FOREIGN DIRECT INVESTMENT IN KADUNA, NIGERIA: OPPORTUNITIES & CHALLENGES

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The country of Nigeria, with Kaduna City indicated (star).
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CITY OVERVIEW: Kaduna, Nigeria

Kaduna City Snapshot

Located in north-central Nigeria on the Kaduna River, Kaduna City is accessible via major transportation links from all regions of the country. Kaduna City lies in three different Local Government Areas (LGAs): Kaduna North, Kaduna South, and Chikun [1].

Climate/Rainfall

Kaduna City is located in a semi-arid savannah region. Both Kaduna City and Kaduna State are located in the north of the country and experience two growing seasons for agricultural products like tomato. The rainy season typically begins in May and runs through October, and the dry season begins in September and ends in May. Temperatures range between 22-30 degrees Celsius and rainfall between 40-60 inches annually [2].

Health

Kaduna State has its own university teaching hospital, which supports the state's hospitals. An estimated 61% of households have access to a hospital or clinic in the state (higher than the national average). However, less than 30% of children between the ages of one and five are fully protected by the most common vaccinations (lower than the national average) [3].

Water

Kaduna City's major water sources include the Kaduna and Gurara Rivers. High levels of water evaporation during the dry season strain available water resources and many of the region's tributary streams dry up annually during this period. There are five completed dams in the state, which range from medium to large in size. Additionally, two borehole projects in each LGA provide extra water for rural communities[4].

Energy

Kaduna State's current power supply is estimated to be between fifty and one hundred megawatts (MW), while demand is estimated to be about 300 MW [5]. Nigeria, as a whole, is a major importer of back-up generators globally.

The Kaduna State Government has adopted an energy plan that includes the development of new hydroelectric dams to generate power for the state, which includes an estimated thirty MW dam at Gurara, and a one hundred MW fuel power plant, although final deadlines for completion have not been revealed [6]. The Gurara Dam is projected to connect to Kaduna State's power grid by 2011. Once completed, the dam will contribute significantly to fulfilling the power needs of households and businesses in Kaduna City [7].

Taxes

The Kaduna State Government intends to introduce an Internet portal to facilitate tax filings for businesses, and to help increase transparency for foreign investors [8]. The Government has successfully implemented this reform, and domestic investors in fruit production have lauded this reform as a success [9].

Land

Nigeria's 1990 Land Use Act designates state governors as public trusts who are to control and manage all land in urban areas within his or her designated state. All other land is under the control and management of local government authority [10]. In line with this policy, Kaduna State's governor has the authority to grant occupancy rights and determine lease conditions within the cities of Kaduna State; as such, the governor must approve all urban land transfers. In general, the land registration process and associated costs have been deemed "problematic" [11].

The Kaduna State government intends to implement reforms to address transparency, and streamline the land registration processes. This includes the introduction of a government-managed Internet portal, which would publish official certificates of land titles and ownership rights to land, making them available online. The intention of this, and other land reforms, is to decrease the time required to acquire land. The government anticipates the processing time can be reduced from almost one year to 90 days [12].

Transportation Infrastructure

Roads link Kaduna City with the major urban centers and outlying rural areas in the region. Kaduna State has approximately 1,750 miles (2815 kilometers) of paved roads that extend outward from Kaduna City. Paved roads link Kaduna City with the largest nearby cities, including Abuja (Nigeria's capital) to the south, Kano to the north, and Jos to the East. The Kaduna State Government has constructed

Kaduna State and City Snapshot

State & City Area	Kaduna State covers a total area of 46,053 square kilometers. Boundaries for Kaduna City are not clearly demarcated, making it difficult to provide an estimated city area size.
City Population	According to the 2006 census, the Kaduna State population is 6,066,562, and the cities of Kaduna and Zaria make up one-third of the state population. Kaduna City population is estimated at 1,128,794.
Employment	An estimated 80% of the state population is employed in the agricultural sector, including small-scale farming for food and cash crops.
Agricultural Products	Ginger, mango, tomatoes, sorghum, maize, groundnuts, tobacco, yam, rice, cassava, sugarcane, and potatoes.

