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FINAL REPORT

STRUCTURING SMESEHs IN THE COTTON-TEXTILE-LEATHER-GARMENT SECTOR

SEPTEMBER 2022

FOREWORD

The Cotton-Textile-Leather-Garment sector is a very important segment of the Cameroonian industrial fabric. It was retained in the SND30 as one of the nine sectors that have the quality and capacity to bring Cameroon to emergence by 2035. However, “the development of the sector faces many constraints that hinder and penalize the harmonious development of the activities that make it up".

With regard to the composite character of the sector, the analysis was made on the Cotton-Textile-Leather-Garment branches on the one hand and Leather industry and shoe manufacturing on the other hand. Indeed, the access to the raw material, the processing chain and the actors who operate there are different, thus justifying our approach.

Analysis of the Cotton-Textile-Confection branch reveals that it is completely devastated by, among other things, the almost total export of national cotton production (99%), almost non-existent local processing (1% of cotton is processed locally) and local spinners who get their supplies at the world cotton price, i.e. they buy locally produced fiber as if they were importing it.

With regard to the Leather and Footwear Manufacturing Industry branch, the analysis reveals that it remains marginal despite a potential in raw materials (raw skins and leather of cattle and horses, sheep and goats), the sector is struggling to see the emergence of a unit on an industrial scale. The activity is essentially confined to crafts or even to the export of raw or semi-finished products.

It is therefore with a view to making a contribution to the development of the Cotton-Textile-Leather-Garment sector that this study was carried out against the backdrop of the idea of structuring Small and Medium-Sized Enterprises, Social Economy Organizations and the Artisans who operate there in order to enable them to fully play their role as catalysts for growth and major players in the structural transformation of our economy.

The Minister of Small and Medium Enterprises,
Social Economy and Handicrafts

Achille BASSILEKIN III

SUMMARY

LIST OF ABBREVIATIONS

CAPE	Credit Agency for Private Savings
ACEFA	Consolidation and Sustainability Program of the Agro pastoral Council
AFD	French Development Agency
APME	Promotion Agency for Small and Medium Enterprises
ANEMCAM	the National Association of Microfinance Institutions
BC-PME	Cameroonian Bank of Small and Medium Enterprises
CAFRAD	Animation, Training, Research and Development Support Center
CAMCULL	Cameroon Cooperative Credit Union League
CC	Circles of Caution
CAD/CAM	Corporation For Africa and Overseas
CICAM	Industrial cotton factory of Cameroon
CIRAD	Agricultural research for development
CNPC-C	National Confederation of Cotton Producers of Cameroon
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
GP	Producer groups
COFIL	Hydrophilic cotton from Cameroon
CTCC	Cotton Textile Tailoring Leather
CTD	Decentralized Territorial Collectivity
CHED	Growth and Employment Strategy Paper
EMF	Microfinance institution
FEICOM	Special Fund for Equipment and Intermunicipal Intervention
SWOT	Strength Weaknesses Threats Opportunities
GIC	Commune initiative group
EIG	Economic Interest Grouping
IEDC	European Institute for Development and Cooperation
MFI	Microfinance institution
IFR	Rural Finance Institutions
NSI	National Institute of Statistics
MAGZI	Mission for the Development and Management of Industrial Zones
ME	Medium Enterprise
MINADER	Ministry of Agriculture and Rural Development

MINCOMMERCE	Department of Commerce
MINEPAT	Ministry of Economy, Planning and Regional Development.
MINEDUB	Ministry of Basic Education
MINEFOP	Ministry of Employment and Vocational Training
MINERSI	Ministry of Scientific Research and Innovation
MINESEC	Ministry of Secondary Education
MINESUP	Ministry of Higher Education
MINDEVEL	Ministry of Decentralization and Local Development -
MINEPIA	Ministry of Livestock, Fisheries and Animal Industries
MINFI	Ministry of Finance
MINHDU	Ministry of Housing and Urban Development
MINMINDT	Ministry of Mines, Industry and Technological Development
MINPMEESA	Ministry of Small and Medium Enterprises, Social Economy and Handicrafts.
NACAM	Nomenclature of activities and products of Cameroon
SIU	Social Economy Organization
OAPI	African Intellectual Property Organization
NGO	Non-Governmental Organization
ILO	International Labor Organization
PAPME	Promotion of Crafts and Small Trades
PADMIR	Rural Microfinance Development Program
PCM	Project Cycle Management
CRP	Presidency of the Republic of Cameroon
PE	Small business
HIPC	Heavily Indebted Poor Countries
PDRM	Mount Mbappit Rural Development Project
PFAC	France Africa Partnership for Co-development
PFCA	Complementary Apprentice Training Program
PIDMA	Agricultural Markets Investment and Development Project;
PM	Prime Ministry
PMEAA	Support Program for Small and Medium Agricultural and Agrifood Enterprises
TFP	Technical and Financial Partner
TANICAM	Cameroon Industrial Tannery

RELESS	Local Network of Social and Solidarity Economy
RESCAM	National Network of Social and Solidarity Economy of Cameroon
SCOOP-CA	Cooperative Society with Board of Directors
SCOOPS	Simplified Cooperative Society
SEP	European Skin Society
CFDT	French Textile Development Company
SODECOTON	Cotton Development Corporation
SODEPA	Company for the Development and Exploitation of Animal Productions
SND-30	National Development Strategy 2020-2030
TPE	Very Small Business
SIU	Social Economy Unit
PCU	Program Coordination Unit
UNESCO	United Nations Educational, Scientific and Cultural Organization
ZIC	areas of hunting interest

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EXECUTIVE SUMMARY

The Cotton-Textile-Leather-Garment sector is a very important segment of the Cameroonian industrial fabric. It was retained in the SND30 as one of the nine sectors which have the quality and the capacity to bring Cameroon to the emergence of 2035. However, "the development of the sector faces many constraints which hinder and penalize the harmonious growth of the activities that make it up".

It is therefore with a view to making a contribution to the development of the sector that this study was carried out against the backdrop of the idea of structuring Small and Medium Enterprises, Social Economy Organizations and craftsmen who operate there in order to enable them to fully play their role as growth catalysts and major players in the structural transformation of our economy.

This document is structured, in accordance with the guidelines of the planning methodological guide, around four chapters, namely; the OVERVIEW and diagnosis of the sector (chapter 1), the operational choices for relaunching the sector (chapter 2), the priority action plan (chapter 3) and finally the monitoring/evaluation system (chapter 4).

It should however be specified that in view of the composite character of the sector, the analysis was made on the Cotton-Textile-Confection branches on the one hand and Leather industry and shoe manufacturing on the other hand. Indeed, the access to the raw material, the processing chain and the actors who operate there are different, thus justifying our approach.

In the first chapter, it was a question of delimiting the scope covered by the study in each of the branches. As regards the Cotton-Textile-Garment branch, operations starting from the cultivation of cotton, to the transformation into clothing products and linens, passing through the spinning of said cotton and its transformation into fabric, are taken into account. Excluded are crushing operations which consist of transforming cottonseed into refined oil and cake.

With regard to the Leather and shoe processing industry branch, the study analyzes the branch as a whole. It briefly covers livestock activities without really going into depth. The aspects that interest us in this segment are related to the organization and structuring of breeders. Emphasis has however been placed on the collection and processing of hides, their tanning, and the manufacture and distribution of the resulting products.

The analysis of the activities selected by branch reveals, with regard to the Cotton-Textile-Garment branch, that with the exception of cotton, the rest of the branch is completely damaged for the following reasons:

- ✓ 99% of national cotton production is exported, 1% is processed locally , which reflects a very low added value given to the fiber produced locally;

- ✓ cotton fiber sold by SODECOTON to local spinners at the world price, i.e. these players buy locally produced fiber as if they were importing;
- ✓ the very high cost of electrical energy for companies (92 FCFA/kWh against a third in China);
- ✓ high input prices;
- ✓ weak tax incentives;
- ✓ unfair competition from imported products;
- ✓ smuggling and counterfeiting are other evils that undermine the sector;
- ✓ presence of second-hand clothes on the market destroys the local industry;
- ✓ the poor condition of product evacuation routes;
- ✓ the slowness of the railroad for the export of bales by sea;
- ✓ problems of maintenance and development of existing infrastructure;
- ✓ lack or inadequacy of storage warehouses for seed cotton, agricultural and industrial inputs;
- ✓ lack of infrastructure housing regional research centers.

With regard to the Leather and Footwear Manufacturing Industry branch, the analysis reveals that it remains marginal despite a potential in raw materials (raw skins and leather of cattle and horses, sheep and goats), this sector is struggling to see the emergence of a unit of industrial scale. The activity is essentially confined to crafts or even to the export of raw or semi-finished products.

The lack of organization of collection circuits and the insufficiency of processing units lead to supply difficulties both in terms of availability and quality. The tannery and shoe manufacturing activities also face competition from imports. And yet the transformation of animal skins is a promising sector involving many actors (collectors, tanners, dressmakers, stylists and other craftsmen) who could be carriers for economic recovery in the northern regions in particular.

On the strength of these observations, chapter two dealt with formulating the operational choices for the revival of the sector through its main branches. The approach here consisted, for each branch, in highlighting the issues and challenges, analyzing the problems identified as well as the resulting objectives, the scenarios to be considered and finally highlighting the operational framework for its implementation.

Also, for the Cotton-Textile- Garment branch, four operational axes have been identified for its revival, these are in particular:

- ✓ structuring and organization of cotton production in Cameroon;
- ✓ strengthening of the cotton ginning system;
- ✓ reinforcement of the device for transforming cotton fiber into fabric;

- ✓ industrialization of textile manufacturing and professionalization of its marketing.

Four areas have also been identified for the revival of the leather and shoemaking industry branch, namely:

- ✓ improved skin removal;
- ✓ organization and structuring of the collection and storage of skins;
- ✓ reinforcement of the skin processing device to transform it into high-quality leather;
- ✓ industrialization of the manufacture of leather-based articles.

The breakdown of these areas into concrete activities is presented in Chapter 3 where a priority action plan for an amount of ***FCFA 161 billion 399 million 002 thousand*** over a period of three years has been developed. It should be noted that this amount fits well with that of the overall agro-industrial plan identified by SND-30.

Chapter 4, for its part, presents the monitoring/evaluation mechanism of our structuring plan for SMESEHs in the Cotton-Textile-Leather-Garment sector. Indeed, given that this plan is part of the implementation of SND 30, it's monitoring and evaluation mechanism cannot be located on the sidelines of the system already implemented for its monitoring. The related political orientations will also be made within the framework of the National Planning Council chaired by the Prime Minister, Head of Government. At the strategic level, it will be ensured by the National Committee for Monitoring and Evaluation of the implementation of the strategy chaired by the Minister of Economy, Planning and Regional Development; specifically at the level of the industries and services sub-committee.

INTRODUCTION

In 2009, Cameroon adopted the document "Cameroon, Vision 2035" which defines its prospects for long-term economic and social development with a view to achieving emergence by 2035. The first phase of implementation of this long-term development vision was operationalized by the Strategy Document for Growth and Employment (DSCE), which constituted the overall reference framework for the actions of the Government and development partners for the period 2010-2019.

At the end of the DSCE, Cameroon has adopted a new strategy which defines the new global reference framework for the actions of the Government during the period 2020-2030, it is the National Development Strategy 2020-2030 (SND-30), adopted by the Government and officially presented on November 16, 2020 by the Minister in charge of planning.

The National Development Strategy 2020-2030 (SND-30), defines a set of strategic orientations for the achievement of the country's development objectives over the next decade. On the horizon of this strategy, one of the main pillars applied relates to the structural transformation of the economy.

This structural transformation of the Cameroonian economy is mainly based on the idea of a change in the productive system, in particular through the densification of the industrial fabric. It is within this framework that objectives on the evolution of the share of Manufacturing Added Value in the Gross Domestic Product (to increase it from 14.5% in 2017 to 25% in 2030) or the increase in share of exports of manufactured products in total exports (from 26.3% in 2015 to 54.5% in 2030) are defined. The achievement of these objectives necessarily involves the implementation of a certain number of strategic actions in the sectors and sectors capable of boosting the desired dynamic.

Considered as a sector that drives economic growth and has strong potential for job creation, the Cotton-Textile-Clothing-Leather sector is identified in SND-30 as an important component of the foundation on which the structural transformation process is based on the Cameroonian economy envisaged. Indeed, from upstream to downstream, this sector is organized around a large number of activities bringing together various actors whose harmonious interaction is likely to play a preponderant role in achieving the development objectives of the country.

However, the low level of processing of products downstream of the chain is characteristic of this sector. This situation gives rise to a rush towards imported products to satisfy an ever-increasing demand. Thus, between 2014 and 2018, the cumulative value of imports of products from the textile and clothing industries is around 584 billion FCFA. This represents a significant shortfall for the economy not only in terms of wealth creation, but also in terms of job creation, given the potential of the sector in Cameroon.

Although the major role that this sector should play in the achievement of the country's development objectives is commonly accepted, the trajectories that it could take in the future remain plural. These depend in fact, in addition to the choices that will be made over the next few years in terms of development of the sector, but also on the dynamism of the actors in its value chain. It would therefore be important to analyze the situation of the players to assess their ability to support the development of the sector.

This document thus restores the reflections carried out within the framework of the analysis of the possible future configurations of the Cotton-Textile-Leather-Garment sector in Cameroon with, in the background, the methods according to which SMEs, the actors of the social economy and artisans should effectively contribute to the structural transformation of the economy.

In this respect, it is organized around four main points dealing respectively with: the presentation of the OVERVIEW and diagnosis of the sector, the formulation of operational choices for the revival of the sector, the development of an action plan and presentation of the monitoring/evaluation mechanism. It should however be noted that the option chosen by this study consisted in analyzing the sector through its branches (Cotton-Textile- Garment on the one hand and Leather industry and shoe manufacturing on the other) and not in a linear fashion.

CHAPTER 1: *OVERVIEW AND DIAGNOSIS OF THE COTTON-TEXTILE-GARMENT-LEATHER SECTOR*

In accordance with the approach indicated in the methodological planning guide in Cameroon, this OVERVIEW of the Cotton-Textile-Leather-Garment sector will be structured around three main points, namely, the delimitation and segmentation of the sector, the description of the sector and its environment and finally the main problems facing the sector as well as the stakes of the sector for the Government.

In view of the composite character of the sector, which brings together two branches whose access to the raw material, the processing chain and the actors who operate there are different, the analysis was made on the branches in order to better understand the said sector. . Also the parts of this chapter are structured around said branches

I. DELIMITATION AND SEGMENTATION OF THE COTTON-TEXTILE- LEATHER CONFECTION SECTOR INTO COMPONENTS

In this part, it will first be a question of defining the concepts that will be used throughout the study in order to harmonize the understanding of the said concepts, which for the most part refer to the trades and products of the sector. The second part will consist in delimiting the field of action or the branches of the sector which will be the subject of an analysis within the framework of this study and finally we will segment the sector into components.

I-1 Definition of the main concepts of the sector

The Cotton-Textile-Leather-Garment sector in Cameroon, as everywhere else, has a set of concepts that are specific to it and which need to be defined for a better understanding of the sector:

Bleaching: the operation by which an unbleached fabric is made suitable for being dyed, printed or sold as white.

Hosiery: manufacture and trade of knitted clothing items and especially socks, stockings and lingerie, made by hand or by machine.

Carding: Activity consisting in separating the natural fibers of cotton from each other, combing them, straightening them, parallelizing them and cleaning them.

Confection: mass production of articles of clothing and various uses.

Cotton/Seed: Raw cotton harvested from the field that still contains seeds wrapped in fibers.

Ginning: activity that consists of separating the cotton seeds from the fibers. The cotton is first moistened and then sent to the gins.

Ennoblement is the set of chemical and mechanical treatments that provide an unbleached textile support with a color and usage properties that meet certain requirements.

Stretching (or doubling): it has intended to harmonize the thickness of the card sliver by stretching the fibers. This operation is carried out by passing several of these ribbons between different rollers of rubber rotating at increasingly rapid speeds. It is often after this step that treatments such as bleaching (with hypochlorite or peroxide) and dyeing of the fibers take place.

Spinning: step of transforming raw cotton into yarn. It can be done either directly from cotton fiber, or through a dye house.

Pressing: treatment of cottonseeds which makes it possible to obtain products such as: oil, cakes, linter, hulls and waste.

Knitting is a special weave that gives a more stretchy, flexible and airy material (t-shirt, socks).

Weaving: activity which makes it possible to obtain the fabric by the intersection of cotton threads. The fabrics obtained can be either unbleached fabrics for domestic or industrial use, or dyed and prepared fabrics for making clothes, etc.

Ecru fabric: Fabric that has not been washed, bleached or dyed.

Dyeing: application of a color in a uniform way on a textile support, whatever its presentation: stuffing, threads, fabrics, knits or even non-woven. This operation using different dyes is applicable on all15 textile fibers, natural, artificial or synthetic. Depending on the quantities to be dyed, full bath (exhaustion) or impregnation (continuous) equipment is used.

Printing: deposition on the textile support of patterns or designs by applying in the form of a paste dyes similar to those used in dyeing.

Chemical finishes or using "resins" or other chemical products make it possible to modify the properties, the behavior of a fabric: softening, non-shrink treatment, anti-odor, water repellency, fireproofing, etc.

C**onfection**: mass production of articles of clothing and various uses.

Deliming **/confiting:** process which consists of plunging the skin into large vats or letting it rest in a solution saturated with vegetable tannins, making the leather tender.

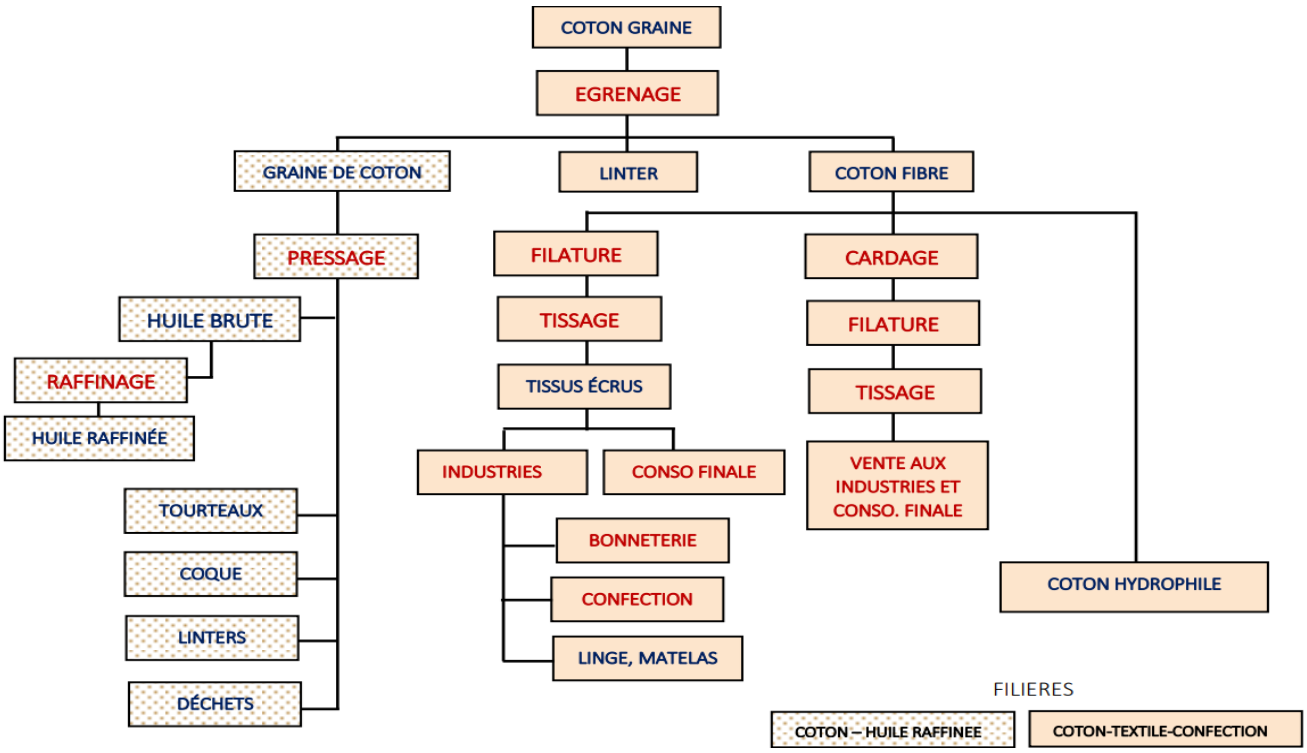
Pickling: preparation of the skin for mineral tanning by reducing its pH, pickled skins

I-2 Delimitation of the sector

The Cotton-Textile-Leather-Garment sector is quite wide and composite, it covers on the one hand the Cotton/Textile/clothing branch and on the other hand the leather industry branch and shoe manufacturing. Another particularity of the sector lies in the fact that the two branches that constitute it are also broken down into several activities.

As for the Cotton-Textile-Garment branch, it includes activities ranging from the cultivation of cotton, to the transformation into clothing products and linens, including the spinning of said cotton and its transformation into fabric. It also includes the processing of cottonseed for the production of refined oil and cakes which are generally used for breeding. Schematically, the branch is presented as shown in graph 1 below.

Figure 1: *chain of Value for COTTON-TEXTILE-GARMENT branch*



Source: HAMADJAM, 2012

The analysis of this branch will focus exclusively on cotton production activities and its transformation oriented towards the clothing industry. Activities relating to the production of refined oil and cakes will be excluded. The study will therefore focus on:

(i) production of seed cotton;

(ii) ginning seed cotton into cotton fiber;

(iii) weaving/knitting;

(iv) ennoblement;

(v) fashion;

(vi) hosiery;

(vii) industrial, artisanal and informal tailoring;

(viii) haberdashery;

(ix) distribution.

It should also be noted that in the textile industry, particularly in the spinning segment, other fibers are used in the manufacturing process. These are wool, silk, plantain fibers and many more. Although constituting an important alternative in the sector, they will not be taken into account in this study. Nevertheless, a frame can be made to emphasize that they constitute a serious alternative and require that attention be reserved for them as well.

As for the products of the branch, the study will focus on those identified in the Nomenclature of Activities and Products of Cameroon (NACAM_NPC_Rév1):

001 AGRICULTURAL PRODUCTS

- ✓ **001006 Cotton**

  001006000 Raw cotton

- ✓ **001012 Products of cotton ginning and other agricultural support services**

  001012001 Cotton lint (ginned cotton)

  001012002 Cottonseed

015 TEXTILE AND GARMENT INDUSTRY PRODUCTS

- ✓ **015001 Textile fibers and yarns**

  015001001 Prepared cotton fibers 015001002 Cotton yarn

  015001003 Other textile fibers and yarns

- ✓ **015002 Fabrics and finishing services**

  015002001 Cotton fabrics (including cotton knit fabrics)

  015002002 Fabrics of other textiles (including knitted fabrics of other textiles)

  015002003 Textile finishing services

- ✓ **015003 Other non-clothing textile products**

  015003001 Household linen, furnishing and bedding articles

  015003002 Rugs and carpets

  015003003 Twine, nets and ropes

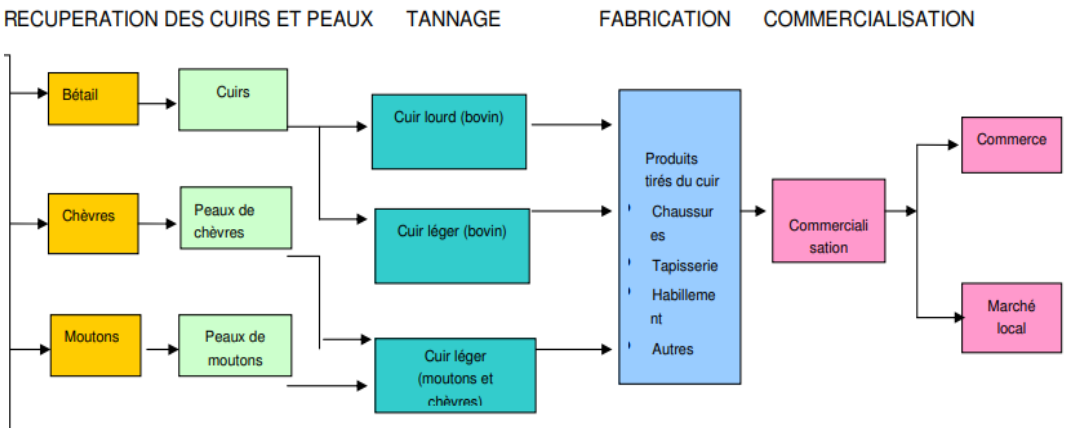
  015003004 Other made up textile articles nec

- ✓ **015004 Articles of clothing (except footwear)**

  015004001 Textile clothing

As regards the Leather industry and footwear manufacturing branch, it includes activities ranging from the recovery of hides and skins, tanning, manufacturing and marketing of products. Indeed, the fashionable leather shoes, bags and clothes sold in stores in cities around the world are the result of a long and diverse process that begins with hunting, raising cattle, sheep in small farms and large agricultural industries, in the mountains, plains and valleys of many very different countries: animals are bred and then slaughtered; their hides and skins are recovered, tanned and transformed into prepared leather; this leather is further processed into leather goods; these items are packaged and transported, and marketed and sold all over the world. Figure 2 below presents these different activities in detail.

Figure 2: *chain of value for the leather industry branch and footwear manufacturing*



Source: CFC, 2004

This study will analyze the branch as a whole. It will briefly cover breeding activities without really going into depth. The aspects that will interest us in this segment are related to the organization and structuring of breeders. Emphasis will also be placed on the collection and processing of hides, their tanning, the manufacture and distribution of products which are those identified by NACAM_NPC_Rév1. These are the following products:

002 LIVESTOCK AND HUNTING PRODUCTS

- ✓ **002001 Cattle breeding products 002001001**

  Live cattle

007 MEAT AND FISH INDUSTRY

- ✓ **007001 Production, processing and preservation of meat and derived products**

  007001006 Hides and raw skins

015 TEXTILE AND GARMENT INDUSTRY

- ✓ **015004 Articles of clothing (except footwear)**

  015004002 Leather and fur clothing

016 LEATHER AND SHOES

- ✓ **016001 Leather products and leather articles**

  016001001 Worked hides and skins

  016001002 Travel and leather goods

- ✓ **016002 Footwear and including rubber and plastic**

  footwear 016002000 Footwear and footwear.

Contrary to previous studies on the sector, emphasis will be placed on the actors in order to ensure their capacity to guarantee the implementation of policies as defined by the Government. The heart of the study will therefore be the assessment of the skills of the latter, the analysis of their environment, the constraints they face and their needs to calmly support the Government in achieving its economic policy objectives.

I-3 Sector segmentation

The segmentation here will be made around the two main branches of the sector, namely the cotton textile clothing branch and the industry branch and leather and shoe manufacturing.

I-3.1 Segmentation of the cotton textile clothing branch

The Cotton-Textile-Leather-Garment branch in Cameroon is structured around four segments, each grouping together a certain number of activities. Upstream, the cultivation and ginning of cotton, at the intermediate level, the textile industry, and downstream, the garment industry. Alongside these segments is added the leather dimension which itself brings together upstream the breeders who produce the skin, and downstream a whole manufacturing industry of various articles made on the basis of these skins which first go through an intermediate stage treatment.

i. Cotton cultivation and ginning

Cotton cultivation gives rise to the production of seed cotton which is extracted from the bolls of the cotton plant. The ginning which is carried out thereafter consists of separating the seed cotton into fiber and seed. While cotton fiber is exclusively oriented towards the textile industry, cottonseed, after pressing, makes it possible to obtain several other products - oil for food use, linter, hulls, etc. (INS, 2014).

ii. Textile industry

The textile industry includes activities such as carding, spinning, weaving/knitting, finishing and quilting. The production process in this segment proceeds by separating, straightening, cleaning and eventually dyeing the cotton fibers in order to obtain cotton yarn. Subsequently, the threads go through the weaving phase where their interlacing makes it possible to produce fabric.

iii. Garment industry

The clothing industry concentrates hosiery, sewing, fashion and distribution activities. It manufactures products such as clothing, bags, etc.

vi. Marketing

Marketing is done at the national and international level and concerns intermediate and final products at different stages of the value chain

I-3.2 Segmentation of the leather industry and shoe manufacturing branch

Like the cotton textile clothing branch, the leather industry and shoe manufacturing branch is structured around four segments which start with the collection of hides and skins from slaughterhouses and continue with the conversion of said skins in tanneries. Once the skins have been processed, the segment linked to the manufacture of various leather products then intervenes. The last segment is related to marketing.

i) Recovery of skins and leathers

Recovery of the hides and skins of animals slaughtered in farms or slaughterhouses, constitutes the first stage of the branch. Indeed, the animals are stripped of their skin which will then be processed and transformed in the other segments.

ii) Conversion of hides and skins

The conversion of hides and skins is carried out in the tanneries. This operation normally requires a large hardware investment.

iii) Manufacture of leather products

Manufacturing of leather products is carried out in small, intensive labor- workshops that require less large investments in equipment or large, capital-intensive factories.

iv) Marketing

Marketing is done at the national and international level and concerns intermediate and final products at different stages of the value chain

II. OVERVIEW OF THE COTTON-TEXTILE-GARMENT-LEATHER SECTOR

This part will be done in accordance with the two branches that make up the sector, namely the Cotton-Textile-Confection branch and the leather industry branch of shoe manufacturing.

II.1. OVERVIEW of the Cotton-Textile-Making business

As underlined in the segmentation of the field, the textile sector includes activities ranging from the cultivation of cotton, to the transformation into clothing products and household linen, through spinning and transformation into fabric. In Cameroon, the range of products offered by the textile industry is varied: cotton fiber, cotton yarn, synthetic fiber, unbleached, dyed or impregnated fabrics, terry cloth, clothing, household linen (table cloths, bed sheets , curtain, etc.), knitted products (men's, women's and children's underwear, etc.), fabric or raffia bags, caps.

It should also be noted that the cotton produced by Cameroon is recognized for its very good quality, the bulk (more than 90%) of the production is exported to Western and East Asian markets, including China, the world's largest producer of textile. On the other hand, the fabrics produced are generally low-end because the target segment is the large mass of the population: school uniforms for students, loincloth fabrics whose high consumption is motivated by cultural reasons (weddings and funerals).

There are several types of clothing products: haute couture products (men's and women's jackets and outfits) made by professional stylists, products from the clothing and hosiery industries: clothing products (work clothes, sports jerseys), underwear and underwear for children, men and women, linens whose quality has evolved a lot - they are also today the subject of international trade, especially at the level of the sub-region - finally, low-end ready-made products made by independent tailors and craftsmen.

Cameroon's supply of textile products is still lacking with regard to the production of yarns, mesh and polyester fabrics, high-end fabrics, t-shirts, various clothing products.

Industrial tailoring generally concerns work clothes, the clothing offer is mainly the work of stylists and tailors, which is therefore very limited. Miscellaneous products such as socks, shawls and scarves, blankets, mops, handmade items are in high demand in the United States, etc.

In Cameroon, the importance of the textile sector is not limited to the level of income it generates; textiles support more than a million people. The government has made the

development of this sector one of the priority actions of its integrated industrialization program. In addition, the American law on growth and economic opportunities in Africa (AGOA) gives a place of choice in terms of opportunities to this sector which was at the base of the process of industrialization in the West. This shows all the interest that should be given to a potentially important sector and which unfortunately is still slow to take off.

In this part, it is a question of making a fairly detailed description of the sector, in particular the main actors involved, the political and legal environment which governs it, their production capacity, their export offer, imports from the sector, the distribution channels and the problems that hinder the development of the sector.

II.1.1 Description of the actors in the value chain of the COTTON-TEXTILE-GARMENT sector

Several actors are involved in the sector. They vary according to each of the components of the sector. This is how we will have a particular type of actor depending on whether it is cotton growing, the transformation of cotton into cotton fiber, the transformation of fabric and clothing.

II.1.1.1 Actors involved in seed cotton production

In this segment, the main players are the Cotton Development Company (SODECOTON), the National Confederation of Cotton Producers of Cameroon (CNPC-C) , the Confederation of Cotton Producers of Cameroon (CPCC), the Producer Groups (GP), Producers and input traders.

1- The Cotton Development Company (SODECOTON).

