



Evaluation of Africa's Critical Demographic Trends in the Leather Sector Development and Integration of Novel Participatory 'Triple Helix' Approach

Mwinyikione Mwinyihija

Executive Director, Leather and Leather Products Institute (LLPI-COMESA)
Addis Ababa, Ethiopia

Abstract:

The global leather sector has grown tremendously in the last decade and continues to show potential to progress even further. In the process, indications are rife that the leather sector is slowly moving from Asia to Africa and the need to prepare for that transition is opportune. Moreover, the evolvement of a huge consuming group of persons in Africa in recent times is preparing the renascence period for greater engagement in the continent's zeal for development. With the vast livestock base in Africa estimated at 21% of the global livestock population, leather forms an important agro-based commodity and becomes worthy of consideration. However, with only about US\$ 2Billion accruals in Africa out of a global US\$100Billion the leather value chain strata requires immediate attention to ascertain its unexplored potential, loss in accruals and remedial measures required. The current study attempted to evaluate the leather value stratum by singling out the sectors' demographic profile as a first line of diagnostics. This was followed-up with a review of a potential approach best suited in driving the leather sector's development to higher heights while providing remedial measures. The results obtained indicated that while gender is a constraining issue in the sector there are positives that once pursued could be a preamble to the continent's success. These include literate (>70%) core players the leather sector mostly with a minimum of high education. Notable is that a youthful population (aged 30-49 years) individually or family based, own the high tier value chain stratum (Tanneries, Footwear and Leather goods enterprises). Essentially, with support on recapitalization, marketing and an enabling operational environment the accruals from these tiers are to be projected in value to more than ten-folds that of raw materials in Africa. Thusly, conspicuous results in increased employment, gender equity, wealth creation and rural development could easily be achieved. Indeed, the enabling environment envisaged is the refocusing of the participatory approach to encompass the three 'strand' approach dubbed as 'Triple Helix' approach in the leather sector's drive towards development. This approach entails participating in a common platform The Government (for regulatory and fiscal policies), Academia (research, development and spur innovation with enterprises) and Private sector (which is core to the leather strata) in preparing and meeting Africa's expectation in the leather sector.

Keywords: Economic Indicators; Demographic trends; Leather sector; Participatory-Approach; & Value Addition

1. Introduction

The global performance of the leather sector in the world has shown progressively positive results in comparison to other agricultural based commodities. Whilst other worldwide economies were experiencing challenges in 2008/09 period, remarkably Africa and Asia managed to overcome the economic turbulence and the leather sector survived with minimal casualties of the onslaught (Mwinyihija, 2010; 2011). Regardless of this occurrence, the central issue of concern for this study was the need to analyze the leather value chain and its players in Africa and determine the deterrents influencing its dismal performance in value

creation (Taye, 2012). For example, from a continental analysis, Asia leads in both consumption of leather products and the production of footwear with over 9 billion out of a total of 13 billion pairs of shoes produced (FAO, 2011).

When closely evaluated countries such as China, India, Pakistan, Thailand, and Vietnam, footwear production in Asia are top world producers due the competitive edge inculcated in their production systems. Comparatively, it is estimated that Africa contributed about 21% of the livestock production and 3.5% of hides and skins supply annually within the 2005 – 2012 period (FAO, 2012). Currently, strengthening regional blocks in Africa to develop the national and global leather sector can possibly provide an alternative pathway to improve on the continent's general economic performance in trade (Rojid, 2007). Yet, in retrospect of all the happenings, Africa is in the preparatory stage of being the next hub of the leather transition from Asia. The consolidation of this perception gaining prominence gradually as socio-economic indicators are conspicuously being witnessed (e.g. improved literacy levels, income, infrastructural development, rural development etc.) in Africa. This has evolved the need through a participatory approach to develop policies towards value addition of the agro-based commodities, including the leather sector (Sharma, Pathania, & Lal, 2010). However, certain preliminaries need to be ascertained especially on harmonizing trade (e.g. price stability etc.) and the trickling down effect of accruals to the leather value chain stratum in Africa.

