



WP1: Preparation- D.1-2: Leather Industry Status in Egypt Focus Group Discussions Report

WP1.2

AASTMT, SVU

April, 2018



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Revision History

Version	Date	Author	Description	Action	Pages
1.0	April, 2018	AASTMT, SVU	Creation of the document	C	21

(*) Action: C = Creation, I = Insert, U = Update, R = Replace, D = Delete

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This project has been funded by the Erasmus+ Programme of the European Union.

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1. EXECUTIVE SUMMARY

This report constitutes an analysis of the deliverable D1.2 of WP1 of the “Innovation for the Leather Industry in Jordan and Egypt (INNOLEA)”; an Erasmus+ project, which aims to create and maintain a link between Universities and businesses of the leather sector that will foster innovation and the manufacturing of high value quality products, as well as further cooperation between EU and Jordan and Egypt Universities and leather businesses.

Four focus group discussions have been organized by the Egyptian partners in the INNOLEA project on the 28th of March in Cairo and the 24th of April 2018 in Alexandria. Total number of participants in the four focus groups is nineteen participants from different leather sector stakeholders (industry and academia). These discussions were very fruitful to identify the problems and challenges facing this vital sector in Egypt, to determine its needs, and to recommend solutions to promote and enhance its performance to compete in the global market. To ensure comparability between the focus groups, the same set of questions were asked to participants at each meeting. The set of questions were further developed by adding more questions to be compatible with the Egyptian market.

Analysis of the discussions indicated a level of deterioration in this industry in Egypt and highlighted the root causes behind it. Areas of collaboration between the leather industry sector and the academia in Egypt have been identified, and suggested to be implemented partly in the proposed innovation Centers that will be established at AASTMT and SVU. In addition, suggestions and recommendations to the government have been identified in these focus group discussions. Finally, a SWOT analysis was conducted and documented to support the data gathered in the desk research report.

2. INTRODUCTION

The leather industry has witnessed a number of crises in recent years, which have directly affected the pillars of this giant industry. The total number of leather facilities in Egypt is more than 17,000. About 5,000 factories have been closed and more than 150,000 workers have been laid off. Currently, only 10% of its production capacity is produced. This is the result of interrelated reasons, foremost of which is import, the profits of importers are up to 200% of imports of Chinese leather products.

The Ministry of Commerce and Industry issued a decree to protect the Egyptian leather industry, which included reviewing the Egyptian standards for the import of shoes, and setting a price list on the basis of what is imported from leather products and shoes in particular. In order to ensure protection the customs authorities introduced a customs tariff on imported leather products, and oblige the Anti-Smuggling Department at the Customs Authority to check imported leather products and verify their documents. Legal actions are taken against those who do not comply. The government also reconsiders the rules governing the control of the production requirements for factories producing natural and industrial leathers.



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In response to industrial and environmental needs, the Egyptian government has made the decision to transfer the tanning industry, presently situated in Old Cairo, in the heart of the capital, to the industrial area near of Badr City (Al-Robikki area), which is situated approximately 45 kilometres from the capital. This decision by the government is of particular historical importance: on the one hand it is a choice imposed by the limits of environmental acceptability of urban industrial development, and on the other it expresses a desire to take the opportunity to support and strengthen the Egyptian tanning industry by helping it to become part of an industrial economy.

The most serious problem facing the leather industry is the unfair competition faced by Egyptian products as a result of the dumping policies and the transformation of a large number of producers into importers. This is, in addition to the rise in the price of raw leather as a result of opening the door for export.

Therefore, INNOLEA is an EU funded project through Erasmus+ organization that aims to create and maintain a link between Universities and businesses of the leather sector that will foster innovation and the manufacturing of high value quality products, as well as further cooperation between the EU, Jordan and Egypt Universities and leather businesses.

The project also aims to help and encourage the Egyptian and Jordanian governments to favor the establishment of leather centers within universities and to promote research and projects between the EU and Egypt and Jordan universities in the leather sector, by creating a research innovation and training network, which will continue to operate and after the end of the current project. Thus, INNOLEA project aims to fill the current gap in the area of specialized services for the leather sector with the establishment of four leather centers in local Universities, two in Jordan and two in Egypt, utilizing the experience and expertise of EU partners in the area of services for the leather sector. Through the creation of these centers and the further tasks that will be implemented in this project, the leather sectors in Jordan and Egypt will be offered access to business development services, such as quality testing, product certification, training, fashion trends, production organization, B2B and funding opportunities, and subsequently, the Jordanian and Egyptian leathers sector will have a valuable assistant for its further development.