It is a mixed economy company in which the Cameroonian State is the majority with 59% of the shares. The remaining capital is held 30% by Géocoton[1], and 11% by the Cameroun Security Investment Company [2](SMIC). Like all cotton companies in French-speaking Africa inherited from the French Textile Development Company (CFDT), SODECOTON is characterized by an integrated intervention combining the supply of inputs on credit, the marketing of seed cotton, ginning and the sale of fiber and seeds, mainly for export. SODECOTON is distinguished by a higher degree of integration by inserting the crushing of seeds to produce refined oil, cakes and livestock feed. Three formulas of these are produced[3]. The set of all the products mentioned constitutes the co-products of cotton. In the conduct of its integrated activities, SODECOTON has nine ginning factories and two crushing factories. For the transport of various products in the value chain, SODECOTON has a fleet of hook lift trucks especially dedicated to the evacuation of seed cotton and trailer trucks for various types of transport, including cotton lint. However, it partially uses private carriers and CAMRAIL rail transport.

[1]Company resulting from the privatization by the French State of DAGRIS, itself heir to the CFDT established in 1949

[2]This was created by Mr. Baba Ahmadou Danpullo during the attempt to privatize the SDCC in 1994 to buy back 48% of the shares with 1.5 billion CFA francs, whereas these shares made it possible at the time to distribute 2 billion of CFA francs in profits to their holders. The ensuing controversy led to a halt to the privatization process and the 11% finally allocated is the result of a compromise following a six-year legal episode.

[3]ALIBET produced in Garoua and NUTRIBET produced in Maroua, with a higher nutritional quality due to a greater richness in non-extracted oil. But also APPETIBET, with enrichment of the composition.

Its main activity is the supervision of the production and marketing of seed cotton. The technical supervision of farmers to grow cotton begins with the identification of input needs and the provision of technical advice. Initially carried out by its own staff, cotton cultivation supervision and monitoring activities are now carried out by the Producers' Groups with the support of SODECOTON and CNPC-C staff. The supervision covers the period from sowing to harvest; technical advice concerns the production of organic manure, tillage or non-tillage, weed control, mineral fertilization and pest control.

2- The National Confederation of Cotton Producers of Cameroon (CNPC-C)

The organization of CNPC-C is modeled on that of SODECOTON. It is made up of 9 federations and 48 unions corresponding to the 9 regions and 48 sectors of SODECOTON, covering approximately 2,000 identified Producer Groups, including 1,545 "active" in the management of input credit and the marketing of seed cotton.

The modes of operation of GPs, unions, federations and the confederation are quite similar. A GP includes on average a hundred members, cotton producers grouped together in Circles of Caution (CC) made up of around 5 to 10 producers. It operates with a steering committee, an extended office made up of the steering committee10 and the heads of all the CCs. The General Assembly (GA) is the supreme body for decisions. The federations and the confederation also have commissions to deal with specific subjects.

The day-to-day operation of CNPC-C is ensured by an executive director (furthermore made available by SODECOTON) according to the directives of the board of directors composed of 12 members (9 presidents of federations, 2 representatives co-opted by the producers and a representative of SODECOTON).

CNPC-C operates in concert with SDCC according to several agreements presented briefly in Appendix 5, namely:

- agreement for the management of a savings fund set up by the producers;
- agreement for the management of inputs and equipment to be acquired by import or local purchases;
- agreement for the sharing of the function of animation called today professionalization of the GP;
- breeding agreement;
- price risk management mechanism agreement.

3- Producer Groups (GP)

Nearly 2,000 Producer Groups, including 1,545 "active", also called GICs, were identified over the 2019 agricultural period. They provide two associated services, the distribution/management of inputs and equipment on credit from a on the one hand, and the marketing of seed cotton on the other. For this last service, the GPs are subject to a professionalization process provided jointly by CNPC-C and SODECOTON.

This operation is governed by a tripartite agreement entitled Triennial Partnership Contract GP/CNPC Cameroon/SODECOTON renewed or updated every three years.

The tripartite and three-year agreement corresponds to the objects of technical support for the production of cotton and food crops, the professionalization of GPs, the supply of inputs and equipment on credit and the marketing of seed cotton. It sets the rules for setting up GPs and the respective commitments of the three parties. The major things to keep in mind are:

- Any producer, to benefit from the input credit, must be a member of a CC, of 5 to 10 members except in special cases;
- The GP is responsible for the stocks of inputs deposited in his warehouse;
- GPs must recruit one or more crop monitoring agents;
- GPs must comply with the practical terms and conditions for the marketing of seed cotton specified in an appendix to the tripartite agreement;
- CNPC-C, in return, must support the GPs in their professionalization, together with SODECOTON and provide inputs and equipment on credit through SODECOTON;
- SODECOTON implements the inputs in the villages according to the orders of the campaign plan and recovers the amounts of the credits on behalf of the CNPC-C;
- SODECOTON has the obligation to provide technical support to producers.

In the operation of the cotton value chain, Cameroon has the particularity that inputs and equipment are owned by CNPC-C and granted on credit to GPs through the intermediary of SODECOTON. This differs from the frequent case where the cotton companies are the owners.

It is also important to, the day-to-day operation of the GPs is ensured by permanent staff paid by SODECOTON for a period of 8 months from a specific remuneration. This staff is made up of at least four people: a manager, a storekeeper, a watchman and a technical agent (for crop monitoring).

4- The producers

There are two main groups of producers, on the one hand those in partnership with SODECOTON who are registered in the blue list and those who can produce by buying inputs

in cash or by making arrangements with neighbors or acquaintances. It should be noted that in terms of data, those of the second group are difficult to obtain.

Producers appearing on SODECOTON's blue list are individuals who are identified and made responsible for the inputs they acquire on credit to produce and who receive the proceeds from the sale of the seed cotton produced. They are in contact with SODECOTON mainly through their CC attached to a GP.

They are obliged to be affiliated with CCs which they have formed by affinity in order to be able to acquire inputs on credit and sell the CG they have produced. The size of CCs varies from 5 to 10 members. The deposit means that the CC must compensate a defaulting member in the event that the latter is unable to repay all the credit taken. For the 2017-18 campaign, across SODECOTON as a whole, 151,336 producers were registered as eligible for input credit within 29,490 CCs under 1,693 active GPs, i.e. an average number of 5.1 producers per CC and of 17.4 CC per GP.

The table below shows the evolution of producers from 2010 to 2018 according to surface area

Table 1: Evolution of the number of producers according to cultivated area

	010	011	012	013	014	015	016	017	018
Number of cotton producers	06 123	65,719	08,776	26,491	04 302	94 249	70,416	52,612	58 211
of which number of producers			7,810	7,856	8,618	0 143	4,309	9,466	2,905
Number of farms concerned	06 123	65,719	08,776	26,491	04 302	94 249	70,416	52,612	58 211
of which number of farms with female producers			7,810	7,856	8,618	0 143	4,309	9,466	2,905
Number of producers with at least 5 ha of cotton	,247	,587	,632	,605	,363	,984	,837	,800	,588
% of total	.6	.6	.2	.5	.1	.1	.0	.1	.1
Number of producers with at most 5 ha of cotton	,654	,469	5 107	8,155	5,461	6,129	2,116	2,293	6,244
% of total	.2	.1	.2	.0	.6	.3	.1	.1	0.3
Number of producers with at most 2.5 ha of cotton	4,149	5,821	6 138	7 130	3,980	2,626	9 139	5,444	0,659
% of total	1.7	5.6	7.3	6.4	6.6	6.8	7.1	6.7	9.4
Number of producers with at most 1.0 ha of cotton	8,220	8,184	1,878	6,857	9,391	5,853	0 206	3,262	8,471
% of total	8.2	9.1	9.6	9.5	9.1	8.8	9.5	8.3	0.6

Number of producers with at most 0.5 ha of cotton	15,853	0,658	1,021	8,744	1 107	3,657	2 118	3,813	3,249
% of total	6.2	8.7	3.6	3.6	4.6	3.1	2.3	1.8	3.7

***Source**: analysis of the cotton chain of value in Cameroon, October 2019, EU commission*

In addition to the actors presented above, it should be emphasized here that, as in all the countries of French-speaking Africa, agricultural research is strongly involved in the development of the cotton value chain in Cameroon. It is the result of the association between national research and international cooperation. Since 2009, SODECOTON, IAD and CIRAD have been associated in a five-year tripartite collaboration agreement which was recently renewed in 2018 until 2022.

In the meantime, a co-ownership agreement was signed in 2014 to promote research results outside Cameroon, the additional resources that may result are intended for research in Cameroon II.1.1.2 textile processing actors

Two major groups of actors operate in this component, in particular industrial processors and small-scale processors.

Regarding the former, the landscape of actors involved in industrial textile processing, at least partially from local cotton, has shrunk a lot in recent years, especially since 2015. A World Bank study in 2015 had identified two players in spinning (CICAM and FAFINSA), three players in weaving (CICAM, SYNCATEX and SOCAFTEC), two players in knitting (BUETEC and FAFINSA), four players in finishing (CICAM, COFIL, BUETEC and SITRACO) , and four in clothing (CICAM, FAFINSA, BUETEC and Garment Makers).

In 2019, CICAM is the only actor in spinning and weaving, BUETEC is the only actor in knitting but from imported yarn. In the field of finishing from local cotton, CICAM is also the only actor really involved, the activities of COFIL are interrupted by a change of equipment and this company now only cleans up the waste from the ginning of the SODECOTON or the CICAM spinning mill to export the product obtained. In clothing, CICAM is the only company active in the production of terrycloth items.

1- The Industrial Cotton Company of Cameroon (CICAM)

The Cameroun Industrial Cotton Company (CICAM) has become the only entity industrially processing the cotton fiber produced in the country, and this to a very limited degree with a volume of fiber consumed ranging between one thousand and two thousand tons.

Established in 1965 by French industrialists, the company was taken over by the Cameroonian State in 2009 when the foreign investors of the time, French and German, had

decided to cease operations. Such a decision forced the Cameroonian state to take over the company to save jobs.

The company has two production sites. The Garoua site, with a very spacious factory capable of accommodating new production equipment, is dedicated to spinning and weaving. The products are then sent to the Douala site which has a dyeing and printing unit as well as a terry cloth production unit. The CICAM Group owns the LaKing Textile brands and the Newco chain of stores for the sale of its products.

The Garoua factory is dedicated to spinning and weaving, it has two production units of which only one is currently in operation, the unit of 400 looms having been shut down for a few years due to lack of investment capacity. Investments were resumed recently, in 2018, with equipment received, assembled but not commissioned. This plant operates with a staff of 403 employees, out of a total of a thousand within the group.

The factory combines very old machines with recent machines. All the machines upstream of the spinning mill, for cleaning and carding the cotton fiber are very old, sometimes dating from the creation of the factory. On the other hand, the spinning machines, according to the Open-end technique, are recent, the ring spinning machines have been reformed. The mill can spin fine, up to metric number 50, or coarse, to metric number 8 intended for tarpaulin or packing material. The weaving of this type of fabric is carried out in looms dating from the creation of the factory, alongside modern looms for the fabric intended for the loincloths. As an indication, artisanal weavers would ask for rather coarse thread, at Nm 16 to Nm 20.

The factory only produces ecru fabric. The quality of the fabric is checked to detect weaving defects, which are clearly evident for certain pieces being checked during our visit to the factory. The frequency of these faults would not be negligible.

The quantity of fiber processed is not completely converted into yarn and fabric, a rate of waste results from cleaning operations and then carding. The waste rate up to the spinning phase is estimated at 4-5%. During weaving, a rate of loss is also manifested by the breakage of the yarn and the setting operation. This rate is estimated between 1 and 2%. The waste is recovered, partly by COFIL and partly by craftsmen who make quilted products from it.

The factory has difficulty obtaining supplies of cotton lint from SODECOTON, which applies the same price to it as for export with deduction of unincurred costs. The factory buys IRIS grade cotton (see below, rather a medium grade) with a length of 1"5/32, which is longer than what the factory needs. The factory does not benefit from any pricing preferential for the acquisition of its raw material, nor for the price of energy (at 37 FCFA/KW against 17 at a certain time).

The Douala plant for its part was shut down for maintenance. The equipment consists largely of machines dating from the creation of the company. The aging of the equipment led to the establishment of an investment plan, the implementation of which, started in 2013, is however chaotic and irregular. An updated investment plan in the amount of CFAF 36 billion, of which a subset of approximately CFAF 18 billion is deemed the most urgent to materialize and which has even been considered for 2019.

2- Hydrophilic cotton from Cameroon (COFIL)

The Hydrophilic Cotton Company of Cameroon (COFIL) was created14 in 2007 to be the only one in the sub-region to process waste from ginning and spinning factories up to the production of hydrophilic cotton. The company was designed with two units located respectively in Garoua and Douala. The aim was to recycle in its Garoua unit the linter15 from the SODECOTON ginning factories and the waste from the cleaning of the fiber and carding before spinning in the CICAM spinning factory. The resulting product, after several phases of cleaning and mixing, is then sent to the Douala unit for export or to produce hydrophilic cotton (cotton is naturally hydrophobic) and related products for beauty care (like make-up removal discs).

However, the company interrupted part of its activities in 2014 to restart the Garoua plant in mid-2018. However, there is a reduction in activities, which is limited to cleaning and homogeneously mixing the fibers from linter and spinning waste and which have different lengths.

The absorbent cotton production unit in Douala, awaiting new equipment, has not yet resumed its activities, however, the company has acquired linter from SODECOTON since 2013/14, with increasing quantities of 383 tons in 2013/14 to 1754 tons in 2017/18. It can be assumed that the product obtained in the Garoua unit is exported outside Africa without being transformed into absorbent cotton.

Alongside the actors presented above, the census of operators in the sector carried out in 2014 by MINEPAT reveals the existence of VSEs, PEs and MEs in this component, particularly at the level of spinning, weaving/knitting, ennoblement and hosiery. The table opposite shows the workforce by segment.

Table 2: Breakdown of companies by business segment

Business segment	*TPE/PE*		*ME/GE*	
	Workforce	*Weight (%)*	*Workforce*	*Weight (%)*
Ginning	0	0.0	2	3.1
Spinning	7	0.0	4	6.3

Weaving/Knitting	61	0.4	1	1.6
Embroidery	0	0.0	1	1.6
Ennoblement	43	0.3	0	0.0
Hosiery	22	0.2	0	0.0

***Source**: INS/census of operators in the cotton/textile/clothing sector, 2014*

As far as small-scale processing actors are concerned, it should be noted that cotton-based textile crafts can be observed in the two regions of the North and the Far North, but their importance remains little known. In 2005, on the initiative of SODECOTON and in concert with the OPCC, a survey was conducted 40 km around Maroua to count spinners, weavers and embroiderers. Although the tradition of this craft remains, it seems to be declining with the lack of appeal for young people. There were then counted 217 spinners, 240 weavers and 22 embroiderers.

The starting point of the sub-chain is the seed cotton acquired locally by the spinners in the villages concerned, sometimes directly in the fields of these spinners when they have any. The low quantity withdrawn has a negligible impact on the production marketed for SODECOTON. The spinners manually gin the seed cotton before spinning the resulting fiber using a distaff. They are mostly elderly people, men or women, and they represent nearly 70% of the craftsmen involved in the village. To obtain a bobbin of about 20 g of yarn, four to five days of work would be necessary, including three to gin the CG by hand and one to two days for spinning. The craftsmen met are unaware that there are fairly simple tools for ginning, such as roller gins operated by a crank.

The introduction of this type of tool would greatly increase productivity without distorting the artisanal and traditional character of the products produced. The bobbins of yarn are acquired by the weavers at the price of 150 or 250 CFA depending on the fineness of the yarn. The weavers are men or women, young or old, most of them specialized in this activity even if some of them also do spinning. The weaving is done on small looms made on site, from small pieces of wood, bamboo bark, to obtain strips with a width varying from 2 to 4 cm. It is indicated that one month of work is necessary to obtain the 75 linear meters of fabric from a hundred bobbins of thread, the length necessary for a boubou.

Dressmakers, who also sometimes do embroidery, buy strips of fabric to assemble them manually before embroidering more or less complex patterns. The roll of fabric of 75 meters and a width of 2-3 cm is sold at 40,000 CFA. The product is completed after a beating phase to smooth out the irregularities of the strips of fabric and end up with an ironed garment. Threshing

requires strength and endurance and is carried out mainly by young men who are paid 5000 CFA/boubou.

II.1.1.3 Players in the clothing segment

The units operating in this segment are made up of clothing, fashion, hosiery and styling activities, representing nearly 91% of the units listed in the study conducted by MINEPAT. Three modes of production coexist at this level: an industrial or semi-industrial fashion, ready-to-wear (tailor-made clothing) and an artisanal mode (independent tailors) where we find the bulk of the operators in the sector. The table below gives the distribution of players by segment.

Table 3: Breakdown of companies by segment of activity

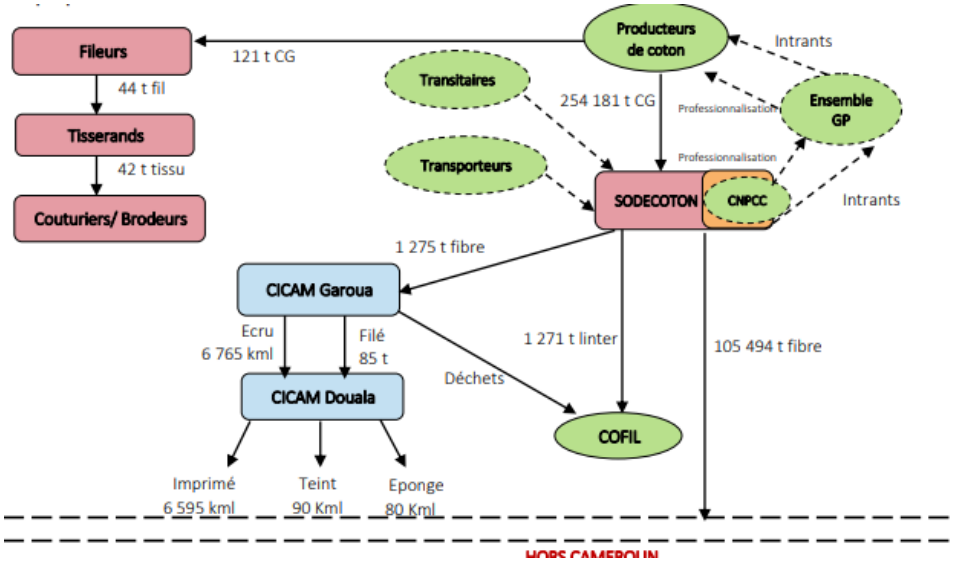
Business segment	***TPE/PE***		***ME/GE***	
	Workforce	***Weight (%)***	***Workforce***	***Weight (%)***
Hosiery	22	0.2	0	0.0
Confection	13,288	90.8	20	31.3
Fashion	36	0.2	0	0.0
Distribution	535	3.7	35	51.6
Haberdashery	627	4.3	1	1.6
quilting	1	0.7	2	3.1
Others	13	0.1	0	0.0
Together	14,522	100	58	100

Source: *INS/census of operators in the cotton/textile/clothing sector, 2014*

In general, it should be noted that several actors are involved in the sector in various segments. The cotton value chain in Cameroon is highly integrated with SODECOTON at its heart, which buys seed cotton from producers, gins it and triturates the seeds from ginning. It is also a value chain where two actors assume two important functions but in the form of service delivery in relation to SODECOTON instead of being directly executed by the latter: the Producer Groups in the management of input credits associated with marketing but also monitoring the agricultural campaign on the one hand, and CNPC-C in the supply of inputs on the other.

The graph below reproduces the relationships between the actors presented to highlight on the one hand the particular nature of the partnership between the SDCC and the CNPC-C for the services of supply of inputs to producers and professionalization of GPs, and on the other hand, the conduct of public service missions by the SDCC.

Figure 3: cotton value chain



***Source**: FOK et al. 2020*

II.1.2 Production capacities of the COTTON-TEXTILE-GARMENT sector

In terms of production capacity, it must be said that the sector has a comparative advantage insofar as Cameroon has favorable climatological conditions for the cultivation of cotton, which, it must be emphasized, is of good quality. In addition, SODECOTON, the main player in ginning, produces good quality cotton fiber (more than 90% of production is classified in the best grades) with a ginning rate equivalent to standards (42%). The real problem in this sector lies at the level of the transformation into fabric, which is still low, both in quality and in quantity, thus altering the production of the sector. The clothing segment also has strong potential. The production-specific aspects of each of the components are presented as follows.

II.1.2.1 Seed cotton production

Production is located in the North and Far North regions, where it concerns 30 to 40% of families. The strong land pressure in the Far North has led to a migratory movement towards the North and the overflow of cotton production into several areas of hunting interest (ZIC).

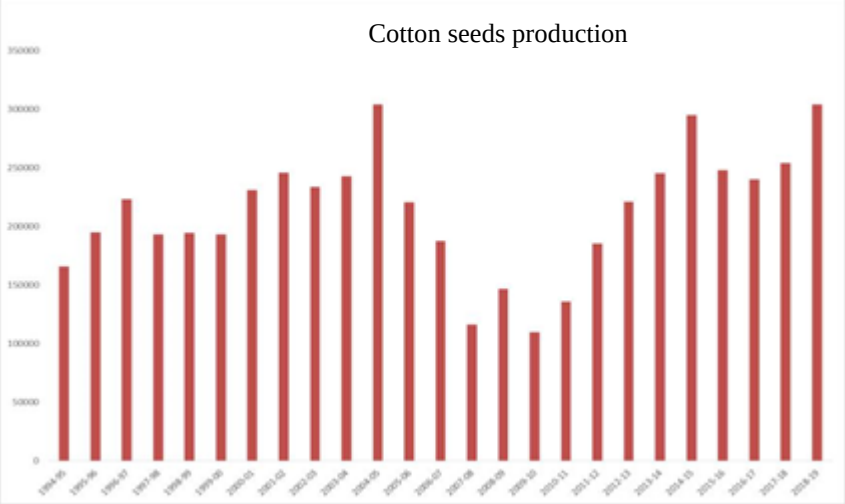
The yield of CG is the highest in French-speaking Africa (nearly 1400 kg/ha). The producers differ according to the size of the cotton sole. VC experienced a sharp drop in production between 2004 and 2010, following the sidelining of opportunistic producers who defaulted on loan repayment.

The reorganization of the input credit system enabled the recovery of production until in 2014-15 it approached the record production of the 2004-05 campaign. Such a recovery, however, was the cause of a serious financial crisis. The CV was not able to shell all the

production and to do so under satisfactory conditions because of the lack of industrial processing and transport capacities.

A recovery plan was put in place in 2017 to increase production with the upgrading of ginning and crushing capacities as well as means of transport for the evacuation of CG. This plan is a success in terms of the evolution of CG production, it allowed a production of 254,181 t of CG in 2017-18 on an area of 182,610 ha for 107,618 t of cotton-fibre (CF). However, without adjusting industrial capacities and given the objective of further increasing production, there is a high risk that the value chain (VC) will be subject to a new financial crisis of greater magnitude.

Figure 4*:* Evolution of cotton seeds production from 1995 to 2019



Source: *analysis of the cotton value chain in Cameroon, October 2019, EU commission*

II.1.2.2 Production of cotton fiber

At SODECOTON, ginning is carried out at 9 factories. These factories are located in the North and Far North regions of the country (Kaele, Tchatibali, Maroua, Guider, Garoua, Ngong, Mayo Galké, Touboro and Home). Each plant is equipped with two to four 170-saw gin stands, making a total of 26 gin stands, operating a total of 4420 saws.

The ginning capacity of the installed equipment depends on the equipment and its effective operating time. SODECOTON retains an effective ginning period of 150 days, ideally starting from the beginning of November to the end of April, but the number of effective days has been well below in recent years.

According to our simulations, the existing equipment can gin 300,000 tons or almost 380,000 tons with a speed of 12 kg/saw/hour with respectively 120 and 150 effective ginning days in the optimal period from November to April.

For the year 2017-2078, for a production of 254,181 t of CG, SODECOTON was able to produce 107,618 t of cotton-fiber (CF). However, it should be emphasized here that, from a quantitative point of view, the main indicator of industrial yield in ginning is the fiber yield (ratio of the weight of the fiber obtained to the weight of CG at the input). In Cameroon, this fiber yield exceeds 42%, against a seed yield of 53 to 54%, and a linter yield of 0.5 to 1% for a waste rate of 3.0 to 3.5%.

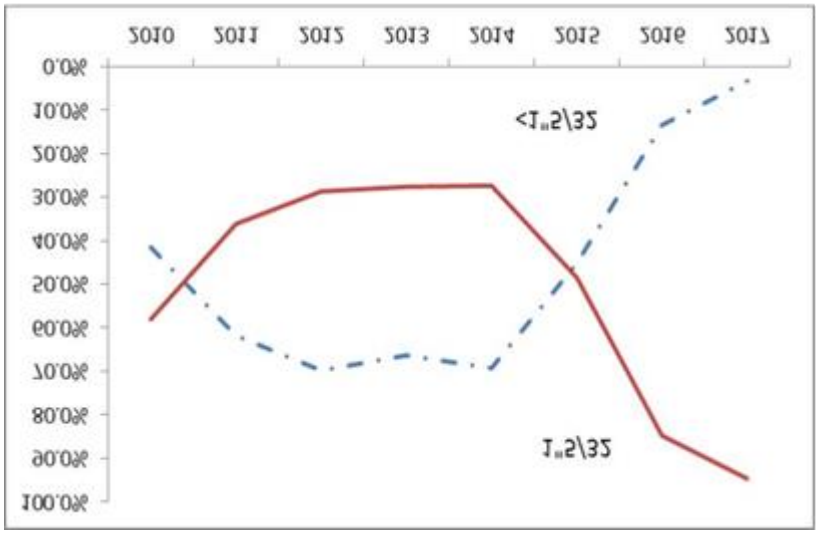
The large-scale distribution of the Q302 variety since the 2015-16 campaign has had a positive impact on lint yield at ginning. However, the gain in fiber yield has the effect of slowing down the rate of ginning, the same quantity of CG requiring more time to be ginned.

Cotton bale moisture content is another quantitative indicator of industrial performance that gets less attention, but wrongly so. Despite the functioning of the humidifiers, the rate reached in the SODECOTON factories would only be, at best, about 5%, against an admitted rate of 8.5%. For a production of 100,000 tons of fiber at the rate of 5%, increasing this rate to 7% would induce a gain in production of 2,000 tons of fiber, i.e. a value of two billion FCFA for an average price of one million per ton. Such a shortfall requires optimizing the operation or the humidification process of the CG before ginning and especially of the fiber before pressing, but this requires changes in the conduct of the ginning. It is also possible that the very dry climate does not make the task easy.

A quantitative indicator of less importance is the weight of the bales for which the international standard is 500 pounds gross weight (226.8 kg) or 478 pounds net weight (216.8 kg). The balls leaving the SODECOTON factory do not always reach the mentioned standard, but in a variable way between the factories. Cases of bullets weighing less than 190 kg have been observed but rarely. Lack of moisture in the fiber is a factor in the difficulty of pressing to achieve the desired weight.

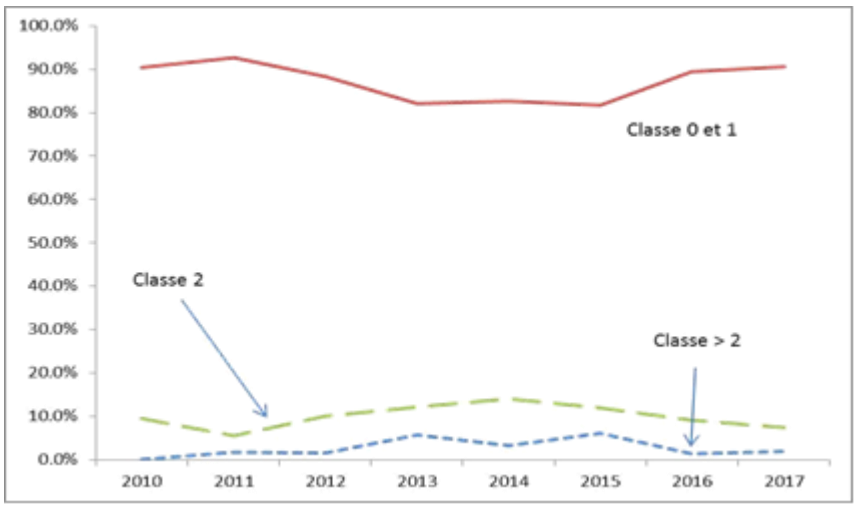
The qualitative indicators of cotton lint production are the characteristics of the fibre, essentially the grade and the length, and for which the performance obtained is good. The graphs below present the evolution of cotton fiber production according to these two indicators.

Figure 5*:* Evolution of fiber production according to length



Source: *analysis of the cotton value chain in Cameroon, October 2019, EU commission*

Figure 6: Evolution of fiber production according to grade



Source: *analysis of the cotton value chain in Cameroon, October 2019, EU commission*

II.1.2.3 Textile production

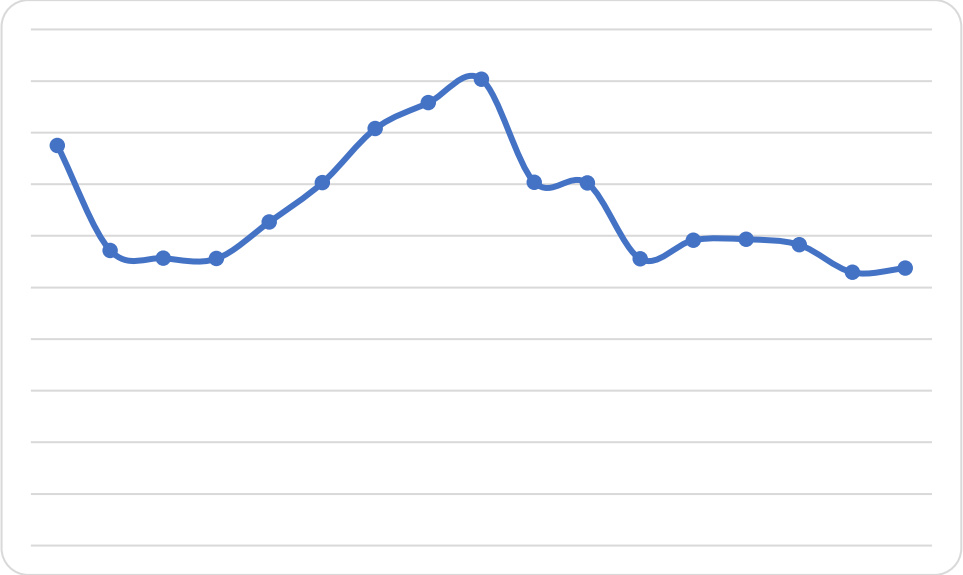
The above-mentioned World Bank study indicated that from 1,600 tons of cotton fiber, CICAM, the only company operating in the production of textiles, produced 1,500 tons of yarn, 8 million linear meters of loincloth and 300 tons of 'sponge.

Since 2013, this production has stabilized around 10-11 million meters. The production of loincloths is largely dominated by event products relating to major festivities in the country, but also in neighboring countries (Chad, CAR). In these countries, the textile industry has completely ceased to produce, despite the regional political will to develop it to promote locally produced cotton.

This production is concentrated in the first half of the year. The production of loincloth according to the patterns owned by CICAM takes place mainly in July. The factory aims to

process 2,200 tons of cotton fiber in the short term. It even has the ambition to reach 6,000 tons in 2021-22, although a loan of 5.6 billion negotiated to relaunch investments has not been successful recently.

Figure 7: Evolution of loincloth production



Source: *analysis of the cotton value chain in Cameroon, October 2019, EU commission*

II.1.2.4 Production in clothing

This branch includes more than a hundred SMEs. Three modes of production coexist at this level: an industrial or semi-industrial mode, ready-to-wear (made to measure), and an artisanal mode (independent tailors) where we find the bulk of the operators in the sector. . In the first two cases, the companies are of modest size (about ten employees at stylists and about thirty in certain industries). These numbers vary according to the pace of activities. These companies are quite well equipped on the whole, despite the many financial difficulties that hinder the expansion of their activities. Industries can produce up to 500,000 units per year, with production peaks during March 08 and Labor Day. Production capacities are used at nearly 40%.

Ready-to-wear is struggling to emerge despite the presence of many talents, the average annual production per unit is around 25,000 units. Significant production (nearly 100,000 units) can be observed with certain designers who have the possibility of winning large contracts such as the making of uniforms for the armed forces. Only a few fashion designers are trying to emerge: Blaz Design, Labo Style, Jeman Institute, Christalix, Groupe Ivy, Azengue, Afritude, etc., but their efforts remain limited.