The importance of price stability in these two continents at most assisted in harmonizing the trade regimes. However, the effect of the highly priced raw materials on tanneries equally affected the other leather chain stratum, particularly the competitiveness of the leather-goods and footwear subsectors (National Productivity Center [NPC], 2010). The oxymoron of Africa's productivity is that it attracts lower prices for its leather and leather products when prices are getting even higher at the global levels (Decreux & Spies, 2012; Mwinyihija, 2011). Thus, the benefits along the leather value chain are negligible and more understanding of its composition and dynamics is crucial.

To have a closer comprehension of the sector it is imperative to scrutinize the leather value chain strata particularly in an African context. Thusly, the leather chain sector encompasses different stratum, which include the producers, traders, tanners, and manufacturers of leather-goods. These are referred to as core players and equally important are the peripheral players who influence the value addition initiatives of the leather chain. The peripheral players are numerous (e.g. freight forwarders, customs, police, researchers, academicians, local government etc.) but specific groupings or categorization of the players would assist in determining their roles in leather value creation initiatives. For instance, all public players involved with the chain will be categorized as 'Government' whilst research, development and training are considered to as 'Academic'. The whole core group in the leather value chain (as explained earlier) will entail the 'Private sector'. Thusly, the Government, Academia and Private sector will form what is dubbed 'The Triple Helix' approach.

It is envisaged that failure to have appropriate participatory approaches to the development of the leather sector has led to adverse impacts on efforts to alleviate poverty, employment creation, wealth generation, gender parity, rural development, and the overall productivity of the leather sector in Africa (Conceição, Mukherjee, & Nayyar, 2011; Handoussa, 2009). As such, the study would implore on whether the conceptual idea of the triple helix using demographic data collected is a panacea to the problem. Therefore, the study will evaluate the lack of conceptual direction or implementation framework for identifying potential opportunities to reinvigorate the leather sector in Africa. The specific problems that this study will focus on are the benefits accruable through tangible participatory approach engaging the three strands of development; Government, Academia and Private sector in forming the triple helix as a critical precursor to value addition, pursuance of unexploited potential opportunities and prompting appropriate policy development directed towards the development of the leather sector in Africa.

2. Methodology

A quantitative correlational study (non-experimental) using Sigma XL (2013) will be adapted to survey a sample of the population in a selected African country to potentially assist to seek out the leather value chain related demographics important for this study. The research design for this study is quantitative. The design will further be enhanced with available literature on participatory approaches and value addition to conceptualize the intricacies associated with demographical profiling of the leather core stratum in Africa. Results based on aggregate score to elucidate the interaction of various players and evaluating performance by Pareto analysis will also be highlighted.

To adequately address the research problem, the study adapted a stratified random sampling approach to efficiently analyze the distinct groupings in the leather value chain by integrating efficient ratios and product estimators (Singh & Solanki, 2013). Therefore, the study will use survey instruments validated from previous research related to the leather sector (e.g. survey instruments of the Indian leather sector performance by National Productivity Centre (NPC) with solid psychometric properties to sample the participants (NPC, 2010). Moreover, by adopting such an approach, validity and reliability are optimized. Validity is indicative of how appropriately a survey measure is conducted. Measuring the content validity in this study will be used as suggested by Litwin (1995) and Prawitz, Garman, Sorhaindo, O'Neill, Kim & Drentea, (2006). Reliability of the survey instrument determined the level of random error in the survey instrument (Radhakrishna, 2007). The consistency, complementarity, and correlation coefficient were measured using Cronbach's coefficient alpha.

3. Analysis and Presentation of Results

The pilot study had 11 sections with a total of 111 assessed items within the instrument and attained a Cronbach alpha of 0.869. The survey instruments had a mixture of dichotomous and multi-point scales as such there was relatively heterogeneous variances in which case the use of standardized variables was appropriate (Santos, 1999; Falk & Savalei, 2011). The attained value of 0.869 in this study was ideal value (where Cronbach alpha values between 0.7 – 0.95 were considered acceptable with values above 0.80

mostly preferred) limits for ascertaining internal consistency and homogeneity (Dunn, Baguley & Brunnsden, 2013; Tavakol & Reg, 2011).