Sources: Kaduna State Government, About Kaduna, http://www.kadunastate.gov.ng/, 2010.
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Thomas, Matthew A.M., Millennium Cities Initiative. "Education Needs Assessment for Kaduna City, Nigeria," Social Sector Working Series No. 3 (New York: Millennium Cities Initiative, 2009).

approximately 745 miles (1200 kilometers) of paved roads; additional roads are being built and others are in the planning stages. Feeder roads linking Kaduna City to large rural areas, thereby providing greater access to agricultural areas, have also been built under the state government's direction [13].

The existing railway network links Kaduna City with Lagos to the southwest, Port Harcourt to the southeast, and Zaria to the north. Zaria is a rail hub, which in turn provides access to the cities of Kaura Namoda, and Kano [14].

Kaduna City has its own regional airport located 18 miles from the city's center. The airport provides daily flights to Lagos [15].

Kaduna City Economic Profile

Nigeria's return to democratic rule in 1999, and the country's political reorganization, has resulted in a more stable economic climate. Federal, state, and local governments have promoted economic diversity, which includes broadening and deepening investment in various industries. Kaduna State consequently established the Kaduna Investor Information Center to promote greater private sector participation in the state's economy and attract investors [16].

In 2008, the World Bank ranked Kaduna City as the top city (out of eleven) in Nigeria for overall ease in doing business. Despite the inclusion of such major commercial cities like Lagos and Abuja, Kaduna City ranked among the strongest for its business-enabling environment. It ranked first with respect to construction permits and construction-related costs, and second in terms of starting a business and enforcing contracts. However, it ranked sixth on the issue of registering property [17].

Approximately 80% of Kaduna State's population engages in small-scale farming for food and cash crops and ownership of livestock. Kaduna City and Zaria are the two dominant urban centers in Kaduna State, and as such, have attracted rural migrants, particularly in recent years. Unemployment and underemployment in Kaduna City are problematic, as young men and women migrate from the rural areas in search of jobs. The increased population has increased the strain on social services including housing, schools, hospitals, and supply of water and electricity [18].

Kaduna State has an abundance of natural resources and provides an optimal climate for the cultivation of various agricultural commodities including ginger, mango, tomato, sorghum, maize, cassava, potato, and yam. Farmers' productivity is, however, often constrained by lack of access to reasonably priced inputs like fertilizer and new seed varieties. Nonetheless, a substantial portion of the Kaduna State Government's 2010 budget is allocated toward agricultural development [19]. The budget aims to support agriculture as well as health, power, and education [20]. Furthermore, the World Bank in May 2010 approved a US$35.6 million grant to Kaduna State, to support commercial agriculture. The grant, to be disbursed over a five-year period, would be met by a contribution of US$6 million from Kaduna State government. The money will go to support 10,000 farmers throughout the state, to help support local rural-based production for important agricultural products including maize, dairy, and fruit [21].

Kaduna City Political Profile

Kaduna City is increasingly viewed as a political and commercial center in Nigeria. In 2008, former President Yar'Adua highlighted the importance of Kaduna City, stating: "strategically, Kaduna can be termed the center of Nigerian politics and a city of commercial orientation. We are being challenged in our various pursuits of developmental needs and should learn from the sound leadership that started from the great city of Kaduna" [22]. The city has gradually evolved into a commercial and financial center for northern Nigeria [23].

Kaduna State, which is multi-ethnic and multi-religious, experienced communal violence in 2002 stemming from the implementation of *shari'ah* law in areas of northern Nigeria. Some of the northern states that follow *shari'ah* law have experienced sectarian tensions, prompting governors to assure Christians that the laws would apply only to Muslims [24].

In 2008, former Kaduna State Governor and current Nigeria Vice-President Mohammed Namadi Sambo highlighted an 11-point agenda for the state, which includes the following goals: 1) security for peace and development, 2) free and compulsory primary education and general development of the education sector, 3) intensive agricultural development, 4) poverty alleviation, 5) youth and women's development, 6) infrastructure development, 7) improved healthcare delivery, 8) industrial regeneration, 9) provision of housing for all, especially low-income earners and civil servants, 10) transformation of rural areas to modern standards, and 11) improved welfare package for all workers and pensioners [25].