In addition, informal micro-industries are developing. Equipped with 3 or 5 machines, they are made up of tailors working day and night alternately and managed by businessmen who are then responsible for buying back the production. Their production, generally made up of men's clothing (shirts, trousers, jacket sets) and women's (sets based on loincloth fabrics) is increasingly important. This production is sometimes marketed in specialized stores where it competes with imported products.

As for independent tailors, they are generally organized as a family with a workforce made up largely of apprentices. The level of production is very low (less than 1,000 units annually), with peaks during the back-to-school and end-of-year holiday periods. This important segment of their market made up of students is now being attacked by products imported from Asia. Some of them have, moreover, withdrawn to their homes and work on behalf of operators who are responsible for marketing the production, especially with regard to household linen (sheets, tablecloths, etc.). Overall, the modern branch's offer revolves around clothing and underwear for men and women, work clothes, T-shirts, linens and household items.

With regard to hosiery, a few companies like BOCOCAM, and SOLICAM, a subsidiary of CICAM and a few players in the informal sector continue to operate despite the strong competition linked to massive imports. Equipped with fairly efficient equipment, these SMEs have an annual production capacity of nearly 600,000 units each. Unfortunately, only 35% of this capacity is used. Major reason given: problems with the supply of raw materials, particularly in mail and polyester fabrics. Despite these problems that paralyze activities, the offer of this branch is varied and includes almost all knitwear items, namely undergarments and underwear for children, men and women, swimsuits, towels, etc. A production that is still in the low and middle range. The arrival of SOTEXCAM will no doubt bring great hope for the revival of activities in this branch.

As for other formwork activities (embroidery, screen printing, dyeing, printing, etc.) A few dynamic SMEs like BUETEC and MEDIA PLURIEL operate in industrial embroidery. Equipped with modern means, these SMEs largely dominate the local market and cover certain countries of the sub-region. Printing, screen-printing and dyeing activities are carried out in an artisanal manner by individual companies operating for the most part in the informal sector.

Some industries like CICAM and BOCOCAM have a production unit dedicated to these activities. Artisanal weaving and dyeing are particularly developed in the west of the country. They concern hessian (very popular for the manufacture of packing bags and traditional outfits) and a tree bark from southern Cameroon called "Obom" (which, according to certain specialists, can be used in the manufacture of hats, accessories and nonwovens). The potential would

therefore be considerable and these activities need to be modernized and enhanced to enrich the range of the offer.

II.1.3 Demand from the Cotton-Textile-Clothing branch

As was the case in the production of the sector, the analysis of demand will be done by component.

II.1.3.1 Demand for the seed cotton production component

Demand in this component is essentially made up of seeds and fertilizers.

II.1.3.1.1 Seed request

It should be noted here that in the absence of data on producers outside the blue list of SODECOTON, we will focus exclusively on the data provided by the SODECOTON network.

In this network, seeds are provided free of charge to producers, the cost of seed production is thus borne by SODECOTON. However, it is up to the producers to acquire, on credit, the products to treat the seeds before sowing. The delivery of seed treatment products is part of the input package provided for cotton cultivation. The seeds are distributed in doses differentiated according to the types of seeds, in a country where the sowing is carried out manually in an almost general way. Coated seeds are supplied at a dose of 40 kg per hectare, which is a quantity well above what is necessary, even taking into account the needs for resowing in the event of poor emergence. Delinted seeds are distributed at a dose of 20 kg per hectare. It should be noted that the use of coated seed is suitable for the current practice of manual seeding, but it would not be so by moving to the widespread use of delinted seed. Industrial delinting is most often associated with the chemical treatment of seeds, with special and more expensive products, the use of which would be less suited to manual sowing because the treatment products would remain stuck to the hands of the sowers (which must also be currently the case with coated seeds). The transition to the use of modern seeds that are delinted seeds is an opportunity to make the transition from manual sowing to mechanical sowing, a source of time saving and productivity. There are many models of seed drills with highly differentiated prices, offered for example in China, but whose seeding accuracy is correlated to the purchase price. A compromise will have to be accepted between seeding precision and access to the greatest number of seed drills.

II.1.3.1.2 The demand for inputs

For the inputs to be used during the campaign of year N, the acquisition process begins from the campaign of year N-1. The census of producers' needs is carried out from the plans for

campaign N after the sowing carried out in campaign N-1. The areas set aside for cotton and for corn and soybeans as well as the associated input requirements are consolidated for the entire GP. These campaign plans are validated by the General Managers of the GPs with the support of the SDCC Area Managers. They are then consolidated at the level of sectors, regions and the entire SDCC. The actual quantities to be ordered may result from a readjustment of identified and consolidated needs. This readjustment is the responsibility of the SDCC's DPA. It is the latter that decides on the quantities to be ordered and communicates them to CNPC-C, which is responsible for launching the calls for tenders and then placing the order. For fertilizers and herbicides as well as seed treatment products, calls for tenders are launched in September of year N-1, whereas they are launched in January of year N for insecticides. The requested delivery periods are such that the products can be put in place in the villages by the trucks responsible for evacuating the CG after marketing. Tenders are drafted by CNPC-C with technical support from SDCC. International tenders are launched for fertilizers, with CIF delivery position at the port of Douala. For pesticides, there are national calls for tenders for pesticides, with delivery position on truck in Pitoa, near Garoua. Through the acquisition process followed, CNPC-C is the player that acquires the inputs and then transfers them to the producers.

Figure 8 : Calls for tenders on herbicides launched from 2015 to 2018

Campagne		2015-2016					
	Unité	NPK	UREE	Herbicides + Ttmt semences	Insecticides	Matériels agricoles*	Total
Quantité	Tonne	15 000	4 200				
Valeur FOB**	10^6 CFA	3 060	815	2 895	7 810		
Valeur CAF	10^6 CFA	3 631	975	3 109	8 405	529	16 648
Valeur APEMS	10^6 CFA	5 192	1 419				
Valeur au prix de revient	10^6 CFA	6 324	1 732	3 388	9 527	529	21 498

Campagne		2016-2017					
	Unité	NPK	UREE	Herbicides + Ttmt semences	Insecticides	Matériels agricoles*	Total
Quantité	Tonne	38 000	11 000				
Valeur FOB**	10^6 CFA	7 877	1 869	2 731	6 562		
Valeur CAF	10^6 CFA	9 322	2 287	2 955	7 057	543	22 166
Valeur APEMS	10^6 CFA	13 294	3 405				
Valeur au prix de revient	10^6 CFA	15 680	4 056	3 222	8 000	543	31 501

Campagne		2017-2018					
	Unité	NPK	UREE	Herbicides + Ttmt semences	Insecticides	Matériels agricoles*	Total
Quantité	Tonne	45 000	12 000				
Valeur FOB**	10^6 CFA	6 789	1 464	3 125	4 940		
Valeur CAF	10^6 CFA	8 501	1 921	3 360	5 316		19 098
Valeur APEMS	10^6 CFA	12 329	2 915				
Valeur au prix de revient	10^6 CFA	14 859	3 560	3 648	6 025	457	28 550

* Principaux matériels agricoles (charrette, charrue, pousse-pousse, appareils de traitement)

** Position FOB, ou avant dédouanement

APEMS = Avant prise en main par la Sodecoton, donc à N'Gaoundéré ou Pitoa

***Source**: analysis of the cotton value chain in Cameroon, October 2019, EU commission*

II.1.3.2 Demand from the textile industry component

The reduction in CICAM's loincloth production could be a direct result of competition from Chinese products. This competition is tough and considered unfair especially when the imports are illegal with evasion of import taxes by false declaration on entry to escape the tax provided for textile products. The sale price of imported loincloths would be lower than the acquisition price of cotton fiber at the Garoua factory. The sale prices of imported loincloths are almost 50% lower, partly because these products are not 100% cotton, but only 30 to 60%. Standards for the control of imported textiles have been developed, including the integration of the 100% cotton criterion, to reduce competition from products from China. These standards are already implemented13. It remains to be seen whether it actually is. CICAM also suffers from indirect competition from second-hand clothes by reducing demand for new products. The thrift store hits CICAM's terrycloth items even more, whereas the latter enjoy a positive image with consumers, unlike the loincloths.

Massive imports of second-hand clothing (10 billion CFA francs in 2002) and the habits of certain consumers of shopping during their stays in the West have largely contributed to the decline in activities in this branch.

II.1.3.2 The demand for the clothing component

Demand for this component is essentially made up of textiles, the quality and quantity of which produced by CICAM still cannot meet local demand and thus forces players to resort to imports.

The local demand for textile products is of two types:

- ✓ Consumer goods for households, companies and administrations: this concerns a wide range of textile products: fabrics (for clothing), linens and household articles, various clothing products, knitwear and other articles in textile materials (bags, carpets, Greenhouses etc.);
- ✓ Intermediate consumption (raw materials) of companies in the sector: this demand includes threads (for embroidery, knitting, etc.), various fabrics (Loincloth, polyester fabric, knit fabrics and knit fabric), t- shirt (needs of embroidery industries) and accessories.

The sons

There are two types of threads in the markets, standard threads and specialty threads. Standard yarns are much in demand for their low price, they are used to make products that target segments made up of poor strata and a fringe of the intermediate strata of the population. They are found on the market, on average at 200 CFA francs per spool for yarn imported from China (or between 1,000 CFA francs and 7,000 CFA francs for the largest spools). On the other hand, in the field of high fashion, professionals sometimes look for specialized threads that could withstand the process of making and especially washing after use by the consumer. These superior quality products are partly imported from Europe and cost 2 to 3 times more than standard products.

The fabric

The fabric offer is particularly varied on the Cameroonian market: loincloth fabrics, terylene and poplin fabrics, muslin, floral, various linings, ecru fabrics, cotton fabrics, terry fabrics, special fabrics (linen, silk, velvet, gabardine, and super 100), upholstery, etc. CICAM, the main local supplier, is well established across the country; however, it has to face fierce competition with Asian products and products from West Africa (mainly Côte d'Ivoire and Nigeria). The loincloth market is particularly developed due to high consumption. The CICAM offer is quite large and, in the opinion of the operators, the quality of the loincloth fabrics has

improved considerably. Prices vary between 4,000 CFA francs and 16,000 CFA francs for 6 yards. Other very competitive products abound in the markets, in particular Chinese and West African loincloths (Nigeria, Benin, and Ivory Coast), English and Dutch waxes, and bazins of all ranges. Some contraband products are printed with the same patterns as those manufactured by CICAM or other West African spinning mills, which creates enormous confusion in the market. And in the opinion of retailers, it is sometimes difficult to discern the origin of the loincloths that are sold on the market. A situation that leads to huge losses among manufacturers because contraband products are sold at very low prices. In general, consumers attach great importance to the design and quality of the loincloths, which leads some traders to give some practical advice to customers on the maintenance of the loincloths. Other fabrics, in particular terylene (any variety) and poplin, muslin, floral are in high demand on the markets, much more for their low price than for their quality. They are generally used for making school and city outfits. They are the basis of the clothes of the less well-off sections of the population. These fabrics are generally imported, and sold in rolls of 30 meters or in detail between 600 CFA francs and 1,200 per meter. The most common colors are blue, green and red, school colors.

Still in the same range of products, we find what is locally called the bulk, bundles of second quality fabrics imported from Europe. There is a bit of everything, linings, various fabrics (terylene fabrics, towel fabrics, sheets, jeans, etc.). The prices vary between 1,000 CFA francs and 2,000 per meter, which makes it a range of products in great demand by individual companies. Other types of fabrics including unbleached fabrics, woven fabrics, silk, synthetics, knit fabrics and others are present on the markets. They are used much more as raw materials for stylists and SMEs in the manufacture and hosiery industry. Asia (China, Hong Kong, Malaysia, Thailand) is the main supplier of these products, with CICAM's local supply (in unbleached and synthetic fabrics) having difficulty establishing itself with manufacturers. Similarly, the market for upholstery and interior decoration fabrics is essentially dominated by products from China.

Linens and household items

Linens and household items include tablecloths, bed linens, napkins, chair backs, curtains, cushions, rugs, mops, etc. The linens come in the form of single pieces or sets comprising, for example, a tablecloth, four to six placemats and napkins (in the case of table services) or a sheet, two pillow tees and a bed-cover. On the Cameroonian market, household linens can be classified into four categories according to style: (i) flat woven, plain or colored,

with simple or embroidered undersides, etc. (ii) flat weaves with printed designs, (iii) jacquards with or without embroidered fringes or plain weaves with various levels of embroidery, and (iv) handmade or machine-made lace articles. There are no particular distinctions on other products. The top of the range linens include jacquards or silk (bed linen), with or without embroidery, interior blinds. The curtains are generally perfectly embroidered on canvas backgrounds. These products are produced by a few emerging local SMEs and imports from China and Western countries. In general, they are popular with wealthy strata or certain consumers who are looking for gifts to offer on the occasion of weddings or birthdays. Mid-range items are sometimes embroidered or in hand-made or machine-made lace. The prices of curtains vary between 2,000 CFA francs and 3,500 per meter that of pairs of sheets between 15,000 CFA francs and 25,000 CFA francs (mid-range), between 30,000 CFA francs and 45,000 CFA francs for tops of range. Low-end products are generally simple.

Clothing and lingerie

Unlike yarns, fabrics, and linens, clothing items are subject to rapid fashion changes. The market includes thrift store products of all types, classic made-up items (shirts, trousers, skirts, sets or suits for men, women, etc.), work sets, traditional outfits or outfits made from loincloth fabrics, items hosiery, children's clothing, etc. Second-hand clothing imports have seriously affected the demand for clothing products. The prices charged are extremely low for the different types of products compared to the prices charged in specialized stores. Currently, only the upper class and a segment of the middle layer of the population frequent specialized clothing stores. Moreover, young people of all persuasions dress in Western style (the influence of television series is very marked among this segment of the population). They have an excessive penchant for so-called “trendy” or “fashionable” clothing products that they find in the thrift store. You can get city outfits with the sum of 5,000 CFA francs, jacket sets with 15,000 CFA francs or 50,000 depending on the quality of the fabrics. The clothes made are varied. Work clothes are made by local SMEs, men's clothing (shirts, pants) and women's (sets with loincloth fabrics made by organized groups of tailors. Prices vary between 3,500 CFA francs and 8,000 CFA francs for work clothes. labor and between CFAF 5,000 and CFAF 10,000 for men's and women's clothing A market in which many informal units operate There is no modern clothing industry for men, women and children, the local supply being ensured by tailors and stylists (micro-enterprises); it is increasingly important despite the strong presence of imported products. These imported products come from Europe and Asia. There are men's sets women's and women's clothing (in smaller quantities), men's and women's lingerie and children's clothing. Intermediate quality products from Asia are currently flooding

the market, particularly in this area concerning knitwear: underwear, T-shirts, knitwear, underwear, sports sets, etc.

The prices charged are well below the average, which raises questions for products subject to both customs duties and transport costs. The decline in household incomes during the crisis years contributed greatly to the breakthrough of these products on the market. The Cameroonian consumer is generally very sensitive to style and fashion. On the whole, the population has clothing habits that conform to Western standards, even if the use of loincloths is developing more and more, especially during commercial and cultural events. A considerable part of the population, particularly in the Muslim zone, has preferences for traditional ensembles and boubous. They are made locally with loincloth fabrics. Among the top-of-the-range products, we find boubous in enriched bazins, perfectly embroidered. The difference in the ranges of these clothes is much more about the quality of the loincloth fabrics. High-end boubous can be around the sum of 200,000 CFA francs, against 10,000 CFA francs to 20,000 for the low and mid-range.

Children's clothing and items (swimsuits and underwear commonly called caddies and absorbing sets, onesies, bras, etc.) are largely imported from Asia for the low end and from Europe for the mid-range. You can find them on the market at less than 10,000 CFA francs for the low end, and at nearly 25,000 CFA francs for the mid-range. The top of the range having practically no clientele. White is the most popular color.

On the market, there are three types of bags depending on the base material: jute, fiber and fabric bags. Jute bags are imported or woven locally but in an artisanal way. They are used for packaging agricultural products (coffee, cocoa and other food products). Agricultural cooperatives therefore constitute a very important segment for these products with regard to their needs. Fiber bags are the most common; they are generally used by households for shopping, traveling and for packaging food products. The prices of these items vary between 100 CFA francs or 1,000 depending on the level of resistance of the product and the dimensions. Bags made of loincloth fabric generally come in the form of travel bags, a model that came from West Africa and spread to Cameroon in the 1990s. The WAEMU zone also exports nearly 1.6 billion CFA francs worth of bags in Cameroon. The specifications mainly relate to the degree of resistance of the bags.

II.1.4. Positioning of the sector in economic activities

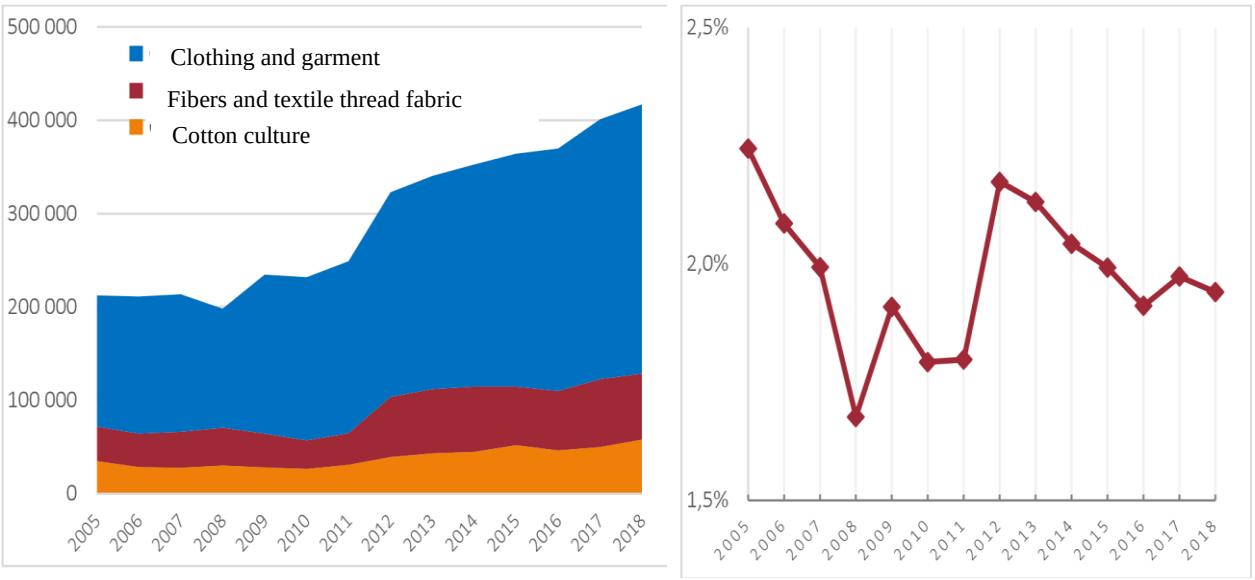
This positioning is defined along three axes, namely: the added value of the sector, jobs in the sector and foreign trade in the products of the sector.

i. Added value

The share of added value (VA) of the Cotton-Textile-Clothing sector in the Gross Domestic Product (GDP) is on average 2% over the period 2005-2018. For the years 2005 and 2012, this share reached its maximum value, located at 2.2%, corresponding to a level of wealth creation estimated at 322.9 billion FCFA.

Regarding the different segments of the sector, with an Added Value oscillating between 127.7 billion FCFA and 288.4 billion FCFA over the period 2005-2018, the clothing link presents the best performance in terms of wealth creation. The share of the VA of this segment is thus between 64% and 75% of the total VA of the sector over the period considered. With regard to the textile industry, its share in the creation of wealth in the sector varies between 13% and 20%, with a peak achieved in 2017 and corresponding to an Added Value evaluated at 72.7 billion FCFA. As for cotton cultivation, over the period 2005-2018, its Added Value oscillates between 27.5 billion FCFA and 58 billion FCFA, with a share in the total Value Added of the sector capped at 15% over the period.

Graph 1: Value added of the segments of the sector (in millions of FCFA) and share of the value added of the sector in the GDP (%)



Source: *INS, national accounts*

ii. Jobs

The census of operators in the Cotton-Textile-Confection sector in Cameroon (MINEPAT and INS, 2014), reveals that it concentrates a total of 66,681 jobs (including apprentices and temporary staff), of which 9% work in ME/GE compared to 91% in VSE/PE. On average,

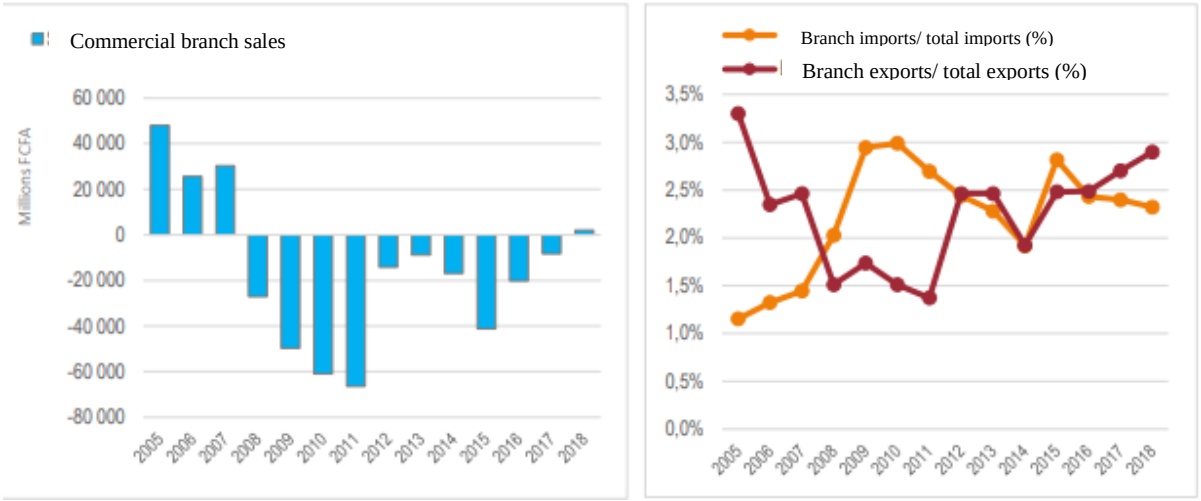
VSEs/PEs employ just over four people per company, compared to 136 employees per company for MEs/GEs. In ME/GE, the activity segments that concentrate the most labor are: ginning (2,770), spinning (1,486 jobs) and distribution (369 jobs).

iii. Trade

Between 2005 and 2018, the value of exports of products from the sector increased from 76.8 billion FCFA to 120.3 billion FCFA. However, this trend corresponds to a decrease in the share of exports from the sector in total exports, which fell from 3.3% to 2.9% over this period.

Regarding imports of products in the sector, their value went from 28.7 billion FCFA to 118.2 billion FCFA, i.e. an increase in the share of imports of these products in total imports from 1.2% to 2, 3% over the period considered.

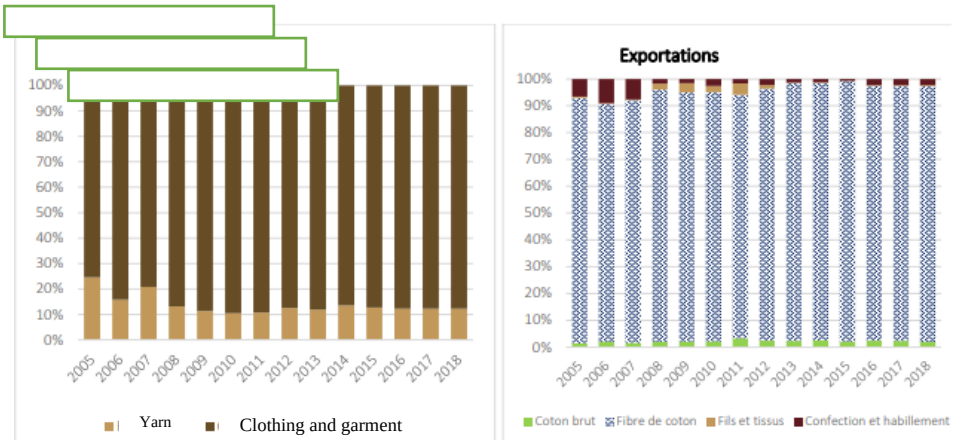
Graph 2: Trade balance of products in the sector and share of the sector in total trade



Source: *INS, national accounts*

Foreign trade in the sector's products shows a deficit balance from 2008, with a peak observed in 2011 when this deficit reached 66.4 billion FCFA. However, since that date, there has been a strong improvement in the sector's exports, driven mainly by cotton fiber exports, which have improved the balance and made it positive in 2018. Between 2005 and 2018, with an average export share of 93.5% of the sector's total imports, cotton fiber is the sector's main exported product. On the other hand, the main imported products of the sector are the products of the clothing link. Indeed, with a value of 103.6 billion FCFA in 2018 against 21.6 billion FCFA in 2005, the imports of these products represent in 2018, 88% of the imports of the sector, against 75% in 2005.

Graph 3: Share (%) of the value of the different segments in the foreign trade of products in the sector



***Source**: INS, national accounts*

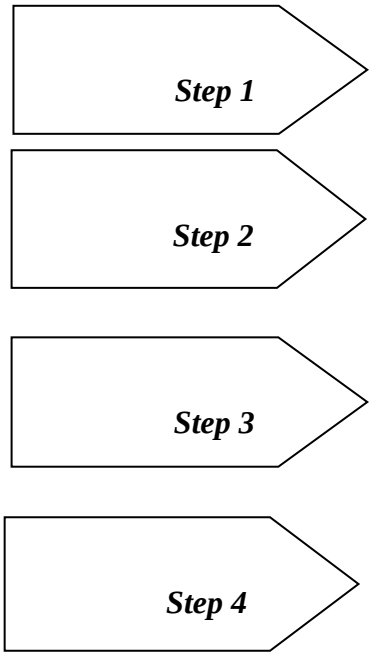
II.2 OVERVIEW of the Leather and Shoemaking branch

The fashionable leather shoes, bags and clothes sold in city stores and markets around the world are the result of a long and diverse process that begins with raising cattle, sheep and goats on small farms and large agricultural industries, mostly located in the far north of the country (Adamawa, North and Far North). Animals are bred and then slaughtered before their hides are harvested, tanned and turned into prepared leather. The latter is later transformed into different articles marketed and sold all over the world.

In this part devoted to the OVERVIEW of the leather branch, it will be a question of returning in detail to its description by highlighting the various actors who intervene there, by presenting the situation of supply and demand of the branch and finally its positioning in the Cameroonian economy.

II.2.1 Description of the leather value chain

The leather value chain presented above in Figure 2 begins with breeding, the source of the raw material, followed by four main stages, three of which are processing and one marketing.



Recovery of hides and skins from slaughtered animals on farms or slaughterhouses

Conversion of hides and skins prepared in tanneries, an operation which normally requires a large material investment

Manufacture of leather products, often carried out in small, labor-intensive workshops but which require less large investments in equipment or large, capital-intensive factories

Marketing, nationally and internationally, of intermediate and final products different stages of the value chain

II.2.1.1. Step 1: Recovery and drying of the skins

After the rearing and slaughtering stage, which will not be addressed specifically in this document, comes the stage of recovering and drying the skins and hides, which truly represent the first stage of the sector.

It can be broken down into two sub-steps, namely dressing and drying. Dressing is the practice of removing the skin and preparing the edible part of the animal. It is generally carried out directly on the ground as soon as the animal is slaughtered without respecting particular standards.

Drying involves salting the skin and drying it before sale. Depending on whether it is intended for consumption or for the tannery, it will be more or less rid of flesh and fat. It is generally done on the ground and is stored in small corridors.

II.2.1.2 Stage 2: Conversion of hides and skins

The production of prepared leather from hides and skins consists of the conversion of leather or raw hide, a putrescible material, into prepared leather, a stable material. This material is obtained through the different stages of treatment and transformation. The production operations of a tannery can be grouped into four broad categories, although those relating to each category may vary depending on the raw material used and the final articles to be

produced. These are the storage of hides and skins and tanning operations, river bathing and liming, tanning operations and finally finishing operations.

- ✓ Storage of hides and skins and tanning operations.

The skins of slaughtered animals are recovered from farms or slaughterhouses then sorted, trimmed, dried (when the raw material cannot be processed immediately) and stored pending river work.

- ✓ River bath and liming

This step is subdivided into three sub-steps: soaking, wetting and rinsing the skin with water. This is done either with detergent, bactericide or bleach. These operations remove blood and other dirt from the skin. Then, the skin is limed to evacuate hairs, or moults for reptiles. The craftsmen for this use wood ash, supported by "lime" and the operation lasts three days, during which the hairs will easily leave on the skin.

The second stage of the process, liming which lasts about 24 hours, consists in neutralizing the skin by making it lose its basic property by using enzymes called bird droppings (these are small bird droppings that the craftsmen collect) . To carry out this operation, it is necessary to have as equipment the drummers, the pre-soaking tanks, the sewing machines and the fleshing machines.

- ✓ Tanning operations

The conversion of hides and prepared leather in tanneries is an operation which normally requires a large investment in equipment. The following operations are normally carried out in a tannery: deliming, bating, vegetable tanning, pickling and tanning.

Deliming **/confiting** to stop the action on the skin of lime and clean it thoroughly while **vegetable tanning** is the process of immersing the skin in large vats or letting it rest in a solution saturated with vegetable tannins making the breast leather. This step already makes it possible to market vegetable-tanned leather, which is a stiffer, firmer and more solid material.

Pickling prepares the hide for mineral tanning by reducing its ph. Pickled hides, for example, sheepskins, may also already be marketed. During the tanning process the collagen fiber is stabilized by the tanning agents so that the skin (the raw material) becomes rot-proof. The tanned skins, once converted into a rot-proof material called leather, are marketable as intermediate products (wet blue). However, if the leather is intended to be used for industrial manufacturing, it will be necessary to provide for subsequent treatments and finishing.

It should be added that this stage is made possible by fullers and wringers.

- ✓ Operations after tanning

They mainly consist in the elimination of the acids still present in the leather due to the tanning operation. Depending on the type of leather to be produced, the leather is re-tanned to improve the feel, dyed using water-soluble dyes to achieve an even color across the surface of the leather or hide, nourished through a process of lubrication to obtain the original characteristics and restore the fats lost during the previous operations and finally dried. After drying, the leather can be given the name of crust leather which can be marketed as an intermediate product.

It should be noted that the operations carried out outside the river work, tanning and post-tanning operations are often called wet work because they are undertaken in barrels filled with water to which are added the chemicals necessary to obtain the desired reactions. Following the operations after tanning the leather is dried. In general, the hides and skins are marketed in the salted state or, more and more often, in the intermediate state, in particular in wet blue for the skins of cattle and in pickle for the skins of sheep.

- ✓ Finishing operations

The art of finishing is to give the leather as light a finish as possible so as not to mask its characteristics, such as its appearance and its ability to breathe. The purpose of the work is to treat the upper surface (flower) to give it the desired final appearance. By application of primer coats (or coating) to block the pores before the application of real finishing coats, satin finishing, printing by pressure of a heated grained plate or by a roller system and ironing which is a pressing with a heated smooth plate to give a surface as smooth and satiny as possible, the leather will have, according to fashion demand, a glossy or matte appearance, single-color or marbled, smooth or rough.

The main objective of finishing is to enhance the appearance of the leather and to meet the qualities demanded in terms of color, glaze and hand, among others.

In addition to these four stages, linked to the treatment of the skin, until obtaining a finished leather of good quality, there is generally a fifth component which relates to its marketing.

- ✓ Marketing and distribution of leather

Dried raw hides are sold, in the case of those destined for the tannery, to some extent to markets in the northern regions and largely to Nigeria and some European markets such as Italy. As far as consumer leather is concerned, it is sold mainly on the Cameroonian and Nigerian market. It should be noted that for the latter, Nigerian buyers go so far as to pay in advance for stocks of around three months.

II.2.1.3 Stage 3: Manufacture of leather products

Leather products are quite diverse and can be grouped into two main categories namely, on the one hand, utilitarian products and on the other hand, cultural and ornamental products.

As for **utility products,** we can cite among others sandals (samaras), women's bags, men's bags, men's wallets, belts, etc. In a more structured way, they can be grouped around four groups, namely:

- ✓ Small leather goods: coin purses, ticket purses, CNI purses, etc.
- ✓ Office items: document holder, pen box, desk pad, box, satchel, diary, etc.
- ✓ Products for men: belts, men's shoes, sandals, bags, etc.



