total imports A positive balance of trade shows that the exporting country has the benefit of critical mass, favorable image in the importing market and strong trade relationships between the exporting and importing countries.	Mauritius has positive balance of trade with: The USA, UK, Madagascar, Netherlands, Vietnam, Hong Kong, Saudi Arabia, Kuwait. While a negative balance of trade with French, South Africa, Germany, China, Switzerland, UAE, Japan, India
Preferential trade agreement: Tariffs have a direct impact to the exporter's prices and marketing strategies of exporters.	Mauritius as a member of WTO has an agreement with all the selected countries. Mauritius is a beneficiary of AGOA, which provides duty free and quota free access to the USA market, Mauritius is eligible for duty free and quota free to the EU market through the interim partnership agreement (iEPA). The Mauritius China free trade agreement also provides Mauritius duty free access to China market.
Logistics Performance Index score: The LPI is a tool that measures countries performance in terms of logistics supply. Logistics supply matters a lot in facilitating or hindering trading in and between countries.	The LPI score for the countries are considered and all the selected countries scored similar scores that lie between 3.7 and 4.2 out of 5.

Table 35: Data collection Template

Variable			Sources and
Apparent consumption In Value (USD)			
	H - 42	Local production	
		Export	ITC
		Import	ITC
	H - 64	Local production	
		Export	ITC
		Import	ITC
Population and Economy	Population Growth rate %		
	Rate of unemployment		
	Inflation Rate%		
	GDP growth rate %		
	GDP per capita		GDP/population
	Export per capita		Export value/population
	Import per capita		Import value/population
	Current account deficit %age of GDP		IMF, World Bank
	External Debt as %age of export earning		IMF world bank
	External debt as %age export earning		IMF, World Bank
	Stock of foreign debt as %age of GDP		IMF World Bank
	Coastal Port Luis to the main port		SeaRates.com, Netpas distance
		Port Luis to nearest port	
		nearest port to capital city Kms	Mapcrow Travel distance calculator
Transport cost 20 FT container to port of destination			
Logistics Performance Index (LPI) Score			http://www.worldbank.org/lpi
Average applied Tariff (Most favored nation applied tariff for H – 42 and H – 64)			UNCTAD TRAINS Data Base and WTO
Frequency of Non-Tariff Barriers			UNCTAD TRAINS

Table 36: Collected Data

	Mauritius Total Export and Import					H -42 Importing Countries			H - 64 Importing Countries						
Partner	Export ($)	Export (%)	Import ($)	Import (%)	Balance	Average (2018 -202	CAGR		Average (2018 - 2922)	%age contribution	CAGR	Average	LPI	C/A Defici	Stock of External
												Distance KMs		%age GDP	Debt %age of GDP
World						81,134,352	19%	100%	147129715	1	21%				
South Africa	$232,251,375	13.90%	$411,896,829	8%	($179,645,454)	217,090	13%	0%	872968	1%	11%	2870	3.7	1.8	65.81
France	$226,148,853	13.50%	$345,184,911	6.71%	($119,036,058)	5,144,914	9%	6%	8501479	6%	10%	14304	3.9	1.3	20.86
United Kingdom	$152,742,406	9.14%	$80,471,017	1.56%	$72,271,389	3,385,458	6%	4%	6249446	4%	-3%	9980	3.7	0.6	287.08
United States	$135,468,144	8.10%	$119,084,372	2.31%	$16,383,772	13,831,382	17%	17%	28717010	20%	37%	11163	3.8	1.5	122.56
Madagascar	$129,212,667	7.73%	$27,803,973	0.54%	$101,408,694	217,090	13%	0%	8133	0%	-14%	1056	2.3	4.8	41
Spain	$82,853,195	4.96%	$109,590,521	2.13%	($26,737,326)	1,907,739	12%	2%	3880575	3%	33%	13427	3.9	1.7	11.28
Italy	$79,487,941	4.75%	$116,246,461	2.26%	($36,758,520)	3,977,934	11%	5%	7362543	5%	34%	17146	3.9	0.7	143.09
Netherlands	$69,076,626	4.13%	$30,310,431	0.59%	$38,766,195	2,126,688	9%	3%	5046367	3%	25%	9520	4.1	1.1	381.62
Vietnam	$65,974,870	3.95%	$53,356,240	1.04%	$12,618,630	215,777	16%	0%	1122053	1%	4%	8654	3.3	5.8	
Kenya	$50,717,848	3.03%	$43,991,160	0.86%	$6,726,688	22,604	9%	0%	58066	0%	18%	2634	2.81	5.3	26
India	$44,412,582	2.66%	$802,443,821	15.60%	($758,031,239)	331,193	23%	0%	692417	0%	-6%	4667	3.4	6.3	16.83
Belgium	$32,380,962	1.94%	$104,906,712	2.04%	($72,525,750)	1,253,540	5%	2%	4835469	3%	9%	5114	4	0.9	104.42
Germany	$28,983,620	1.73%	$139,792,151	2.72%	($110,808,531)	4,732,497	6%	6%	13445190	9%	14%	15529	4.1	0.9	65.53
China	$25,718,369	1.54%	$914,506,161	17.80%	($888,787,792)	5,021,373	21%	6%	5790500	4%	31%	16990	3.7	4.2	13.55
Switzerland	$25,228,108	1.51%	$36,543,853	0.71%	($11,315,745)	1,384,769	2%	2%	2286821	2%	3%	5568	4.1	1.8	284.57
United Arab Emirates	$24,301,990	1.45%	$443,422,606	8.61%	($419,120,616)	1,311,371	23%	2%	1996607	1%	47%	5056	4	4	59.69
Canada	$4,555,580	0.27%	$8,427,082	0.16%	($3,871,502)	1,760,595	15%	2%	2424445	2%	34%			1.6	
Japan	$14,252,779	0.85%	$124,696,997	2.42%	($110,444,218)	5,720,398	4%	7%	5018577	3%	-2%	14303	3.9	1	98.44
Total		85.14%		76%		52,562,412		64%		66%					