3. METHODOLOGY

In order to identify the needs of the leather industry in Egypt, focus group discussions approach has been adopted as the qualitative approach. Four focus groups discussions have been conducted in Egypt. Three of them were in Cairo at the Egyptian German Chamber of Commerce on the 28th of March 2018 and the last one was conducted in Alexandria at AASTMT premises on the 24th of April 2018. The number of participants was between 4-5 participants in each focus group. The total number of participants was 19 (as shown in annex II).



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Each focus group discussion took about 120 minutes. It is worth mentioning that these national focus groups were the first of their kind relating academic staff to their counterparts' leather industrial experts in Egypt. The focus groups also included representatives from Egyptian Industrial Chamber as a policymaker.

AASTMT team further developed the list of the questions by adding more in each section to reflect a more valid in-depth investigation of the current situation of the sector in Egypt. The proposed list from the work package leader JUST included 10 generic questions which was then expanded to 25 questions to be tailored to Egyptian market as shown in Annex I.

The discussions focused on identifying the status of the leather industry in Egypt, areas of collaboration between leather industry and academia, and recommendations to the government to help and promote the leather industry sector in Egypt and summarizing the strengths, weakness, opportunities and threats in the industry. Annex III includes some photos for the focus groups discussions.

4. KEY RESULTS

4.1. First Theme: The status and the future of the leather industry in the country

The status of the leather industry in the country

- The industry is characterized by being random and with a weak governing legal framework that manages and directs the industry in the country. The sector is mainly comprised of fragmented small firms of no ability to pump investment for growth. Meanwhile, for this reason the government is trying to regulate and rationalize the industry through establishing the new leather industrial area called El Robbiki in Cairo. In addition to, huge Infrastructure development is need in Alexandria; hence Tannery areas are older than Cairo.
- Insufficient reliable statistics, previous studies and records regarding the leather industry status, tannery, production, fabrication and exports in Egypt.
- The leather industry is facing a big threat in Egypt due to many factors, one of which is the invasion of the Chinese products to the Egyptian market. Currently locally produced leather products are considered weak compared to imported ones. In the absence of appropriate local leather products, the size of the Egyptian markets attracts most of the international processed leather producers epically from China.
- Chinese synthetic leather products that are good looking with acceptable quality for Egyptians and offered at very cheap prices decrease the opportunities of Egyptian leather products to compete. Consumers are shifting to synthesized leather due to the soaring up prices of natural leather as well as increase in price of materials associated with production process. The annual Egyptian imported footwear and belts exceed 100 Million pieces.
- Moreover , some of the produced leather products are of poor quality which provides limited chances to compete with foreign products or to export. Majority of tanneries export raw leather (crust, dry crust,



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wet blue “recently illegal”) to China, India, Spain and Italy. Very limited number of exporters/producers export high quality finished leather products. Nevertheless, some Egyptian leather shoes products are competitive and they are exported to Romania, Turkey and China “safety shoes for factories”.

The industry with its two main phases (tannery and manufactured leather products) lack integration. Both areas are also in continuous disputes.

The status of leather manufacturing is as follows:

- Only a few producers operate at a large scale follow international standards. The industry in general is not strong as producers are not engaged in mass production due to limited capital resource of the majority of companies engaged in the industry. A number of producers are mainly small enterprises and family businesses that have inherited the craft years ago. According to participants' information and experience, there are over 17,000 workshop for leather products manufacturing in Egypt.
- Supply of local materials and tools is very limited. There is only a small number of suppliers of local raw materials. Meanwhile, leather manufacturing requires high quality accessories, manufacturing components and auxiliaries. Many supporting industries are not available or available but at low quality in Egypt. Some of the parts that are needed to manufacture leather products are prohibited to be imported by laws, for exampl with acceptable price and quality.

