

Intermediate Production of Skin and Leather Goods and Intra-Regional Trade: The Case of Mali in the ECOWAS Region

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Received: March 20, 2025

Revised: April 23, 2025

Accepted: August 25, 2025

Published: August 31, 2025

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DOI: [10.56566/mandalika.v3i2.335](https://doi.org/10.56566/mandalika.v3i2.335)

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Abstract: Our article aims to promote the link between intermediate production of skin and leather goods and intra-regional trade in Mali within the ECOWAS region. Indeed, it first examines the importance of large-scale industrial processing units with approximately 76% of total tanning of skins produced in Mali (Table 3). Then the article shows that the intra-regional trade flows of skin and leather from Mali illustrate the importance of size in the intra-regional trade relationship (Figure 4). Finally, the article identified the profile of the actors operating in ECOWAS intra-regional trade in intermediate production of skin and leather goods. This mainly concerns the profile of suppliers and demanders in intermediate production activities of skin and leather goods. On the other hand, the economic literature remains poorly documented on the subject, especially very specifically for our region. Among the studies that are interested in our subject, we can cite: that of Bassolé (2022) and Dabié Désiré Axel NASSA (2005). Regarding the methodology used, it is mainly based on the Bassolé thesis (2022), carried out in two stages on the profile of the actors operating in ECOWAS intra-regional trade.

Keywords: ECOWAS area; Mali; Micro businesses; Intra-regional exchange

Introduction

In West Africa, intra-regional trade between countries remains relatively low. According to recent studies, it represents between 10 and 15% of total trade in the ECOWAS zone. Trade between European and Latin American countries accounts for around 80% and 60% respectively. Statistics from Eeswaran et al. (2022) reveal that the leathers and skins produced in West Africa, particularly in the main livestock-raising countries, fall into two types of circuits on a regional scale: traditional crafts and industry. The weakness of intra-trade within the ECOWAS area remains based on natural comparative advantages, therefore on the absence of development of agricultural and agro-industrial enterprises. The weak development of intra-trade in the leather and skins sector is underpinned by a

lack of dynamism and the absence of business development. In addition to its overall embryonic nature, there is a strong disparity by country in the company's development process (Arslan et al., 2023; Luo et al., 2019; Troise et al., 2023; Vaz et al., 2023). For example, in the case of Mali, the sector is dominated by the presence of large-scale industrial processing units, mainly geared towards the export market with approximately 76% of total tanning of hides produced in Mali.

Examination of the distribution curve of companies in Mali according to size and by sector, follows the normal law of statistical distribution. Indeed, the distribution curve shows a minority of large and medium-sized companies (Bassolé & Tamboura, 2025). The distribution curve is asymmetrical, spread out towards the left, i.e. the proportion of large and

How to Cite:

Bassole, I., & Maiga, I. (2025). Intermediate Production of Skin and Leather Goods and Intra-Regional Trade: The Case of Mali in the ECOWAS Region. *MANDALIKA: Journal of Social Science*, 3(2), 41–46. <https://doi.org/10.56566/mandalika.v3i2.335>

medium-sized companies is relatively low, around 20%. It is unevenly distributed between: medium-sized companies, where this concerns in particular agricultural explorations of sugar cane, used by Chinese companies in the Markala area (sukala 1 and 2); and large companies such as the Office du Niger. Our work focuses on the right part of the curve, that is to say the proportion of large and medium-sized industrial production companies in Mali's intra-regional trade within the ECOWAS area. The literature review on regional trade reveals two models of approaches: The first model considers regional trade as an opportunity, a resource for both populations and States, like the studies carried out by Boubacar (2012) and Ermakova et al. (2020). On the other hand, the second model is based on the role of cross-border trade merchants such as, underlined by Bassolé et al. (2025a) and Nassa (2010). Our article deals with: "the link between participation of small and medium-sized enterprises and intra-regional ECOWAS trade from Mali within the ECOWAS area". It focuses on the role of the profile of intra-regional trade actors in the dynamics of exchange relations for plant production within the ECOWAS area.