- ✓ Women's products: handbags, shoulder bags, shoes, backpacks, sandals, etc.

With regard to cultural and ornamental products, these are, on the one hand, items requested for holidays such as:

- ✓ The leather pants of the Lamido riders for the fantasia
- ✓ The knife sheaths
- ✓ Horse saddles for parades
- ✓ Fetishes and various vials

On the other hand, these are decorative objects and household equipment such as:

- ✓ Wall rugs and tablecloths
- ✓ Floor mats
- ✓ Cushions and leather lounge with horn bases

II.2.1.4. Marketing of leather products

As for finished products and other items, they are mainly sold in Cameroon, through local traders who sell them to the populations of the far north and to tourists, but also, in the markets of Douala and Yaoundé to the tune of more than 5 million per month. Items are also smuggled into markets in Chad, Gabon, Equatorial Guinea and Nigeria. However, more formally, the items are sold in Europe either through traditional exporters or through fair trade networks (FAIR *TRADE)* with purchasing groups such as EFTA, Tradecrafts and EZA. The best-selling items are handbags, leather goods, bracelets and watches, trunks, belts and briefcases.

Table 4: Breakdown of demand for leather goods in Cameroon

Market	National	Sub-Regional	Sightseeing	Europe (export)
Weight by customer type	80%	15%	4%	1%

Source: *Our calculations/SIARC 2021*

Items are sold at the following prices:

Table 5: Prices of items sold

	Price range (FCFA)	Approximate Quantity Sold/Month
Sandal	**15000 to 20000**	**14**
Bags	**10000 to 15000**	**15**
Necklace	**7500 to 10000**	**40**
Leather shoes	**5000 to 10000**	**60 to 100**
Bracelet	**3000 to 5000**	**30**
Leather mats	**70,000 to 100,000**	**11**

Source: *Our calculations/SIARC 2021*

II.2.2 Actors involved in the leather value chain

Several actors are involved in this process depending on each of the above steps.

II. 2.2.1 Slaughter and recovery of hides

This operation begins in slaughterhouses, of which two main categories can be distinguished: modern or industrial slaughterhouses owned by SODEPA and community slaughterhouses.

With regard to modern slaughterhouses, SODEPA has three slaughterhouses in Douala, Yaoundé and Ngaoundere. These slaughterhouses, which it would be permissible to consider as semi-modern, have the particularity of having equipment such as winches. These slaughterhouses have a fairly large capacity. By way of illustration, the number of animals slaughtered per week is on average 4,500 animals per week, mainly in the 2 slaughterhouses of Douala and Yaoundé.

The other slaughterhouses which are considered simply as **slaughtering areas** are about thirty spread over the different regions of the country. These different areas, depending on whether they are located in the main town or on the outskirts, can have cemented space, hanging hooks and water wells. The number of slaughters per region per day can be estimated at around sixty.

Whatever the type of slaughterhouse, it should be noted that a set of actors allow their organization and operation, including in particular a structure such as SODEPA, the lawans, the sarkis, the veterinarians and the technical staff of the slaughterhouses.

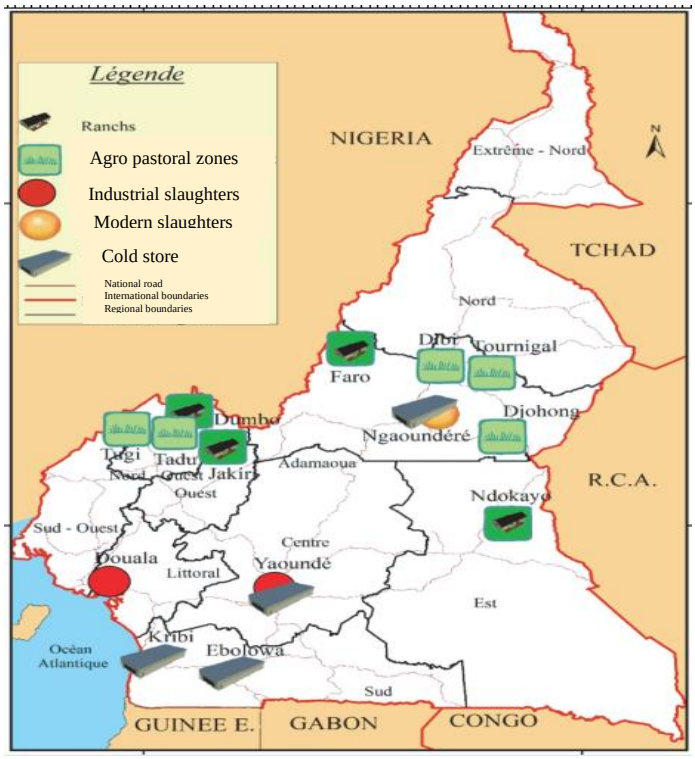
The company for the development and exploitation of animal products (SODEPA)

The Society for the Development and Exploitation of Animal Products (SODEPA) was created by Decree No. 74/182 of March 8, 1974, amended and supplemented by Decree No. 81/395 of September 9, 1981. Its purpose is to produce at at the national level, fresh meat products for household consumption and derived products through the management of ranches, slaughterhouses and butcheries .

Public limited company with a board of directors with a capital of 833,750,000 FCFA whose head office is located in Yaoundé (NFANDENA) having for technical supervision the MINEPIA and for financial supervision the MINFI , the development company, SODEPA has a land holdings of approximately 383,233 hectares. From a practical point of view, it has Operational Units (see figure 1) which allow it to carry out its missions: ranches , land management areas , agro - pastorals and threshers .

- ✓ The Faro Ranch (Adamaoua) with an area of 60,000 ha;
- ✓ The NDOKAYO Ranch (East) with an area of 144,000 ha;
- ✓ The DUMBO Ranch (North-West) 38,000 ha;
- ✓ The JAKIRI breeding station (North-West), 600 ha.

Figure 9: SODEPA slaughterhouses and operational units



Source: *SODEPA 2017 activity report*

The modern SODEPA slaughterhouses in Yaoundé and Douala have two slaughter lines: one for cattle and the other for pigs and sheep. With a capacity of 1,200 animals per day, these slaughterhouses, along with that of Ngaoundéré, are among the most modern in Cameroon. Construction projects for other slaughterhouses are maturing , these are slaughterhouses for the cities of Maroua and Bamenda. Mobile slaughterhouses for pigs and small ruminants have been built and will soon be put into operation in Mbankolo and Nkol'Ewoe respectively in Yaoundé and Douala. These production units will expand

The Lawans and Sarkis

The Lawans is an intermediate title between the Lamido (traditional chief at the regional level) and the Djaorous (traditional chief at the level of a district) whose specialized bodies have been created since French colonization. These are the Lawans specialized in craft trades: Lawan shoemaker, Lawan leather goods, etc.

The Sarki-pawa is responsible for the slaughter of cattle in the large markets of chieftaincies and towns. Formerly notable in its own right, it is now under the responsibility of the Urban Commune and the Sub-prefect. Next to the Sarki-pawa we can find the Sarki-sanou

who was nothing more than the leader of the Lamido herd and responsible veterinarian in the 1930s. This last position is increasingly rare these days.

Nurses

Veterinary nurses play a very important role in slaughterhouses and slaughter areas. Indeed, it is mandatory that each slaughter operation be carried out under the supervision of a veterinarian who must, at the end of the operation, anchor a stamp on the carcass of the animal signifying in general that the process to be followed standards and that meat is healthy for consumption.

The slaughterhouse staff

The slaughterhouse worker or operator for those who are more or less modern has the task of: bleeding, skinning of the skin, evisceration, splitting of the carcass, boning, trimming of the meat, final weighing, and refrigeration. Depending on whether you are in a modern slaughterhouse or not, these different operations are more or less facilitated by equipment and more or less automated.

II.2.1.2 Tanneries

A distinction is made between industrial tanneries and artisanal tanneries . With regard to artisanal tanneries, in 2022 there are more than 49 artisans in the North and Far North Regions.

Industrial tanneries

STPC, NOTACAM, TANICAM and TMV

The Cameroonian government created the Cameroun Tannery and Cookery Company (STPC) in 1974 and made it operational in 1978 in Ngaoundéré, which was preparing to host the construction project of a modern slaughterhouse. The STPC became by the integration of the French firm CFAO the industrial tannery of Cameroon (TANICAM) in 1985 with the statute of parastatal company aiming at valuing hides and skins. TANICAM ceased its activities in 1991, went into liquidation the following year and then bought in 1996 by the New Cameroon Tannery Company (NOTACAM) located in Maroua, which is mainly focused on the collection, pre-tanning and export of leather and skins in a semi-tanned state.

The company recovers less than 10 % of the slaughterhouse's production, the rest being used for human food. NOTACAM changed its corporate name to Vina Tannery and Taweries (TMV), which succeeded in obtaining free zone status. However, the latter began to slow down its activities from 1998 before stopping them completely in 2004.

WORIKA Tannery

Alongside the companies mentioned above which have a strong public dimension, we can also add the WORIKA tannery located in Douala created by the Italian Vincenzo Cioffi who ceased his activities in 1998 for supply-related difficulties.

African Society of Skins and Leathers

The African Society of Skins and Leathers (SAPC) was created by the Frenchman Giorgio Fassio in Garoua.

Today, there are no large companies in the industrial tannery.

Artisanal tanneries

- ✓ The Traditional Tannery of Cameroon is an association within which are grouped collectors of animal skins, tanners, leather workers, upholsterers, shoemakers, sellers of leather products, sellers of chemical products intended for the treatment of leather , etc. aims, we learned from sources within the sector, to seize the opportunities offered by the local market;
- ✓ Individual tanners, a profession that developed very early following the Islamic invasion which made the city of Maroua an artisanal capital of that time;
- ✓ GICs such as COTAFAC in Garoua which brings together around twenty tanners and TATCAM located in Maroua with more than 50 tanners

It should be said that these tanneries are also interested in the skins of domestic animals such as ox, sheep and goat, as in wild animals from hunting such as hyenas, antelopes, buffaloes, panthers, lions and monitor lizards.

Craftsmen

They are most often found in the manufacture and repair of shoes. They are mainly from the Gijiga, Moundang, Toupouri and Massa ethnic groups.

The products are quite varied: bags, shoes and sandals, knife cases and handles, guitars, chairs, sofas, pedestal tables, poufs, lounges with ox horn legs, etc.

They are mainly of two categories, leather craftsmen and shoemakers.

Traders

The marketing of leather-based articles, as indeed for all other handicrafts, is done through five channels: directly, through themed shops, in shops/galleries, online art shops and through classic shops which are located either in the craft villages or in the old points of sale of craft products.

- ✓ ***Direct sales:*** these are mostly orders that some customers place directly with craftsmen in return for an advance which represents half or a little of the total amount.

- ✓ ***Theme shops/networks*:** These are generally shops in the fair trade network such as PRESCRAFT.
- ✓ ***Shops/Art Galleries*:** these are craft promoters who have succeeded in creating art galleries and/or art shops where pre-selected works are either purchased or taken on credit and exhibited in towns and areas with strong tourist appeal.
- ✓ ***Craft villages/sales spaces*** : These are shops found in craft villages and those in craft centers such as the craft hub in Maroua or the Tsinga craft space in Yaoundé
- ✓ ***Online sales:*** more and more are emerging virtual galleries that offer the possibility of exhibiting online and ordering.

Supervisory structures

Cooperatives and networks

- ✓ The GIC ADA which worked with the NGO International Solidarity Association (ASI) and SNV for structuring, training and marketing support in the leather sector. This initiative made it possible, for example, to set up the Kalkaï Label.
- ✓ The Network of Craftsmen of the Far North which has often worked with the Diocesan Committee for the training of young apprentices.
- ✓ The Cooperative of Craftsmen in the Productive Sectors (COOPAPEN) set up by PREPAFEN for better management of the marketing of handicrafts.
- ✓ The Association of Integral Craftsmen Maroua (ADAIMA) which was created in 1999 by 22 craftsmen (leather goods and shoemakers) to provide craftsmen with advice and the economic promotion of their activities.
- ✓ The National Corps of Craftsmen of Cameroon (CNAC) which has more than 5,000 craftsmen and which carries out networking and advocacy activities.

Public structures

- ✓ MINPMEESA, which promotes crafts through three instruments, namely the registration of craftsmen, which results in obtaining a craftsman's card, the organization of SIARC for exhibition, training and networking, the villages crafts to facilitate access to the market
- ✓ MINEPIA through SODEPA tries to better manage slaughterhouses
- ✓ The CCIMA, which offers technical and managerial training to craftsmen in both tanning and leather goods.

Programs/projects/NGOs

- ✓ The Animation, Training, Research and Development Support Center (CAFRAD) actively contributes to training through instruments such as the Complementary Training Program for Apprentices (PFCA) and the Promotion of Crafts and Small Trades (PAPME)
- ✓ The European Institute for Development and Cooperation (IEDC) which provides management training for small businesses.
- ✓ The UNDP and UNESCO have also often supported craftsmen, but less and less since the end of the HIPC initiative.
- ✓ SEP (European Skin Society); A subsidiary of CFAO II nevertheless processes 3,500 to 4,000 small skins per day, 25 days a month, which gives a capacity of nearly one million skins per year out of a theoretical availability of 2.3 million raw skins.

Schools and training centers

- ✓ The Polytechnic School of Maroua which trains leather engineers;
- ✓ CETICS and technical high schools that train in textiles with knowledge of leather.

II.2.3 presentation of the offer

Although leather can come from various animal hides, over 99% of the leather in the world comes from four different animals:

- 65% cows
- 15% sheep
- 11% pork
- 9% goats

Table 6: Evolution of the numbers of the main livestock from 2015 to 2021 by species in Cameroon

Main livestock	2015	2016	2017	2018	2019	2020	2021
Cattle	6,859,359	7,456,123	7,890,962	8,761,385	9,506,103	9,857,361	10,202,369
Sheep	3,172,063	3,283,086	3,345,340	3,499,933	3,604,931	3,817,395	3,931,917
goats	6,290,048	6,365,528	6,441,915	6,506,334	6,571,397	7,078,226	7,149,008
Pigs	3,373,217	3,491,280	3,613,475	3,729,106	3,848,437	3,936,636	4,062,608

Source: *Administrative data from MINEPIA*

The table above reveals that livestock breeding in Cameroon held more than 10 million cattle in 2021 against more than 6 million in 2015, i.e. an addition of more than 3 million cattle. This evolution is the most important because the evolution of other species varies between 600,000 and 1.5 million animals.

Table 7: Number of livestock by region in 2020 and 2021 in Cameroon

Region	Year 2020				Year 2021			
	Cattle	**Sheep**	**Goat**	**porcine**	**Cattle**	**Sheep**	**Goat**	**porcine**
Adamawa	6,170,918	271,443	341,958	39,890	6,386,900	279,586	345 378	41,166
Center	35,946	34,358	84,671	132,993	37 204	35,389	85,518	137,249
East	44 154	48,345	70,544	43,850	45,699	49,795	71,249	45,253
Far North	1,095,472	1,736,451	2,894,368	394,038	1,133,814	1,788,545	2,923,312	406,647
Littoral	6,430	24,092	65,219	184,882	6,655	24,815	65,871	190 798
North	802 662	475,603	888 794	287 156	830 755	489,871	897 682	296,345
North West	1,432,705	912 410	2,052,393	1,397,311	1,482,850	939 782	2,072,917	1,442,025
West	240 940	145,550	369 459	786 312	249,373	149,917	373 154	811 474
South	3,441	36 117	55,056	91,863	3,561	37,201	55,607	94,803
South West	24,695	133,029	255,765	578,340	25,559	137,020	258,323	596,847
Total	**9,857,361**	**3,817,395**	**7,078,226**	**3,936,636**	**10,202,371**	**3,931,920**	**7,149,009**	**4,062,607**

Source: *MINEPIA administrative data*

In general, the Adamaoua region is the one where the most cattle are raised, in fact there are more than 60% of the Cameroonian cattle herd. It is followed by the North-West and Far-North regions where we find 15% and 11% respectively. In addition, sheep are mainly raised in the Far North region; 45% and North West 24%.

In addition, this distribution of livestock by region is contradictory with the distribution of leather production. The table below shows that it is in the Center and Littoral regions that the largest quantities of leather are produced. This could be explained by the fact that the skin of slaughtered animals is in certain regions intended for nutritional consumption rather than for processing.

Table 8: Breakdown of leather production (in number) in 2020

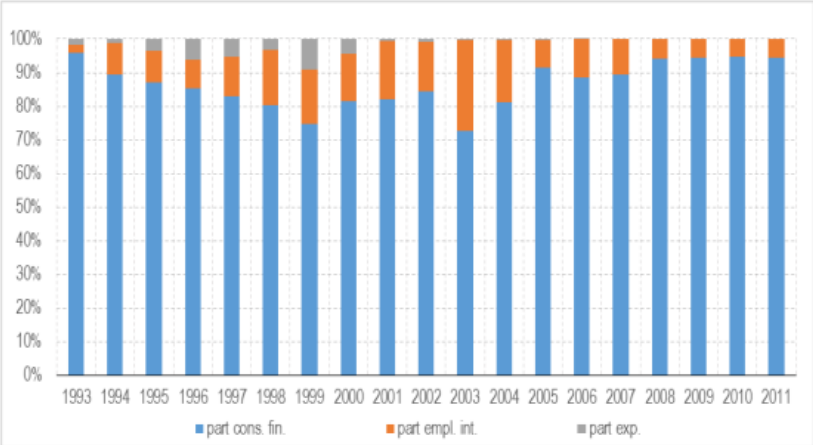
Region	Leathers
Adamawa	73,244
Center	125,368
East	34,429
far north	62,598
Littoral	97,753
North	50,737
North West	…
West	47431
South	6,265
South West	…

Source: *MINEPIA/DREPIA*

II.2.4 Presentation of the request

The graph below shows a considerable drop in exports between 2000 and 2001, which has completely faded since 2007. Growing trend in the evolution of final household consumption since 2000, which portends strong demand for leather goods as well as footwear in Cameroon for years to come.

Graph 4: Analysis of the components of leather demand.



Source: *Cameroon Industrialization Master Plan*

II.3 Description of significant external factors

Significant external factors are considered to be external elements that have an influence (both negative and positive) on the COTTON-TEXTILE-GARMENT-LEATHER sector. It takes into account all aspects related to the legal, political and social environment of the sector but also to its value chain.

II.3.1. Economic and financial factors

Although identified as a buoyant sector of the national economy, the Cotton-Textile-Clothing-Leather sector only contributed 2% to GDP over the period 2005-2018.

Table 9: Structure of the added value of the Cotton-Textile-Confection component between 2005 and 2018

	Contribution of the COTTON-TEXTILE-GARMENT component between 2005 and 2018	
	Value added (in billion FCFA)	**Share in the total added value of the COTTON-TEXTILE-GARMENT component (in %)**
Cotton cultivation	] 27.5-58]	] 10-15]
Textile industry	] 50-72.7]	] 10-20]
Confection	] 127.7-288.4]	] 50-72.7]

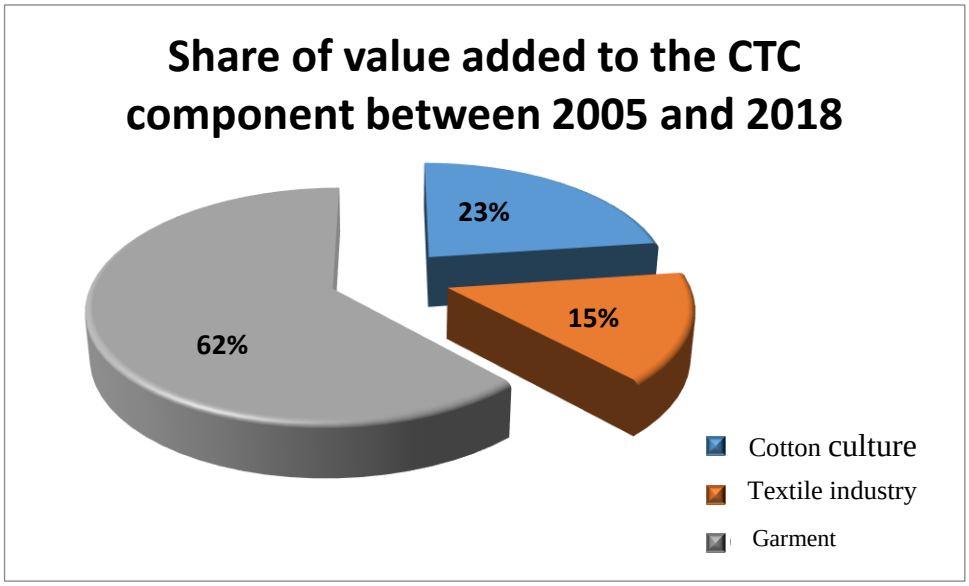
Source: *our calculations*

The study of the sector reveals to us that the cultivation of cotton, over the period 2005-2018, presents an added value which oscillates between 27.5 billion FCFA and 58 billion FCFA, with a share in the total value added of the COTTON component -TEXTILE-GARMENT capped at 15% over the period.

With regard to the textile industry, its share in the creation of wealth in the sector varies between 13% and 20%, with a peak achieved in 2017 and corresponding to an added value estimated at 72.7 billion FCFA.

The confection as for it presents the best performances with a creation of wealth estimated between 127, 7 billion and 288, 4 billion FCFA during the above-mentioned period, representing 64% to 75% of the total added value of the die set. The contribution of the elements of the COTTON-TEXTILE-GARMENT component is estimated in the following figure:

Chart 5: Share of value added to the COTTON-TEXTILE-GARMENT component between 2005 and 2018



Source: *our calculations*

By making a financial analysis of the actors of the sector, it appears that the statistics related to the production of seed cotton are constantly changing over the agricultural campaigns. That of 2020-2021 has once again kept the promise of the forecasts, and even well beyond. SODECOTON recorded, during the campaign which is coming to an end, a production of 357,000 tons, well beyond the 342,000 tons that it had set as its objective. In comparison with the 2019-2020 campaign, during which national cotton production peaked at 328,000 tons, the company recorded an increase in production of 29,000 tons, or 14.3%.

Regarding the company's equity, despite a significant drop (68.5% in 2020), it remains above the threshold set by the OHADA Uniform Act on the rights of commercial companies and economic interest groups (50%). SODECOTON will also have to deploy to collect more than 80 billion FCFA of late collection from various partners and customers.

The situation of the textile industry component, carried by the CICAM is more and more catastrophic. This is due to the obsolescence of the production equipment and the debt of 25 billion that the company holds, which makes it a risky client with banking institutions and reduces the quantity of pre-financed orders. Customers have turned to the Asian and Nigerian markets which control around 90% of the loincloth market. To remedy this, a SODECOTON-CICAM merger is planned.

Clothing, for its part, is subject to competition from Chinese products, second-hand clothing and other synthetic and vegetable textiles.

Framed 1 Survey by the Ecofin agency on textile consumption in Cameroon

In 2019, the Ecofin agency conducted a survey on textile consumption in Cameroon and revealed that Cameroon spent a sum of 101.71 billion FCFA in 2019 for the import of 121,935 tons of textile materials and their works, the thrift store, an increase of 6.4%. This import, part of which is contained in the table below, also concerns synthetic or artificial fibers (2580 tons), 4.4 billion FCFA. Wadding and felt (2711 tons), 2.912 billion FCFA

Table 10: Expenditure on imports of textile products by Cameroon in 2019

Textile Product	Quantity (in tons)	Amount (in million FCFA)
Silk	135	117
Wool and hair	794	1,427
Other vegetable textile fibers	4,899	3,803
Carpets and floor coverings	4,104	2,527
Fabrics and knitwear	23	39,000
Knitted garments	5,390	8,045
Other made up textile articles	86,458	61,879
Thrift shop	73 170	39,482

Source: *Ecofin Agency*

With regard to foreign trade, between 2005 and 2018, the value of exports of products from the sector increased from 76.8 billion FCFA to 120.3 billion FCFA. However, this development corresponds to a decrease in the share of exports of the sector in the country's total exports, which fell from 3.3% to 2.9% over this period. Regarding imports of products in the sector, their value increased from 28.7 billion FCFA to 118.2 billion FCFA, i.e. an increase in the share of imports of these products in total imports from 1.2% to 2%. .3% over the period considered.

Like the COTTON-TEXTILE-GARMENT sector, the leather market faces stiff competition from leather products from second-hand clothes

One of the major external factors of the last 20 years has been the fall in the price of cotton; this mechanically resulted in a reduction in export earnings causing a deficit in the cotton sectors. The main cause of the pressure on world cotton prices is the oversupply of subsidized cotton from major producing countries, particularly the United States. The export and production subsidies paid by the United States to its 25,000 cotton growers amount to approximately $4 billion, which is significantly more than the entire cotton export earnings earned by all Central African countries.

The combined effect of the devaluation of the CFA franc in January 1994 and the rise in the world price in 1994 and 1995, on the other hand, injected a breath of fresh air into the sector, improving its profitability and competitiveness in the short term.

II.3.2. Cultural and social factors

Cameroon's 2018 economic and financial data bank presents the situation of jobs and payroll in the COTTON-TEXTILE-GARMENT sector, of which here are the extracts.

Table 11: Workforce and wage bill [4]in the textile and clothing industries

	Number of national employees		Total	Payroll of nationals (in thousands of FCFA)		Total
	M	F		M	F	
Senior executives	26	6	**32**	469,929	62,460	**531,389**
Senior technicians and middle managers	2	1	**3**	6,249	7,375	**13,624**
Technicians, supervisors and skilled workers	117	1	**148**	625 735	114,407	**740 142**
Employees, laborers, workers and apprentices	661	6	**717**	1,634,201	109,721	**1,743,922**
Total	**806**	**14**	**900**	**2,735,115**	**293,961**	**3,029,076**

Source: *INS 2018*

It appears that the largest companies in the sector employ 900 nationals for a payroll of 3,029,076,000 FCFA. It should be noted that most of the staff are employees, laborers, workers and apprentices, i.e. 79.67%, positions that do not require any particular qualification except physical strength and whose level of study requested for recruitment does not exceed the BEP. This could explain the insignificant share of female employment in this sector (10.44%).

Table 12 : Workforce and payroll [5]of the leather and shoe manufacturing industries

	Number of national employees		Total	Payroll of nationals (in thousands of FCFA)		Total
	M	F		M	F	
Senior executives	15	-	**15**	12,281	-	**12,281**
Senior technicians and middle managers	-	-	-	-	-	-
Technicians, supervisors and skilled workers	2	-	**2**	1,578	-	**1,578**
Employees, laborers, workers and apprentices	26	2	**28**	21,907	1,449	**23,355**
Total	**43**	**2**	**45**	**35,766**	**1,119**	**37,215**

Source: *INS 2018*

The table reveals that the largest companies in the sector employ 45 nationals, including 2 women. As in the textile and clothing industry, most staff are employees, labourers, workers and apprentices.

[4]The data in this table concerns 8 companies out of the 48 in this branch. Their turnover represents 88.0% of the entire branch

[5]The data in this table concerns 4 companies out of the 10 in this branch. Their turnover represents 74.0% of the entire branch

II.3.3. Spatial factors

The production of Cotton, like that of Leather in Cameroon, is located in the North and Far North regions, where it concerns 30 to 40% of families. The choice of the region is explained by several factors:

- ✓ the abundance of fertile soils (the entire cotton-growing area is located in a pen plain with soils favorable to the practice of cotton cultivation. It lends itself to the intensification of cultivation through small motorization and animal-drawn cultivation);
- ✓ a favorable climate for cultivation (the Far North has a desert climate (BWh) according to the Köppen-Geiger classification. Over the year, the average temperature is 28.7°C and rainfall is on average **726.2 mm)** ;
- ✓ a large population (the strong land pressure in the Far North has led to a migratory movement towards the North and the overflow of cotton production into several areas of hunting interest (ZIC));
- ✓ an abundant labor force;
- ✓ the quality of the cotton produced.

In addition, there is persistent insecurity and growing conflicts between farmers and transhumant herders.

II.3.4. National factors

In 2017, Geocoton-Advens, one of the shareholders of SODECOTON, drew up a recovery plan for the company valued at 63.2 billion F, and approved by the State of Cameroon, which is the majority shareholder of SODECOTON. Its implementation has enabled the company to restore its image. It recorded an overall turnover of 120 billion (2017), then 130 billion (2018) and peaked at 157 billion F in 2019, a record not reached for the past sixteen years. But in 2020, turnover fell by 9 billion F, due to the Coronavirus pandemic which seriously impacted the company's activities. Overall, the financial health of the company has been satisfactory since the adoption of this plan

As far as leather is concerned, institutions have been set up.

II.3.5. Legal and political factors

It was with a view to regulating the production sector that in 1974, ***Law No. 74-2 of July 1, 1974*** was promulgated authorizing the government of the United Republic of Cameroon to conclude an establishment agreement with the ***Cameroon cotton development Company (SODECOTON)***.

In addition, the need for industrial spinning of cotton production gave birth to CICAM in 1965; it is the only entity industrially transforming cotton fiber, for a volume of 1,000 to 2,000 tons per year.

In this context, the restrictions on the import of second-hand clothes and those from China, associated with the promotion of textile links, law n° 2018/022 of December 11, 2018 on the organization of the finance law of the Republic of Cameroon for the 2019 financial year, stipulates in its article 5 paragraph 2 that "second-hand items of the tariff heading of 63,090,000,000 FCFA are subject to excise duties at the average rate of 12.5%».

II.3.6. Negative externality of the production activity of leather products

The activity also pollutes the environment with its nauseating odors and destroys it through the use of wildlife skins, attracts young people who are not interested in school, hence illiteracy

II.3.7. international factors

India and China appear to be the leading cotton producers with respective production volumes of 6,423,000 and 6,009,000 Metric Tons between 2020 and 2021. It should be noted that these countries have a dense population, large areas cultivable and low labor costs. On the other hand, Cameroon's production is about 350,000 tons for the same period.

China is the largest textile producer and exporter in the world. China's textile industry has grown rapidly over the past two decades and is one of the main pillars of the country's economy. Clothing, clothing accessories, textile yarns and textile articles are among China's leading export goods and Africa, in particular Cameroon, is the main consumer. China controls more than 80% of the Cameroonian loincloth market.

The sector suffered the consequences of the following factors:

- ✓ the end of the multi-fibre agreements and the reintegration of textile products into the common rules of international trade;

- ✓ the orientation in the industrialized countries of production towards technical textiles or top-of-the-range woolen fabrics, which are fabrics meeting high technical and qualitative requirements, mechanically, thermally or in terms of durability;
- ✓ the rapid development of distribution chains and the generalization of the "short circuit" process, where the distributor becomes the real customer, which means that the weavers and those who ennoble them must, like the garment makers, respond quickly to a demand constantly renewed; as a result, companies have acquired sophisticated machines and implemented innovative processes.

These developments clearly demonstrate that competitive pressures at the global level are becoming increasingly strong in this sub-component and that they require the implementation of adaptation strategies in all its segments (spinning, weaving, clothing, hosiery). Without triggering such dynamics of adaptation, the lack of competitiveness of the local industry is likely to materialize by a progressive disarticulation of the sector.

III- DIAGNOSIS OF THE COTTON-TEXTILE-GARMENT SECTOR

As for the OVERVIEW, the diagnosis will be made according to the two branches identified, namely the Cotton Textile Confection branch and the leather branch.

III-1 Diagnosis of Cotton-Textile-Confection

The diagnosis includes here on the one hand a global diagnostic analysis of the sector, a SWOT analysis by component and a review of previous policies in the field.

III-1.1 overall diagnostic analysis

Note that with the exception of cotton, the rest of the sector is completely devastated for the following reasons:

- ✓ 99% of national cotton production is exported, 1% is processed locally, therefore already a very low added value given to the fiber produced locally;
- ✓ The sale price of cotton fiber by SODECOTON to local spinners is equal to the world price, i.e. the local player buys the locally produced fiber as if it were importing;
- ✓ The cost of electrical energy is very high for businesses (92 FCFA/kwh compared to a third in China);

- ✓ the price of inputs is also very high;
- ✓ heavy fiscal pressures are commonplace;
- ✓ unfair competition from imported products exists;
- ✓ smuggling and counterfeiting are other evils that undermine the sector;
- ✓ the presence of second-hand clothes on the market destroys the local industry.
- ✓ the poor condition of product evacuation routes;
- ✓ the slowness of the railroad for the export of bales by sea;
- ✓ problems of maintenance and development of existing infrastructure;
- ✓ the lack or inadequacy of storage warehouses for seed cotton, agricultural and industrial inputs;
- ✓ the lack of infrastructure housing regional research centers.

