LEATHER
PRODUCT PROFILE
2012

Zambia Development Agency

Overview

The leather industry in Zambia is based on livestock and wildlife as sources of raw materials. This comprises mainly bovine hides, sheep and goat skins and crocodile skins as well as skins from other wild animals and reptiles. Zambia currently has approximately 2.6 million head of cattle, over 1 million goats and 970,000 sheep. Despite most of the livestock population being in the small holder farming sector, the off take of raw hides and skins is adequate to feed into the tanneries and finished products manufacturing. The country currently has approximately 238,666 crocodiles and 44,000 wild life animals found in crocodile farms and game ranches respectively.

Zambia currently has five tanneries, with total installed capacity of 1,700 hides per day. Utilization of installed capacity currently stands at 63%. This has seen a steady increase from 23% in 2000. Key export products from the sector include raw crocodile skins, wet blue leather, crust, finished leather and leather goods. Specific leather products include printed leather (military), corrected grain (plain), corrected grain crust, crust lining, hunting calf, black splits, upholstery, vegetable kips, vegetable sole leather, moccasin suede, laminated foot ball leather, industrial gloves/splits and insoles. Key leather goods include footwear, bags, gloves and protective clothing, soccer balls and household décor items.

Why invest in the Zambian Leather Industry?

Seven main reasons to invest in the Zambian Leather are:

1. Abundant renewable raw material base;
2. Growing demand for Zambian leather on the regional and international markets;
3. Steady growth of the domestic market;
4. Preferential market access to wide markets;
5. Competitive production costs;
6. Strategic policy Interventions, and
7. Attractive incentives for investment.

Hides and Skins

Finished Leather

Point 1. Renewable Raw Material Base

The leather industry is a by product of the meat industry which has seen steady growth in terms of livestock numbers, off take rates and per capita meat consumption. Raw materials for the leather sector are mainly in the form of cattle hides, goat skins and sheep skins. In addition to these, wild animal skins are sourced from wild life ranches and through licensed hunting activities. All wildlife skin operations in Zambia, including the Crocodile Industry, comply with the regulations of the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES).

a. Cattle

Most cattle are found in the Western Province, followed by Southern, Central and Eastern Provinces (See Figure 1).

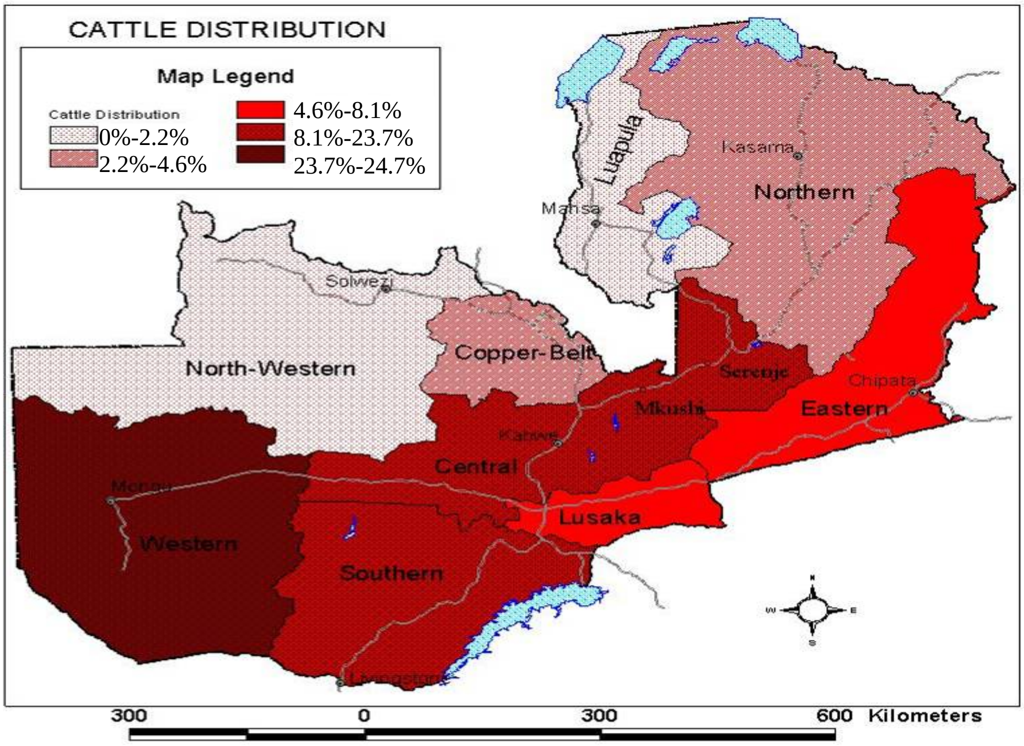


Figure 1. Cattle Distribution

Source: Department of Veterinary and Livestock Development

There are approximately 2.6 million cattle in Zambia of which 83% are found on small scale farms. The cattle are mostly found in five provinces: Western Province (24%), Central and Southern Provinces (23%), Eastern Province (8%), and Northern Province (5%). The commercial sector supplies exotic breeds such as Africanda, Boran, Hereford and Fresian, while the small holder system is predominantly composed of indigenous breeds such as Angoni (the Zebu type), the Barotse and Tonga breeds (Sanga types). Cross-breeding is common, aimed at production of quality beef, improved milk yields as well as leather quality and disease resistance.