Method

The general objective of our article is to examine the link between intra-regional trade flows and the size of the plant production company's activity. In other words: What are the factors that limit the link between intermediate production of skin and leather goods and intra-regional trade in Mali within the ECOWAS area? This article is based on two main hypotheses: intra-regional trade flows in the skin and leather sector positively influence the size of the company's activity; the dynamics of the skin and leather sector's activities determine the profile of intra-regional trade actors. Our methodological approach is based first on data collection and then on information processing.

Data Collection

It consists of collecting data from our survey, carried out in two stages on the profile of actors operating in intra-regional trade (Bassolé & Traore, 2025b), to which must be added economic statistics from ECOWAS countries, UEMOA, UNCTAD, INSAT and the Ministry of Economy and Finance, as well as information collected on the internet.

Information Processing

We used descriptive statistics, general economic analysis and mathematics to process the information

collected above. This information was processed manually using tables and diagrams illustrated inside the article. Our article is structured in two questions to address: the dynamics of production activities in the skin and leather sector; the dynamics of the profile of intra-regional trade players. Dynamics of production activities in the skin and leather sector Let us first look at the growth of production activities in the skin and leather sector, then at the vectors of this growth.

Growth of Skin and Leather Production Activities

The monthly level of change in the quantities of sheep and goat skins produced in the intervention areas of the Regional Project for the Improvement of the Quality of Leather and Skins in West African Countries (PACP) in 2013, and those collected and processed locally by industrial units are given in figure no. 31 below. From the analysis of figure no. 1, it emerges that the quantities collected (number of pieces) are by far the most important. This explains why they are not all transformed on site despite the presence of establishments specialized in this area.

Result and Discussion

In fact, significant quantities come from neighboring countries (Burkina Faso, Guinea, Mauritania) in addition to national production, hence the relatively high level of collection compared to production.

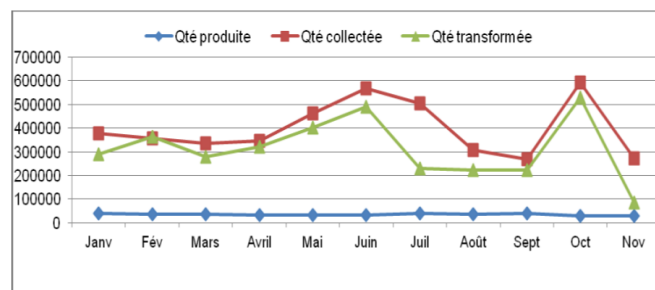


Figure 1. Evolution of the quantities of skins produced, collected and processed (DNPIA, 2014)

Based on the average prices practiced locally, the export figures recorded during the year 2014 without taking into account the quantities of sheep and goat skins tanned in wet blue, represent a monetary value of 5.100 billion FCFA. Compared to the trends observed during 2014, the situation is very fluctuating for both raw hides and skins. However, a maximum threshold was observed in October and a minimum in April for raw hides.

Table 1. Controlled Exports of Leather and Skins by Region (DNPIA, 2014)

bbbb	Cuirs		Peaux ovines		Peaux caprines	
	Nbre	Bruts Pds	Nbre	Brutes Pds	Nbre	Brutes Pds
Kayes	9.537	47.685	7.733	3 868		
Koulikoro	14.040	70.200	15.470	7.735		
Sikasso	36.460	18.2300	2.708	2.236	3.369	2.503
Ségou	4.369	21.015				
Mopti	13.745	64.765	9.609	15.148	6.884	3.441
Tombouctou	11.401	79.807	25.581	38.372	26.21	39.932
Gao	7.412	36.460	4.117	2.061		
Kidal						
Bamako	67.1550	3.357 750	193.000	283.500	132.550	104.840
Total 2014	76.8514	3.859 982	258.218	352.920	169.424	150.716
Total 2013	70.5599	3.527.995	59.361	33.998	29.128	17.598
Variation (%)	8.92	9.41	335.00	938.06	481.65	756.44

For raw hides, the situation is more stable with a peak observed in February. In any case, the volume of raw hide exports is decreasing compared to 2012 for reasons mentioned above (illustrated in figure 2).