The status of leather tanning is described as follows:

- There are over 300 registered tannery in Egypt.
- 80% of the high quality Egyptian semi-finished hides and skins (wet-blue and crust) are exported without added value, and the remaining low quality 20% is directed to the local market.
- Tanneries view exporting leather as being more profitable than selling locally. Leather products are not up to specifications of European countries however, raw leather's quality is very good, demanded, conforms to specifications of importing countries and can compete abroad. Reaching the stage of crust and dry crust need a small percentage of valued added activities (lining, decreasing, wet blue, spraying, dry crust) which is not costly and materials used are not expensive and widely available.
- The government is also giving much care for leather tanning than leather manufacturing. So owners prefer workers that inherited the craft to higher education graduates as they prefer traditional methods.
- Waste and scrap are considered a threat to the environment that needs to be addressed.
- Most of HR working in the industry especially tanneries are ignorant and with minor skills. Owners of tanneries now are seeking improvements through the help of foreign technicians from Bangladesh and India.



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- There is a great need for more training involving employees throughout the production process.

The status of leather industry in Egypt is summarized in terms of Materials, Machines, Manpower and Method that need to be improved

Materials
<ul style="list-style-type: none"> • Egyptian hides and skins are of high quality and rated as one of the best sources of leather in the world. • Most of chemicals used for leather manufacturing are imported and not manufactured locally. • Majority of produced leather products do not comply with the international norms and standards.
Machines
<ul style="list-style-type: none"> • No technological advancements in both tanning and leather finishing processes except for a minority of giant tanneries and producers mainly in the new Robbiki leather industrial area.
Manpower
<ul style="list-style-type: none"> • There is a big shortage in labor force, due to low wages and inappropriate perception of the field. • Labor misbehavior affects the quality of skins, leather and consequently the quality of leather products. • Small factories that represent the biggest number of businesses in the field have a small number of employees. • Current labor force in the industry of leather are old fashioned, not seeking development. • Knowledge is transferred from older experienced labors, disregarding training processes and advancements taking place in the manufacturing processes. • Lack of discipline in timing, production scheduling, product quality, etc.). • The existence a very limited number of specialized technical faculties that graduate professional trained candidates for the leather industry. • The Egyptian market seeks innovative product designers.
Methods/ Approaches
<ul style="list-style-type: none"> • Ranching and animal-life actions affect the quality of the skins. • Low quality skins may result from poor and inappropriate skinning practices that take place in the slaughterhouses. • The absence of mass production technologies in leather-product manufacturing affects quality, cost and profitability. • There is a deficiency in the specialized technical support given to the factories, particularly in the field of raw materials and chemicals used in tanning and finishing.



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|---|
| <ul style="list-style-type: none"> • Unprofessional inspection process and unskilled inspectors are weak points in the import and export stages. |
| <ul style="list-style-type: none"> • There is no specialization and no job description for those who are working at any stage of leather production. As a result those who graduated from institutions related to the industry do not possess a clear idea of the exact jobs or positions that awaits them after graduation. |

The future of the leather industry in the country

- Leather industry has a great potential in case of solving its problems. Government intervention is highly needed. The internal as well as external markets are very promising. Europe is a very wide market that proposes a large opportunity for Egyptian leather products because of the high quality natural leather (but low processing quality). Processors believe that Europeans like to wear leather and value high quality leather. For the local market, it is easier to compete, as Egyptian consumer are not very experienced with differences in quality of leather, thus, their expectations are not very high, and their perception of quality is lower than that of Europeans
- Volumes of locally produced hides and skins can cover both the Egyptian market needs and the export activities of the finished leathers.
- Egypt has the potential to convert the exported “crust” leather, which presents 80% of the total produced skins, to fabricated items, and gain the added value by exporting these finished products.
- Leather represents 45-65% of the value of finished leather products, and the rest is in the form of accessories, auxiliaries and other components (fabric, zipper, etc.)
- Distribution centers for different types of leather are needed to provide the manufacturers with their needs.
- Egypt is missing the opportunity of increasing exported finished leather goods due to several factors that mentioned before such as:
 - No major technological advancements in both the tanning and leather finishing processes.
 - Produced leather products do not comply with the international norms and standards.
 - The absence of local producers of high quality accessories.
 - There is no exposure to the new designs, fashions and modes.
 - Low labor skills and low emphasis given by the companies to training.