Box 1. Enhancing Quality of Cattle Husbandry in Zambia

Disease Free Zones

In order to enhance quality of cattle husbandry and disease control in the country, a number of strategies have been put in place such as, establishment of livestock centres for enhanced animal husbandry extension delivery system; establishment of breeding centres; encourage and promote stocking and restocking in deficit areas; development of a sustainable disease control programme including the establishment of Disease Free Zones (DFZ). The current area under Disease Free Zones is approximately 105,000 kmsq, covering ten districts in Central, Copper belt and Lusaka Provinces (See Figure 2). The main aim of these livestock strategic interventions DFZ is "opening up of opportunities for improvement of local and export trade of quality livestock and livestock products through enhanced productivity". This will also result in increased livestock populations as well as higher growth rates, assuring supply of raw hides and skins for the Leather Industry.

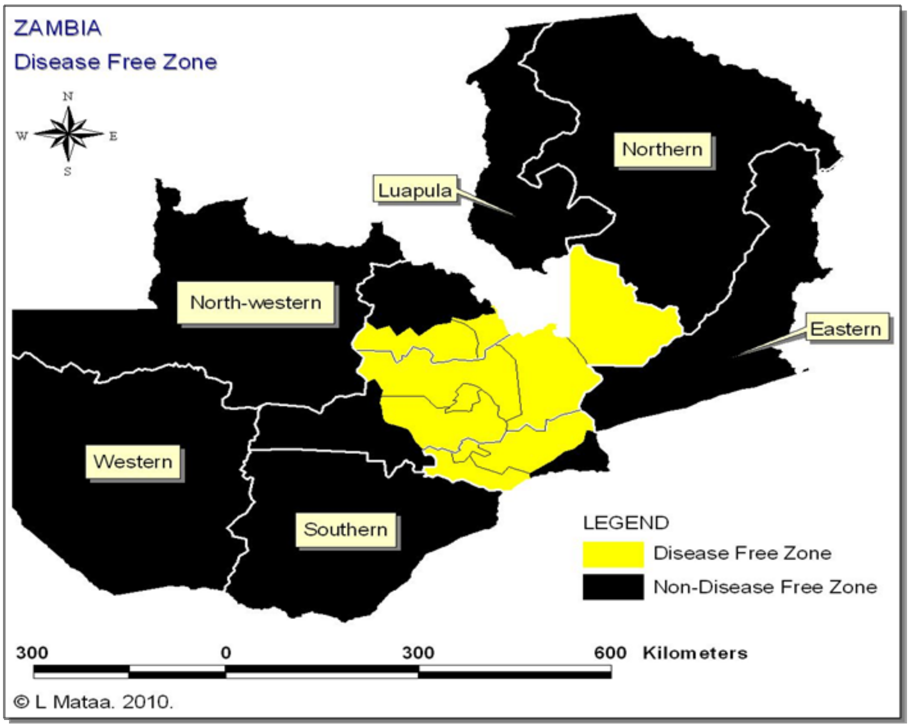


Figure 2. Disease Free Zone

Source: Department of Veterinary and Livestock Development

b. Goats

There are over 1 million goats found mainly in four provinces: Southern Province (32 %), Central and Eastern Province (26 %), and Luapula Province (6 %). The highest goat population is in the Southern Province, followed by Central, Eastern and Luapula Provinces (See Figure 3). Goats in Zambia are mostly reared by small scale farmers.