As far as confections are concerned, there are no real clothing industries. Clothing VSEs and MEs hardly consume local products for various reasons:

- ✓ Local products are uncompetitive in terms of price;
- ✓ The range of products offered is insufficient;
- ✓ The quality of the local products offered is insufficient;
- ✓ etc

III-1.2 SWOT analysis by component

This will be done according to the components identified in the delimitation. However, to better understand the branch, aspects related to marketing will also be analyzed.

II-1.2.1 Production of seed cotton

STRENGTHS	WEAKNESSES
• research center active in varietal improvement and cultivation techniques; • establishment of a producer price risk management mechanism; • availability of an input fund for producers; • acquisition of inputs at cost price for producers;	• low yield per hectare; • low level of production; • low level of mechanization; • transport costs add to the production costs of inputs;

• seed cotton production classified at more than 70% in the category of the best grade; • production of CmiA certified cotton; • supervision of producers via an umbrella structure.	• low use of growth regulators, which accentuates soil depletion; • declining soil fertility; • high expenditure on fertilizers and pesticides.
OPPORTUNITIES	**THREAT**
Possibility of investing more in the production of organic cotton	• security threats in production areas; • heavy subsidies of cotton production in leading countries; • quality of road infrastructure in production areas

II-1.2.2 Cotton lint production

STRENGTHS	**WEAKNESSES**
• Very good cotton fiber quality (more than 90% passed through the best grades); • Ginning rate (42%) equivalent to the standard.	• dilapidated production equipment; • low production capacity, the factories not being able to absorb the entire production of seed cotton; • a low presence of SMEs in the component
OPPORTUNITIES	**THREAT**
Proven technologies are accessible	Frequent disruption of supplies on the electrical network in the areas where the factories are located.

II-1.2.3 Textile industry

STRENGTHS	**WEAKNESSES**
The existence of an operator (CICAM).	• dilapidated production equipment;

	• low quality products • low production that does not meet market demand; • an undiversified offer • low presence of SMEs • low conversion rate
OPPORTUNITIES	**THREAT**
Possibility of exporting co-products, in particular cakes, to European products.	• Strong importation of fabrics; • Access to cotton lint at international costs

II-1.2.4 Clothing industries

STRENGTHS	**WEAKNESSES**
• Existence of an elite having been trained abroad and which constitutes the backbone of Cameroonian designers; • A strong presence of SMEs in the component	• absence of a training and development platform for high-level stylists; • low using rate of installed capacity (less than 40%)
OPPORTUNITIES	**THREAT**
• growing domestic markets; • booming African fashion, locally and abroad; • integration into international value chains	• destabilization of companies by products by contraband products, low-cost products and second-hand products; • Frequent disruption of supplies on the electrical network.

II-1.2.5 Marketing

STRENGTHS	**WEAKNESSES**

RAS	• Difficulties in integrating global distribution chains; • ignorance by the actors of the requirements and specific approach of the export market; • inability to mobilize large volumes
OPPORTUNITIES	**THREAT**
Opportunities offered by AGOA, an American initiative that allows textile products to enter the American market without customs duties.	• Volatility of cotton prices on the international market; • Destabilization of the market by smuggled products, low cost products and thrift store products.

III-1.3 previous policies

Political initiatives have been undertaken for the development of the sector. In partnership with the World Bank, in 2009 the Government embarked on a special program to support the competitiveness of growth sectors, including the textile, clothing and leather industries. IT was also a question for the government to make every effort to take advantage of the provisions of AGOA which offer export opportunities, especially in textiles and cultural products.

These political initiatives proved to be insufficient in 2020 and the Government has redefined its strategic scope for the 2030 horizon. This includes nine (9) sectors, including the COTTON-TEXTILE-GARMENT-LEATHER sector. The strategic rapprochement between SODECOTON and CICAM should make it possible to constitute an integrated industrial pole around which the sector will be structured. In this perspective, four (4) objectives are set:

i. increase national cotton production to 600,000 tons/year by 2025;
ii. Integrate the industrial transformation of local fiber to reach a minimum rate of 50% by 2030;
iii. Develop an industry for manufacturing and making outfits, especially for sports (jerseys, outerwear, basketball, etc.), capable of satisfying at least 50% of national demand; and

iv. Supply the great bodies of the State (military, police and civilians in uniforms and equipment with 60% of Cameroonian cotton.

On July 16, 2020, the financing agreement for the cotton sector in Cameroon was signed in Yaoundé between MINEPAT, Alamine Ousmane Mey and the Head of the Delegation of the European Union to the Republic of Cameroon, Hans-Peter Schade.

The donation consisting of an envelope of 15.5 million Euros or more than 10 billion FCFA has been allocated. All part of the project called Accompaniment of changes in the Cotton Basin (ABC). This funding is made up of a contribution from the European Union of 9.5 million Euros and a second of 6 million Euros from the Federal Republic of Germany. A start well under way while other financing is in preparation. A loan/donation blending, "blending" operation will support SODECOTON's investment plan.

- **ABC-PADER program**

The Support Program for Rural Development in the Cotton Regions of Cameroon (ABC-PADER) co-financed by the European Union for a period of 5 years (from 2020 to 2024). Its main objective is the adaptation of production systems to climate change increased the economic performance of private actors operating in agriculture and livestock farming in the cotton basin regions of Cameroon.

It is implemented in the following fields of action:

a. Promote tenure security and sustainable land management in eight selected communes to ensure regulated use of land, pasture, water and forests. The ultimate goal is to prevent conflict, promote investment, sustainably increase agricultural and livestock productivity and generate higher incomes.
b. Strengthen the banking of financial transfers in rural areas, promote entrepreneurship and facilitate access to financing for producers and breeders.
c. Improve the productivity and sustainability of cotton, rotational food crops and livestock through climate-smart agriculture. This field of action also encompasses the digitization of information sharing and the strengthening of the capacities of producers' and breeders' organizations.
d. Promote inter-institutional dialogue by setting up consultation frameworks and appropriate forums for dialogue. In addition, to offer capacity building measures for the

benefit of public actors, the private sector and civil society in the fields of agriculture and livestock.

e. Extend the vocational training offer according to the needs of the agriculture and livestock sector. These measures will improve the employability of young people and increase the capacities of vocational schools, both in terms of gender and in terms of digitalization.

- **ProCOTON project**

Presented on March 09, 2022 at the Hilton hotel in Yaoundé, the new CAMTEX LAB tool, intended to support textile entrepreneurship in Cameroon, is an incubator / accelerator at the service of entrepreneurship financed by German Cooperation through ProCOTON to bring out and support textile industrial start-ups in Cameroon.

It should be remembered that this project, which benefits from the support of GIZ, aims to experiment and evaluate the different technical itineraries for the production of organic cotton in the Cameroonian context in order to popularize it among potential producers.

III-2 Leather Diagnosis

The diagnosis includes here on the one hand an analysis of the main problems facing the actors of the sector, a SWOT analysis by component and a review of previous policies in the field.

III-2.1 the main problems of the actors

We can list the difficulties at the level of the various links in the hides and skins sector

III-2.1 1- Difficulties linked to the treatment of skins and leather •

The skinning work is done with unsuitable knives, which causes damage to the skin. Several currently operational slaughterhouses are not equipped with hide and skin diggers. The large SODEPA slaughterhouses, although they have modern equipment such as winches, do not have the appropriate equipment for the recovery of skins.

In addition to the skinning work, there are difficulties in collecting the skins. It's worth noting that hide collectors face adversity from hide consumers. Indeed, the main use of the skins is for food consumption. This has effects on the quality of the skin. Indeed the skinning activities are made taking into account this destination.

III-2.2 SWOT analysis of the leather and footwear industry

It will be a question here of making, on the basis of the OVERVIEW of fixtures above, to make a diagnosis which aims to highlight on the one hand, the difficulties of the actors and on the other hand the dysfunctions throughout the leather industry value chain in Cameroon. But first, it is important to highlight the overall trends in the macroeconomic environment likely to have a significant impact on the development of the said industry.

III-2.2.1 Analysis of the environment external to the branch

Factors	**Threat**	**Opportunities**
Demography		- Rapid population growth (2.6%)
Economy	- Decline in purchasing power - Raw material price growth (6.5%) - Weak structuring of the economy with a strong informal sector - Cost of business - Access to credit - Liberalization and opening of the world market	- GDP growth despite the recession felt in Sub-Saharan Africa (3.9%) GDP/capita $1,527 (2018)

Factors	Threat	Opportunities
	- Raw material diverted for domestic consumption	
Political and institutional	- Transformation of local products as a pillar of the government's development strategy - Lots of incentive available (customs, taxes and duties, registration fee, etc.	- Existence of MINMEESA for promotion with the organization of exhibition events such as SIARC, registration of craftsmen, etc.
Technology	- Strong race for innovation in the sector	- Availability of processing equipment: fuller, wringer, fleshing machine, sewing machine, press machine - Low productivity
Social and educational	Non-integration of the sector at the secondary education level	- Opening of leather engineering cycles - Better knowledge of leather quality by consumers - Increasingly high consumption of items made from local leather
Legal and regulatory	Absence of texts specific to the collection of the skin	

III-2.2.2 Analysis of the branch's internal environment

	Strengths	Weaknesses
Actors		
SODEPA	Existence of a large herd of cattle	- Absence of supervision and management tools - Poor integration of leather-related issues - Inability to renew and maintain equipment
Sarki lawan		- Lack of training and professionalism - Lack of awareness,
Modern slaughterhouses		- Old equipment - Incomplete equipment - Poorly maintained equipment with numerous breakdowns
Slaughtering areas		- Lack of equipment and adapted tools - Low productivity - Quality problem during dressing which alters the quality of the skin
Tanneries		
Shops		
slaughterhouse workers	Experienced and very committed	- Failure to wear PPE - Lack of specific tools for stripping leather - Lack of training
veterinarians	Good experience in the business	Inspection limited to the carcass, high workload because low slaughtered head/veterinarian ratio
Craftsmen		
Value chain		

Slaughter and collection		- Increasingly rare raw material because leather is increasingly damaged - Poorly organized collection system - Unsuitable storage system
skin treatment		- Lack of process innovation - Use of obsolete machines - Inappropriate factory space - Non-compliance with quality standards - Non-respect of the environment
Manufacture of articles	Good creativity and innovations produced	- Lack of appropriate equipment - Low productivity - Poor internal organization
Marketing and distribution	Good image of Maroua and Garoua crafts	- Very fragmented offer generating an unbalanced balance of power with traders - Poor knowledge of the national and regional market - Inefficient marketing channel - Isolation of the production site

CHAPTER 2 : *OPERATIONAL CHOICES FOR THE REVIVAL OF THE COTTON-TEXTILE-GARMENT-LEATHER SECTOR*

The purpose of this chapter is to propose operational choices for relaunching the sector. These choices should take into account, on the one hand, the need to overcome the problems identified in the previous chapter and, on the other hand, the need to contribute to the achievement of the Government's objectives for the sector.

To ensure that the choices to be made effectively contribute to the achievement of the government's objectives, it will first be a question of recalling the government orientations in relation to the sector as well as the main challenges and issues. It will also be a question in this part of recalling the problems identified and making a link with the objectives of the Government. Thereafter, we will formulate the objectives to be achieved through the implementation of the support plan for the players in the sector and we will end with the declination of the main strategic axes.

However, as in the previous chapters, the analysis here will be done according to the two branches of the sector, namely Cotton-Textile-Confection (CTC) on the one hand, and Leather industry and shoe manufacturing on the other hand.

II.1 OPERATIONAL CHOICE FOR THE REVIVAL OF THE COTTON-TEXTILE-CONFECTION BRANCH

In this part, it will be a question of making a cross between the stakes and orientations of the government on the one hand and the main problems identified within the framework of the OVERVIEW and the diagnosis.

The idea behind this is to ensure that the operational choices that will be made subsequently not only contribute to the achievement of the government's objectives, but also contribute to improving the competitiveness of the sector by providing appropriate responses to problems identified.

The approach here will naturally consist of presenting the challenges and orientations of the government for the sector and then making an analysis of the main problems identified as well as their interactions in the different components of each of the branches that make up the sector.

II.1. 1 Challenges and orientations of the Government for the branch

Cameroon's industrialization strategy is based on a limited number of driving sub-sectors, including the Cotton-Textile-Leather-Garmentsector. It is also based on the requirement to optimally couple or articulate the approach of satisfying domestic demand for industrial products through import-substitution and that of external demand. Also, a number of objectives have been set for each of the sub-sectors identified.

With specific regard to the Cotton Textile Confection branch, the challenges and orientations of the government are structured around the main components of the branches and presented as follows:

II.1.1.1 Level of seed cotton production

The government's objective for this component is to increase national cotton production to the threshold of 600,000 tons/year by 2025. Indeed, the government is talking about increasing the supply of seed cotton, the production, as we noted in chapter 1, is around 300,000 t per year.

However, it should be noted that the diagnosis revealed that the land where cotton is usually cultivated is characterized by soil impoverishment due to the heavy use of fertilizers. We also note the lack of mastery of new cotton cultivation techniques which results in a low yield per hectare, not to mention the weak innovation in terms of improving seeds and cultivation techniques and practices.

We also noted the limited capacity of SODECOTON to gin a large quantity of seed cotton. Indeed, the high production of the 2004/2005 period highlighted the insufficiency of SODECOTON's capacities to honor its commitments vis-à-vis the producers, which resulted in a drop in production for the following years.

In view of this situation, the challenges for the government will be to find an optimal approach not only to increase production in an environment where the soil is less and less sensitive to fertilizers, but also to manage the problem of the shattering of a large amount of seed cotton.

II.1.1.2 Processing level

Here the public authorities aim on the one hand to integrate the industrial transformation of the local fiber to reach a minimum rate of 50% by 2030 which is acquired by the labeling or the improvement of the quality and the increase of added value to comply with competitiveness criteria such as obtaining international business certificates and labels and efficiency and speed in logistics platforms (ports, airports and roads);

On the other hand, the development of an industry for manufacturing and making outfits, in particular for sports (jerseys, tracksuits, baskets, etc.) and for armed corps; capable of satisfying at least 50% of national demand.

It should be noted that, during the OVERVIEW and diagnosis, we noted a low level of transformation of this component due to the limited number of actors involved. Indeed, only one operator is truly active with a low production capacity which is itself inherent in the quality of the equipment it has. Indeed, CICAM's production capacity does not exceed 3,000 t of cotton lint in an environment where the production capacity is greater than 100,000 t. i.e. a conversion rate that barely reaches 3%.

Another concern identified and which will have to be resolved is the acquisition price of the raw material. Indeed, SODECOTON, which is the only player in cotton ginning, sells it to the operator at the prevailing price on the international market.

It should also be noted that, within the framework of the development strategy for the industries and services sector as well as in the Industrialization Master Plan, one of the orientations of the government is the merger between the two players, CICAM and SODECOTON. . Alongside this hypothesis, another refers to the relocation of production units with a production capacity of 300,000t/year.

If these solutions can contribute to boosting transformation at the local level, they nevertheless present some risks, in particular the second. Already, even by increasing cotton production to 600,000t/year, the question of access to the raw material will arise. Indeed, with a seed cotton production capacity of 600,000 t/year and a fiber yield of around 42%, the quantity of cotton fiber is estimated at nearly 250,000 t/year, which remains below the transformation capacity of relocated factories. However, it should be specified that the production of seed cotton can go beyond this threshold, thus resolving the problem raised, just as it can also be below. Another problem with this approach is its impact on the balance of payments, which could see its deficit worsen with the transfer of dividends to the countries of origin of the relocated factories.

In addition, it should be noted that solutions such as mergers can have results contrary to what is expected insofar as they can further hinder the economic game by reinforcing the natural monopoly of SODECOTON.

It should also be noted that an organization of cotton producers is also done on the fringes of the classic canons of SODECOTON and that several other producers prefer to sell their cotton in neighboring Nigeria. In addition, several craftsmen operate in ginning and in the artisanal manufacture of fabrics. This mass of actors could be recovered through a better structured organization around local initiatives which could also be supported.

In view of the above, the challenge for the public authorities will be to find the right balance between the need to increase the volume of transformation of this component while trying to involve local players.

With regard to the garment component, the diagnosis of the branch made it possible to highlight the central problem which hinders its competitiveness, namely the low rate of transformation of the textile industry, which negatively impacts the garment industry component which today wears the branch. It must be said that the manufacturing activities that pull the whole branch are those that require the most innovation. Consequently, clothing needs a greater variety of fabrics and patterns than the market satisfies, hence the strong importation by players in this sector.

II.1.1.3 Marketing level

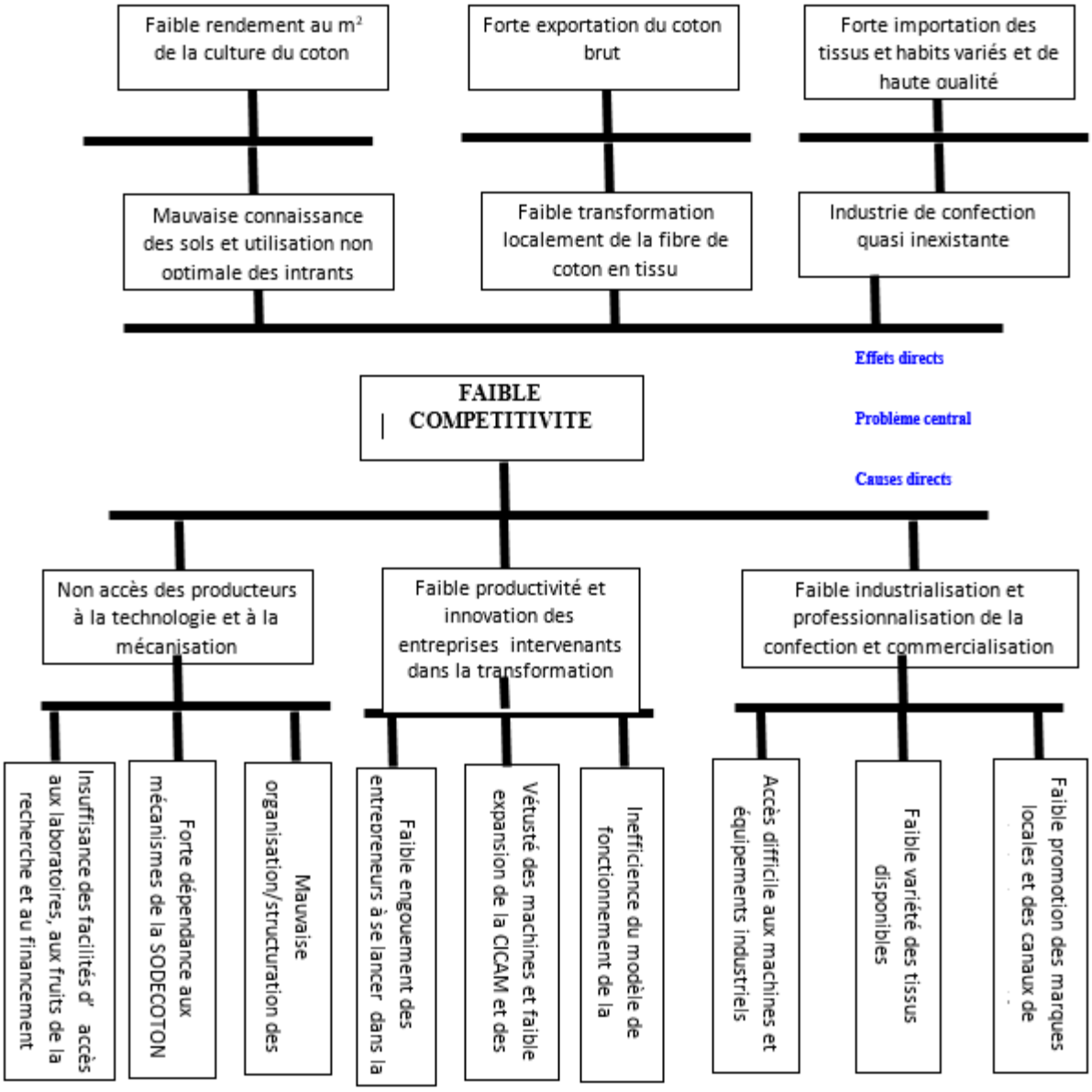
The main issue in this component is the supply to the main bodies of the state (military, police, gendarmes, customs officers, prison guards, etc. and civilians) of clothing and clothing equipment incorporating at least 60% of Cameroonian cotton. This will improve the level of production and the cost price of cotton lint and manufactured products.

However, the current observation is that only the loincloth market for traditional outfits for events seems to be served in an acceptable way: weddings, mourning, March 8, teachers' day, etc. The innovation here is limited to the choice of patterns and colors. While the production of fairly standardized outfits such as uniforms requires more innovation and technical requirements in all the value chain and is also part of a more competitive field at the international level. The trend today is to be able to optimize the combination of organic cotton (for sustainable development reasons) with synthetic cotton and other types of material (including cobwebs, bird feathers, etc.) in order to obtain clothes and uniforms that are weatherproof and capable of reducing the risk of work accidents.

II.1.2 Analysis of the branch problem

It emerges from the diagnosis carried out that the central problem of the branch is its low competitiveness.

Figure 10. Branch problem tree



Three main direct causes of the problem of competitiveness have been identified, namely: the non-use of technology and mechanization in cotton cultivation, the low productivity/innovation of the actors involved in the transformation of cotton fiber into fabric, and the weak industrialization and professionalization of manufacturing and marketing.

With regard to producers' access to technology and mechanization, it should be noted that it is mainly the result of poor organization/structuring of producers, heavy dependence on the SODECOTON mechanism and 'inadequate access to laboratories, the fruits of research and financing.

With regard to low productivity and the absence of relevant innovation in the companies involved in processing, it is explained by the shortcomings of the SODECOTON model, especially with regard to the management of producers and customers, the obsolescence machinery and equipment from CICAM and SMEs which are trying somehow to survive in this sector, and the low enthusiasm of entrepreneurs to embark on this activity.

With regard to the weak industrialization and professionalization of clothing and marketing, it should be noted that this is not only the result of weak promotion of local brands and appropriate distribution channels, but also of difficult access to machines and industrial equipment without forgetting the small variety of fabrics available to be able to satisfy the varied demands.

All of its causes have the effect of poor knowledge of the soil and non-optimal use of inputs, which results in a low yield per m2 of cotton cultivation. Another direct effect is the weak local transformation of cotton fiber into fabric, which leads to a strong export of raw cotton. Finally, still as a direct effect, we can note the fact that the clothing industry is almost non-existent, resulting in the heavy importation of varied and high-quality fabrics and clothes.

II.1.3 Analysis of objectives

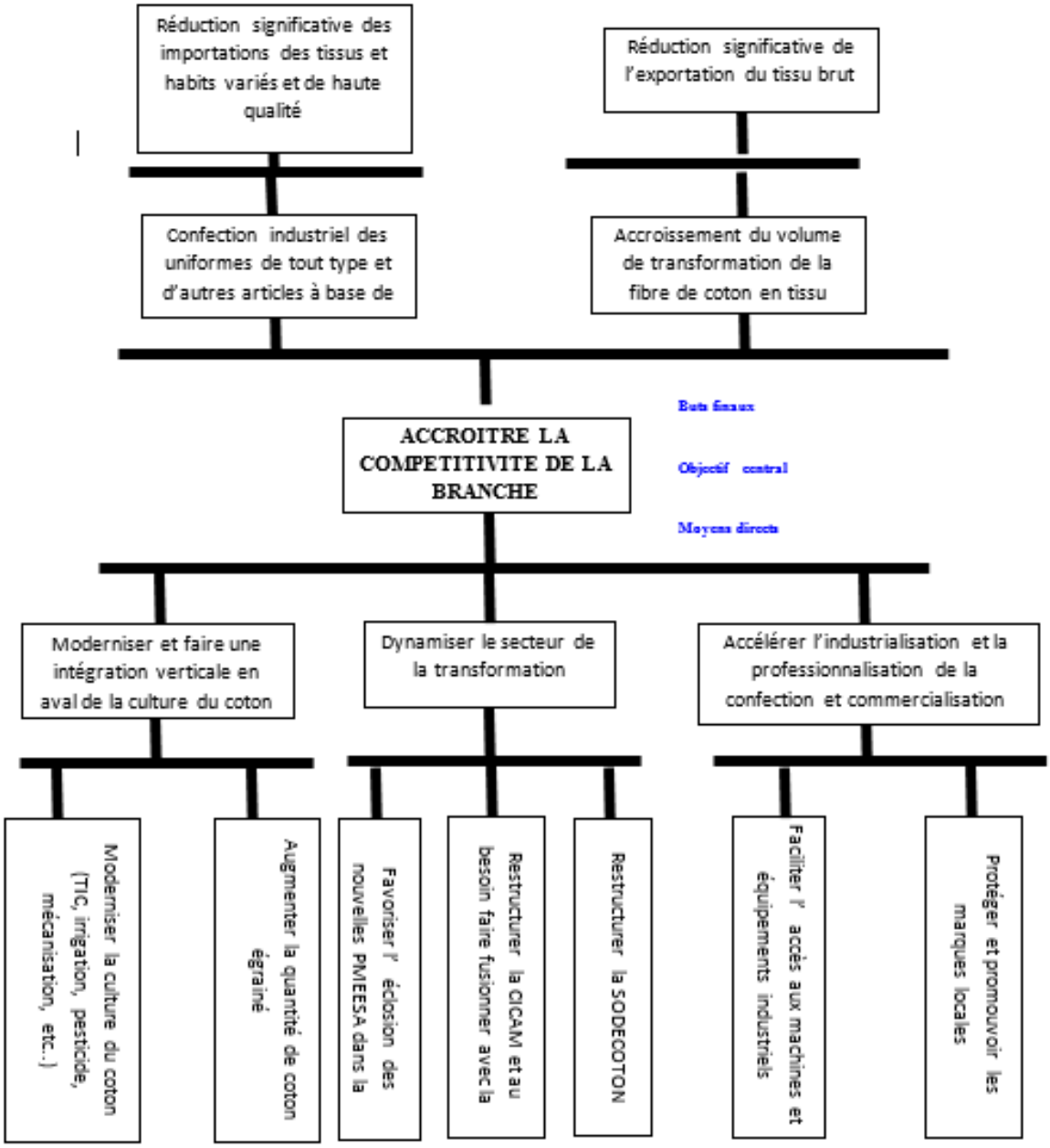
In order to develop this branch, we have set ourselves the main objective of increasing its competitivity. In other words, it will be a question of aligning with the strategic objectives of the SND30:

Strategic objectives No. 1: Increase the volume of national cotton production to the threshold of 600,000 t/year by 2030;

Strategic Objectives No. 2 Increase the industrial transformation of local fiber to reach a minimum rate of 50% by 2030;

Strategic Objectives No. 3: Develop an industry for manufacturing and making outfits, in particular for sports (jerseys, basketball tracksuits, etc.) capable of satisfying at least 50% of national demand, and outfits and equipment for large bodies of the 'state' military, police, gendarmes, customs officers, prison guards, etc. and civilians) incorporating at least 60% of Cameroonian cotton.

Figure 11: COTTON-TEXTILE-GARMENT objective tree



It emerges from the analysis of the above objectives that increasing the competitiveness of the branch in order to achieve the strategic objectives as set by SND 30 requires:

- ✓ the modernization of cotton cultivation and even and make a downstream vertical integration by adding the activity of ginning;
- ✓ revitalization of the processing sector;
- ✓ the acceleration of the industrialization and professionalization of the manufacture and marketing

II.1.4 Scenarios and assumptions

To achieve the above objectives, three scenarios are possible:

Scenarios	Hypotheses
SI - Maintain the current system for which the recommendations of SND-30 and the PDI will make it possible to increase the level of processing while emphasizing, as far as MINPMEESA is concerned, the aspect of seed cotton production by peasants	**H1:** The increase in production can be obtained by restructuring certain organizational aspects of SODECOTON and CICAM and by providing them with additional resources.
S.II - Puts a device parallel or complementary but sufficiently autonomous to that of SODECOTON/CICAM for the production and processing of cotton	**H1:** The current system, even taking into account the recommendations of the SND30 and the PDI (SODECOTON/CICAM merger) and relocation) is not optimal and sustainable. **H2:** The emergence of a new generation of SMEs throughout the textile value chain will allow for more sustainable development and stronger growth in the positioning of this branch of activity in the Cameroonian economy.
S.III - Combines scenarios I and II	**H1:** The establishment of a complementary but autonomous device in addition to the reforms to be made at the level of the organization of producers, will allow a better development of the branch.

II.1.5 Scenario choice

II.1.5.1 scenario selection criteria

If the three scenarios described above are likely to allow or at least contribute to the achievement of the strategic objectives as defined by the SND30, the fact remains that for reasons of efficiency and even effectiveness, that It is necessary to choose the most relevant, on the basis of the grid below, strongly inspired by Project Cycle Management (PCM).

Table 13: Project Cycle Management (PCM)

Criteria	Scenario 1	Scenario 2	Scenario 3
Target group	6/10	8/10	10/10
Target territory	8/10	10/10	10/10
Implementation structure	5/10	8/10	8/10
Inputs (HR, Material, etc.)	10/10	10/10	10/10
Needs/problems	8/10	8/10	10/10
Political priorities	10/10	10/10	10/10
Impact	5/10	7/10	10/10
Feasibility	5/10	8/10	10/10
Sustainability	2/10	10/10	10/10
TOTAL/90	**61**	**79**	**88**

Source: *working group*

It emerges from this analysis grid that the most relevant scenario is 3 insofar as it is most likely to have more impact both in terms of employment (increase in the number of PMEESA/PMI) and wealth creation (added value from processing). Also, its feasibility is more advanced because most of the operational activities remain within the scope of competence of MINPMEESA. In addition, this scenario is without the most sustainable because aims to create emulation in the branch while empowering the actors and to make the law of the market reign while keeping the simple of regulator. Finally, it is this scenario that affects almost all players in the branch distributed throughout the national territory.

II.1.5.2 Simulation of seed cotton production by 2030

The SND30 has set the objective of increasing national cotton production to the threshold of 600,000 tons/year by 2025. Starting from the reference production, the SODECOTON campaign for 2020-2021, which amounts to tons of cotton, we find an average annual growth rate of 1.11% over the period 2021-2025.

Table 14: Estimation of the evolution of cotton production according to the objectives of the SND30

Year	Estimated cotton production (in tons)
2023	439 401

2024	487 481
2025	600,000
2026	665 653
2027	738,490
2028	819 296
2029	908 945
2030	1,008,403

Source: *our calculations*

This estimate of cotton production is in line with that of the "Cotton Plan" which aims to produce 1,000,000 tons of cotton by 2030 *(ref: SND30 page 147)*.

It should be noted that this evolution of production depends on multiple factors such as the number of producers, the climate, political stability, yield and intensification in the use of production factors (inputs, labor, etc.).).

In addition, SODECOTON's performance during its 2020-2021 campaign, which is 357,000 tons, and the projection of its cotton production at 400,000 tons by 2025 (according to its internal recovery plan) have enabled us to determine the average annual growth rate of its cotton production which is 1.023%. Assuming the production of SODECOTON with this average growth rate, by 2030; its production would reach 448,179 tons.

Table 15: Estimated cotton production by SODECOTON from 2022 to 2030

Year	Cotton production (in Tons)
2023	373,616
2024	382 211
2025	400,000
2026	409 203
2027	418 617
2028	428 248
2029	438 100
2030	448 179

Source: *Our calculations*

A quick comparison of these estimates allows us to see that the SODECOTON mechanism alone will not be enough to meet the challenges set by the SND30 in terms of cotton production.

II.1.5.3 Simulation of the industrial transformation of local fiber in 2030

This simulation will be done at two levels: firstly, it will be a question of simulating the evolution of the production of cotton fiber at the national level and of SODECOTON and the local transformation rate of the said fiber will be estimated.

Simulation of the quantity of cotton lint to be produced.

The ginning rate of SODECOTON is 42% and it is so far the optimal result (according to international standards) in terms of cotton fiber extraction.