The Kaduna State Government in January 2008 launched "Operation Yaki," a security taskforce to address crime throughout the state. It will employ up to 2,000 personnel to carry out this objective [26]. Furthermore, the authors' interviews with government, private sector, and civil society representatives revealed a positive trend in peace and security in Kaduna State and Kaduna City [27]. However, outbreaks of violence in Jos, Plateau State, continue to impact the perception of security within Kaduna State and Kaduna City, posing a concern for local businesses, most notably in the hospitality industry [28].

SECTOR ASSESSMENT: Leather Goods Processing

Industry overview

Leather is a flexible material made from animal rawhide or skin. It is produced through a chemical process that alters the protein composition of the material, making it more durable. Leather is an important by-product of, and closely tied to, the meat industry. Finished leather is a major part of the international apparel industry value chain. More widely, it helps manufacture popular goods such as clothing and foot apparel, luggage, furniture and other finished goods.

Global market landscape

China is the world leader in leather production, followed by Italy, Hong Kong, France, and the United States [29]. Although in recent years the global market for leather products has been negatively influenced by slow economic growth and changes in consumer preferences, global demand for both leather and leather products has grown [30]. Leather consumption is on the rise in many developing countries, including India and China, thanks in large part to the emerging middle class in these countries and the growing consumer preference for leather products [31].

From 2004 to 2008, while top leather exporters such as Italy, China, Brazil, the US and Germany, experienced single-digit average growth, Nigeria's export growth averaged 101.6%. From 2007 to 2008, the growth increased to 106% [32]. In 2008, Nigeria possessed 3% of the global market share for leather, with total leather exports valued at US$680.2 million [33]. This same year, the EU was the destination for 90% of Nigeria's leather exports [34].

Production in Kaduna City and Kaduna State
Skins and hides for leather are sourced from meat wholesalers or small-scale livestock farmers or pastoralists, who slaughter their animals for food. Nigeria has one of the largest livestock populations on the African continent and is the destination for the annual migration of pastoralists, although the trend in skin and hide production has reportedly been on the decline [35]. A 2002 USAID report on leather production in Nigeria attributes this decline to the decreased number of slaughtered animals since 1986 brought on by structural adjustment policies. The decline in animals slaughtered has reduced the quantity of quality hides and skins harvested, negatively impacting the industry [36]. Currently, cattle are shipped to southern Nigeria for meat processing, while the major tanning facilities (where hides are treated to become finished leather) in the country are concentrated around Kano in the north.

Finished goods made from Nigerian leather are considered premium quality in the market. The majority of skins are from cattle, sheep and goat, yet exotic ostrich and red goatskin are highly prized and available in Kaduna State as well [37]. Most of the leather used for finished goods is shipped to Lagos for further processing and production [38]. The leather industry in northern Nigeria over the last decade has scaled down significantly, from forty tanneries in 2000, to just eight in 2008 [39]. However, another source reported that only two tanneries currently operate in the north [39].

Value-Chain Analysis
The following steps describe the production of finished leather and leather goods in Nigeria [40]:

Production: The production of leather goods in Nigeria is currently concentrated in Lagos [41]. Leather is closely related to the meat value chain. Meat and leather share a number of initial steps within their value chains: animal husbandry, animal marketing, and initial animal processing. Once the animal meat is processed, the two value chains diverge, as the animal skins are separated and processed into finished leather, while the meat is processed into meat products.

1. Animal Husbandry: Farming includes breeding, rearing, and herding/grazing livestock.

2. Animal marketing
   Wholesaling/Semi-Wholesaling: pastoralists bring livestock from rural areas to wholesale markets in Kano for inspection and sale. Brokers mediate price negotiations between farmers and wholesalers. Livestock are groomed, fed, and prepared for resale to local and out-of-town semi-wholesalers and retailers, and then transported to cities.