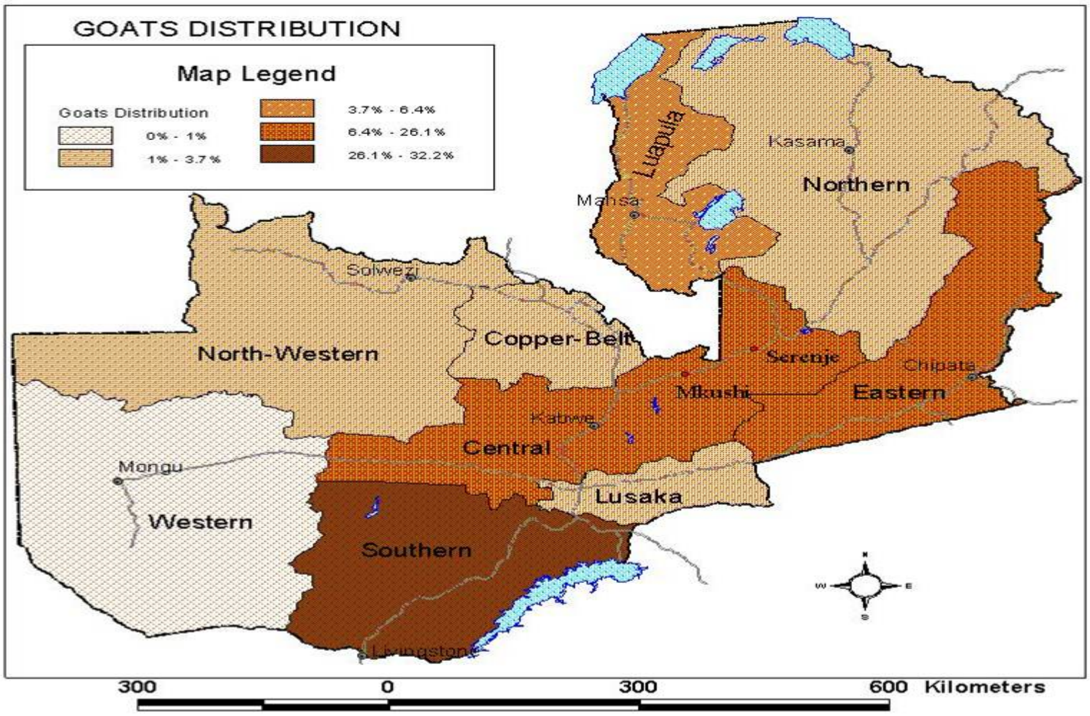


Figure 3. Goats Distribution

Source: Department of Veterinary and Livestock Development

c. Sheep

There are an estimated 970,000 in the country found mostly in four provinces: Eastern and Southern Provinces (39 %) and Luapula and Northern Provinces (13 %) (See Figure 4).

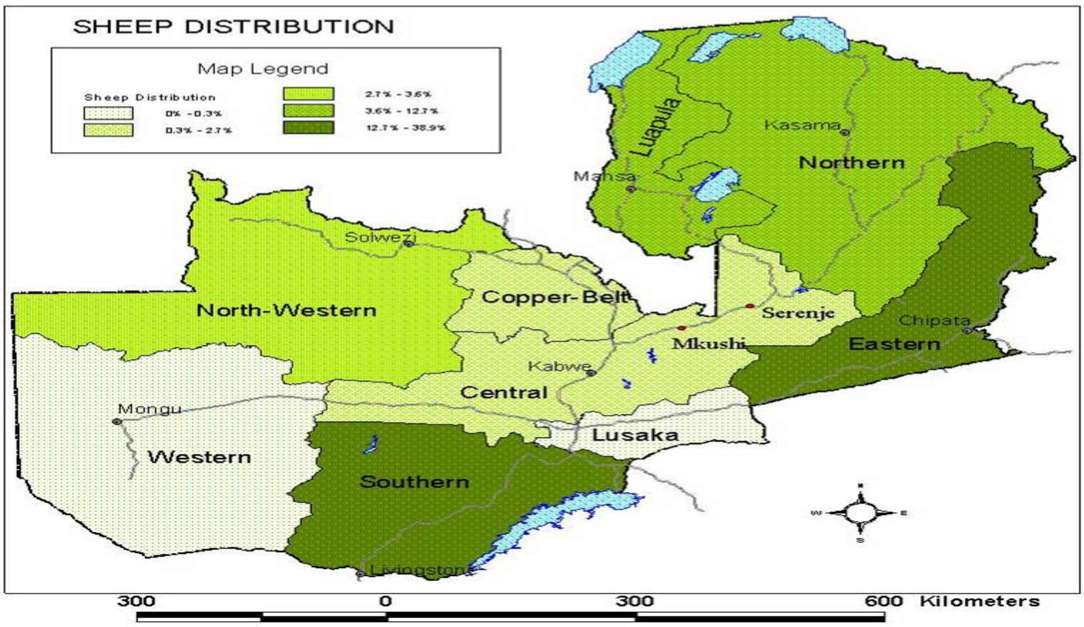


Figure 4. Sheep Distribution

Source: Department of Veterinary and Livestock Development

The Ministry of Livestock and Fisheries Development, working with Livestock Trusts and Non Governmental Organization, has been promoting and encouraging small ruminant production, especially in the smallholder farming system as a means for diversify the livestock industry and meet the growing demand for sheep and goat skins.

d. Crocodiles

The Zambian Leather Industry also derives its raw materials from wildlife, mainly from crocodile farms, game ranching activities and occasional licensed hunting governed by the Zambia Wildlife Authority. Key crocodile ranches are located and clustered along the banks of Lake Kariba in Siavonga, Sinazongwe and Gwembe Districts in Southern Province. Zambia has fifteen established crocodile farms and game ranches stocked with approximately 238,666 Nile crocodile, Crocodylus niloticus and eight male specimens of African slender Snouted Crocodile. Other crocodile farms are found on the Zambezi, Luangwa and Ngwerere rivers (See Annex I). Potential exists for the establishment of more crocodile farms particularly along Luangwa and Zambezi rivers. According to the Demand/Supply Survey for the Leather Industry report of 2010, Zambia produces approximately 26,000 crocodile–skins per annum. In addition to crocodile ranching, the report indicates Zambia's wild life game ranches at 119, spanning 238,794 hectares of land containing 44,085 different wild animals[1].

e. Slaughter Facilities

The slaughter facilities in Zambia comprise abattoirs, slaughter houses and slaughter slabs. Slaughter facilities are key to ensuring a high off-take on livestock and production of quality raw hides and skins. Most abattoirs in the country are vertically integrated with tanneries to ensure steady flow and quality supply of raw hides. Slaughter houses and slaughter slabs which comprise the majority are found in all ten provinces.