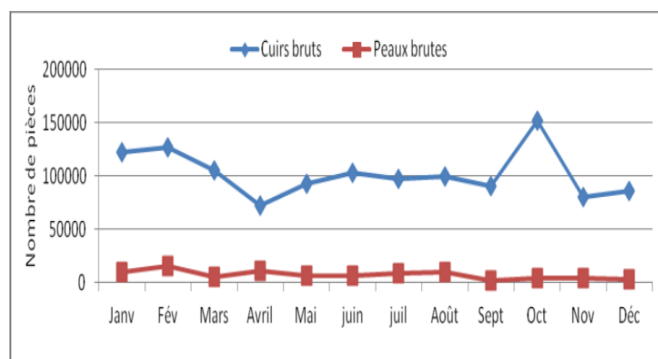


Figure 2. Monthly evolution of leather and skin exports during the year 2014. Almost all leather is exported to Ghana (47% of the total quantities of leather and 67% of sheep skins)

Growth Vectors

These are growth vectors driven by supply and demand for production activities in the skin and leather sector.

The Offer

According to the controlled production of skin and leather, obtained on the basis of estimates made from controlled slaughtering. Indeed, the quantity produced in the different slaughtering centers of the country can be estimated as follows: 330,176 green skins, for a weight of 5,282,816 kg; and 848,798 green skins with a total weight of 679,038 kg (table 2). This production represents respectively 78.16% and 90% of the objectives of the 2014-2015 Agricultural Campaign Plan. It is largely dominated by the District of Bamako with 45% of the total weight of leathers and 35.43% of the total weight of sheep and goat skins.

Table 2. Production of Leather and Skins in 2014 (DNPIA, 2014)

Regions	Peaux vertes		Peaux vertes ovines		Peaux vertes caprines		Peaux camelin	
	nbre	Pds	nbre	Pds	nbre	Pds	nbre	Pds
Kayes	42.934	686.944	62.062	49.650	77.883	62.306	30	600
Koulikoro	44.326	709.216	28.038	22.430	64.215	51.372		
Sikasso	34.413	550.608	31.176	24.941	74.269	59.415		
Ségou	23.547	376.752	30.704	24.563	87.386	69.909	67	
Mopti	16.538	264.608	11.631	9.305	27.097	21.678	64	1.280
Tombouctou	7.993	127.888	12.214	9.771	16.608	13.286	52	1.040
Gao	4.315	69.040	5.739	4.591	13.447	10.758	352	7.020
Kidal				0		0		0
Bamako	156.110	2 497.760	153.965	123.172	152.364	121.891	564	9.940
Total 2014	330.176	5 282.816	335.529	268.423	513.269	410.615	1.128	19.880

In addition to controlled slaughtering, industrial processing units for skins and leathers are located in the Bamako District. These include: the New Tannery of Mali (NTM-SA): with a current production of 3,000 sheep and goat skins per day; the Malian Tannery Initiative (IMAT), with a production of 10,000 skins per

day, this unit only produces wet blue; the West Africa Tannery (WAT), represents 10,000 to 12,000 sheep and goat skins per day.

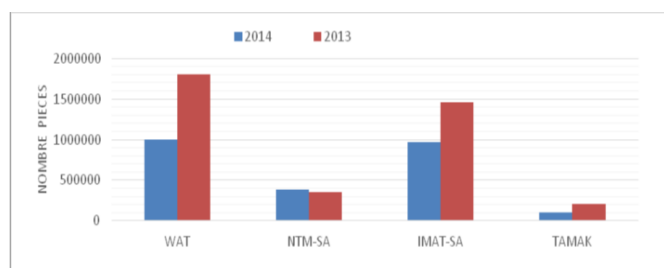


Figure 3. Quantities of sheep and goat skins tanned in wet blue, from 2013 and 2014 (DNPIA, 2014)

The Request

As regards demand, it brings together domestic and foreign demand for production activities in the skin and leather sector.