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4.2 Second Theme: The needed steps and regulations from the government to help the leather industry in the country

- Government's contribution is not sufficient for encouraging the leather production sector to be developed and rationalized. Each firm is struggling to support itself. However, currently the government is trying to regulate and organize the industry by establishing the Robikki leather industrial area in Cairo.
- Moreover, the government is setting rules that limit importation of needed tools and materials for leather production to protect the local industry without acting first to improve the local industry.
- Inefficient inspection on the leather products which is needed to ensure its compliance with the international specifications and standards. Thus, the government should follow up through proper inspections to ensure the quality standards. For instance, to be consistent with world quality standards for leather, materials used should be consistent with needed specs such the level of blue chrome used which is considered toxic and prohibited in many countries.
- The government should work on developing calibers in the field through establishing more training center and colleges that are specialized in all the phases of leather production.
- Unprofessional inspection process and unskilled inspectors in the import and export stages.
- *All participants agreed on the following kinds of support from government:*
 - put greater emphasis on the inspection of imported and exported leather and leather products.
 - set higher penalties for those who violate laws and export raw leather. An official body should set specifications of leather as well as regulating the exportation and importation of leather and related material. Also, to act as quality control organization to ensure all needed specs are being followed at all stages of production.
 - More accredited labs should be available to test the quality of the raw leather and apply the international certifications to them.
 - Provide financial support and provide effective educational and training courses for labors, technicians, engineers and designers.
 - Subsidize the factories which work on making finished leather products.
 - Provide support for local chemical factories to manufacture raw materials needed for the leather production, instead of importing them.
 - Provide support for local factories to manufacture and develop accessories and auxiliaries needed for the leather fabrication.
 - Increase the trade barriers for the imported finished leather goods.
 - Support exports mainly through subsidizing participation in the international exhibitions.
 - Promote effectively the leather products in international exhibitions through facilitating the procedures for the companies to get involved.



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- The Chamber of commerce may arrange appropriate educational courses for the leather factories to include engineers, technicians and labors.
- There are a large number of potential candidates to receive an appropriate training, where around 15000 labors are needed for recruitment in the industry of leather and leather products (as per the Leather Branch in the Chamber of Commerce). However, most of the workers are not interested in the leather industry for previously mentioned reasons.

4.3 Third Theme: The collaboration with the universities

- The role of the universities is highly appreciated as a neutral party, as companies may be reluctant to incorporate in the training with the concern of disclosing its industrial secrets. However, academic institutions provide qualified staff, advanced testing equipment and well trained technicians.
- The government shall encourage more universities to develop an education program to teach and train students and workers. The leather department in Helwan University is a good example for providing a high level of educational and vocational training. The department has a production line of leather garments and leather shoes for men and women as well as other leather products. The college also offers periodic training for industry workers and uses its products for fairs (non-profit).
- The college has 5 labs for testing and producing high quality leather products which are:
 - Sewing lab
 - Tensile lab
 - Production line
 - Design and planning lab
 - Physical testing lab
- Graduates from the academic institutes need to be trained on leather products fabrication and processing particularly in the stage of finished goods design, marketing and sales.
- Current standards and specifications can be developed by the academic institutions to match the fast progress in this industry. That may include specifications of both input materials and finished goods.
- There is a need for more centers to:
 - Provide quality certificates for the exported products.
 - To work as a verification body for the importing companies. The required devices can include devices to measure the thickness of and stretching capacity of the leather.
 - The tannery owners and producers asked for labs that provide two categories of testing (physical and chemical) and there is need in both as follows:
 - ✦ Percentage of chrome
 - ✦ Softness vs hardness of leather



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- ✦ Thickness of leather
 - ✦ Evenness and consistency of colour
 - ✦ Fixedness of colour
 - ✦ Flexibility test
 - ✦ Durability test
 - ✦ Porosity and permeability of water
 - ✦ Percentage of PH
 - ✦ Moisture percentage
- The tannery owners highlighted a need for more trainings in the areas of deficiencies especially tanning which is the first stage in the leather supply chain. The current lack of knowledge at this stage affects the quality of the whole chain.
- As for finished leather products the need emerges for trainings in leather production including:
- ✦ Operations management
 - ✦ Advanced patron and design training (manual and computerized)
 - ✦ Quality control
 - ✦ Production stages of all leather products (garments, bags, shoes and others)
 - ✦ Providing modern and low cost treatment unit for the effluent waste of the tannery plants.