Table 1. Main Slaughter Facilities in Zambia

Location	Abattoir	Numbers of slaughtered animals per day*		
		Cattle	Goats	Sheep
Lusaka	Chibolya Market	-	50	-
	Lusaka West	-	-	10
Kafue	Mwanamainda Abattoir	5	-	-
	Turnpike Abattoir	10	20	-
Chipata	Chipata Abattoir	10	30	-
Chisamba	Chisamba Abattoir	15	-	-
Chongwe	Chongwe Abattoir	8	30	-
Mongu	Mongu Abattoir	12	20	-
Namwala	Namwala Abattoir	20	-	-
Ndola	Ndola Abattoir	8	-	-

* The numbers listed in this table are estimate.

[1] Ibid

Wet Blue Leather

Leather Shoes Manufacturing

Point 2. Growing demand for the Zambian Leather

The Leather Sector has been significant to Zambia's Non Traditional Export Sector (NTES)[2] over the years due to its positive growth averaging 27% over the half decade from 2004 to 2008. In 2010 exports from the leather sector totaled US$ 4,808,675 showing a decrease of 35% from US$ 7,368,492 in 2009. Average growth declined over the last half decade to 10% from the 27% recorded in 2008. In 2006 exports totaled US$ 4,854,110 (See Table 2). The contribution to total NTEs from the sector in 2009 was 0.75% but declined to 0.35% in 2010.

Table 2. Trends in Zambia's Leather Export Performance (US$ 1,000)

	2003	2004	2005	2006	2007	2008	2009	2010
Leather and leather Products (US$ 1,000)	3,354	3,533	3,960	4,854	5,829	10,143	7,368	4,809
Annual Growth	-	5%	12%	23%	20%	74%	-27%	-35%
Contribution to NTES*	0.81%	0.73%	0.70%	0.64%	0.71%	0.84%	0.75%	0.35%

*NETS: Non Traditional Export Sector

Source: ZDA analysis based on BOZ/CSO data and ZDA Exporter Audit

It must be noted that negative growth was initially recorded in 2009, at the time when the impact of the global economic crisis affected the sector. A study undertaken by the Zambia Development Agency and the Leather industries Association of Zambia shows that prices of raw hides, on average, fell dramatically from US$15.17 in 2008 to US$3.67 in May, 2009, a reduction of 75.8%. Although Zambia experienced a major fall, in the range of 62.1% to 66.7%, this was less than that experienced by South Africa, Uganda and Burundi. Ethiopia had the biggest fall (80% – 88.4%), followed by Sudan (62.1%– 66.7%) and Rwanda and Eritrea (53.2% – 57.1%). Also, Zambia remained competitive with a raw hide average price of USD5.5 during that period (See Annex II). These price effects were commensurate with other studies on the crisis which evidenced a fall in commodity prices.

[2] "Non Traditional Export Sector (NTES)" in Zambia means of all export except copper and cobalt.

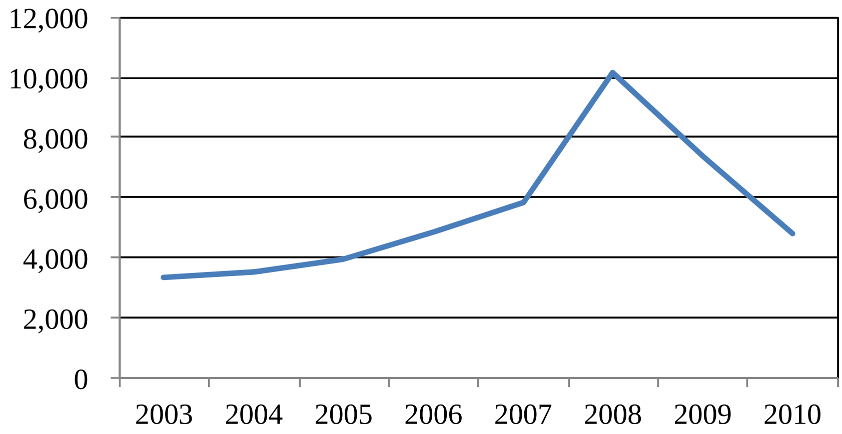


Figure 5. Trend in Zambian Leather Exports (US$)

Source: ZDA 2010 Annual Exporter Audit

Key export markets for Zambia's leather and leather products in 2010 comprised of Singapore (29%), South Africa (18%), India (12%), Zimbabwe (10%), Turkey (8%), Spain (6%), the United Kingdom (4%) and Japan (3%) (See Figure 6). Crocodile skins were the main product of export, accounting for 29% of Zambia's total leather sector exports. Game trophies, crust and wet blue leather, footwear and upholstery leather were the other key products.