Out of the targeted 281 participants to be interviewed, the study yielded 244 valid responses providing a response rate of 87%. The demographics of the sample included number of participants in the identified strata in the value chain map (Figure 1) along with gender involvement and comparisons. Age, position level, type of organization, education level and type of specialization depicted the diversity and characterization of the core value players of the leather value chain. Moreover, experience provided an insight to the conformity of the experimental prerequisite (of participants having equal or more than 5 years exposure to the leather sector) and ultimately ascertain the reliability of responses emanating from the value chain players.

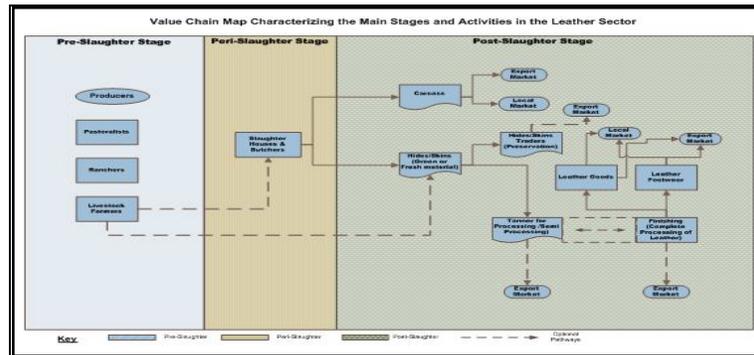


Figure 1: Value Chain Map Characterizing the Core Stages and Activities in the Africa’s Leather Sector

3.1 Gender and Age Group in Leather Strata

3.1.1 Gender balance

Within the total sample, significantly more males (86.6%) than females (13.4%) participated in the study (n=244). This provided the male dominance aspect conspicuous in the leather sector in most African countries. The ratio of male (66.7%) to female (33.3%) participation in the Leathergoods stratum in particular exhibited a much higher ratio of female participants in comparison to the other leather chain stratum. The least of gender male to female ratio balance was with Producers (94.6%:5.4%) and Traders (94.4%:5.6%). This observation was attributed by the extraneous activities which are mostly field based (e.g. herding of livestock in pastoral areas and physical handling of ostensibly foul smelling and heavy loads of hides and skins). As such, the matter of women engagement to large livestock trade (apart from small livestock also referred to as shoats) and handling is culturally unsupported in most African societies.

3.1.2 Age Group

The age bracket along the value chain indicated that the majority of participants 77.5% of Producers (n=93), 57.9% Slaughterhouse owner/Butchers (n=41) and 77.1% Traders (n=71) were between 40yrs and 59yrs of age (see Figure 2). However, in the higher levels of the leather value chain youthful engagement by the participants were observed with 100% of the Tanners (n=7), 81.9% Footwear (n=14) and 76.5% Leather goods (n=18) found within the age group of 30 – 49yrs bracket. This was an important illustration that indicated higher stratum of leather value addition having great unexplored potential and youthfulness to stimulate growth in the sector. In exception to all the other stratum of the value chain, participants whose ages were more or equal to 70yrs were only observed for Producers (21.1%) and Slaughterhouse owners/Butchers (21.1%). This trend unlike traders, tanners, leather goods and footwear was closely associated with livestock owners (who mostly are Producers and double-up in some cases as Butchers) as a source of livelihood and whose affiliation to the livestock industry is imbibed in their lives and has never been dependent with age in pastoral Africa. Thusly, the youth age in the higher tiers of the chain provided explorable opportunity for enhanced value addition through agility, potential to enhance skills and dynamism required at these levels..



Figure 2: Grouping of the SME leather strata along age categorization

3.1.3 Employment and Enterprise Ownership

Employment position from the demographic information indicated that Producers (83.7%), Footwear (57.1%) and Leathergoods (72.2%) of the participants were drawn from technical, supervisors and management staff. Comparatively, Slaughter house owners/Butchers (75%), Traders (83.1%) and Tanners (100%) participation were from executives, management and supervisors. The positional level of the demographics illustrated the seniority and responsibility of the sample along the leather value chain (Figure 3). Only 12 (Producers (11) and leather goods (1)) within the sample (representing 17.6%) were below the technical levels out of 244 participants engaged (see Figure 3). This illustrated the qualitative responses from the participants who at most were between the technical and management staff level as demonstrated.