3. Retailing: Meat wholesalers and retailers purchase animals for slaughtering and butchering.

4. Animal Processing: Livestock are inspected, slaughtered, and bled while the extremities removed.

5. Animal Skin Processing:
   Skin Curing: Skins are salted in flat bundles of fifty (fifty skins per bundle) with mined salt. During the curing period, the hides absorb the salt, which kills bacteria, and are then stored for future processing.

   Tanning: Skins are tanned, which includes hair removal, soaking, liming, fleshing, and splitting. The tanning process also includes de-liming, bating, and picking. In the post-tanning process, skins are washed, re-tanned, dried and lubricated.

   Finishing: Skins are shaved, re-tanned and dyed. Skins are then dried to crust, staked, trimmed, buffed, dry-milled, and ironed. Finally, skins are graded for selection, measured, and packed for distribution.

6. Retail Distribution: Manufacturers purchase leather skins, which are then transported to buyers.

7. Leather Goods Processing: Leather skins are used to make finished goods, including: shoes, wallets and purses, clothing apparel and furniture.

Investment Opportunities
Capturing high value leather goods production
Global consumption of footwear, handbags, wallets, clothing, and luggage is forecast to grow, indicating an investment opportunity in leather production [42]. A value chain analysis of Napa goat leather, a particular type of leather that is chemical dyed blue and is exported to Europe from Kano, revealed high potential for value added opportunities as long as the necessary processing is undertaken in Nigeria. In the analysis, the value of cured goatskins (NGN 22 million, US$146,666) once transformed into finished leather (NGN 46.8 million, US$312,000) [43] generated an overall increase in value of 113% [44].

Kaduna City's Optimal Location
The establishment of a finished leather goods processing factory in Kaduna City – given its proximity to livestock production sources – offers an attractive opportunity. Kaduna State's Governor recently designated five areas in the state as cattle reserves with supporting services, including veterinary care. The cattle reserves serve as an area to concentrate and support cattle herders, who often experience challenges in finding open areas for their herds. The reserves therefore provide a supporting environment for the raising of cattle and also present a source of leather skins production. Processing facilities could be placed nearby to take advantage of these. The Federal College of Leather Technology (Cheltech), is located in nearby Zaria (which is located 100 kilometers from Kaduna City) and represents the only educational institute of its kind in West Africa for training students in finished leather processing and leather goods production [45]. Neighboring Kano is home to only two operating tanneries, and the decline in animal slaughtering and leather production represents an opportunity to seize a greater share in regional leather production for Kaduna City [46]. Additionally, Kaduna City could leverage its geographic proximity to Cheltech to take advantage of the school's leather production research and development skills, as well as its trained graduate body.

Ready supply of inputs and skilled labor
Cheltech estimates that at present, only 40% of its graduates obtain skilled employment after graduation, so there is a substantial supply of skilled labor [47]. Combined with an abundant, if seasonal, supply of skins and hides, there is a clear investment opportunity to establish a leather goods factory in Kaduna [48].

Constraints and mitigations to Investment
→ *High-Cost Transport Logistics, Equipment and Handling*: Limited facilities and outdated production practices have hindered the leather sector. It is reported that

90% of equipment and chemicals used at Cheltech in Zaria for treating leather are imported [49]. Livestock production over large rural areas, due to the seasonal movements of pastoralists' herds, reflect a need for more efficient collection schemes, along with improved handling and storage [50].

→ *Labor Constraints*: Low labor productivity was identified as a major constraint to leather production. Although Cheltech produced leather research and high-quality products, insufficient funding and outdated machinery constrain the university's ability to produce these and in high quantity. The university does continue to graduate skilled students in leather production processes and employs a number of research scholars. Annually (on average) 200 students trained in finished leather processes and leather goods production graduate from Cheltech. The university currently employs 41 research scholars [51].

→ *Quality of Raw Skins and Hides*: Limited veterinary services and inappropriate handling of animals lead to lower quality hides. Educating and training livestock farmers and pastoralists, and providing them with supporting services care, could ensure higher quality hides and an opportunity for farmers to capture greater value added. The GON currently has programs that provide veterinary services and training on livestock husbandry for farmers [52].