Major brand names that have market linkage with the Mauritius Textile Manufacturers		
Topshop, Topman, River Island, Levi's, Le Chateau Calvin Klein, Woolworths, Ecko, Abercrombie & Fitch, Jasper Conrad, Tex-Gold,	Foschinis, Burton UK, Devred, Guess, Hackett, Tommy Hilfiger, Victoria's Secret, Zara, Mango, La Redoute, 3 Suisses, and L.L. Bean	Massimo Dutti, Naf Naf, Orvis, Peeble Beach, Puma, Harrods, Banana Republic, Express, S.Oliver, Esprit,

Annex 5:

Trade Information/ market access condition

https://www.tradeatlas.com/
https://comtradeplus.un.org/
https://www.marketinsidedata.com/
https://www.exchange-data.com/
https://www.importdoor.com/
https://www.importgenius.com
https://www.trademo.com/
https://finage.co.uk/
https://www.spglobal.com/marketintelligence/en/index
https://wits.worldbank.org/countrystats.aspx?lang=en
https://ec.europa.eu/eurostat/web/main/data/database
https://stats.oecd.org/Index.aspx?DataSetCode=BIMTS_CPA
https://comesa.opendataforafrica.org/
https://ato.africa/en
https://www.macmap.org/en/query/results?reporter=450&partner=478&product=410120&level=6

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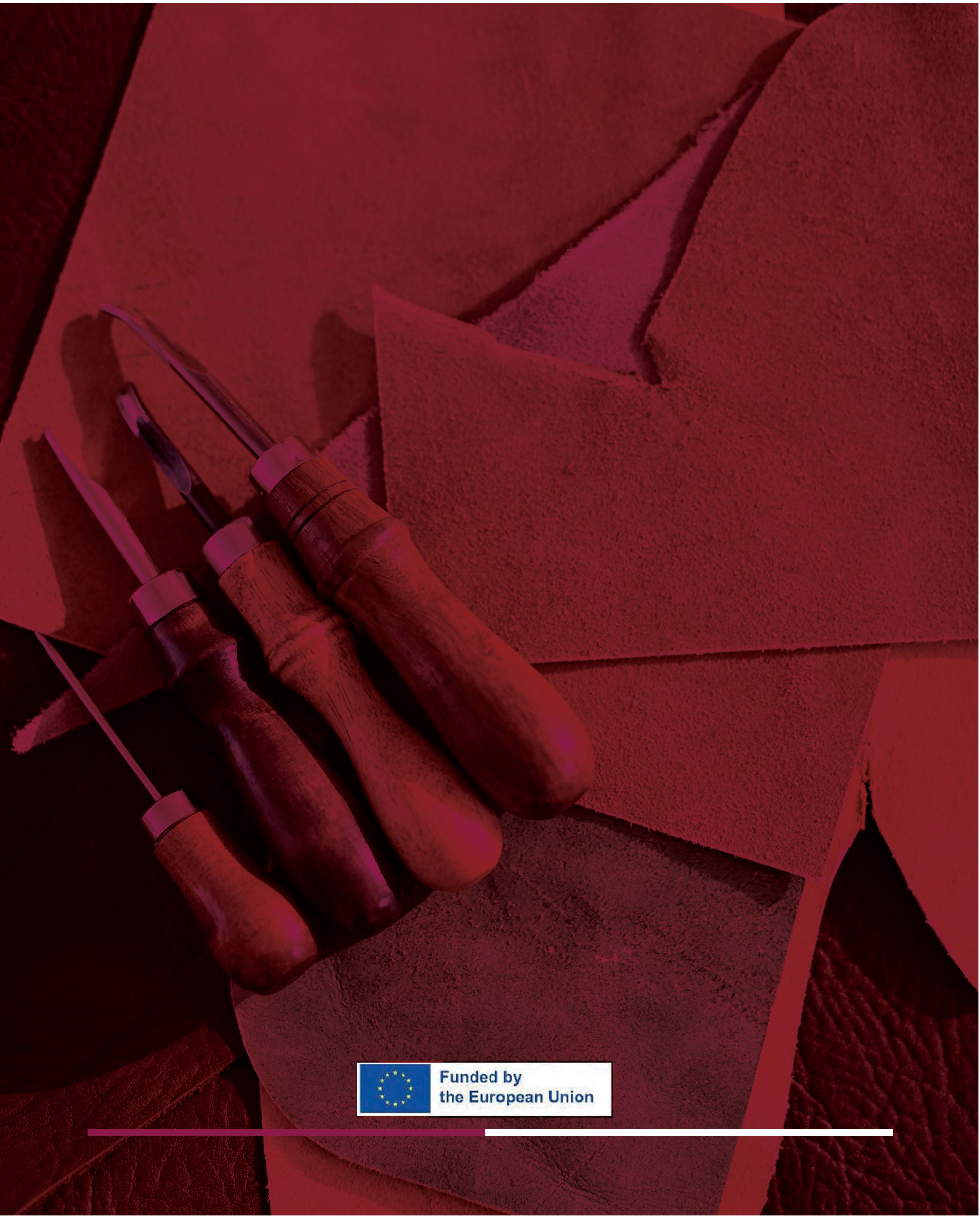

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