The responsibility and seniority levels observed was also collaborated with data depicting enterprise/organizational ownership trends where Producers (81.7%) were from individuals, limited company or family setup. Butchers (72.5%), Footwear (78.6%) and Leather goods (66.7%) were mostly from individual ownership only (see Figure 3). Moreover, Traders (96.2%) were predominantly drawn from Individual, Corporate and Family owned enterprises, and Tanners (57.1%) from Family owned. The total sample result (n=244) showed few partnered on average (5.9%) and lower corporate ownership (5%) enterprises was conspicuous in the leather value chain illustrating that participation the study was mostly drawn from the top and inner core of the enterprises/organization improving on reliability and depth of the data obtained.

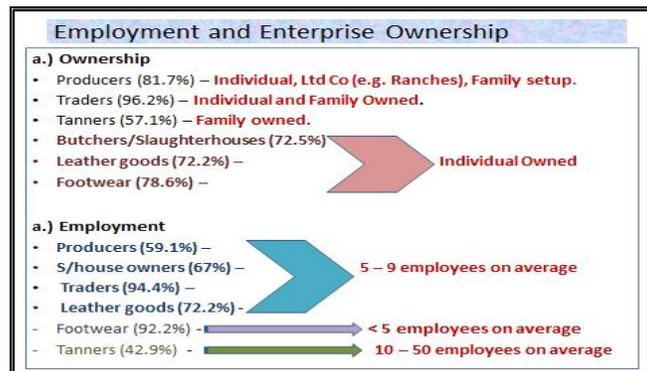


Figure 3: Depicting employment and enterprise ownership profiles of leather strata SME's

The level of employment and associated production is critical to be linked with productivity (Figure 4). Specifically, in the leather sector when evaluating the leather foot wear the number of pair of shoes per person per day forms an important criterion. As such figure 4 provides a graphical summary of the Africa's average and the targeted breakeven point required to evolve the stratum towards tangible results (e.g. employability, profitability, sustainability etc.).

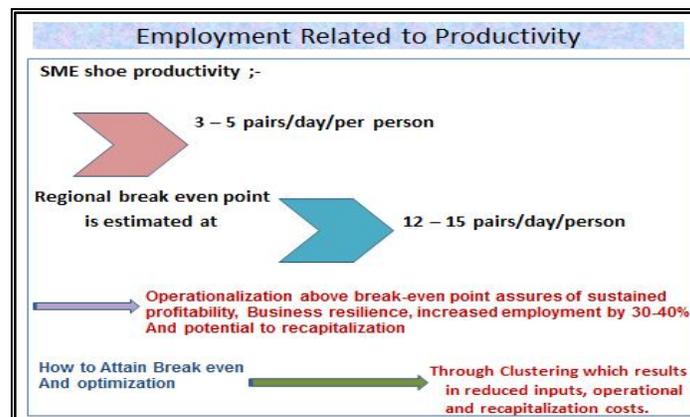


Figure 4: Current average Footwear productions per day per person in Africa's SME and target setting for breakeven points.

3.1.4 Education

The level of education within the demographics also further supports the awareness and responsibility of the sample population of the study (Figure 5). The Producers (79.6%), slaughterhouse owners/Butchers (75.6%), Traders (80.3%), footwear (85.7%) and Leather goods (83.3%) had high school to some college level education. Tanners (100%) in exception encompassed high school including graduate educational level positioning. In relating the educational positioning to the specialization depicted Producers (59%), Butchers (61%) and Traders (33.8%) undertook mostly business oriented courses. Comparatively, the Tanners (85.7%), Footwear (57.1%) and Leathergoods (44.4%) centered their specialization on scientific/technical and Business oriented courses. The participants' business competency along the whole value chain and technical or professional acumen specifically within the

higher phases of the value addition (i.e. Tanners, Footwear and Leathergoods) was observed. This supports previous research indicating a close relationship positively correlating educational levels, relevant specialization and economic development (Holland, Liadze, Rienzo & Wilkinson, 2013).