Domestic Demand

Domestic demand is estimated at around 1,328 tonnes of hides and skins per year for a value of 870 million CFA francs. Indeed, the quantities of hides and skins produced in Mali are used by families to meet domestic needs. In addition, the traditional craft sector uses around 20% of the hides and 30% of the skins produced in Mali. The tanning technology remains largely traditional, it is vegetable tanning practiced by women. This type of tanning mainly concerns sheep and goat skins.

External Demand

Over the period 1997 to 2002, Mali exported an average of 3,439 tonnes of hides and skins per year, worth 3.65 billion CFA francs. Exports accounted for 76% of the total tanning of hides produced in Mali, with a slight decrease in favour of local consumption (34%).

Table 3. Mali Skin and Leather Sector Market

	1997	1998	1999	2000	2001	2002
Exportation						
Valeur (milliards fcfa)	3.07	3.23	3.40	3.67	3.97	4.57
Volume (tonnes)	2.976	3.125	3.281	3.445	3.617	4.190
% production	83%	83%	83%	62%	63%	70%
Consommation locale						
Valeur (milliards fcfa)	0.37	0.39	0.40	1.39	1.42	1.25
Volume (tonnes)	621	635	649	2.131	2.120	1.815
% production	17%	17%	17%	38%	37%	30%

The main geographical export areas are: Spain represents the main destination market, interested in skin and leather from Mali; Italy, which intervenes in the market of pre-tanned sheep and goats. Dynamics of the profile of intra-regional trade actors. Intéressons-nous main tenant au profile des offers et des demanders de biens en cuirs et peaux. Officers: The suppliers here include: producers; and networks. Producers: The producers here represent: artisanal processors; and industrial processors. Artisanal processors. On a craft scale, the north of the country represents a dynamic in the craft transformation and in the design of art objects such as: bags, shoes, belts, etc.

Industrial transformers

At the industrial level, the production of skins and leathers is dominated by the processing units located in the District of Bamako. These processing units export almost all of their production to the foreign market.

Networks

Unlike the producers studied above, the networks are illustrated here by: traditional circuits; non-food products.

Traditional Circuits

As in all other Sahelo-Sudanese countries, the collection of hides and skins is still ensured in the bush through traditional channels. Most collectors are not only traders in hides and skins, but it is through them that 90% of Malian production is fraudulently shipped to neighboring countries. They are linked to butchers and other traders by a system of "advances" in cash, repayable in spoils, and by habits whose importance should not be underestimated.

Export of Skins and Leathers

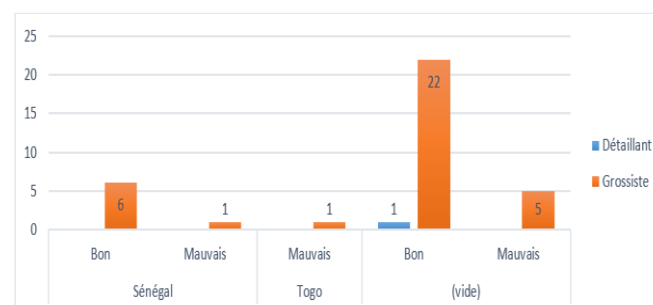


Figure 4. Size of activity used according to road conditions and by destination country

According to Bassolé (2022), illustrated in Figure No. 4 above, the destination of skins and leathers in intra-regional trade relations in Mali is likely to explain the role of the size of the wholesale activity used compared to that of retail. It also indicates in the same Figure No. 4 that the road infrastructure represents the main route of transport of goods, particularly skins and leathers, in intra-regional trade relations. It also indicates in the same figure n°4 that the road infrastructure represents the main route of transport of goods, in particular skins and leathers, in intra-regional trade relations.