Expected Local Impacts to Investments in Leather Production

→ *Increase Employment and Incomes*: A finished leather goods factory in Kaduna City could provide skilled jobs for graduates trained in finished leather processing and leather goods production. Currently, the lack of large-scale leather factories leaves graduates with job opportunities in the sector outside of working at one of the few tanneries in Kano, or opening their own businesses [53]. The creation of leather goods factories would provide increased job opportunities that enable the students to put to use the skills and training they have gained from Cheltech.

The leather supply chain is linked to animal husbandry and rural economies, and therefore increased demand for leather could stimulate informal job creation and contribute to increasing livestock farmers and pastoralists' incomes.

→ *Strengthen Rural-Urban Market Linkages*: Nigeria is a net exporter of finished leather and leather goods, and the value of leather exports continues to grow, increasing 50% between 2007 and 2008 [53].

The majority of skins and hides used for leather production and processing are sourced from small-scale livestock farmers and pastoralists located in the northern region of the country. Investment in this industry, particularly at the initial stage of animal skin and hide production, would link rural-based skin and hide production from the area surrounding Kaduna City to urban-based production and processing in Kaduna City. This would concentrate the value added opportunities within Kaduna City, instead of the current structure where skins and hides are shipped to the southern region of Nigeria for these processes.

→ *Improve Productivity and Technology Transfer*: Much of Nigeria's finished leather is shipped abroad for further processing, and therefore an investment in a leather goods factory would benefit the local value chain. Additionally, greater local processing capacity could help establish new job opportunities and promote transfer of technical know-how through the importation of leather processing machinery.

→ *Improve Sustainability*: Global and domestic consumption of leather goods is forecast to grow in the near future. At present, weak performance in production and processing represents a key opportunity for new investment in the sector. Revitalizing and improving the standards of animal rearing, supporting research on leather processing techniques, as well as standardizing finishing and processing techniques are several ways to strengthen the quality of Nigerian leather and increase profits from locally produced finished goods. The resultant improvement in quality can also redirect domestic consumer preferences toward the local market, further strengthening this investment opportunity. By taking these steps, Nigerian finished leather exports could capture a larger market share, both in Nigeria and internationally.

Feasibility

→ *Workforce and Technological Requirement*: As mentioned above, Cheltech graduates 200 students on average each year. These graduates are skilled in leather production using both manual and machinery methods. The university employs 41 research scholars on leather production with extensive research training. These scholars can support leather production research and training of students to continue building skilled labor to support the leather sector.

→ *Inputs and Supporting Services*: As a major producer of livestock, Kaduna State requires greater veterinary services as well as training for small-scale livestock farmers and pastoralists to ensure higher quality skins and hides.

→ *Prices and Profitability*: Domestic consumers appear to prefer foreign to Nigerian leather goods because of their higher quality [54]. Investment in a leather goods factory could raise the quality of Nigerian leather products and capture greater value added domestically. Raw animal hides can be purchased on average for US$9.36 per square meter (depending on quality), and grade one finished leather can be sold for US$18.62 per square meter, representing significant markup and profit potential [55].

At present, 90% of the equipment and chemicals used for leather production are imported. Investing in leather research and development would help strengthen these inputs.

→ *Supportive Domestic Policy and Trade Agreements*: Because Nigeria supports domestic value-added processing and finishing, raw skin and hides (including unfinished leather) are prohibited for export [56].

Through its Nigerian Export Promotion Council (NEPC), the GON has promoted policies to boost non-oil exports. One such example is the Export Expansion Grant (EEG), which help ensure that the prices of export commodities remain internationally competitive for local businesses.[1] Leather has been identified as an investment area under EEG, and manufacturing gets special preference under the EEG policy. The grant program provides a cash inducement to exporters who have exported at least N500,000 worth of processed products, which can be used to cover operational and other production costs. The amount of the grant is based on a company-specific assessment of "export performance" measured by six factors: the company's capital investment, export growth, participation in a priority sector, level of Nigerian employment, utilization of local content and local value added [57].

Leather production and processing have already been identified by the GON as a priority area for investment within the wider manufacturing industry [58]. In addition, the greatest levels of cash inducements (called EEG incentive rates) are awarded to manufacturing companies, which would include semi and finished leather goods processing companies.

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