4.4 Fourth Theme: SWOT Analysis (the Strengths, weakness, opportunities and threats)



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Strengths

- Availability of raw leather with high quality
- Long history and expertise (well-known industry based for many years)
- A huge number of factories, 17,000 factories and 312 tanneries for leather production (mainly small ones)
- Availability of Trade agreements (COMESA, etc.)
- Geographical position
- Huge domestic market
- Availability of universities that can offer training courses
- Availability of talented workers
- The establishment of the new leather industrial area in Cairo.

Weaknesses

- Uninterested labor in learning new methods and advancements
- Manufacturers have insufficient funds for improving themselves
- Small entities represent the largest proportion of leather manufacturing
- low emphasis is placed on logistical activities
- Most of chemicals used for leather manufacturing are imported and not manufactured locally.
- Produced leather products do not comply with the international norms and standards.
- Minor technological advancements in both the tanning and leather finishing processes.
- Labor misbehavior affects the quality of skins, leather and consequently the quality of leather products.
- Labors in the industry of leather are old fashioned, not seeking improvement.
- The absence of mass production technologies in leather-product manufacturing affects quality, cost and profitability.
- There is a deficiency in the specialized technical support given to the factories, particularly in the field of raw materials and chemicals used in tanning and finishing.
- Lack in quality procedure in all supply chain activities of the sector.



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EX TE RN AL EN VI RO M EN T	<p>Opportunities</p> <ul style="list-style-type: none"> • High demand for substances needed for manufacturing leather • Using mass production and achieving economies of scale • High demand for leather products in the Egyptian market • High demand for leather in other countries • Geographical position is accessible for exporting • More involvement in international Exhibitions. 	<p>Threats</p> <ul style="list-style-type: none"> • Inflation on the products • Anticipated decrease in the tariff rate on imported goods • Indian and Chinese finished goods of relatively high quality • Competitive pricing of the international suppliers of leather finished products • There is a big threat for the industry as the old the experienced workers are aging without a mechanism for transferring experience between generations.
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5. CONCLUSIONS

Four focus group discussions have been held in Egypt (German Chamber in Cairo and AASTMT in Alexandria) with diverse groups of participants representing Association of Leather Exporters and Manufacturers, Egyptian Universities, leather manufacturer and tanneries to discuss the status of leather industry in Egypt, identify problems and challenges, recommend solutions, and determine the needs to promote this sector. The participants indicated that the leather industry lost its competitive edge due to many reasons.

They blamed the government regulations for the decline of the leather industry in Egypt. The participants indicated that there is a need to enhance the qualifications of the workers engaged in leather industry by training them on the use of leather-molding machines, leather-testing machines, and the design of leather products. At the national level, they stressed on the government to allocate a specialized territory for tannery owners, equipped with effluent treatment plants to reuse the water from tanning process and provision for the supplementary materials of the industry with high quality and reasonable prices. The government already started establishing a new Robbiki industry leather area to regulate and rationalize the industry especially the tanning processes. The focus group participants also emphasized on the importance of collaboration between Egyptian universities and the industry, stressing on the importance of establishing educational and effective training programs related to leather processing and manufacturing at the Egyptian universities.

1 ANNEX I: FOCUS GROUP QUESTIONS

In the first set of questions, we will ask about the status and the future of the leather industry in the country.

- Q1. Let us start by discussing how you see the status of the leather industry in the country.
- Q2. Now let us discuss how you see the future of the leather industry in the country.
- Q3. How do you see the competition of the local products vs the imported ones?
- Q4. Can the local leather product be exported? If no, please elaborate why
- Q5: What is the reason of exporting raw leather as wet blue or white blue with very little value added?
- Q6: What are the obstacles that face exporting high quality leather products?
- Q7: Is there any exported shipments that have been rejected before? why?
- Q8: What kind of human resources are available in the industry now?