We therefore make the following assumption:

H: *the ginning rate is 42%;*

We define the following variables as follows:

- ✓ **CF_{SNDi}** represents the quantity (in tons) of cotton fiber estimated according to the objectives set by the SND30;
- ✓ **CF_{Si}** represents the quantity (in tons) of cotton fiber estimated according to the objectives set by SODECOTON
- ✓ **CF_{INDi}** represents the quantity (in tons) of cotton fiber obtained by actors outside the SODECOTON network

$$CF_{SNDi} = CF_{Si} + CF_{INDi} \quad i = 2023,\ldots,2030$$

With $CF_{SNDi} = P_{SNDi} * 42\%$

And $CF_{If} = P_{If} * 42\%$

The table below shows us the estimated fiber cotton capacity

.

Table 16: Quantity (in tons) of cotton fiber estimated between 2022 and 2030

I	**CF $_{SNDi}$** *(1)*	**CF $_{If}$** *(2)*	**CF $_{INDi}$** *(3)= (1)- (2)*
2023	184,549	156,919	27,630
2024	204,742	160,529	44,214
2025	252,000	168,000	84,000
2026	279,574	171,865	107,709
2027	310 166	175,819	134,347
2028	344 105	179,864	164 240
2029	381,757	184,002	197,755
2030	423 529	188 235	235 294

Source: *Our calculations*

Simulation on the local transformation of cotton fiber

It should be noted that CICAM only processes 2% of the cotton fiber produced by SODECOTON while the SND30 plans to integrate the industrial processing of local fiber to reach a minimum rate of 50% by 2030. The strategic rapprochement between SODECOTON and CICAM, should make it possible to constitute an integrated industrial pole around which the sector will be structured, but a transformation mechanism supported by local SMEs will make it possible to objectively achieve this goal.

Indeed, consider that;

Assumptions:

H1: *CICAM maintains its processing capacity at 2%;*

H2: *all the cotton lint produced by the complementary mechanism is entirely transformed locally.*

The table below presents the estimated cotton lint conversion rate.

It was obtained by the following process:

(1) by estimating the quantity of cotton fiber processed by CICAM (**CFT $_{CICAMi}$**) (which represents 2% of the quantity of cotton fiber produced by SODECTON which can be found in table 4);

(2) the previously calculated quantity is added to the quantity of cotton fiber obtained by the independent players (this value represents the total estimated quantity of cotton fiber processed locally) **(CFT $_{Li}$)** ;

(3) We finally obtain the transformation rate **(T_i)** estimated by dividing the estimated amount of locally processed cotton lint by the estimated amount of wholly produced cotton lint.

With $\mathbf{CFT_{CICAMi} = CF_{Si} * 2\%}$

And $\mathbf{CFT_{Li} = CFT_{CICAMi} + CF_{INDi}}$

And $\mathbf{T_i = CFT_{Li} / CF_{SNDi}}$

Table 17: Rate (estimated) of local processing of cotton lint between 2022 and 2030

I	CF_{SNDi}	CF_{INDi}	CFT_{CICAMi}	CFT_{Li}	T_i
2023	184,549	27,630	3,138	30,768	17
2024	204,742	44,214	3,211	47,424	23
2025	252,000	84,000	3,360	87,360	35
2026	279,574	107,709	3,437	111 146	40
2027	310 166	134,347	3,516	137,863	44
2028	344 105	164 240	3,597	167,838	49
2029	381,757	197,755	3,680	201,435	53
2030	423 529	235 294	3,765	239,059	56

Source: *Our calculations*

In view of the table above, it clearly appears that the additional mechanism to be put in place would make it possible to greatly exceed the objective of 50% transformation of local fibre.

II.1.6 Operational framework

It is a question here of declining the diagram of operationalization of the scenario n°3 retained. In this perspective, the following operational axes can be declined:

Axis 1 → **Structuration et organisation de la production du coton au Cameroun**

Renforcement du dispositif d'égrenage du coton

Axis 2 → **Objectif:** ***Faire éclore des nouvelles PME/PMI dans l'égrenage du coton***

Axis 3 → **Renforcement du dispositif de transformation de la fibre du coton en tissu**

Objectif: ***Faire éclore des nouvelles PME/PMI dans la transformation***

Axis 4

Industrialisation de la Confection textile et professionnalisation de sa commercialisation

Objectif: ***Favoriser la production industrielle des***

II.1.6.1 Axis I_ on the structuring and organization of cotton production in Cameroon

The objective being to boost the production of seed cotton in Cameroon, it is a question here of setting up a framework that should make it possible to significantly improve cotton production through a better yield per hectare, access to technology and facilities for mechanization, transport and marketing. In order to determine the production and the areas needed to achieve the objectives defined by the SND30, the model below has been developed.

Modeling of seed cotton production capacity at 600 tons per year by 2025.

By making the following assumptions;

H1: *SODECOTON's cotton production reaches 400,000 tons in 2025;*

H2: *SODECOTON's cotton production varies at an average annual growth rate of 1.023% from 2022 to 2030;*

H3: *The yield per hectare of the additional network of cotton producers to be developed is 1.6 t/ha for a given year*

Let $\mathbf{P}_{\mathbf{INDI\ be\ the}}$ cotton production from the complementary network for a given year

Cotton production according to the SND30 estimated above ($\mathbf{P}_{\mathbf{SNDi}}$) represents the sum of the production of the two poles mentioned above.

$\mathbf{P}_{\mathbf{SNDi}} = \mathbf{P}_{\mathbf{Si}} + \mathbf{P}_{\mathbf{INDi}}$ i= 2023,…, 2030

With $\mathbf{P}_{\mathbf{SND25}} = \mathbf{P}_{\mathbf{S25}} + \mathbf{P}_{\mathbf{IND25}}$

= 600,000 Tons

And $\mathbf{S}_{\mathbf{INDi}} = \mathbf{P}_{\mathbf{INDi}} / 1.6$

- **Estimation of $\mathbf{P}_{\mathbf{INDi}}$ and the land areas needed for its production $\mathbf{S}_{\mathbf{INDi}}$**

The different values of $\mathbf{P}_{\mathbf{INDi}}$ and $\mathbf{S}_{\mathbf{INDi}}$ thus are contained in the following table3:

Table 18: Estimate of additional cotton production and arable land (ha) to be mobilized

I	$\mathbf{P}_{\mathbf{SNDi}}$ *(1)*	$\mathbf{P}_{\mathbf{If}}$ *(2)*	$\mathbf{P}_{\mathbf{INDi}}$ *(3)= (1)- (2)*	**SINDI _** *(4)= (3)/1.6*
2023	439 401	373,616	65,786	41,116

2024	487 481	382 211	105,270	65,794
2025	600,000	400,000	200,000	125,000
2026	665 653	409 203	256,450	160 281
2027	738,490	418 617	319,873	199,921
2028	819 296	428 248	391,049	244,405
2029	908 945	438 100	470,845	294 278
2030	1,008,403	448 179	560 224	350 140

Source: *our calculations*

Profile of actors in the complementary cotton production network

After estimating the area needed to be mobilized to reach the level of production set by the SND30, we undertook to simulate the number of actors, in particular Social Economy Organizations that would be needed to cultivate these areas.

Indeed, the analysis of the cotton value chain in Cameroon carried out in 2018 by "Value Chain Analysis for Development" gave a structuring of cotton producers in the SODECOTON network (see Table...). Based on this reality, we first divided the producers' cotton sole into 3 intervals:

- ✓ those who own no more than 2.5 ha of land (]0; 2.5]);
- ✓ those with between 2.5 ha and 5 ha of land (]2.5; 5]);
- ✓ those who own more than 5 ha of land (]5; +[ ).

We then weighted these elicited intervals as follows:

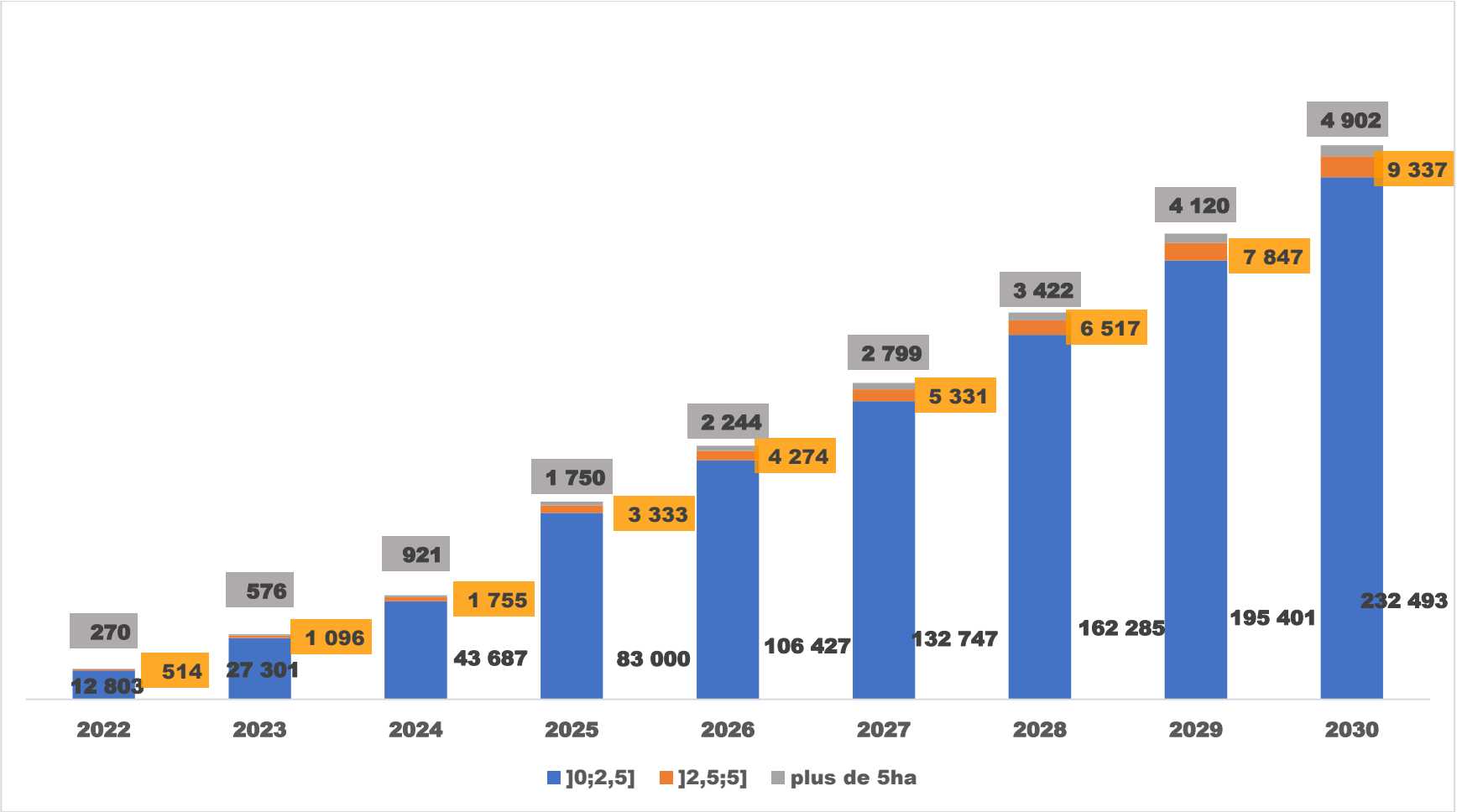
Table 19: Weighting of intervals of cotton area to be cultivated

Interval	]0; 2.5]	]2.5; 5]	]5; +[	Total
Weight	0.8	0.1	0.1	1

Source: *our calculations*

We finally obtained the graph of distribution of the number of actors estimated according to the cotton sole owned where it appears that it would take 13,587 cotton farmers to cultivate 19,281 ha of land and that by 2030 the additional network will have to include approximately 246,732 cotton producers for a mobilized area of 350,140 ha.

Graph 6: Distribution of the number of actors estimated according to the intervals of cultivable land they own



Source: *our calculations*

II.1.6.2 Axis II_ on strengthening the cotton ginning system

It is a question here of ensuring the ginning of the additional cotton production induced by the establishment of the complementary network of producers. Also the model below will allow us to define the profile and the number of SMEs to install.

Profile of SMEs installed in the ginning component

An analysis of the operation of SODECOTON's ginning equipment (number of effective ginning days, saw rotation speed) enabled us to make a guess about the ginning of seed cotton harvested by the complementary network of cotton growers.

By ginning 11,657 tons of seed cotton for an effective ginning period of 120 days and with a rotational speed of 12 kg/saw-hour, 4896 tons of cotton lint are obtained (*Table 21*). Going to 150 days, with the same speed of rotation, we could gin nearly 14,571 tons of seed cotton and obtain 6,120 tons of cotton lint.

Table 20: Estimated ginning of cotton grown by the complementary network

Number of effective ginning days	**150**				**120**			
Rotation speed (kg/saw-hour)	11	12	13	14	11	12	13	14
Cotton fiber capacity (in tons)	5,610	6,120	6,630	7,140	4,488	4,896	5,304	5,712
Seed cotton capacity (in tons)	13,357	14,571	15,786	17,000	10,686	11,657	12,629	13,600

Source: *our calculations*

Furthermore, in addition to the gin stands, the factories to be set up should have other equipment, in particular a system for sucking seed cotton from the trucks, a conveying system to the cleaners before reaching the gins and humidifiers.

In contexts of dry air, as is the case in the cotton-growing area of Cameroon, these are installed to inject water vapor into seed cotton before it is ginned, but also into the fiber before the transition to the press to obtain bales of cotton fiber with humidity up to the limit of 8.5% water authorized by international trade.

In addition they should be equipped with presses and "lint cleaner". The presses make it possible to form bales of cotton fiber with a standard weight of 220 kg. The "lint cleaners" make it possible to recover short fibers from ginning waste.

With regard to the forecasts on the production of seed cotton by the additional system to be put in place, the following assumptions are made:

Assumptions:

H1: *the working life of a gin stand is 120 days, with a rotation speed of 12 kg/saw-hour;*

H2: *each unit to be set up must have a minimum of two gin stands.*

$SME_i = P_{INDi} / 23{,}314$

Where 23,314 tons (11,657*2) represent the ginning capacity of 2 stands to be installed in an SME under the hypothesis H1

And SME_i is the number of SMEs to be set up in year i (i=2022;…; 2030)

We obtain the following projections in terms of SMEs to be implemented.

Table 21: Estimate of the number of SMEs able to gin cotton from the complementary network

I	P_{SNDi}	P_{If}	P_{INDi}	SME_i
2023	439 401	373,616	65,786	2
2024	487 481	382 211	105,270	3
2025	600,000	400,000	200,000	5
2026	665 653	409 203	256 450	7
2027	738,490	418 617	319,873	8
2028	819 296	428 248	391,049	10
2029	908 945	438 100	470,845	13
2030	1,008,403	448 179	560 224	15

Source: *our calculations*

In total, it will be necessary to support the establishment or development of fifteen (15) SMEs in cotton ginning. This support must be progressive in accordance with the table above.

II.1.6.3 Axis III_ on strengthening the local fiber transformation system

The achievement of the objective of this axis requires the establishment of a very incentive framework to create a great enthusiasm for entrepreneurs and investors for the activities of transformation of the natural cotton fiber into varied and high quality fabric. .

Indeed, the current system mainly led by the CICA M aims to reach 6,000 tons in 2021-22, very far from the local fiber transformation target of 50%.

Hence the need to set up a complementary network that will make it possible to achieve the objectives of the SND. Setting up said network presupposes mastery of the cotton fiber transformation process in order to assess whether it is necessary to duplicate it or to

segment it so as to involve several actors. The idea here is not to propose a cumbersome mechanism that is difficult to operate. But to propose a simplified device which obeys the theory of the division of labor of Adam Smith.

Also we analyzed the cotton fiber transformation process as it is currently done. It is done in several stages.

1st step: Analysis of cotton bales

Each bale of cotton is first analyzed. There are several varieties of cotton that it is necessary to mix in order to obtain an optimal quality thread and fabric.

2nd step: Threshing

This is the step of opening and cleaning the cotton fiber. The different varieties of cotton are mixed. At the end of this stage, the cotton fibers are in the form of flakes.

3rd step: Carding

Carding makes it possible to transform the layer of flakes into a veil. The fibers are disentangled in a parallel way. Short fibers and the last vegetable impurities are eliminated. At the end of this stage, the cotton fibers are in the form of ribbons.

4th step: Stretching

The drawing operation consists of sliding the fibers over each other. On leaving this stage, the cotton fibers are in the form of ribbons whose fibers are parallelized.

5th step: Rotor spinning

The yarns are made directly from the draw tape. At the end of this stage, the cotton fibers are in the form of coils of yarn thanks to the twist they receive from the process.

6th step: Warping

The threads in coils are put side by side on the cantor of the warping machine. The warping machine is the machine that performs this process. At the end of this stage, the coils of yarn are in the form of rolls.

7th step: Gluing

These rollers are mounted on a sizing machine so that the threads are immersed in a bath of glue, then dried in order to give them additional mechanical strength. This will allow them to withstand the stresses of the loom. At the end of this stage, the threads are in the form of a chain.

8th step: Weaving

The fabric is made by inserting inside the layer of warp thread previously divided into 2 sub-layers (the crowd), then a weft thread is interlaced between these 2 sub-layers. To do so, machines called “looms” are available.

9th step: Packaging

The fabric is packaged in the form of bales using machines called "measuring machines and presses". The Balls are ready to be shipped to the Douala factory

10th step: The EBT service (unbleached - Bleaching - Dyeing)

Ecru is a virgin textile that has not undergone any finishing step. The ecru from Garoua is bleached to eliminate chips and the pigment responsible for the yellowish color. This operation gives it a whitish appearance while improving its hydrophilidity.

11th step: The GEI service (Engraving-Sampling-Printing)

Engraving: The purpose of engraving is to transpose the patterns constituting a drawing onto a frame called a cylinder. The latter being made of Nickel and perforated with small holes called wicks. Sampling: Its purpose is to carry out coloristic research in accordance with the requirements of the colors of each pattern on the drawing.

12th step: The RCP service: finishing (Ramming-Calendar-Folding)

This is the finishing or post-treatment which consists in giving the fixed and washed and/or dyed printed fabric a commercial appearance thanks to a series of physico-chemical operations.

At the end of this analysis, it appears that the CICAM has the particularity of combining several stages, which requires investments to enable it to be carried out optimally. Indeed, in addition to the steps presented above, CICAM has another factory in which other steps are carried out on the coils of wire.

This system, although integrating the entire value chain, nevertheless has limitations, one of which could be the poor performance of the textile industry in Cameroon.

By grouping these steps into a functional component, this study will focus on supporting SMEs in their installation in four segments. The first going from step one to step seven with the end product being the yarn rolls. The second goes from step eight to step nine with the output of the production of the ecru fabric. The third segment will integrate steps ten to step twelve with the final product being the printed fabric. The last segment will be in the same wake of the CICAM factory in Douala.

With regard to the first segment, depending on the availability of raw material and market demand, the spinning units envisaged will produce worsted yarns with an average count of between Ne 24/l and Ne 40/l or around Ne 30/l. The choice of worsted yarn is explained by a weaker competitive intensity, in particular from countries such as Pakistan. In addition, this yarn category is sought after for high value-added applications. For example, combed cotton

yarns are used in the weaving and knitting of textiles for clothing, underwear, outdoor and upholstery.

As regards the number and profile of SMEs to be set up, two important factors determine the minimum critical size and the financial viability of a spinning mill, namely the counts of the yarns produced and the capacity of the opening and threshing. The titration is linked to the demand and the quantity of raw material available. The capacity of the working and threshing equipment determines the amount of yarn that will be possible to produce.

For the proposed titration, the smallest viable — and optimized — unit is set at around 21,000 spindles with a daily production of around 12 tons. A unit should therefore be sufficient alongside the system already in place at CICAM level.

II.1.6.4 Axis IV_ on the industrialization of textile manufacturing and the professionalization of its marketing

Unlike the other components, textile manufacturing is sufficiently representative with 90.8% of players. The real problem here being its low competitiveness mainly due to access to the raw material which is here the fabric, the dilapidated state of the production equipment and the obsolescence of the production techniques.

The real challenge here would be to strengthen the capacities of the units already operational.

II.2 OPERATIONAL CHOICE FOR THE REVIVAL OF THE LEATHER BRANCH AND THE SHOE MANUFACTURING INDUSTRY

As for the COTTON-TEXTILE-GARMENT branch, this part will consist of presenting the challenges and government orientations for the branch, the objectives pursued, the scenarios envisaged as well as the operational choices made.

II.2.1 Issues and government guidelines related to the leather industry and shoe manufacturing

As part of the implementation of both SND 30, the strategy of the industries and services sector, and the Industrialization Master Plan, several orientations have been formulated with regard to the Leather industry branch and the manufacture of shoes.

For SND 30, it is a question of exploring the possibilities of reviving tanneries and the leather goods manufacturing industry (boots, bags, belts, etc.) and ensuring the intensification of leather processing.

In the strategy of the industries and services sector, as well as in the industrialization master plan, it is a question of redeploying the leather and shoe manufacturing industry throughout the national territory through:

- ✓ The organization of the skin collection;
- ✓ The organization of the profession;
- ✓ The creation of a national leather sorting center;
- ✓ The strengthening and redeployment of the industrial capacities of existing tanneries;
- ✓ The creation of new industrial units for the manufacture of leather products (shoes, etc.);
- ✓ Securing quality supplies for industrial enterprises in the leather industry created;
- ✓ The implementation of safeguard clauses for the emergence of thrift store or second-hand shoes;
- ✓ Training and strengthening of technical supervision;
- ✓ The redeployment of TANICAM and NOTACAM
- ✓ Strengthening research on the transition from raw leather to finished leather

Here, contrary to the COTTON-TEXTILE-GARMENT branch, there is no data on the initial situation of the leather and shoe-making industry. The only data are those of 1994 which correspond to the period when the branch was still structured and dynamic. For the past year,

the branch has experienced a slowdown in its dynamism. In 2018, only eight modern companies operating in the branch were identified out of all modern companies, i.e. a rate of almost zero. In terms of turnover for the same period, the branch records a value of 894,300,000 FCFA. That is to say an almost zero weight compared to the overall turnover.

II.2.2 Branch Problem Analysis

The figures mentioned above clearly indicate the central fundamental problem to be solved in the branch, which is: ***the low level of production and added value (almost zero contribution to GDP) as well as the implications in terms of jobs and income distributed.***

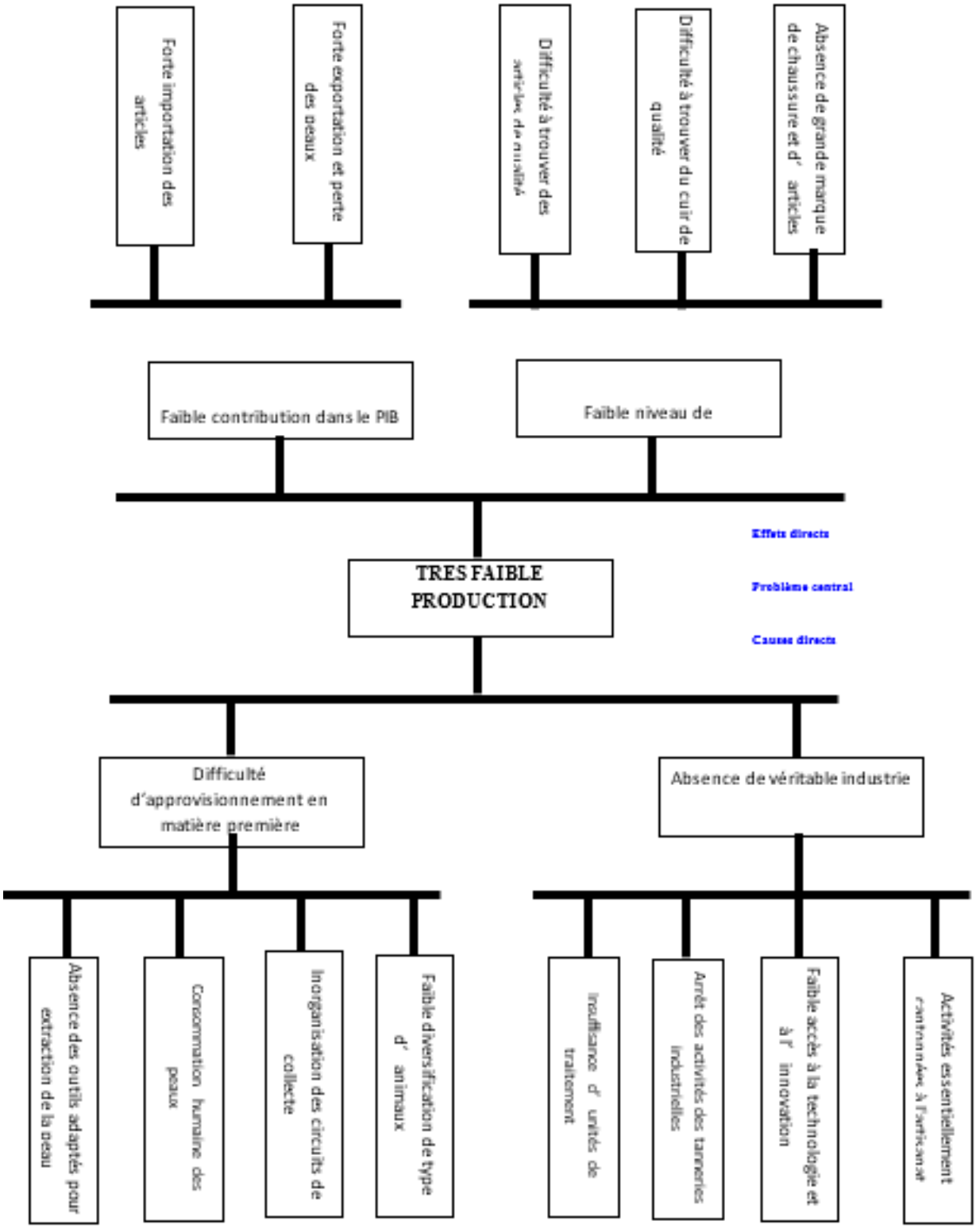
In fact, the leather and shoe manufacturing industry remains marginal despite a potential in raw materials (raw skins and leather of cattle and horses, sheep and goats), this sector is struggling to see the emergence of a industrial scale unit. The activity is essentially confined to crafts or even to the export of raw or semi-finished products.

The lack of organization of collection circuits and the insufficiency of processing units lead to supply difficulties both in terms of availability and quality. The tannery and shoe manufacturing activities also face competition from imports. And yet the transformation of animal skins is a promising sector involving many actors (collectors, tanners, dressmakers, stylists and other craftsmen) who could be carriers for economic recovery in the northern regions in particular.

The figure opposite schematically represents the problems of the branch. It emerges that central is none other than the very low production of this branch, resulting in a low contribution to GDP and a low level of processing.

The causes are mainly the difficulty of supplying raw materials and the absence of real industry. The difficulty of supply is due not only to the absence of suitable tools for the extraction of the skin, the disorganization of the collection circuits but also to the low diversification of animal types and even the human consumption of the skins. The absence of industry is explained by the lack of processing units, the cessation of activities of industrial tanneries, the low access to technology and innovation and the strong informal nature of activities.

Figure 12: Leather problem tree



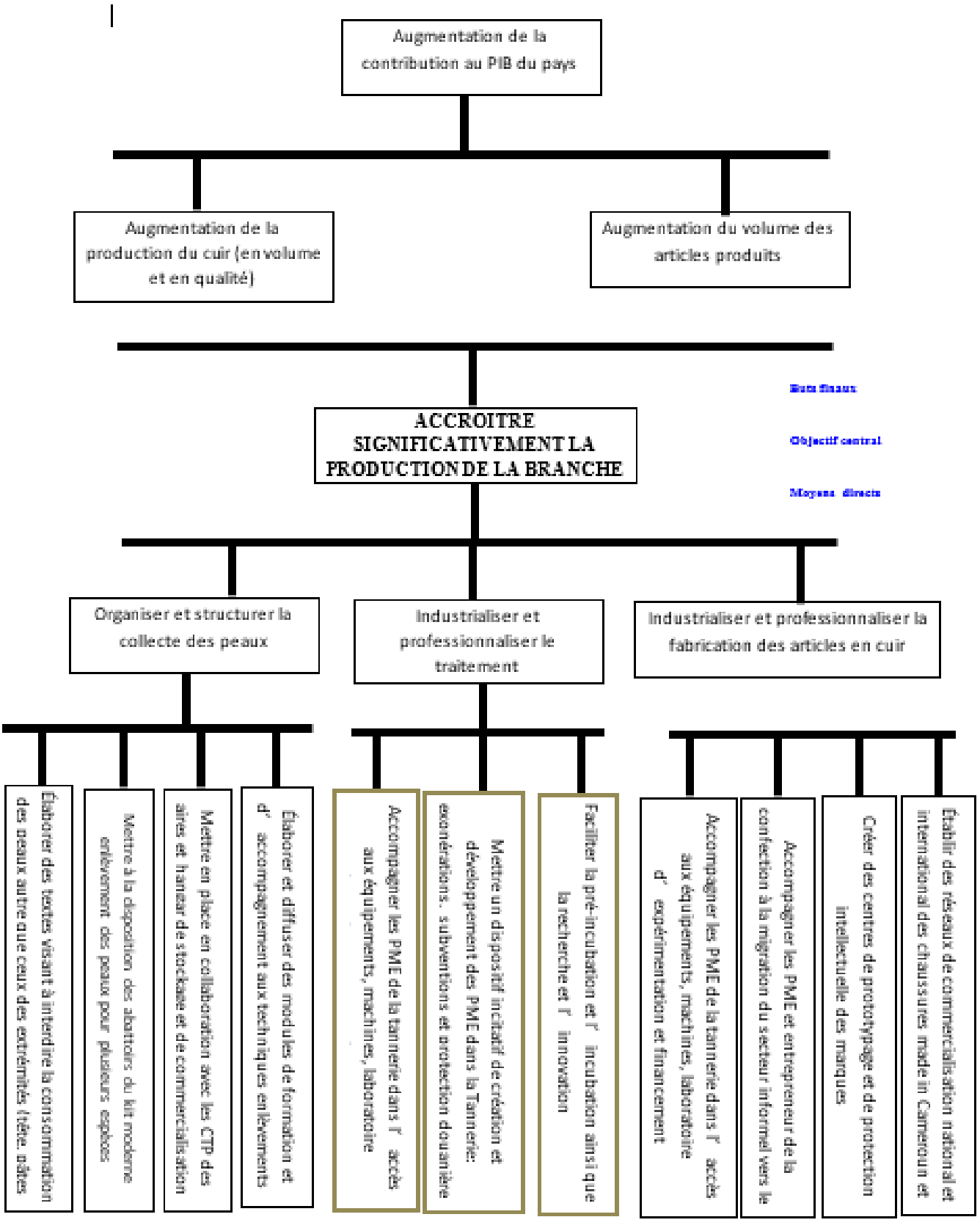
II.2.3 objectives Analysis

In view of the problems identified above, the general objective of this study is to significantly increase production in the branch, which will consequently allow an increase in leather production (in volume and quality) and a increased volume of items produced.

Specifically, it will be about:

- ✓ To organize and structure the collection of skins by drafting texts aimed at prohibiting the consumption of skins other than those of the extremities (head, pasta and tails), the provision of modern skin removal kits to slaughterhouses for several animal species, setting up, in collaboration with the CTDs, areas and sheds for storing and selling skins as well as Developing and distributing training and support modules for skin removal techniques;
- ✓ Industrialize and professionalize the processing of skins through, for example, support for tannery SMEs in access to equipment, machines, experimental laboratory and financing, the establishment of an incentive mechanism for the creation and development of SMEs in Tannery, facilitating pre-incubation and incubation as well as research and innovation;
- ✓ Industrialize and professionalize the manufacture of leather articles by supporting SMEs in the tannery in accessing equipment, machines, experimental laboratories and financing, supporting SMEs and entrepreneurs in the garment industry to migrate from the informal sector to the formal sector, the creation of centers for prototyping and intellectual protection of trademarks and the establishment of national and international marketing networks for shoes made in Cameroon and others.

Figure 13: Lens tree



II.2.4 Scenarios and assumptions

To achieve the above-mentioned objectives, two scenarios are possible, namely, focusing on existing actors by restructuring/reactivating both existing industrial tanneries and artisanal ones. In this scenario, the supply of quality skin and leather in large quantities is considered to be the main bottleneck of the branch. The second scenario is the one that is built under the assumption that there is no real leather and clothing industry in Cameroon. For this, we must think about the establishment of an industry to achieve the government's objectives.