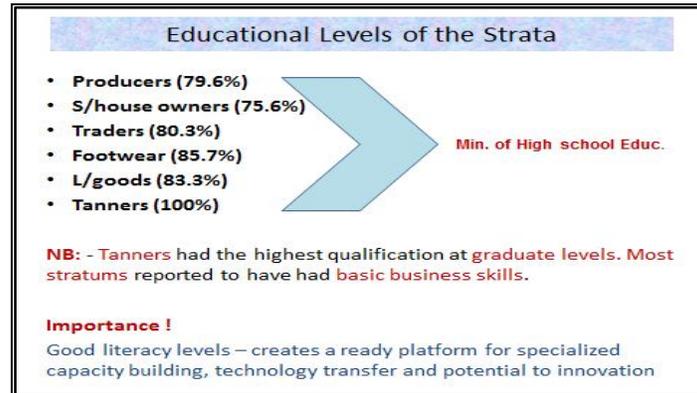


Figure 5: Illustrating the leather stratum minimum educational level and response participation in percentages (%).

3.1.5 Experience

The experience (in years) related to the individual participants from the leather sector value chain was found to be fundamental in addressing the delimitation of the study (see Figure 6). The Producers (80%), Butchers (85.4%), Traders (93.9%), Foot wear (88.9%) and Leather goods (31%) had a span of between 5 - 30 years' experience. Moreover, the tanners (100%) illustrated a much high experience of 11 – 30 years than the rest of the strata most probably strengthened with predominance of Family ownership which exposes longer period of association to the stratum. Overall the experience component of the study solidified the purpose of obtaining enriched results based on participants with high institutional memory, data backed with acquired experience and enhanced knowledge of the leather sector. This illustration as depicted (Figure 6) was supported by previous studies by Moyer-Packenham, Salkind, Bolyard, and Suh (2013) where they demonstrated that using participants who were knowledgeable and experienced resulted in them being appropriately selective, effective, and resourceful in their participation.

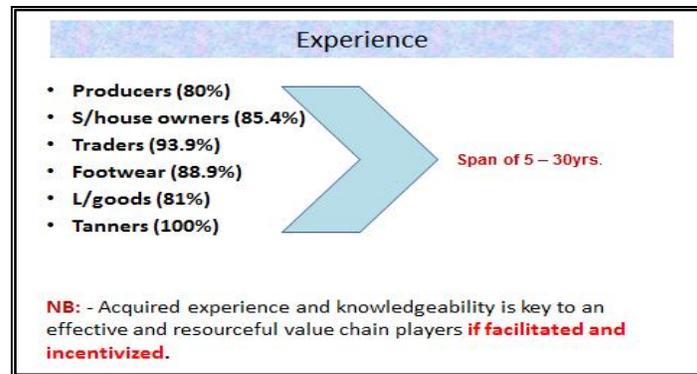


Figure 6: Graphic representation of the leather chain strata response (in %) related to experience (in years).

3.1.6 Annual Turnover Of The Leather Strata (2004-2013)

To conceptualize the activities of the leather value chain strata in relation to the demographics, the total annual turnover covering 2004/05 to 2012/13 period were analyzed (see figure 7) (n=240). Furthermore, a one way ANOVA and a mean matrix were carried out and this allowed for multiple pairwise comparisons. The analysis allowed for test of $H_0 = \mu_1 = \mu_2 = \mu_3 \dots \mu_k$ (at $p < 0.05$) where at least one pairwise set of means is not equal. The ANOVA p-value of 0.000 result illustrated that at least one pairwise set of means was not equal. The deduction from the means matrix indicated that the means from the annual turnover related to the participants of the various strata (Producer, Butchers, Traders, Tanners, Leather goods and Footwear) were significantly difference at $p=0.000$. The resultant R-Square value of 31.44% approximately explains the annual turnover variation in the leather value strata.