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Q9: What kind of human resources are needed in the future?

Q10: Is there any benefit from current training centers? If no, why?

In the next set of questions, we will ask about the needed steps and regulations from the government to help the leather industry in the country.

Q11. Do you think that the government is promoting and helping the leather industry in the country?

Q12. How do you think the government can help the leather industry in the country?

Q13. How do you think the Commerce of Industry or other associations can help the leather industry in the country?

Q14: In your opinion, is it suitable to set specifications/standards for raw materials used in production and tanning?

1.1 In the next set of questions, we will ask about the collaboration with the universities

Q15. Do you think that collaboration with universities can help the leather industry in the country?

Q16. What services do you need from universities?

Q17. What are the important tests that you need and do not have?

Q18: What necessary tests does the industry need and are not available?

Q19: What type of devices are needed to perform those tests?

Q20: How much candidates you expect to attend different trainings (average in one year)?

In the next set of questions, we will ask about the Strengths, weakness, opportunities and threats.

Q21: What are the Strengths of the leather industry in Egypt?

Q22: What are the weakness of the leather industry in Egypt?

Q23: What are the Strengths in of the leather industry in Egypt?

Q24: What are the opportunities for improving the leather industry in Egypt?

Q25: What are the threats that face the leather industry in Egypt?



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2 Annex II: Number of Focus Groups

Focus Group 1		
Date of Focus Group	March 28, 2018	
Location of Focus Group	Cairo, German Chamber	
Number of Participants	5	
Moderator Name	Gamal Haikal	Lecturer, AASTMT
Note Taker Name	Farida Abdel Hakim	Administrator in GCC
Participants	Ahmed Rezk	General Manager, Oryx Leather Products
	Mrs. Doaa Rezk	Marketing Manager, Oryx Leather Products
	Sanaa Mohamed	Lecturer, Leather department, Helwan University
	Kholoud El Hady	Production Manager, El Samalouty company
	Khaled Abdel Azeem	Executive Manager, Egyptian Industrial Union
Focus Group 2		
Date of Focus Group	March 28, 2018	
Location of Focus Group	Cairo, German Chamber	
Number of Participants	4	
Moderator Name	Ahmed Abdel kader	Lecturer, AASTMT
Note Taker Name	Aida Gharib	GTA, AASTMT
Participants	Nabil El-Shamy	General Manager, Chamber of Leather Industry
	Omer Hefny	Vice General Manager, Chamber of Leather Industry
	Shaimaa Abdel fatah	Assistant Lecture, Leather Department, Helwan University
	Nadia Khalil	Lecturer, Leather Department, Helwan University
Focus Group 3		
Date of Focus Group	March 28, 2018	



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Location of Focus Group	Cairo, German Chamber	
Number of Participants	5	
Moderator Name	Sahar El Barky	Lecturer in AASTMT
Note Taker Name	Trevena Ayman	GTA in AASTMT
Participants	Sara Kahled	Teaching Assistant, College of Home Economics Department of Leather Products, Helwan University
	Menna Nabil	Teaching Assistant, College of Home Economics Department of Leather Products, Helwan University
	Mohammed Salah Eldin	General Manager, Business Bridge Export and Import
	Elsaid Mohamed Montasser	Design Manager, El Samaloty Leather Production
	Hany Emam	Chairman, Leather Tannery for Export
Focus Group 4		
Date of Focus Group	April 24, 2018	
Location of Focus Group	AASTMT, Alexandria	
Number of Participants	5	
Moderator Name	Ahmed Abdel Kader	Lecturer, AASTMT
Note Taker Name	Mai Haroun	Teaching Assistant, AASTMT
Participants	Ahmed Nasr	Lecture, Desert Research Center
	Abdelhamid Shahin	Chairman, Abnaa Shahin Tannery
	Salem Bayoumi	Engineer, El Temsah Tannery
	Rahima Sherief	Business Woman, Elset Elmasreya
	Islam Mahmoud	Trainer, Elset Elmasreya



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3 ANNEX III: PHOTOS



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INNOLEA	Version: [1]
WP1: Preparation- D.1-2: Leather Industry Status in Egypt Focus Group Discussions Report	Issue Date: [April, 2018]



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