Applicant

The applicants here represent consumers:

Consumers

Studies based on the household economy approach, presented by Save the Children (2009), illustrate the determining role of livestock sales and livestock products in the income of Sahelian households in rural areas. It is estimated that households without access to this income are also the poorest. Thus, cross-border livestock flows enable the functioning and development of life systems and survival mechanisms in the Sahel.

Analysis of Results and Discussions

Our article makes two major contributions, namely: First, we have shown that the skin and leather sector is dominated by the presence of large-scale industrial processing units, mainly geared towards the export market with approximately 76% of total tanning of skins produced in Mali (Table 3); On the other hand, the intra-regional trade flows of skin and leather from Mali illustrate the importance of size in the intra-regional trade relationship (Figure 4). Second, we have shown the profile of the actors, mainly suppliers and demanders in the skin and leather goods sector: the first profile of actors concerns producers and networks; the second profile of actors is distinguished by consumers. Indeed, we can see these results in certain similar studies including that observed by (Bassolé, 2022; GREAT Report, Notebooks No. 12, 2012) on business development and intra-regional ECOWAS trade: the case of Mali, exploitation of cattle in the cotton zone in Southern Mali or the DNPIA Report, 2014 on Animal Production and Industries.

Conclusion

At the end of our article on the analysis of the link between small and medium-sized animal production enterprises and intra-regional trade: the case of Mali in the ECOWAS region. Two main results emerge from this article: on the one hand, we have shown that 76% of the

total tanning of hides produced in Mali is carried out by large-scale industrial processing units (table n°3); on the other hand, we have identified the profile of the actors used in intra-regional trade in intermediate production of hides and leather goods; finally, the intra-regional trade flows of hides and leather from Mali reveal the importance of size in the intra-regional trade relationship (figure n°4). Among the main problems that weigh on the participation of micro enterprises of plant production in the framework of intra-regional trade relations, are cited below: strengthening local and regional value chains; developing and strengthening skills, linked to regional trade. The possible solutions to the problems raised above are: Local and regional value chains play a key role in expanding the intra-regional common market, particularly in manufacturing. They also offer the possibility of improving the level of productivity and quality standards: on the one hand, for national companies with export potential; on the other hand, for those that produce goods intended mainly to satisfy national or regional demand. In West Africa, the development of local and regional value chains could serve as a lever in the regional strategy for developing micro-enterprises in plant production. National companies are facing increasingly fierce competition in export markets due to the opening of the national economies of ECOWAS countries to the world. Their ability to overcome this fierce competition depends on: On the one hand, their technological capabilities, On the other hand, its use, at the national or regional level, by investing in education, training and research and development. Unlike other regions of the world, the continent devotes less than 1% of its GDP to research and development, this rate remains lower in West Africa. Consequently, the lack of essential skills constitutes a major problem for the development of companies in West Africa, in particular. In terms of perspective, it would therefore be interesting to extend this subject to the monetary union which is supposed to influence trade to the extent that it involves a reduction in uncertainty about the exchange rate, transaction costs and simplifies the calculation of costs and pricing decisions. They also indicate that border effects would be reinforced by the use of a single currency. Thus, the effects of a monetary union would favor an increase in bilateral trade, an increase in the overall openness rate, a net creation of trade and the stability of trade. Finally, this is an important subject but very little addressed in empirical studies. We hope that the results we obtained in this study will generate more empirical and theoretical investigations for other mechanisms or links between micro crop production enterprises and intra-regional exchange in the country.

Acknowledgments

Thanks to all parties who have supported the implementation of this research. I hope this research can be useful.

Author Contributions

Conceptualization, methodology, validation, formal analysis, investigation, resources, data curation, writing—original draft preparation, writing—review and editing, visualization. All authors have read and agreed to the published version of the manuscript.

Funding

Researchers independently funded this research.

Conflicts of Interest

The authors declare no conflict of interest.

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