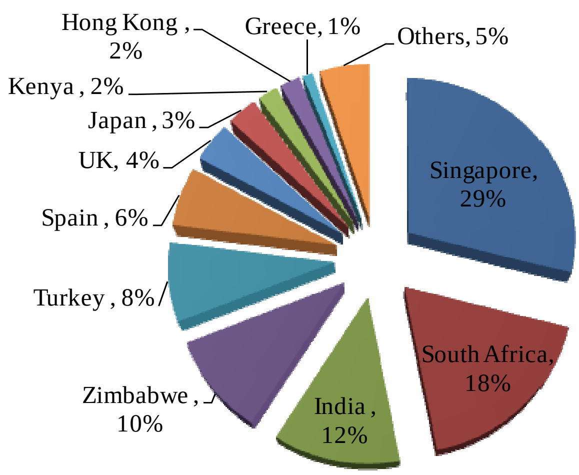


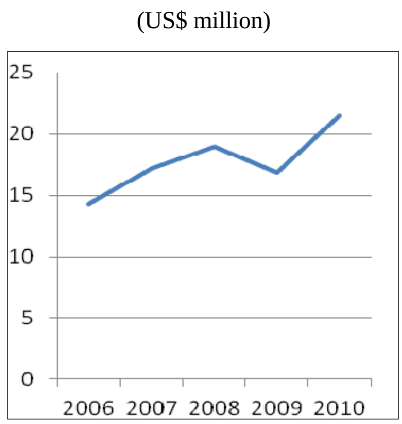
Figure 6. Key Export Markets for Zambian Leather

Source: ZDA 2010 Annual Exporter Audit

Point 3. Steady Growth of the Domestic Market

Zambia has been achieving an average of 5% economic growth per annum in the last ten years. In addition, its GDP per capita grew from US$908 in 2006 to US$1,200 in 2010.

With this growing economy, the import of leather products to Zambia is also on the increase (except for the year following the global financial crisis in the 2008-2009 period), indicating a great investment opportunity to explore its domestic market. Imports of leather products into Zambia



average between US$ 80 million to US$ 100 million per annum, and are mostly from the United States, Europe and Asia.

Figure 7. Zambia Leather Imports (2006-2010)

Point 4. Preferential Market Access to Wide Markets

Zambia is privy to preferential market access to a number of key markets. As a member of the Common Market for East and Southern Africa (COMESA) the country is part of a Customs Union and in SADC a Free Trade Area. As a Least Developed Country (LDC) member of the WTO, Zambia benefits from a number of GSP schemes in developed country markets as well as a number of unilateral preferences. Zambia enjoys duty free quota free (DFQF) market access for a number of products including leather in Canada, India, China, Japan and Australia. She is also a beneficiary under the African Growth Opportunities Act (AGOA) and the EU Everything But Arms.

Given the current regional integration agenda under both COMESA and SADC, and in particular the tripartite FTA between the two blocs and the East African Economic Community (EAC), it can be anticipated that intra-regional trade will be enhanced both through intra-industry as well as inter-industry trade. According to the African Union, the three Regional Economic Communities have an estimated combined population representing 57% of Africa's population 58% of its GDP.

<table>
<tr><th>COMESA: Common Market for Eastern and Southern Africa</th><th>SADC: Southern African Development Community</th></tr>
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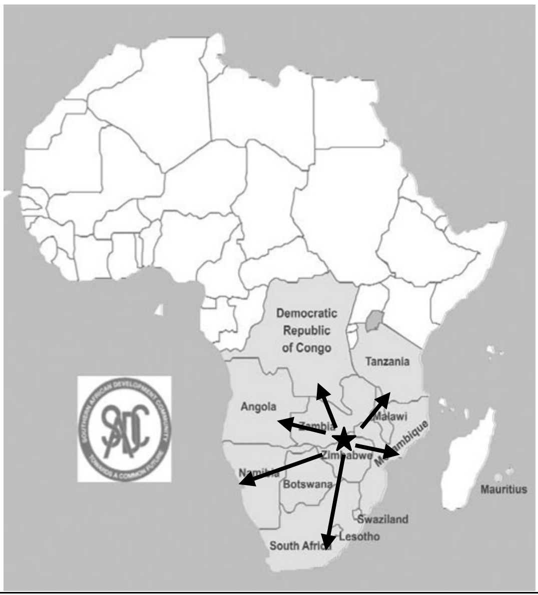

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Total Population: 580 million* **Total GDP: US$ 870 billion*** * Including Zambia
Access to <u>25</u> national markets:
Angola, Botswana, Burundi, Comoros, Djibouti, DRC, Egypt, Eritrea, Ethiopia, Kenya, Lesotho, Libya, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Rwanda, Seychelles, South Africa, Sudan, Swaziland, Tanzania, Uganda, and Zimbabwe.