Scenarios	Hypotheses
S1_Restructuring/reactivation of industrial tanneries and strengthening of artisanal tanneries	**H1:** the main bottleneck in production is the problem of supplying quality hides and leather.
S2_Stimulate, structure and organize the creation of a baking and clothing industry	**H1:** there is no real leather and clothing industry in Cameroon

II.2.5 Scenario choice

SND 30 proposes to explore the possibilities of reviving tanneries and the leather goods manufacturing industry (boots, bags, belts, etc.) and ensuring the intensification of leather processing. This objective, which could not be clearly quantified, sufficiently shows the almost non-existent nature of the leather industry and the manufacture of articles made from this material, which very quickly eliminates scenario 2.

Indeed, scenario 2 is the one that best suits the political priorities at the same time as it makes it possible to directly hit the targets while remaining almost entirely within the perimeter of competence of MINPMEESA.

Criteria	Scenario 1	Scenario 2

Target group	5/10	9/10
Target territory	5/10	10/10
Implementation structure	5/10	8/10
Inputs (HR, Material, etc.)	8/10	10/10
Needs/problems	3/10	10/10
Political priorities	10/10	10/10
Impact	4/10	9/10
Feasibility	4/10	8/10
Sustainability	4/10	10/10
TOTAL/90	**48**	**84**

Table 22: Project Cycle Management (PCM)

Source: *working group*

II.2.6 Operational framework

Axe 1

Amélioration de l'enlèvement des peaux

Objectif: ***réduction des pertes de peaux***

Axe 2

Organisation et structuration de la collecte et stockage des peaux

Objectif: ***Optimiser la collecte des peaux tout en améliorant le séchage et stockage***

Axe 3

Renforcement du dispositif de traitement de la peaux pour la transformer en cuir de grande qualité

Objectif: ***Densifier les unités de traitement des peaux***

Axe 4

Industrialisation de la Confection des articles à base de cuir

Objectif: ***Favoriser la production industriel des chaussures et autres articles en cuir***

CHAPTER 3 : PRIORITY ACTION PLAN FOR REVIVING THE COTTON-TEXTILE-GARMENT-LEATHER SECTOR

The action plan is the result of the strategic objectives that led to the strategic axes of the different branches of the sector. Indeed, these strategic axes have been retained as major orientations to lead the structuring of the COTTON-TEXTILE-GARMENT-LEATHER sector in Cameroon for the period 2023-2030, this in line with the requirements of the SND30. It is:

- For the Cotton-Textile-Making business

1) Structuring and organization of cotton producers in Cameroon ;
2) Strengthening of the cotton ginning system ;
3) Reinforcement of the system for transforming cotton fiber into fabric ;
4) Industrialization of textile manufacturing and professionalization of its marketing.

- For the leather industry and shoemaking

1) Improved skin removal;
2) Organization and structuring of the collection and storage of skins;
3) Reinforcement of the skin processing device to transform it into high quality leather;
4) Industrialization of the manufacture of leather goods.

The choice of strategic axes is a response to the problems and/or obstacles to the blossoming of the sector. These difficulties have been noted in Chapter 1 of this document. In addition, a diagnosis of the sector made it possible to identify, among other things, a certain number of weaknesses and threats. Based on these, we have made strong recommendations to boost the sector.

From these, a prioritization of recommended actions/initiatives was carried out by a group of experts in the field. It is presented as follows by branch of the sector.

III.1 PRESENTATION OF THE PRIORITY AREAS OF INTERVENTION OF THE COTTON-TEXTILE-CONFECTION BRANCH

For this branch; the following priority activities have been selected for each of the strategic axes.

III.1.1 Axis I_ on the structuring and organization of cotton production in Cameroon

The objective being to boost the production of seed cotton in Cameroon, it is a question here of setting up a framework that should make it possible to significantly improve cotton production through a better yield per hectare, access to technology and facilities for mechanization, transport and marketing.

This axis is underpinned by 04 activities below:

ACTIVITY 1_Awareness, Structuring and Incentives

It is a question here of setting up a community of producers, old as newcomers, belonging or not to the network of producers of SODECOTON. This community will be structured and organized in such a way as to make it a real production force using modern production techniques and tools.

ACTIVITY 2_Innovation, Training and Support

Increasingly, agriculture in search of a better yield makes use of science and is the subject of permanent research that must be regularly tested and put into practice. In the background of all this research and innovation we find the increasingly strong use of ICT through artificial intelligence, IOT, VR. Thus, as part of this program, emphasis should be placed on:

- ✓ Soil analysis and advanced irrigation techniques such as drip
- ✓ The intelligent use of pesticides and fertilizers
- ✓ Continuous seed improvement
- ✓ Training and support for farmers in acquiring inputs and using the results of research
- ✓ The extension of production areas in regions with favorable climatic characteristics for cotton cultivation

ACTIVITY 3_Mechanization, Logistics and Transport

For a good yield and a minimization of risk, agricultural practices must tend towards the second or even third generation. Also, the products from the harvest must be able to easily reach the marketing centers.

ACTIVITY 4_Finance, Insurance and Marketing (FAC)

Ensuring continued and growing agricultural production requires not only adequate investment but also outlets for the produce of the harvest. Consequently, it is imperative to set up a relevant financing and insurance system, all of which anchors the marketing capacity.

III.1.2 Axis II_ on strengthening the cotton ginning system

The objective pursued by this axis is to increase local ginning capacity. In fact, our estimates showed us that SODECOTON did not guarantee the achievement of the SND's objectives. Also the complementary mechanism of structuring the actors presented in the previous axis will induce an increase in the production of seed cotton which will have to be ginned. It is therefore a question of encouraging the installation and development of SMEs in this component. Also the activities below will be carried out.

ACTIVITY 1: Raising awareness and organizing

It is a question here of mobilizing the actors through the organization of awareness seminars which will be accompanied by all the canons of communication (posters, flyers, brochures; radio, TV; social networks, etc.). At the end of these seminars; we will have identified a community of SMEs that we can support in cotton ginning. In addition, it will be a question of proposing incentives for the installation of small modern cotton ginning units of the said SMEs. As a priority, we can create ginning centers near the storage sheds

ACTIVITY 2: Accompaniment and Access to machinery and equipment

It will be a question of supporting SMEs in the acquisition of modern ginning equipment through the establishment of complementary mechanisms, in particular leasing, risk capital and leasing. An important phase of this support will consist of identifying major producers of this equipment to put them in contact with the promoters.

III.1.3 Axis III_ on strengthening the processing system

Achieving this objective requires the establishment of a very incentive framework to create a great enthusiasm for entrepreneurs and investors for the activities of transformation of natural cotton fiber into varied and high quality fabric.

The priority actions for this recruited strategy include:

ACTIVITY 1: Research, Development, Innovation & Support

With regard to innovation, it should be noted that beyond automation, the fourth industrial revolution has generated some opportunities for innovation by introducing more creativity to processing. Moreover, according to the International Labor Office (ILO), the main areas in which technologies have the greatest potential for action in terms of innovation in textiles are: *market intelligence, design, materials, suppliers and logistics, manufacturing, marketing, retail, and customer service.*

According to several analysts, innovation in the textile industry is extremely important for the fashion industry. Over the years, certain fabrics like polyester were in vogue. However, trends change over time, and more recently, fabrics like cotton have become more fashionable as people have started thinking about sustainability (sustainability) in fashion. The trend based on a time series analysis would therefore be that organic cotton will be widespread by 2025.

Under this program, four major factors can drive innovation

- ✓ Sustainable transformation (waste reduction: water and carbon)
- ✓ industrial tailoring including the production of multiple size fabrics (more than 120 cm wide)
- ✓ The combination of cotton with other fibers and raw materials
- ✓ printing and dyeing

With regard to the third point, our research tells us that priority must be given to the production of fabrics which are most in demand for imports and which have the following characteristics:

Table 23: Cotton demand between 2014 and 2018

Import volume over 5 years (2014-2018) in FCFA	plain cotton	Armor	Weight (g/m2)	Cotton dosage	Integrated fibers
2,215,129,445	Ecru cotton	Cloth	weight >100g/m2, but <= 200g/m2	85%	N/A

2,076,806,638	Ecru cotton	Cloth	Not exceeding 200g/m2	85%	N/A
1,073,275,543	Ecru cotton	Cloth	weight >100 g/m2	85% or more	N/A
780 420 912	Printed cotton	Cloth	weight >100g/m2, but <= 200g/m2	85% or more	N/A

Source: *national accounts*

However, it must be said that the table above has the limitation of not accurately reflecting the consumption of the different categories of fabric. Indeed, it does not stand out fabrics with other weaves such as **twill** and **satin** which are used in the manufacture of articles such as jeans pants, pullovers, various uniforms, furniture coverings and curtains. It is aware of this that the orientations of the SND 30 place an emphasis on these articles.

In more detail, we will discuss here:

- ✓ Create experimental laboratories and workshops;
- ✓ Multiply training programs in weaving and knitting;
- ✓ Multiply training programs in dyeing and printing;
- ✓ Encourage and support incubation and pre-incubation programs in textiles ;
- ✓ Support companies in the search for partnerships and participation in fairs and professional meetings;
- ✓ Create a textile-clothing center and/or clusters;
- ✓ Create platforms or economic zones that encourage the establishment of new industries;
- ✓ Support current companies that are in the process of transformation (quality, productivity, innovation, etc.);
- ✓ Promote innovation in these structures by launching new ranges of fabric corresponding to the trend of the national and international market;
- ✓ Train coaches and consultants specializing in the development of textile production.

ACTIVITY 2: Modernization of Machinery and Equipment

In view of the demand both in terms of quality and quantity as mentioned above, it is necessary to facilitate access to the appropriate technology. through the establishment of

complementary mechanisms, in particular leasing, venture capital and leasing. An important phase of this support will consist of identifying major producers of this equipment to put them in contact with the promoters. In this perspective it will be necessary:

- ✓ Develop leasing, venture capital and leasing mechanisms.
- ✓ Grant subsidies for the acquisition of new equipment;
- ✓ Organize a technology transfer and maintenance system;
- ✓ Create a workshop for the improvement and finishing of local processing equipment;
- ✓ Improve coordination within the interprofessional organization;
- ✓ Organize exhibitions of textile equipment and machinery;
- ✓ Create a technical center for clothing trades.

ACTIVITY 3: Sensitization and Incentives

The cotton fiber to fabric processing sector is a sector full of opportunities and its industry is quite mature in developed countries and in Asia. These opportunities are not well known in our ecosystem. It is therefore necessary to raise awareness among entrepreneurs of the potential of this sector and of the incentive measures that the government can set up. For this purpose it will mainly be necessary:

- ✓ Organize awareness-raising workshops and seminars for SMEs and potential entrepreneurs (entrepreneurial awakening, success stories, master classes, etc.);
- ✓ Increase awareness at the preincubation level (schools and universities) and public and private incubation structures;
- ✓ Adopt tax incentives for the establishment of new businesses, if necessary set up a free zone and textile clusters (Increase customs duties and other taxes relating to second-

hand clothes and printed fabrics that are not 100% cotton, Adopt the tax incentives for setting up new businesses);

- ✓ Guide research and training in the field of biotechnology applied to textiles.

III.1.4 Axis IV_ on Industrialization of textile manufacturing and professionalization of its marketing

The manufacture and making of uniforms for both security (PPE), armed forces (police, army, gendarmerie, etc.) and schools requires compliance with the standards relating to the making and composition of the fabrics. It is a question here that at the same time as we encourage large local orders (public and private), to promote access to machines and tools for making clothes.

ACTIVITY 1: Encourage/encourage public and private commissioning

It would be more than appropriate here to set up a mechanism to guarantee and therefore plan for major orders from both the private and public sectors. Also it will be about:

- ✓ Develop a text that devotes a percentage of local order in the orders of outfits and uniforms that can be manufactured in Cameroon over 5 years ;
- ✓ Include in the list of prices for products made of cotton;
- ✓ Creation of a purchasing center for outfits and uniforms for public and private structures operating in the form of an economic interest group;
- ✓ Encourage the creation of business clusters/clusters by type of uniform;
- ✓ Fight against anti-competitive practices, smuggling and second-hand clothing imports.

ACTIVITY 2: Promote access to tailoring equipment

Manufacturing and tailoring of quality and in large quantities requires specific equipment such as laser cutting for mass cutting, digital embroiderers and a set of finishing and personalization machines. This activity will consist of:

- ✓ Promote the creation of shared cutting, embroidery, hosiery and overcasting workshops;

- ✓ Facilitate the acquisition of machinery and equipment through leasing, venture capital and leasing mechanisms. An important phase of this support will consist of identifying major producers of this equipment to put them in contact with the players. ;
- ✓ Supporting computer-aided manufacturing (virtual reality and 3D printing) and innovative manufacturing mechanisms.

ACTIVITY 3: Promote brands and organize distribution channels

It is not enough to produce clothes of high quality and in large quantities, but it is also necessary to better value them and facilitate their marketing through the tasks below:

- ✓ Facilitate the filing of trademarks and models at OAPI;
- ✓ Multiply the exhibition events of clothes made from cotton;
- ✓ Encourage the creation of textile departments in supermarkets and travel agencies;
- ✓ Encourage online marketing.

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III.2 PRESENTATION OF THE PRIORITY AREAS OF INTERVENTION OF THE LEATHER INDUSTRY AND FOOTWEAR MANUFACTURING BRANCH

The main axes will be broken down as follows:

III.2.1 Axis 1_Improving the removal/stripping of skins

In view of the diagnosis carried out in the branch relating to the quality of the remains in slaughterhouses, it is necessary to carry out a set of activities aimed not only at improving quality but also at raising awareness among the various actors involved in the process in order to reduce significantly the loss of skins.

ACTIVITY 1: Awareness raising and training

The first step will be to raise awareness and create a framework for continuous improvement and innovation. So it will be:

- ✓ Organize awareness campaigns in slaughterhouses and chiefdoms
- ✓ Organize training sessions for slaughterhouse technicians

- ✓ Organize competitions for the best stripper at municipal and then regional level

ACTIVITY 2: Support and tools

Once raised, it will then be a question of providing the various technicians with the most appropriate tools to carry out their work through:

- ✓ Purchase and distribution of skin removal kits
- ✓ Establishment of maintenance centers and development groups (virtual and real)

I II.2.2 Axis 2_Organization and structuring of the collection and storage of hides

As reported in the diagnosis, the collection and storage of skins does not take precise channels worse, the latter is often more in demand as an edible food in households. In this operational axis, it will be a question of optimizing the collection of skins while improving drying and storage, while discouraging the edible use of skins by households.

ACTIVITY 1: Establishment of a regulatory framework

The establishment of a regulatory framework is essential to revitalize this sector, whether it concerns decrees, decisions or even a simple circular letter. It will be about:

- ✓ Development of a text on the prohibition of the sale of certain skins to households and on the categorization of skins according to quality and animal
- ✓ Drafting of a text aimed at organizing the activity of collecting, storing and transporting skins

ACTIVITY 2: Structuring and organization of the collection, storage and marketing of hides

As the first step in the leather value chain, it is essential to dry and store the skins in the standards in order to take a real option on the quality through the spots below:

- ✓ Construction of storage sheds in collaboration with the CTDs

- ✓ Installation of skin drying units near storage sheds
- ✓ Development of learning and improvement manuals for the skinning of an animal in French, in local languages and illustrated
- ✓ Creation of departmental skin marketing centers

I II.2.3 Axis 3_Strengthening the skin treatment system

The treatment of hides or tanning is a crucial step in the leather industry. The diagnosis having proved that these actors were not only poorly equipped but very dispersed and almost all operating in the informal sector, it would be wise to seek to densify the fairly competitive skin processing units.

ACTIVITY 1: Raising awareness and structuring

The densification of the processing units of competitive skins requires a strong awareness and structuring of the actors with a strong implication of the CTD and the traditional authorities. We will discuss in more detail:

- ✓ Identify and map artisanal and informal tanners
- ✓ Group together artisanal and informal tanners by department then by region in collaboration with CTDs and traditional authorities
- ✓ Identify and diagnose formal SMEs working in industrial and semi-industrial tanning

ACTIVITY 2: Training and support

Once sensitized and structured, it is necessary to raise and standardize the level of knowledge by disseminating good practices and making use of greater mechanization for at least semi-industrial processing of skins through the tasks below:

- ✓ Develop manuals, brochures and training videos for learning the trade of tanner
- ✓ Organize training and upgrading sessions for artisan tanners

- ✓ Subsidize the acquisition of new equipment
- ✓ Set up a leasing mechanism to facilitate the acquisition of machinery and other equipment
- ✓ Train in the use and maintenance of new equipment
- ✓ Build shared workshops for the realization of works such as river bathing, stripping and dyeing

ACTIVITY 3: Innovation and incubation

From a perspective of continuous improvement and sustainable and inclusive development, it is important to introduce the innovation aspect in a special way as follows:

- ✓ Build and equip a specialized quality laboratory for experimentation with skin treatment processes
- ✓ Organize entrepreneurial awareness activities in schools and universities
- ✓ Initiate leather project incubation programs within existing incubation structures

III.2.4 Axis 4_Industrialization of the manufacture of leather-based articles

Current craft production is not only low productivity but also highly variable in terms of quality. It is therefore necessary to promote mechanization while taking into account the constraints of innovation and marketing. It will be about:

ACTIVITY 1: Boost Production and Productivity

Establishing and disseminating SOPs (standard operations procedures) while promoting the acquisition of machinery and equipment will help boost the production of items such as shoes that can go from unit production to mass production. It will then be:

- ✓ Develop and distribute the white paper on the production of leather-based articles
- ✓ Set up a program to improve the production and formalize informal manufacturing units for leather-based articles

- ✓ Set up a mechanization program/center for the production of leather goods
- ✓ Create shared workshops to allow the heavy stages of the transformation process to be outsourced

ACTIVITY 2: Promoting creativity and innovation

The current trend in terms of creativity and innovation in the manufacture of articles such as shoes and resorts to modeling interfaces using virtual reality, 3D printing and 3D scanning technologies. It would be more than wise to take this into account through:

- ✓ Set up a modeling, prototyping and intellectual protection center
- ✓ Increase the creation of leather-making courses in schools and vocational institutes
- ✓ Develop and make available to the various stakeholders assisted design applications integrating virtual reality (VR)

ACTIVITY 3: Facilitating marketing

Marketing comes to close this process of value creation by giving the possibility to the articles to be seen and sold in Cameroon and in the whole of Africa for a start before attacking the Western markets. It will then be a question of:

- ✓ Organize an annual leather and related products fair
- ✓ Obtain an agreement with supermarkets and large fashion boutiques
- ✓ Set up a program to export leather-based articles to other African markets
- ✓ Create a leather show shop at CIAY with visibility on the web for the exhibition of the best items

CHAPTER 4 : MONITORING-EVALUATION MECHANISM OF THE STRUCTURING PLAN OF THE COTTON-TEXTILE-GARMENT-LEATHER SECTOR

The implementation and monitoring-evaluation mechanism of the Action Plan presented in the previous chapter is defined through the guiding principles, the actors involved in the implementation and their respective responsibilities, the expected results at the sector level and follow-up procedures.

IV.1 GUIDING PRINCIPLES

The implementation of the Plan for structuring actors in the Cotton-Textile-Leather-Garmentsector in Cameroon will be based on the following guiding principles:

- ✓ Clearly define performance indicators for the sector in line with the National Development Strategies 2020-2030;
- ✓ Adopt an inclusive approach of actors with particular attention to disadvantaged groups such as young people, women, the disabled, rural people and actors in the informal sector;
- ✓ Guarantee the effectiveness and sustainability of the results of the plan by referring to the performances defined for the sector;
- ✓ Ensure quality and efficiency in the implementation of the priority action plan;
- ✓ Ensure good governance (respect for the principles of subsidiarity, deserved authority and separation of powers) in the implementation of the plan and respect for governance in relations with partners and stakeholders in the sector;
- ✓ Rely on existing institutions and dialogue structures for the implementation of actions and the achievement of expected results;
- ✓ Set up effective communication of the plan with the actors for better visibility and ownership of it;
- ✓ Develop the visibility and credibility of the Plan with the State and development partners.

The period of implementation of the activities of the Plan for structuring the actors of the Cotton-Textile-Leather-Garmentsector in Cameroon is three (3) years. This deadline which

seems, a priori, spread out responds to an imperative of adaptation to the budgetary requirements and the dynamism of the sector.

IV.2 THE SYSTEM FOR STEERING AND IMPLEMENTING THE PLAN

The system for steering and implementing the plan is made up of three hierarchical levels, namely the political level, the strategic level and the operational level.

Politically

Given that this plan is part of the implementation of SND 30, its monitoring-evaluation mechanism cannot be located on the sidelines of the system already implemented for its monitoring. Also, the political orientations of this plan will be made within the framework of the National Planning Council chaired by the Prime Minister, Head of Government.

At the strategic level

The strategic orientation body for the implementation of the plan is the National Committee for Monitoring and Evaluation of the implementation of the strategy chaired by the Minister of Economy, Planning and Regional Development. It should be noted that this committee has a sub-committee for industries and services, which will serve as the technical secretariat of the said committee and will ensure operational coordination before strategic validation by the national committee.

At the operational level

The Technical Coordination Unit ensures the implementation and monitoring of the strategic orientations of the National Committee in accordance with its missions. It is the executive body for the implementation of the Plan and is responsible for the day-to-day execution of the activities selected in the priority action plan.

It coordinates the interventions of the various actors and provides support for the general reflection on the sector. Indeed, it ensures the collaboration of all stakeholders in order to protect the interests of each other.

The Technical Coordination Unit is led by a manager appointed by the Minister of Small and Medium Enterprises, Social Economy and Handicrafts. The latter, as contracting authority for the Structuring Plan for the Cotton-Textile-Clothing-Leather sector, oversees the

finalization of the processes for implementing the plan's activities in terms of deadlines, human resources, financial and material.

With a view to mobilizing financial resources, the Technical Coordination Unit works in close collaboration with MINFI, MINEPAT, MINMIDT, MINADER, and technical and financial partners. It is made up of focal points from sectorial administrations, public establishments, employers' organizations, and civil society organizations, technical and financial partners.

As part of its missions, the Technical Coordination Unit works with the private sector, civil society organizations, public administrations and their external/deconcentrated services, decentralized local authorities and their technical services, firms and consultants. Specialized.

IV.3 OPERATIONALIZATION OF THE PLAN

The Government of the Republic of Cameroon adopts the Structuring Plan of the Cotton-Textile-Clothing-Leather sector, distributes the roles according to the fields of competence of the actors and entrusts its management to the National Strategy Monitoring Committee. Its implementation is ensured by the Technical Coordination Unit.

The National Committee ensures the proper execution of the actions of the plan and the achievement of results, the Technical Coordination Unit implements and supervises the priority action plan for the structuring of the Cotton-Textile- Making-Leather.

The strategic implementation partners (public administrations, employers, consular chambers, civil society organizations, international cooperation partners) are fully involved and make positive contributions to achieving the expected results.

The Technical Coordination Unit will produce quarterly reports, submitted to the industry and service sub-committee for validation, and forwarded to the National Committee and other technical and financial partners.

The validation of the activity reports by the industry and services sub-committee will require an in-depth examination relating, among other things, to (i) the activities carried out, (ii) the results achieved in relation to the annual work plan, (iii) the investments made, (iv) the level of achievement of the sector's performance indicators.

Two evaluation principles will guide the monitoring of the implementation of said plan:

- ✓ A half-yearly internal evaluation of the subcommittee and strategic partners ;

- ✓ A periodic external evaluation (every year: 2023, 2024 and 2025) and a final external evaluation (2035) initiated by the National Committee.

These evaluations will make it possible to assess the overall performance of the implementation of the Plan, the results achieved, the impact on the beneficiaries and overall the dynamism observed within the sector.

IV.4. RISK MANAGEMENT

The successful implementation of the Cotton-Textile-Clothing-Leather Sector Structuring Plan requires that a certain number of critical conditions be taken into consideration and that preventive or corrective actions be planned in time to avoid unnecessary bottlenecks. The table below indicates the six critical conditions retained whose level of representing risks is measured from 1 (least risk) to 5 (high risk), with some comments.

Type of risk	Risk level	Comments
Low buy-in from stakeholders	4	Low support from stakeholders, in particular cotton growers and SMEs and sectorial administrations, which must take ownership of the Plan and get involved in its implementation, mitigated through communication campaigns jointly organized by the Technical Coordination Unit, MINPMEESA, MINEPAT and MINMIDT. With regard to the adherence of cotton growers, it may be at the level of payment deadlines for their cotton with the ginning units to be set up. The plan should then provide for factoring mechanisms that would allow them to have their income as soon as possible.
Weak political commitment from the Government	5	The main assumption for the implementation of this plan is the government's firm desire to see new players, mainly SMEs, prosper alongside the traditional players in the sector. It will be necessary to arouse the interest of the public authorities to lead them to understand that it is not a question of a mechanism which comes to compete with the system in place, let alone the proposals formulated both in

Type of risk	Risk level	Comments
		the SND and the PDI, but that it is rather a complementary device that aims for the same objectives but with a desire to involve local entrepreneurs and thus create even more opportunities and jobs.
Socio-political instability	2	The Far North region, one of the main areas of production of the material both in terms of cotton and livestock production, is in the grip of a crisis linked to the Islamic sect Boko Haram. Anything that is likely to hamper the implementation of the plan and limit its impact. The same is true for the North West region which is a production center in terms of livestock which is also facing the crisis of the Ambazonian secessionists. It will then be necessary that measures be effectively taken to ensure peace in these two regions. The North-West region being declared economically devastated with the economic advantages falling under this status should nevertheless be a priority within the framework of the implementation of this plan. .
Insufficient mobilization of financial resources	3	As highlighted below, the implementation of the Plan will require the mobilization of many human, material and financial resources which are not necessarily available at this time. It is therefore important that the State take it upon itself to ensure the implementation of the action plan while waiting to mobilize additional or complementary resources from international partners. To this end, the plan provides for the State to put in place: (i) financing mechanisms adapted to industrialization needs, in particular Project Finance mechanisms, risk capital, leasing, etc., (ii) incentives to the private sector to interest them more in investing in the sector.
Low technical and	2	Encouraging the installation of SMEs in Components such as ginning, spinning and weaving requires them to have

Type of risk	Risk level	Comments
technological capacities of SMEs		a strong technical and technological capacity enabling them to be effectively competitive. Anything that is not always the case for our SMEs. To resolve this problem, emphasis will have to be placed on supporting SMEs in this area. Mechanisms such as venture capital will also solve the problem of access to advanced technologies.
Insufficient energy supply	5	Access to energy is crucial for the industrialization process. It is therefore fundamental to solve the problem of its access, either through the increase of the public offer or by the development of complementary mechanisms, in particular the internal production of energy according to the SOSUCAM model.

ANNEX

OPERATIONAL PLAN OF THE COTTON-TEXTILE-GARMENT-DIVISION											
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
Action or operational axis 1: **Structuring and organization of cotton production in Cameroon**		**objective: Increase the volume of seed cotton produced and marketed within the country** **Major indicator: Ton of seed cotton produced (t)** **Reference situation 2021: 357,000 t** **Target 2030: 1,008,403 t**									
A1: Structuring of seed cotton production actors		Set up a community of producers, both old and new, whether or not they belong to the SODECOTON producer network	**T1** : Identify and map current cotton producers outside the SODÉCOTON network	A cartography of cotton growers not included in the SODECOTON blue list AVAILABLE	North Extreme North	125,000	100,000	25,000	-	MINPMEESA, MINADER, MINEPAT, MINDEVEL, INS, CTD	
			T2: Sensitization of identified actors on the need for networking	At least 246,732 cotton growers will join producer networks by 2030	North, Extreme North, Adamaoua, East	100,000	50,000	25,000	25,000	MINPMEESA, MINADER, MINDEVEL, CTD	low buy-in from stakeholders

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							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T3: Support for the establishment of the network of non-blue list producers (Gather and organize producers around cooperatives, EIGs, an umbrella organization and by CTD then by region)	a national network of cotton producers is operational by 2030	North, Extreme North, Adamaoua, East	350,000	-	150,000	200,000	MINPMEESA, MINDEVEL, CTD	low buy-in from stakeholders
			T4: Identification of areas with favorable climatic and geographic characteristics for cotton production	New cultivable areas outside the North and Far North regions identified	Adamawa, IS etc,	300,000	200,000	100,000	-	MINPMEESA, MINADER, MINEPAT, MINCAF, INC CTD	the non-existence of areas with the same characteristics

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							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T5 : Raising awareness of producers wishing to start growing cotton in all basins whose climates and soils are favorable to this crop	At least 246,732 cotton growers produce in the identified areas by 2030	All production pools	50,000		25,000	25,000	MINPMEESA, MINADER, MINEPAT, MINDEVEL, CTD	Low buy-in from stakeholders
			T6 : Preparation of advocacy for a municipal, regional or even national incentive framework for degressive facilities spread over at least 10 years. This could, for example, be the abolition of customs duties on inputs, fertilizers and equipment, etc.	An incentive framework for the development of cotton cultivation set up in partnership with the municipalities	production basins	40,000	30,000	10,000		MINPMEESA, MINFI, MINEPAT SPM, PRC, MINADER, MINDEVEL, CTD	low buy-in from stakeholders

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OPERATIONAL PLAN OF THE COTTON-TEXTILE-GARMENT-DIVISION											
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming *(in thousands of FCFA)***			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T7: Establishment of test fields in the localities identified for the cultivation of cotton	Test fields are set up in the regions identified for cotton cultivation	Areas identified favorable to cotton cultivation	50,000	-	25,000	5,000	MINADER, MINPMEESA, CTD	cotton does not produce in these areas
TOTAL ACTIVITY I						**1,015,000**	**380,000**	**360,000**	**275,000**		
A2 : Support for cotton production			**T1** : Strengthening of research programs within dedicated institutions (improved seeds, technical itinerary to ensure greater production and better yield per hectare)	Improved seeds and new cultivation techniques are developed	extent of the territory	300,000	100,000	100,000	100,000	MINRESI, MINPMEESA, MINESUP IRAD, IITA	the yield per hectare does not improve
			T2 : Training of producers in the conduct of a second or even third generation farm	At least 246,732 producers trained in farm management	Production basin	400,000	50,000	150,000	200,000	MINADER, MINPMEESA, CTD	low support from producers

ANNEX

OPERATIONAL PLAN OF THE COTTON-TEXTILE-GARMENT-DIVISION											
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T3 : Farm monitoring	At least 246,732 producers respect the technical production itinerary	Production basin	25,000	-	25,000	-	MINADER, MINPMEESA, CTD	failure to respect technical itineraries by producers
			T4: Training and support for producers in standardization and labeling processes (organic farming, Max Havelaar, etc.)	At least 246,732 producers trained in organic farming	Production basin	1,250,000	300,000	450,000	500,000	MINADER, MINPMEESA, MINMIDT, CTD, ANOR, GIZ	low buy-in from stakeholders
			T5: Support for producer groups on improved cultivation techniques (intelligent irrigation, intelligent management of pesticides, manures and fertilizers, soil testing, etc.)	production groups are supported	Production basin	2,975,000	825,000	950,000	1,200,000	MINPMEESA, MINMIDT, MINADER, MINRESI, MINEPAT, GIZ	low buy-in from stakeholders

ANNEX

OPERATIONAL PLAN OF THE COTTON-TEXTILE-GARMENT-DIVISION											
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T6 : Facilitation of access to inputs for cotton growers	At least 246,732 producers have access to inputs	Production basin	7,999,999	1,333,333	2,666,666	4,000,000	MINFI, MINEPAT, MINPMEESA, MINMIDT, MINADER, MINRESI, GIZ	Misuse of inputs
TOTAL ACTIVITY II						**12,949,999**	**2,608,333**	**4,341,666**	**6,000,000**		
A3 : Mechanization, Logistics and Transport			**T1** : Facilitation, in collaboration with the CTDs, of access to mechanization and modern cultivation techniques (tractors and tillers, drones, etc.) for the owners of large farms	At least 5,000 owners of large farms have access to mechanical cultivation devices	production basins	840,000	40,000	80,000	720,000	MINPMEESA, MINADER, MINIFI, MINEPAT, CTD,	Overlap in the use of tractors