Kruskal- Wallis median test, moreover, confirmed the results to be significant (at $p=0.000$). The test statistic compared the mean ranks of each strata versus the mean rank of all observations in the leather value chains (n=240). The smallest absolute Z value of the strata related to the Leather goods (-2.479) indicated that the mean rank differed least when compared with all the observations. Whilst the largest Z absolute value was related to Traders (2.607) whose data illustrated that the mean differed most from the mean ranks of the other observations (see appendix G). Although there were significant ($p<0.05$) pairwise mean difference in all strata, an exception was observed for Tanners versus Leather goods ($p=0.3716$), Tanners versus Foot wear

($p=0.7095$) and Leather goods versus Footwear ($p=0.6020$). This observation was further articulated through use of graphics (Figure 7) to provide a significant differentiation and demarcation between phases of low value addition (i.e. producer, butcher and trader) and high value addition potential areas in the leather chain (Tanners, Leather goods and Footwear). Moreover, the higher value strata (Tanners, Leathergoods and Footwear) never overlaps the lower strata (Producer, Butcher and Traders) its annual turnover mean values (see Figure 7).

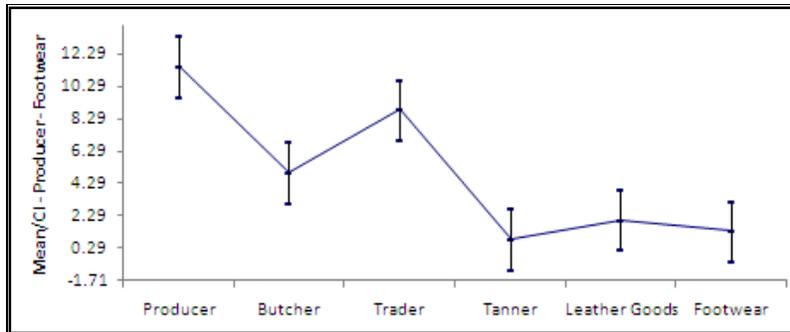


Figure 7: Graphical illustration of the annual turnovers means and 95% confidence intervals (CI) within the leather value chain strata covering 2006/07(A) to 2012/13(E) periods (n=240)

Indeed using Pareto analysis (80:20) where 80% of the revenue earnings are accrued and specifically compared across the leather strata to determine performance (Table 1). This illustration has been compared on annual earnings covering the periods 2006/07 to 2012/13. Tanners’ annual earnings are the highest with over US\$ 187,500 per annum. The lowest earnings was shared between Slaughterhouse/Butchers, Footwear and leather goods stratum. The implication of this result is that for the high tiers (e.g. Footwear and Leathergoods) there is a dire need to re-strategize for purposes of enhancing their value addition acumen. Whilst for the lower tiers irrespective of their earnings there are manifest losses and unexplored opportunities that are required to improve the strata performance as illustrated through Pareto analysis.

Range of Annual Turnover of Strata (US \$) 2010 - 2013		
• Producers (80%)	-	1,250 - 187,375
• S/house owners (80%)	-	1,250 - 4,988
• Traders (80%)	-	1,250 - 62,375
• Footwear (80%)	-	1,250 - 4,988
• L/goods (80%)	-	1,250 - 4,988
• Tanners (80%)	-	> 187,500

NB:
- Perusal of the annual turnover of high tier strata as regards Traders and Producer explains lost unexplored and or unpursued opportunities.

Table 1: Illustrated specific leather strata earnings using Pareto analysis

4. Discussion of Results

Previous studies have enveloped the value addition in segmented rather than holistic approach. In the past, studies centered in a few strata (mostly on tanners and footwear) without taking cognizance of the impact of the strata on the overall leather value strata and identifying opportunities therein (Ngore, Mshenga, Owuor & Mutai (2011), Viju, (2008), Bekele and Ayele (2008), Shirley, (2011) and NPC (2010). This approach created knowledge and earnings gap that required to be addressed. Mwinyihija and Quisenberry (2013) and Mwinyihija(2014) attempted to discuss the challenges, upheavals and antidote that Africa’s leather sector experiences. As such the need to comprehend the dynamics of the leather sector become fundamental. According to Powers (2012), trade transactions related to the leather sector along the value chain are crucial to evaluate each stratum and with derived observations analysis of potential impact becomes feasible. Thusly, it was this background that influenced the current study and engulfed the comprehension of the SME’s demographics as reported. Therefore, by studying the gender, age, employment, enterprises ownership status, productivity and annual turnover a window was opened to scrutinize weaknesses and strength of the SME’s engagement in the leather sector.