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“Availability of raw hides and sound policies to promote the* leather *sector”

Zamleather Limited was established as a subsidiary of Zambeef Products Plc in 1997, upon the acquisition of a tannery. It was created as a way to give avenue to utilization of raw hides resulting from the operations of beef production in the mother company by adding value and processing into leather.

The tannery was bought in 1997. The company is Zambia’s largest producer of leather in Zambia, processing about 67 000 hides per annum through tannery. 60% of hides are processed into wet blue leather for export. The company includes a leather finishing and a shoe manufacturing plant which is now a major producer of industrial footwear, school shoes and casual shoes. Other products include leather protective clothing, including gloves, smelter suits and welding aprons. Export markets include South Africa, Europe and the Far East average US$1.3 million per annum.

“For Zamleather, investing in the leather sector was a good venture. There is availability of raw hides in the country, there are sound government policies put in place to develop and protect (promote) the leather sector and the Zambian hides are bigger than the East African competitors coming in 3rd in the region behind South Africa and Zimbabwe. In addition, ZDA has helped the company set up to a point where it is able to export its products easily and the company utilizes COMESA and SADC incentives for both imports and exports in its supply chain. ”

Richard Franklin, General Manager of ZAMLEATHER Limited

Point 5. Competitive Production Costs

a. Skills Development

The Zambian Government through the Ministry of Agriculture and Livestock provides extension services and related capacity building among farmers and abattoirs aimed at improving animal husbandry and flaying techniques.

b. Labour

Zambia offers competitive labour costs. The average monthly salaries are as follows; US$ 2,500 for management workers; US$ 1,400 for fresh graduates, US$ 1,000 for technical workers, US$ 200 for level graduates and US$ 150 for unskilled or manual labour.

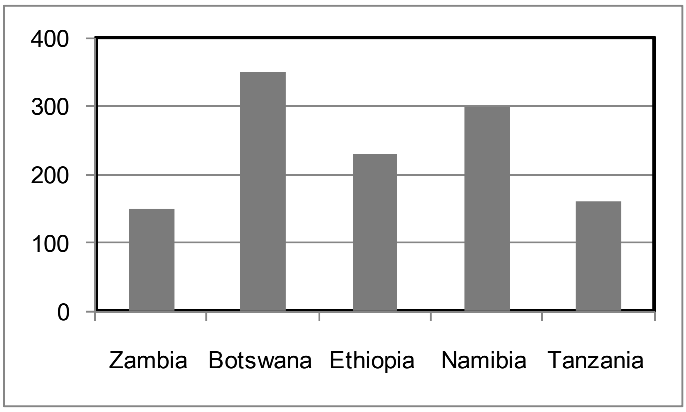

Figure 8: Labour Cost Comparion (US$ per month)

c. Power

At US$0.03–US$0.04 per kWh, Zambia has some of the lowest power tariffs in Africa. Its power tariffs fall below the typical price range of US$0.05–US$0.10 per kWh among developing countries.

d. Water

The leather industry requires abundant water supply. Zambia is well endowed with water relative to other countries in southern Africa. The renewable water resource per capita is estimated at about 8,700m^3 per year, well above the average for Sub-Saharan Africa (7,000 m^3 per person per year) and the global average (8,210m^3 per person per year). In Zambia the non-residential tariff is US$ 0.59 per m^3 and the residential tariff is US$ 0.48 per m^3.

Point 6. Attractive Incentives

The Government has identified leather as its priority sub-sector. The following incentives are available to those who are interested in investing in this sub-sector (Also see the Zambia's Investors' Guide Handbook, 2011 for more general incentives).

a. Tax Incentives to set up new tanneries and for export of PROCESSED hides and skins

- No tax on the profits for a period of 5 years from the first year profits are made. From year 6 to 8, 50% of the profits will be taxed and for years 9 and 10, 75% of profits will be taxed.
- No tax on dividends for a period of 5 years from the year of first declaration of dividends.
- No import duty on capital goods, machinery including trucks and specialized vehicles for five years.
- 100 % tax allowance tax allowance for land development and conservation.
- Capital expenditure on improvement or for the upgrading of infrastructure shall qualify for improvement allowance of 100% of such expenditure.
- 15 % income tax on agricultural concerns.
- Capital expenditure on farm improvements qualifies for an allowance of 20% per annum for the first five years.
- A substantial rate of depreciation allows farm machinery to be rapidly written off against tax.
- Dividends payable to farmers are tax exempt for the first five years of operation.
- Import VAT exemptions on imported inputs targeted at production for exports.

b. Tax Incentives to set up value added leather products companies based on either imported hides or locally available hides