ANNEX

OPERATIONAL PLAN OF THE COTTON-TEXTILE-GARMENT-DIVISION											
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T2 : Facilitation in collaboration with traditional and religious authorities of access to alternative means of plowing (donkey, horse and ox hitching) for owners of small farms	At least 232,493 smallholders have access to alternative means of tillage	production basins	150,000	25,000	25,000	100,000	MINPMEESA, MINEPIA, MINADER, CTD, traditional and religious authorities	non-adhesion of the actors
			T3 : Development of agricultural tracks in collaboration with CTDs and local development partners	Agricultural tracks are improved	production basins	10,000,000	2,500,000	2,500,000	5,000,000	MINADER, MINTP, CDT, FEICOM, PIDMA, PNDP, PTF	low buy-in from stakeholders

ANNEX

OPERATIONAL PLAN OF THE COTTON-TEXTILE-GARMENT-DIVISION											
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T4 : Construction of production storage sheds in partnership with CTDs	storage sheds are built in all the municipalities of the production basins	production basins	2,100,000	300,000	600,000	1,200,000	MINPMEESA, MINADER, MINFI, MINEPAT, CTD,	Insufficiency of built hangars
			T5: Organizing crop bundling and transportation to storage sheds and ginning units	the cotton is transported from the fields to the storage points and from the storage points to the ginning points	production basins	2,400,000	600,000	800 000	1,000,000	MINPMEESA, MINADER, MINFI, MINEPAT, CTD,	non-compliance with the clauses by the carriers
			T6: Facilitation of the realization of community projects (drilling, solar panels, schools, etc.)	community projects are carried out	production basins	3,000,000	500,000	1,000,000	1.5 million	MINPMEESA, MINADER, MINFI, MINEPAT, MINESEC MINEBASE, MINCAF, UNDP, GIZ, FEICOM, PIDMA, CTD; PNDP	non-adhesion of the actors
TOTAL ACTIVITY III						**18,490,000**	**3,965,000**	**5,005,000**	**9,520,000**		

ANNEX

OPERATIONAL PLAN OF THE COTTON-TEXTILE-GARMENT-DIVISION											
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
A4 : Finance, Insurance and Marketing (FAC)			**T1** : Implementation of crop insurance and producer price insurance regulations	Regulations are developed	production basins	40,000	30,000	10,000		PRC, PM, MINFI, MINPMEESA, MINEPAT,	the slowness in the text validation procedure
			T2 : Establishment of outlet centers or cotton exchange (order, negotiation, futures contract, etc.) for cotton production accompanied by a pre-financing system	a local cotton market set up	national territory	300,000	100,000	100,000	100,000	MINFI, MINPMEESA, MINEPAT, APECAM, ANEMCAM, BC PME, SFI, BEI, Commercial Banks, Business Banks PTF	non-adhesion of the actors

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							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T3 : Implementation of suitable financial products with the Cameroonian Bank for SMEs and with commercial banks	Financial products linked to cotton producers are set up	national territory	25,000,000	5,000,000	10,000,000	10,000,000	PRC, PM, MINFI, MINPMEESA, MINEPAT, APECAM, ANEMCAM, BC PME, SFI, BEI, Commercial Banks, Business Banks PTF	non-adhesion of the actors
			Q4 : Subsidy of the UES of the network of producers through a fund of smoothing funds	producers are supported	production basins	3,000,000	500,000	1,000,000	1.5 million	PRC, PM, MINFI, MINPMEESA, MINEPAT, APECAM, ANEMCAM, BC PME, SFI, BEI, Commercial Banks, Business Banks PTF	low fundraising

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							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T5 : Establishment of a special guarantee fund for the Cotton - Textile - Clothing - Leather sector	a guarantee fund is set up	national territory	25,000,000	5,000,000	10,000,000	10,000,000	PRC, PM, MINFI, MINPMEESA, MINEPAT, APECAM, ANEMCAM, BC PME, SFI, BEI, Commercial Banks, Business Banks PTF	low fundraising
TOTAL ACTIVITY IV						**53,340,000**	**10,630,000**	**21,110,000**	**21,600,000**		
TOTAL AXIS I						**85,794,999**	**17,583,333**	**30,816,666**	**37,395,000**		
Action or operational axis 2: Reinforcement of the cotton ginning system		**Objective: Increase local ginning capacity** ***Major indicator: Ton of cotton fiber obtained (t)*** ***Reference situation 2021: 149,940 t Target 2030: 423,529 t***									
A1 : Awareness and Organization			**T1** : Raising awareness on the importance of locally ginning cotton	At least 15 SMEs with a capacity of 2 gin stands are created by 2030	Production basin	150,000	100,000	25,000	25,000	MINPMEESA, MINMINDT, MINEPAT, MINDEVEL, CTD	Low buy-in from stakeholders

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							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T2: Establishment of a community of PMEESA specialized in seed cotton ginning	A community of actors working in ginning is set up	Production basin	300,000	50,000	100,000	150,000	MINPMEESA, MINMINDT, MINEPAT, MINDEVEL, CTD	Low buy-in from stakeholders
			T3 : Incentive for the installation of small modern cotton ginning units for non-aligned producers in the blue list of SODECOTON and those who traditionally preferred to sell their cotton in Nigeria	Small modern ginning units are installed	Production basin	175,000	25,000	50,000	100,000	MINPMEESA, MINMINDT, MINEPAT, MINDEVEL, CTD	Insufficiency of modern ginning units
			T4 : Creation of ginning centers near storage sheds	Ginning poles are set up near the storage sheds	Production basin	240,000	40,000	80,000	120,000	MINPMEESA, MINMINDT, MINEPAT, MINDEVEL, CTD, GIZ, PTF	Misuse of gin poles, poor road conditions

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							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
TOTAL ACTIVITY I						**865,000**	**215,000**	**255,000**	**395,000**		
A2 : Accompaniment and Access to machines and equipment			**T1** : Strengthening the ginning capacities of craftsmen through continuous training	ginning abilities are improved	Production basin	175,000	100,000	50,000	25,000	MINPMEESA, MINMINDT, MINDEVEL, CTD, GIZ, PTF, IITA, Private consultants	low buy-in from stakeholders
			T2 : facilitation of access to heavy equipment in the form of shared resources	At least 423,529 t of cotton fiber will be obtained by 2030	Production basin	3,750,000	1,000,000	1,250,000	1.5 million	PRC, PM, MINFI, MINPMEESA, MINEPAT, APECAM, ANEMCAM, BC PME, SFI, BEI, Commercial Banks, Business Banks, PTF	low buy-in from stakeholders
TOTAL ACTIVITY II						**3,925,000**	**1,100,000**	**1,300,000**	**1,525,000**		
TOTAL AXIS 2						**4,790,000**	**1,315,000**	**1,555,000**	**1,920,000**		
Action or operational axis 3: Strengthening of the transformation system		***Objective: Strengthen the processing system Major indicator: Number of cotton fiber processing SMEs Baseline 2021: 1.988% Target 2030: 50%***									

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OPERATIONAL PLAN OF THE COTTON-TEXTILE-GARMENT-DIVISION											
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming *(in thousands of FCFA)***			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
A1: Research, Development, Innovation and Support			**T1** : Creation of laboratories and experimentation workshops	new varieties of fabrics are developed	national territory	2,000,000	1,000,000	500,000	500,000	MINPMEESA, MINMINDT, MINESUP, MINRESI MINDEVEL, CTD, GIZ, AFD, PTF, IRAD	Low local expertise in the field
			T2: Strengthening the capacities of PMEESA in weaving through training	Better quality and quantity of woven fiber cotton is obtained	national territory	300,000	75,000	125,000	100,000	MINPMEESA, MINMINDT, MINDEVEL, CTD, GIZ, PTF	low buy-in from stakeholders
			Q3 : Multiplication of training programs in dyeing and printing	Better quality and quantity of dyed and printed fabrics is achieved	national territory	300,000	75,000	125,000	100,000	MINPMEESA, MINMINDT, MINDEVEL, CTD, GIZ, PTF	low buy-in from stakeholders
			T4: Incentive and support for incubation and pre-incubation programs in textiles	new processing techniques and technologies are developed	national territory	2,000,000	500,000	500,000	1,000,000	MINPMEESA, MINESUP, MINMINDT, MINDEVEL, CTD, GIZ, PTF	low buy-in from stakeholders

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OPERATIONAL PLAN OF THE COTTON-TEXTILE-GARMENT-DIVISION											
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming *(in thousands of FCFA)***			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T5 : Support to PMEESA in the search for partnerships and participation in fairs and professional meetings	- many partnerships in the field of textile processing have been signed - the PMEESA participate in fairs and professional meetings in the field of textiles each year	national territory	3,000,000	1,000,000	1,000,000	1,000,000	PRC, PM, MINFI, MINPMEESA, MINEPAT, MINMIDT, PTF	low buy-in from stakeholders
			T6 : Creation of centers and/or textile-clothing clusters	textile-clothing clusters are created	national territory	2,000,000	1,000,000	500,000	500,000	MINPMEESA, MINEPAT, MINMIDT, PTF	low buy-in from stakeholders
			T7: Creation of platforms or economic zones to encourage the establishment of new industries	New platforms dedicated to the textile-clothing industries are set up	national territory	4,000,000	2,000,000	1,000,000	1,000,000	PRC, PM, MINPMEESA, MINEPAT, MINMIDT, PTF, MINHDU; MAGZI	low buy-in from stakeholders

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Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T8: Support for current units involved in processing (quality, productivity, innovation, etc.)	this stain is implicit in the previous ones		-					
			T9 : support for innovation in these structures by launching new ranges of fabric corresponding to the trend of the national and international market	New ranges of fabrics meeting national and international demand are developed	national territory	4,000,000	2,000,000	1,000,000	1,000,000	MINPMEESA, MINMINDT, MINESUP, MINRESI, CTD, GIZ, AFD, PTF, IRAD	low buy-in from stakeholders
			T10: Training of coaches and consultants specialized in the development of textile production.	A number of local experts specializing in textile development are available	national territory	15,000	5,000	5,000	5,000	MINPMEESA, MINMINDT, MINESUP, MINRESI, GIZ, AFD, PTF, Cabinet, Consultants	low buy-in from stakeholders

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Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T11: Encouragement to create fabrics made from other fibers (bamboo, coconut, wood, pineapple, etc.)	fabrics are created from new fibers	national territory	45,000	10,000	15,000	20,000	MINPMEESA, MINMINDT, MINESUP, MINRESI, GIZ, AFD, PTF, Cabinet, Consultants	fiber deficiency
TOTAL ACTIVITY I						**17,660,000**	**7,665,000**	**4,770,000**	**5,225,000**		
A2: Modernization of Machinery and Equipment			**T1:** Development of adapted leasing mechanisms	the actors are equipped thanks to the mechanism	national territory	15,000	5,000	5,000	5,000	PRC, PM, MINFI, MINPMEESA, MINEPAT, APECAM, ANEMCAM, BC PME, SFI, BEI, Commercial Banks, Business Banks PTF	low buy-in from stakeholders
			Q2 : Granting of subsidies for the acquisition of new equipment	PMEESA are subsidized	production basins	300,000	50,000	100,000	150,000	PRC, PM, MINFI, MINPMEESA, MINEPAT, PTF	low buy-in from stakeholders
			T3 : Organization of a technology transfer and maintenance system	the technologies of the transformation machines are assimilated	national territory	10,000	5,000	2,500	2,500	MINPMEESA, MINMINDT, MINESUP, MINRESI, GIZ, AFD, PTF, Cabinet, Consultants	low buy-in from stakeholders

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Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T4 : establishment of a workshop for the improvement and finishing of local processing equipment	local processing equipment is up to date	national territory	175,000	25,000	50,000	100,000	MINPMEESA, MINMINDT, MINESUP, MINRESI, GIZ, AFD, PTF	low buy-in from stakeholders
			T5: Improved coordination within the inter-profession	the inter-profession works in synergy and their result is improved	national territory	15,000	5,000	5,000	5,000	MINPMEESA, MINMINDT, GIZ, AFD, PTF	non-membership of the inter-profession
			T6 : Organization of textile equipment and machinery fairs	fairs are organized	national territory	2,300,000	600,000	700,000	1,000,000	PRC, PM, MINFI, MINPMEESA, MINEPAT, MINMIDT, PTF	low buy-in from stakeholders
TOTAL ACTIVITY II						**2,815,000**	**690,000**	**862,500**	**1,262,500**		

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Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
A3: Awareness and Incentives			**T1:** Organization of awareness-raising workshops and seminars for SMEs and potential entrepreneurs (entrepreneurial awakening, success stories, master classes, etc.);	workshops and seminars are organized	national territory	30,000	10,000	10,000	10,000	PRC, PM, MINFI, MINPMEESA, MINEPAT, MINMIDT, PTF	low buy-in from stakeholders
			T2 : Densification of awareness at the pre-incubation level (Schools and universities) and public and private incubation structures)	the incubation structures are sensitized and many of them direct their activities towards textiles	national territory	30,000	10,000	10,000	10,000	MINPMEESA, MINEPAT, MINMIDT, PTF	low buy-in from stakeholders

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Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T3: Adoption of tax incentives for the establishment of new businesses, if necessary set up a free zone and textile clusters (Increase customs duties and other taxes relating to second-hand clothes and printed fabrics that are not 100% cotton, Adopt tax incentives for the implementation of new businesses	a free zone and new textile companies are created	national territory	30,000	5,000	10,000	15,000	PRC, PM, MINPMEESA, MINEPAT, MINMIDT, PTF, MINHDU; MAGZI	low buy-in from stakeholders

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Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming *(in thousands of FCFA)***			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T4 : Orientation of research and training in the field of biotechnology applied to textiles	textiles and fabrics are made using technologically innovative processes and materials	national territory	6,000,000	1,000,000	2,000,000	3,000,000	MINPMEESA, MINMINDT, MINESUP, MINRESI, GIZ, AFD, PTF, Cabinet, Consultants	low buy-in from stakeholders
TOTAL ACTIVITY III						**6,090,000**	**1,025,000**	**2,030,000**	**3,035,000**		
TOTAL AXIS III						**26,565,000**	**9,380,000**	**7,662,500**	**9,522,500**		
Action or operational axis 4: Industrialization of textile manufacturing and professionalization of its marketing		*objective: encourage large local orders Major indicator: Baseline: Target 2025:*									
A1: Encourage/encourage public and private ordering			**T1** : Elaboration of a text which devotes a percentage of local order in the orders of the outfits and uniforms manufacturing in Cameroon over 5 years	a text signed by the Government exists	national territory	30,000	10,000	10,000	10,000	PRC, PM, MINFI, MINPMEESA, MINEPAT, MINCOMMERCE	Inadequate defined percentage

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							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T2 : Creation of a purchasing center for outfits and uniforms for public and private structures operating in the form of an economic interest group	a purchasing center is created	national territory	350,000	100,000	250,000		MINPMEESA, MINCOMMERCE	
			T3 : Encouragement for the creation of business clusters/clusters by type of uniform	clusters are created	national territory	15,000	5,000	5,000	5,000	MINPMEESA, MINEPAT MINCOMMERCE	low buy-in from stakeholders
			T4 : Fight against anti-competitive practices, smuggling and second-hand clothing imports	measures to combat anti-competitive practices smuggling and second-hand clothing imports are adopted	national territory	70,000	50,000	10,000	10,000	MINPMEESA, MINFI, MINEPAT, MINCOMMERCE, Customs	existence of ways of circumventing these measures
TOTAL ACTIVITY I						**465,000**	**165,000**	**275,000**	**25,000**		

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OPERATIONAL PLAN OF THE COTTON-TEXTILE-GARMENT-DIVISION											
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming *(in thousands of FCFA)***			**Implementation frameworks**	**Risk assumptions**
							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
A2 : Promote access to manufacturing equipment			**T1:** Support for the creation of shared cutting, embroidery, hosiery and overcasting workshops	Shared workshops for cutting, embroidery, hosiery and overcasting are created	national territory	35,000	10,000	10,000	15,000	MINPMEESA, MINFI, MINEPAT	low buy-in from stakeholders
			T2 : Facilitation of the acquisition of machinery and equipment through subsidized leasing mechanisms	PMEESA are equipped by leasing mechanisms	national territory	175,000	50,000	50,000	75,000	PRC, PM, MINFI, MINPMEESA, MINEPAT, APECAM, ANEMCAM, BC PME, SFI, BEI, Commercial Banks, Business Banks PTF	low buy-in from stakeholders
			T3 : Support for computer-aided manufacturing (virtual reality and 3D printing)	the actors are trained in computer-aided tailoring	national territory	300,000	100,000	100,000	100,000	MINPMEESA, MINMINDT, MINESUP, GIZ, AFD, PTF, Cabinet, Consultants	low buy-in from stakeholders
TOTAL ACTIVITY II						**510,000**	**160,000**	**160,000**	**190,000**		
A3: Promote brands and organize distribution channels			**T1:** Facilitation of the filing of trademarks and models at OAPI	trademarks exist	national territory	15,000	5,000	5,000	5,000	MINPMEESA, MINMINDT, MINCOMMERCE, PTF, Cabinet, Consultants	low buy-in from stakeholders

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							A1	A2	A3		
Industry		**COTTON-TEXTILE-CONFECTION**									
			T2 : Multiplication of exhibition events for clothes made locally from cotton and other plant fibers;	fairs are organized	national territory	750,000	250,000	250,000	250,000	MINPMEESA, MINMINDT, MINCOMMERCE, PTF	low buy-in from stakeholders
			T3 : Incentive for the creation of textile departments in supermarkets, airport free shops, and travel agencies	textile departments are created	national territory	350,000	150,000	100,000	100,000	MINPMEESA, MINCOMMERCE	low buy-in from stakeholders
			T4: Online Marketing Incentive	online shops selling textile products	national territory	15,000	5,000	5,000	5,000	MINPMEESA, MINCOMMERCE	low buy-in from stakeholders
TOTAL ACTIVITY III						**1,130,000**	**410,000**	**360,000**	**360,000**		
TOTAL AXIS 4						**2,105,000**	**735,000**	**795,000**	**575,000**		
TOTAL COTTON-TEXTILE-GARMENT DIVISION (Axis I + Axis II + Axis III + Axis IV)						**119,254,999**	**29,013,333**	**40,829,166**	**49,412,500**		

ANNEX

LEATHER AND FOOTWEAR DIVISION OPERATIONAL PLAN													
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**		
							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
Action or operational axis 1: Improvement of the removal/stripping of skins		**Objective: Significantly reduce skin loss** **Major indicator: number of skins collected** **Baseline:** **Target 2025:**											
A1 : Awareness and training			**T1** : Organization of awareness campaigns in slaughterhouses and chiefdoms	awareness campaigns are organized in slaughterhouses and chiefdoms	national territory	3,000	1,000	1,000	1,000	MINPMEESA, MINEPAT, MINEPIA, SODEPA, CTD	Insufficiency of skins		
			T2 : Organization of training sessions for slaughterhouse technicians	training sessions for slaughterhouse technicians are organized	national territory	50,000	25,000	15,000	10,000	MINPMEESA, MINEPAT, MINEPIA, SODEPA, CTDs, consultants	low buy-in from stakeholders		

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LEATHER AND FOOTWEAR DIVISION OPERATIONAL PLAN													
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**		
							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
			T3 : Organization of competitions for the best skinner at municipal and then regional level	the best skin strippers are known	national territory	1,620,000	540,000	540,000	540,000	MINPMEESA, MINEPIA, SODEPA, CTDs, Consultants	low buy-in from stakeholders		
TOTAL ACTIVITY I						**1,673,000**	**566,000**	**556,000**	**551,000**				
A2 : Support and tools			**T1** : Purchase and distribution of skin removal kits	skinners are equipped with hide extractors	national territory	4,000,000	2,000,000	1,000,000	1,000,000	MINPMEESA, SODEPA, MINEPIA, CTD, PTF	low buy-in from stakeholders		
			T2: Establishment of maintenance centers and development groups (virtual and real)	maintenance centers and groups exist	national territory	-							
TOTAL ACTIVITY II						**7,346,000**	**3,132,000**	**2,112,000**	**2,102,000**				
TOTAL AXIS I						**9,019,000**	**3,698,000**	**2,668,000**	**2,653,000**				

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LEATHER AND FOOTWEAR DIVISION OPERATIONAL PLAN													
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**		
							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
Action or operational axis 2: Organization and structuring of the collection and storage of hides		**objective: optimize the collection of skins while improving drying and storage** **Major indicator:** **Baseline situation: 2025 target:**											
A1 : Establishment of a regulatory framework			T1: Development of a text on the categorization of skins according to quality and animal	a text on the categorization of skins is signed by the Government	national territory	15,000	5,000	5,000	5,000	PRC, PM, MINEPAT, MINPMEESA, SODEPA, MINEPIA, CTD, FEICOM, PTF	low buy-in from stakeholders		
			T2: Development of a text on the prohibition of the sale of certain skins to households	a text on the prohibition of the sale of certain skins to households is signed by the Government	national territory	15,000	5,000	5,000	5,000	PRC, PM, MINEPAT, MINPMEESA, SODEPA, MINEPIA, CTD, FEICOM, PTF	low buy-in from stakeholders		

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LEATHER AND FOOTWEAR DIVISION OPERATIONAL PLAN													
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**		
							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
			T2: Establishment of mechanisms to certify skin collectors with SODEPA	a mechanism for granting approval is put in place	national territory	20,000	10,000	5,000	5,000	PRC, PM, MINEPAT, MINPMEESA, SODEPA, MINEPIA, CTD, FEICOM, PTF	low buy-in from stakeholders		
			T3: Drafting of a text aimed at organizing the activity of collecting, storing and transporting skins	a text aimed at organizing the activity of collecting, storing and transporting skins is signed by the Government	national territory	15,000	5,000	5,000	5,000	PRC, PM, MINEPAT, MINPMEESA, SODEPA, MINEPIA, CTD, FEICOM, PTF	low buy-in from stakeholders		
TOTAL ACTIVITY I						**65,000**	**25,000**	**20,000**	**20,000**				
A2: Structuring and organization of the collection, storage and			**T1:** Construction of storage sheds in collaboration with CTDs	storage sheds are built	national territory	500,000	200,000	150,000	150,000	MINEPAT, MINPMEESA, SODEPA, MINEPIA, CTD, FEICOM, PTF	Insufficiency of built hangars		

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LEATHER AND FOOTWEAR DIVISION OPERATIONAL PLAN													
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**		
							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
marketing of hides			**T2** : Installation of skin drying units near storage sheds	storage units are set up	national territory	500,000	200,000	150,000	150,000	MINEPAT, MINPMEESA, SODEPA, MINEPIA, CTD, FEICOM, PTF	Insufficiency of built hangars		
			T3 : Development of manuals for learning and improving the skinning of an animal in French, in local languages and illustrated	Learning manuals are available	national territory	10,000	10,000	-	-	MINPMEESA, SODEPA, MINEPIA, CTD, FEICOM, PTF	misuse of manual		
			T4 :Creation of departmental skin marketing centers	departmental marketing centers are created	national territory	75,003	25,000	25,001	25,002	MINPMEESA, SODEPA, MINEPIA, CTD, FEICOM, PTF	low buy-in from stakeholders		
TOTAL ACTIVITY II						**1,085,003**	**435,000**	**325,001**	**325,002**				
TOTAL AXIS II						**1,150,003**	**460,000**	**345,001**	**345,002**				

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							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
Action or operational axis 3		**Reinforcement of the skin treatment system Major indicator: Baseline situation: 2025 target:**											
A1 : Raising awareness and structuring			**T1** : Identify and map artisanal and informal tanners	A map of artisanal and informal tanners available	national territory	125,000	100,000	25,000		MINPMEESA, MINEPIA, MINEPAT, MINDEVEL, INS, CTD	low buy-in from stakeholders		
			T2 : Group artisanal and informal tanners by department then by region in collaboration with CTDs and traditional authorities	a national network of artisanal and informal tanners is operational by 2030	national territory	300,000	200,000	50,000	50,000	MINPMEESA, MINEPIA, SODEPA, MINDEVEL, CTD	low buy-in from stakeholders		

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							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
			T3 : Identify and diagnose formal SMEs working in industrial and semi-industrial tanning	a diagnosis of formal SMEs in the industrial and semi-industrial tannery sector is carried out	national territory	500,000	300,000	150,000	50,000	MINPMEESA, MINEPIA, MINDEVEL, SODEPA, CTD	low buy-in from stakeholders		
TOTAL ACTIVITY I						800 000	500,000	200,000	100,000				
A2: Training and support			**T1: Develop training manuals, brochures and videos for** apprenticeship in tanning	a training program for the tanner trade is available	national territory	1,000,000	500,000	250,000	250,000	MINPMEESA, MINEPIA, MINDEVEL, CTD, MINEFOP, MINEDUB, MINESEC	low buy-in from stakeholders		

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							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
			T2 : Organize training and upgrading sessions for artisan tanners	tanner artisans are trained in improving tanning techniques	national territory	400,000	200,000	100,000	100,000	MINPMEESA, CTD, MINEPIA, MINEFOP, SODEPA	low buy-in from stakeholders		
			T3: Subsidize the acquisition of new equipment	skin treatment capabilities are improved in terms of quality and quantity	national territory	3,000,000	2,700,000	150,000	150,000	MINPMEESA, SODEPA MINEPIAMINMINDT, MINDEVEL, CTD, GIZ, PTF, IITA, Private consultants	low buy-in from stakeholders		
			Q4 : Set up a leasing mechanism to facilitate the acquisition of machinery and other equipment	the tanners are equipped thanks to the mechanism	national territory	15,000	5,000	5,000	5,000	PRC, PM, MINFI, MINPMEESA, MINEPAT, APECAM, ANEMCAM, BC PME, SFI, BEI, Commercial Banks, Business Banks PTF	low buy-in from stakeholders		

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Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**		
							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
			T5 : Train in the use and maintenance of new equipment	tannery machinery technologies are assimilated	national territory	10,000	5,000	2,500	2,500	MINPMEESA, MINEPIA, SODEPA MINMINDT, MINESUP, MINRESI, GIZ, AFD, PTF, Cabinet, Consultants	low buy-in from stakeholders		
			T6 : Build shared workshops for carrying out work such as river bathing, stripping and dyeing	shared workshops are built in all the municipalities of the production areas	national territory	2,000,000	1,000,000	500,000	500,000	MINPMEESA, MINEPIA, MINFI, MINEPAT, CTD, SODEPA	low buy-in from stakeholders		
TOTAL ACTIVITY II						6,425,000	4,410,000	1,007,500	1,007,500				
A3 : Innovation and incubation			**T1:** Build and equip a specialized quality laboratory for experimentation with skin treatment processes	the quality of skin treatment is improved	national territory	2,000,000	1,000,000	500,000	500,000	MINPMEESA, MINMINDT, MINESUP, MINRESI MINDEVEL, CTD, GIZ, AFD, PTF, SODEPA	low buy-in from stakeholders		

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							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
			T2 : Organize entrepreneurial awareness activities in schools and universities	workshops and seminars are organized in schools and universities	national territory	25,000	15,000	5,000	5,000	PRC, PM, MINFI, MINPMEESA, MINEPAT, MINMIDT, SODEPA, PTF	low buy-in from stakeholders		
			Q3 : Launch leather project incubation programs within existing incubation structures	new skin processing techniques and technologies for obtaining leather are developed	national territory	2,000,000	1,000,000	500,000	500,000	MINPMEESA, MINESUP, MINMINDT, SODEPA, MINDEVEL, CTD, GIZ, PTF	low buy-in from stakeholders		
TOTAL ACTIVITY III						4,025,000	2,015,000	1,005,000	1,005,000				
TOTAL AXIS III						**11,250,000**	**6,925,000**	**2,212,500**	**2,112,500**				
Action or operational axis 4		**Industrialization of the Manufacture of leather-based articles** **Major indicator: Baseline situation: Target 2025:**											

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LEATHER AND FOOTWEAR DIVISION OPERATIONAL PLAN													
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							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
A1 : Boost Production and productivity			**T1** : Develop and distribute the white paper on the production of leather-based articles	a directory of articles made from leather is available	national territory	1.5 million	500,000	500,000	500,000	MINPMEESA, MINEPAT, MINCOMMERCE, SODEPA, PTF	Absence of a nomenclature document on leather products		
			T2 : Set up a program to improve production and formalize informal units for making leather-based articles	the production of leather goods is improved following the new techniques developed	national territory	2,000,000	1,000,000	500,000	500,000	MINPMEESA, MINEPAT, MINCOMMERCE, SODEPA, PTF	low buy-in from stakeholders		

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LEATHER AND FOOTWEAR DIVISION OPERATIONAL PLAN													
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							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
			T3 : Set up a mechanization program/centre for the production of leather-based articles	Improved access to mechanical devices for better production of leather goods	national territory	8,000,000	4,000,000	2,000,000	2,000,000	MINPMEESA, MINEPIA, SODEPA, MINDEVEL, CTD, GIZ, PTF	low buy-in from stakeholders		
			T4 : Create shared workshops to allow the heavy stages of the transformation process to be outsourced	shared workshops are built in all the municipalities of the production areas	national territory	2,000,000	1,000,000	500,000	500,000	MINPMEESA, MINEPIA, MINFI, MINEPAT, CTD, SODEPA	low buy-in from stakeholders		
TOTAL ACTIVITY I						13,500,000	6,500,000	3,500,000	3,500,000				
A2: Promote creativity and innovation			**T1** : Set up a modeling, prototyping and intellectual protection center	the techniques of production of leather objects are developed	national territory	4,000,000	2,000,000	1,000,000	1,000,000	MINPMEESA, MININDT, MINEFOP, OAPI, MINESUP, MINEPIA, SODEPA,	low buy-in from stakeholders		

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LEATHER AND FOOTWEAR DIVISION OPERATIONAL PLAN													
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							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
										MINDEVEL, CTD, GIZ, PTF			
			T2 : Increase the creation of leather-making sectors in schools and professional institutes	the development of the confectionery-cooking sector is extended to vocational schools and institutes	national territory	25,000	15,000	5,000	5,000	MINPMEESA, MINEFOP, MINESUP, MINESEC, MINEDUD MINEPIA, SODEPA, MINDEVEL, CTD, GIZ, PTF	low buy-in from stakeholders		

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LEATHER AND FOOTWEAR DIVISION OPERATIONAL PLAN													
Activities	**Problems identified**	**Objective**	**Tasks**	**Expected outputs**	**Locality of implementation**	**Cost T (in thousands of FCFA)**	**Budget programming** *(in thousands of FCFA)*			**Implementation frameworks**	**Risk assumptions**		
							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
			T3: Develop and make available to the various stakeholders assisted design applications integrating virtual reality (VR)	actors improve their productivity thanks to the integration of assisted design applications integrating virtual reality (VR)	national territory	200,000	100,000	50,000	50,000	MINPMEESA, MINEFOP, MINERESI, MINEPIA, SODEPA, MINDEVEL, CTD, GIZ, PTF	low buy-in from stakeholders		
TOTAL ACTIVITY II						4,225,000	2,115,000	1,055,000	1,055,000				
A3 : Facilitate marketing			**T1** : Organize an annual leather and related products fair	increase the visibility of leather and derivative products	national territory	1,000,000	500,000	250,000	250,000	MINPMEESA, MINTOUR, MINISTRY OF CULTURE , MINEPIA, SODEPA, MINDEVEL, CTD, GIZ, PTF	low buy-in from stakeholders		

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							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
			T2 : Obtain an agreement with supermarkets and large fashion boutiques	make leather products available in all major retail outlets	national territory	500,000	250,000	150,000	100,000	MINPMEESA, MINCOMMERCE, MINEPIA, SODEPA, MINDEVEL, CTD, GIZ, PTF	low buy-in from stakeholders		
			T3: Set up a program to export leather goods to other African markets	increase the visibility of leather and derived products in Africa	the national territory and in Africa	500,000	250,000	200,000	50,000	MINPMEESA, MINCOMMERCE, MINEPAT, MINFI, MINEPIA, SODEPA, MINDEVEL, GIZ, PTF	low buy-in from stakeholders		
			T4: Create a leather show shop at CIAY with visibility on the web for the exhibition of the best items	digital marketing of leather goods is increased	the 12 craft villages	1,000,000	500,000	250,000	250,000	MINPMEESA, MINCOMMERCE, MINEPAT, MINFI, MINEPIA, SODEPA, , GIZ, PTF	low buy-in from stakeholders		
TOTAL ACTIVITY III						3,000,000	1.5 million	850,000	650,000				

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							A1	A2	A3				
Industry		**LEATHER -FOOTWEAR MANUFACTURING INDUSTRY**											
TOTAL AXIS IV						**20,725,000**	**10,115,000**	**5,405,000**	**5,205,000**				

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