Education as a basis of capacity building and skills development was articulated in the current study. The importance of trainability cannot be overemphasized as detrimental factors compounding on lack of initiatives towards value addition include inadequacy on skills. This inadequacy to skills and appropriate capacity was particularly notable at artisanal level to influence tangible impact on SME’s. This included also the inability to reverse the abject investment opportunities propelling the sector’s problems to unimaginable levels (Gale, 2012; Mwinyihija, 2010).

Moreover, areas that predominantly depend on livestock and are high in livestock populations (e.g. countries in northern, eastern, and southern Africa), are inhabited with pastoralists who have been adjudged to be of low education but the study found otherwise. The only dilemma attested to the Producers is conspicuously low productivity and handling of undervalued hides and skins as their principal raw material (Little, McPeak, Barrett, & Kristjanson, 2008). However, with appropriate awareness creation and market orientation the producers can close the trading and value addition gap with ease. This view is further supported and illustrated by Elliot, Ekpot, & Sieper, (2011) who attested that lack of tangible value addition initiatives, unexploited potential opportunities attributed to a lack of awareness to the concerned players, and the need for Government and private sector to develop in consultation appropriate policies directed towards the overall development of agro-based commodities (leather sector being no exception) in Africa. This therefore, warrants interventions or optimization to identify unexplored opportunities within the other production stratum for the purposes of agility in value addition (Swafford, Ghosh, & Murthy, 2006).

In tandem to studies by Conceição, Mukherjee, & Nayyar (2011) and Handoussa, (2009) they asserted that the inability to develop the potential of the leather sector due to some of the challenges cited, adversely impacted the alleviation of poverty, employment creation, wealth generation, gender parity, rural development, and the overall productivity of the leather sector in Africa. This observation elucidated the importance of exploring some of the opportunities by considering competitiveness of the value chain products. This also included integrating total factor productivity in their production framework and encouraging direct investment to spur leather development as bedeviled by the poor annual returns in crucial leather stratum demonstrated in the current study.

Total Factor Productivity (TFP) which according to Dettori, Marrocu, and Paci (2012) captures how efficiently inputs are utilized and was integral to project competitiveness. Thusly, Delgado & Ketels, (2011) and Delgado, Ketels, Porter, & Stern, (2012) observed that enhancing competitiveness underscored the leather sector's potential to improve its performance in the leather value chain stratum.

As regards direct investments Karantininis, Sauer, & Furtan (2008); Durand (1952) and Jacobs & Shivdasani (2012) they were all in agreement that direct investments in the production chain are crucial in ensuring products that always evolve or sustain to attain market dominance. This is a prescription worthy of note to Africa's SME's who are at a point where after improving their value chain strata require investment in leather product development. Indeed, forecast studies on the leather chain potential by Mwinyihija and Quisenberry (2013) indicate that with the growing population and increased per capita consumption of leather products the potential for demand of leather products increase overtime. Other studies by Hattingh, Russo, & Sun-Basorun (2013) forecasted also that consumption potential in leather goods and footwear in Africa would continue to register continued growth if appropriately sustained.

Sustainability in this case requires encompassment of research and development as a prerequisite. Therefore, it is highly envisaged that development of business related R&D activities could enrich stratum involvement towards innovation in the leather value chain. This is in tandem with studies by Frankelius & Eliason (2011) and Brewin, Monchuk, & Partridge (2009) who depicted those enterprises that explore and domesticate innovativeness exhibit complementarities and competitiveness and characterize on tangible value addition. In further support, Frankelius & Eliasson, (2011) and Frankelius, (2009) strongly indicated that innovation is considered fundamental in delivering value to enterprises and most effectively improves processes, products and services.