- Importation of inputs especially chemicals for tanning hides and skins are zero rated. The government is also in the process of considering zero rating importation of shoe components in order to encourage the manufacture of leather goods.
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III. Investment Opportunities in the Value Added Sub-Sectors of the Zambian Leather Industry

The value added sub-sectors of the Zambian Leather Industry offer great investment opportunities for investors. There are mainly four tanneries in Zambia. The products produced by the tanneries provide exciting investment opportunities to produce various leather products in Zambia.

a. Tanning

The Zambian tanning subsector has grown from one tannery in 1974, to five tanneries in place since 1996. Four of these tanneries are private owned, namely Kembe Estates; Tata Tannery, King Quality Tannery, and; Malar Tannery. The fifth tannery, Zamleather, is a subsidiary of Zambeef Plc, which is listed on the Lusaka Stock Exchange.

Table 3. Tanneries in Zambia

Location	Tannery	Ownership	Daily Capacity (Hides per Day)	Utilized capacity
Lusaka	Kembe Estates Ltd.	Zambian private company	750	60%
	Zamleather	Subsidiary of the Zambeef Group (Zambian owned)	250	100%
	King quality Tannery			0
Kabwe	Malar Estates Ltd	Subsidiary of Malar Industries	120	0
	Kabwe Tannery	Subsidiary of the Tata Group (Indian owned)	500	40%

There is a high level of integration up the value chain within individual enterprises with some companies having feedlots and slaughter facilities supplying hides and skins after slaughter, tanneries and finished leather goods manufacturing plants. There remain significant opportunities for value added production given the substantive raw material and tanning base. A summary of key products by each key company and the level of integration can be found in Annex IV.

A Demand/Supply Survey of the Leather Industry in Zambia undertaken by the International Trade Center in 2010 reveals installed tannery capacity utilization of the five tanneries in the country has evolved from 26%–30% in 2000-2002 to 50%–60% in 2003–2005. In 2007-2008 this increased further to over 65% while at present it stands at 63%. Policy measures and interventions made by the government of Zambia have contributed to ensuring that adequate supply of raw materials in Zambia is secure.

b. Footwear and leather goods manufacturing subsector

Some of the key products include industrial military boots, safety boots, fashion boots (for men), school shoes and sandals (See Annex IV). Other products include household décor items, hand bags, purses, wallets, conference folders, table mats, wine holders, belts, footballs and floor mats. The main location of these operations is Lusaka and Ndola, supplying both the domestic and export markets.

IV. Frequently Asked Questions about Leather in Zambia

Question: Are there any regulations or policies specific to the leather industry?

Answer: Yes, there are. There are two main regulations/policies specific to the leather sub-sector: (1) Exportation of livestock raw hides and skin from Zambia is prohibited. This is in order to allow further value addition to the raw hides and skins to wet blue leather and beyond, and enhance full utilization of tanning capacity (2) All wildlife skin operations in Zambia, including the crocodile industry, must comply with the regulations of the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES).

Question: Is the Zambian Government doing much to improve the skills of workers in the leather industry?

Answer: Yes, In order to develop quality leather in Zambia, ZDA signed a memorandum of understanding (MoU) in Ethiopia with COMESA Leather and Leather Products Institute (COMESA LLPI) in 2009 for capacity building of farmers, traders in hides and skins, slaughter facilities, tannery operators and leather goods manufacturers. ZDA is working in line with the COMESA's objective of developing international leather and leather products trade by linking SMEs to the Indian, Italian and regional leather sectors. Through the linkages, local skills will further be strengthened.

Question: Does ZDA support development and promotion of exports from the sector?

Answer: Yes, ZDA participates in a number of regional and international leather fairs and facilitates participation of Zambian companies and SMEs in these. ZDA also organizes study tours in countries that have recorded notable development in the sector.

V. USEFUL CONTACTS OF GOVERNMENT AGENCIES IN THE LEATHER SECTOR

	Name	Address	Telephone / Fax	Email / URL
1.	Zambia Development Agency (ZDA)	P.O. Box 30819, Lusaka	T: 260-211-220177 F: 260-211-293223	zda@zda.org.zm www.zda.org.zm
2.	Ministry of Agriculture and Livestock	P.O. Box 50181 Lusaka	T: 260-211229420 F: 260-211-229421	
3.	Ministry of Commerce, Trade and Industry	P.O. Box 31968, Lusaka	T: 260-211228301/9 F: 260-211-226984	http://www.mcti.gov.zm

Zambian Stand at the Meet in Africa Leather Exhibition in Khartoum, Sudan 2009

Zambian Stand at the Feira Internacional de Maputo, Maputo, Mozambique, 2009

VI. Zambia also offers…

In addition to attractive features of Zambia's Leather Industry, Zambia also offers:

- Stable political system.
- Guarantees security to investors with legislated rights to full and market value compensation.
- Progressive banking, legal and insurance services of international standards and stock exchange market.
- Condusive investment and working environment. The country has also beautiful tourism facilities, with, friendly and peace loving people.
- For more information and services tailored to your needs, contact ZDA and let us know how we can help!

Zambia Development Agency (ZDA)
P.O Box 30819, Lusaka
260-211-220177260-211-225270
zda@zda.org.zm
www.zda.org.zm

ZDA is a one-stop shop established to support investors in finding the right place, people, and information to start or expand their businesses in Zambia!

Annex I. Crocodiles Farms/Ranches and Number of Crocodiles

Name of Ranch/ Farm	Location/ Province	No of Crocodiles Species	Skin Production p.a, 2000 – 2003)
Zongwe- Croc Farm	Southern	123,480	18,888
Lunchinze- Croc Farm	Southern	27,405	
Yuka Crocodile Farm	Western		2,500
Gordana Croc- Farm	Southern	22,752	2,033
Crocodile hides- Croc Farm	Southern	21,457	2,000
Kailolio- Croc farm	Southern	15,373	1,868
J & I Brooks LTD			1,608
Luangwa- Croc Farm	Southern	9,716	
Luangwa- Croc Farm	Lusaka	8	150
Kalimba- Croc Farm	Lusaka	9,207	612
Sumbu- Croc Farm	Southern	9,071	814
Gwembe- Croc Farm	Southern	123	
Shiwangandu- Croc Farm	Northern	39	
Gwembe- Croc Farm	Southern	25	
Mbizi- Croc Farm	Eastern	10	
Total		**238,666**	

Source: Zambia Wildlife Authority Annual Report 2008

Annex II. Impact of Global Financial Crisis on Prices of Raw Hides and Skins

Country	Price of Raw Hides/piece (US$)			Price of Finished Leather/Square foot (US$)	
	2008	May 2009	% Change	Plain	Printed
Burundi	24.00	4.00	-83.3	-	-
Ethiopia	10.00	2.00	-80.0	1.30	1.30
Eritrea	14.00	6.00	-57.1	1.65	
Kenya				1.50	1.17
Rwanda	0.77	0.36	-53.2	1.80	1.80
Sudan	15.00	5.00	-66.7	1.30	0.60
South Africa	25.00	4.40	-82.4		
Tanzania					
Uganda	18.10	2.10	-88.4	0.75	0.90
Zambia	14.50	5.50	-62.1	1.02	0.84

Source: ZDA Report on the Impact of the Global Financial Crisis on the Leather Sector

Annex III. Export prices of wet blue and types of finished leather (2010)

Types of Finished Leather	Export Price (US$/SQFT)
Wet blue Grade A,B & C	1.05
Grade D	0.65
Crust leather	
Finished leather:	
Printed (military) Grade A, B & C	1.10 – 1.25; 1.00 & 0.80 – 0.90
Corrected grain (Plain) Grade A,B & C	1.30 – 1.35; 1.20 & 1.00
Corrected grain crust	0.90
Crust lining	0.60 – 0.70
Black splits	0.80
Upholstery	2.00
Vegetable Kips	
Mocassin	1.35- 1.45
Suede	1.00
Industrial gloves	0.50
Insoles	0.35

Annex IV. Key Companies in the Zambian Leather Industry

Tannery	Location (Town, Province)	Production
Zamleather	Lusaka, Lusaka Province	Feedlot (by Zambeef- mother company) Wet blue, finished leather, safety and security boots, safety shoes, security shoes, combat boots, military boots, fashion boots, school shoes, men's and ladies' fashion shoes, leather aprons
Kembe	Lusaka, Lusaka province	Wildlife ranching, wet blue, finished leather, upholstery leather, game trophies
Malar Industries	Kabwe, Central Province	Wet blue, finished leather, industrial safety boots, military boots, fashion shoes (incl. boots), school shoes, gumboots and sandals, leather products
Tata	Kabwe, Central Province	Wet blue
Bata Zambia	Lusaka, Lusaka Province	Leather shoes and sandals
Copperbelt Shoes	Ndola, Copperbelt Province	Industrial leather footwear, leather school shoes, PVC shoes and sandals
Copacabana	Ndola, Copperbelt	Footwear
S.D. Investment Limited	Lusaka, Lusaka Province	Military boots, safety shoes (incl. industrial ones), men's office footwear, ladies fashion shoes & sandals, men's fashion shoes, leather gloves, school shoes
African Joy Ltd	Lusaka, Zambia	Handbags and other leather goods
Mable's Creations	Lusaka, Zambia	Handbags, other leather goods and household goods
Jackal and Hide	Lusaka, Zambia	Handbags
Bimzi Limited	Lusaka, Zambia	Assorted leather articles
Alive and Kicking	Lusaka, Lusaka Province	Soccer balls
Kalimba Farms Ltd.	Lusaka, Lusaka Province	Crocodile skins
Zongwe Farming Enterprises	Sinazeze, Southern Province	Crocodile skins
Sumbu Crocodiles	Siavonga, Southern Province	Crocodile skins
King Quality (not in operation)	Kafue, Lusaka Province	*Wet blue, finished leather*