As such capacity to analyze the value chain in all stratum is key towards the envisaged sustainability. Accordingly, Fearné, Martinez & Dent (2012) and Kumar & Kapoor (2010), indicated that the principal objective of an encompassing value chain analysis (VCA) is to expose strategic and operational misalignment within the chains, where dealing with incomplete value chains would easily lead to misallocation of resources, missed opportunities, lack of value addition, and economic unsustainability. Thusly, addressing these aspects needs is no longer a realm of the core stakeholders but requires inclusivity of other players as well. The intended approach which is exemplified from strands of a structural protein that makes leather will ensure more stability, consistency and sustainability of the leather strata by including Government and Academia to the existing private sector framework to form the triple helix approach (see Figure 8).

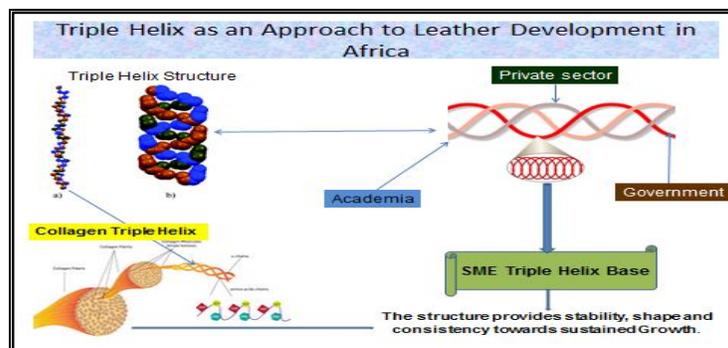


Figure 8: An inclusive Triple Helix approach encompassing Government, Academia and Private sector for sustainable development of the leather sector in Africa

4.1 Limitations

While the above results offer new insights for the development of leather value chain strata in Africa. There were a few limitations that require to be addressed. For instance, the characteristic profile for Producers and Butchers stratum was homogenous in nature as such the results obtained could easily be representative along their individual stratum. To the contrary, Footwear profiling demonstrated heterogeneity due to various categories of operations and expertise deduced within the same stratum. For example, the inclusion of cobblers (mostly informal players) with other formalized players could easily miss out on the complexities amongst the stratum. Thus bias could easily be experienced if the sample is not representative and also from the fact that being a vital value addition stage there might have been potential unexplored opportunities unidentified.

On the other hand with the majority of enterprises indicating individual or family owned orientation it would have been important to dissect the employees profiles based on those who were connected as family from those who were non-family members. This would have shown the true scenario on employment terms and condition which at most favour family members when salary and occupational positioning are scrutinized.

5. Conclusion

The study successfully evaluated the resultant demographic data on selected SME's and the emergent information indicated leather value chain strata with huge potential and unexplored opportunities. Conspicuously, while the leather strata exhibited glaring gender imbalances there was indication from the study that overcoming cultural stigmatization will improve the balance through awareness creation and capacity building. Encouraging was the improved numbers of women (33%) engaged in the leather goods stratum. With optimal production, recapitalization and improved marketing the accruals in the leather goods could surpass all the other stratums. Furthermore, the study had an interesting revelation by indicating that the sector is experiencing a youth full entrepreneurship group whose importance is related to dynamism and consistency in developing the leather strata in Africa. With the positive minimum education reported, the youthfulness and entrepreneurial standings (where most are the owners or part of the family ownership) a leap to an enhanced value addition is feasible. However, critical aspects such as attaining the breakeven productivity levels of 12-15 pairs per person per day should be the underlying factor for them to strive and achieve. In addition, an appropriate operating environment is critical and that's where the triple helix approach is relevant. This approach will ensure a common base of operation and decision making that involves the Government (to inculcate appropriate regulatory and fiscal policies), Academia (supports research and development towards an innovative culture to the enterprises) and Private sector which form the core to the industry. All these factors supported by the vast experience of the players in the sector (spanning 5-30years) and the potential shift of the leather sector to Africa premeditate a vibrant, sustainable and beneficial sectors towards the continent's desire to alleviate poverty, create wealth, employment and rural development.

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