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Productivity
and Decent Work
Improving Productivity Ecosystems and Strengthening
Working Conditions in Key Industrial Sectors in Egypt



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▶ Enhancing productivity and improving working conditions in key industrial sectors in Egypt

Leather tanning sector

Assessment
summary report

January 2026



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► Abbreviations

ASSOMAC	National Association of Italian Manufacturers of Footwear, Leather Goods and Tanning Technologies
CAPMAS	Central Agency for Public Mobilization and Statistics
CID	Cairo for Investment and Development
FEI	Federation of Egyptian Industries
FGD	Focus Group Discussion
FTTC	Foreign Trade Training Centre
IDA	Industrial Development Authority
ILO	International Labour Organization
IMC	Industrial Modernization Centre
ISIC	International Standard Industrial Classification of all Economic Activities
ISO	International Organization for Standardization
LTTC	Leather Tanning Technology Centre
LWG	Leather Working Group
MSME	Micro, Small and Medium-Sized Enterprises
OSH	Occupational Safety and Health
PPE	Personal Protective Equipment
PVTD	Productivity and Vocational Training Department
RLC	Robbiki Leather City
SME	Small and Medium Sized Enterprises
UNIC	Unione Nazionale Industria Conciaria (National Union of the Tanning Industry)
UNIDO	United Nations Industrial Development Organization
ZDHC	Zero Discharge of Hazardous Chemicals

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► Executive summary

This report is the shortened version of the assessment report on Egypt's leather tanning sector that was produced under the ILO project, Productivity ecosystems for decent work in Egypt. The project aims at enhancing productivity and improving working conditions within two key industrial sectors in Egypt: the leather tanning sector in Robbiki leather city and the marble sector in Shaq Al-Tho'ban. By mapping conditions affecting productivity and decent work, it is intended to serve as a guide for designing tailored activities. Preparation of the study involved field visits, enterprise surveys, focus group discussions, stakeholder workshops, and key informant interviews with representatives from government, business associations, enterprises, and workers' organizations. It is worth noting that the detailed version of the report is available upon request from the ILO Cairo Office.¹

The leather tanning sector plays a vital role in Egypt's economy and makes a significant contribution to global leather supply chains. Spanning from small, family-run tanneries with limited mechanization to large export-oriented firms, the sector combines deep historical roots with a high degree of informality. Recent modernization efforts, particularly the relocation of tanneries from the middle of Cairo city to Robbiki Leather City (RLC), aim to boost competitiveness and environmental compliance.

Development of the RLC is intended to attract local and foreign investment and allow Egypt to move from mainly processing and exporting raw leather to exporting higher-value products. Phase 1 of the RLC relocated enterprises from Old Cairo: So far, there are 155 operational tanneries in the RLC, accounting for 60-65 per cent of Egypt's 200 million square feet of tanned leather production. A planned Phase 2 is intended to attract companies specializing in chemical production to support leather processing, while Phase 3 will focus on value-added industries such as footwear and leather goods manufacturing.

Constraints on enterprises

Product defects: Enterprises reported a high share of defects in final products due to outdated machinery and lack of skills within the cluster, though also due to similar problems in earlier parts of the supply chain that result in a lack of high-quality inputs.

Raw material costs and supply chain inefficiencies: Many firms continue to rely on scattered suppliers and processors outside the cluster.

Reliance on outdated equipment and labour-intensive methods: Many firms continue to operate with legacy equipment and semi-manual processing techniques, missing opportunities to enhance productivity and meet emerging international sustainability requirements.

Lack of access to skilled labour: Firms are struggling to attract qualified personnel and to improve technical competencies based on international best practices in leather tanning.

¹The outcomes of the sector assessments, conducted for the leather tanning and marbles sectors as part of the ILO project, were presented and discussed along a series of events and meetings, including through a validation workshop that took place in June 2025, that aimed at validating the results and ensuring national stakeholders' endorsement.

Working conditions

Lack of social insurance: Only about 10 per cent of workers in the cluster have social insurance, in part because transitioning to the scheme means deducting the employee's share from wages.

Worker safety: Workers face chemical risks due to exposure to chromium salts and solvents, mechanical risks from sharp tools and moving parts, ergonomic strains from repetitive tasks and manual lifting, and slipping hazards due to wet processing areas. There are no structured or clearly defined safety measures in place across the cluster, and only a few of the larger tanneries have (partially) implemented safety protocols.

Lack of training: Training in the cluster is mostly informal and workplace-based, with limited access to external skills development programmes. A training centre is part of the plan for Phase 3 of the RLC, though will require equipping and operationalization.

Lack of channels to voice concerns and complaints: Workers do not have a formal mechanism for addressing workplace grievances, and there is no established worker union or official representation within the cluster.

Gender: Women are almost entirely absent from production processes. The physical intensity of the work, combined with long hours and exposure to chemicals, reportedly makes the sector socially and practically unsuitable for most women.

Suggested activities

Through structured exercises and facilitated dialogue, stakeholders participating in an ILO productivity workshop in February 2025 collectively developed the following shared vision for the future of Egypt's leather industry:

Vision 2030: *A fully integrated cluster that has created a well-known brand (Made in Robbiki) for leather products, adheres to environmental and social standards, attracts foreign direct investment, promotes innovation, and has increased exports by US\$300 million.*

Building on this, the report outlined a number of suggested activities to address identified constraints:

- Strengthening cluster governance and institutional coordination.
- Upgrading skills and workforce development.
- Enhancing technology and innovation.
- Improving market access and export readiness.
- Promoting technical, environmental and social compliance.
- Facilitating access to finance and investment.
- Empowering sector institutions and service providers.
- Fostering social dialogue and worker representation.

► 1. Introduction

1.1 Background and objective

The productivity ecosystems for decent work in Egypt project is a collaborative initiative between the International Labour Organization (ILO) and the Egyptian Ministry of Industry. Funded by the Italian Directorate General for Development Cooperation, it is designed to enhance productivity and improve working conditions within two key industrial clusters: the leather tanning sector in Robbiki leather city and the marble sector in Shaq Al-Tho'ban. These sectors are integral to Egypt's economy but face structural constraints that hinder their growth and the promotion of decent work. The purpose of this study is to map conditions affecting productivity and decent work. It is intended to serve as a guide for designing tailored activities to address identified problems, focusing on activities at the sector (meso) and enterprise (micro) levels.

1.2 Methodology

The study employed a mixed-methods approach. Secondary research included a review of existing literature, such as policy documents, market studies, economic reports, academic papers, sectoral statistics, productivity trends, labour market conditions and export performance data. It also included an assessment of the relevant regulatory frameworks.

Primary research involved field visits to observe sector dynamics and working conditions firsthand, meetings with companies of different sizes to identify productivity challenges and decent work deficits and focus group discussions and stakeholder workshops to engage industry players in identifying constraints and proposing activities. It also entailed key informant interviews with representatives from government, business associations, enterprises, and workers' organizations, as well as a survey of enterprises in Robbiki leather city.

► **Figure 1: Approach to the study**

Inception	Desk research	Primary research	Analysis	Draft two reports	Validation	Final report
• Study framework • Consultations • Mapping key stakeholders	• Review of existing literature and data.	• Interviews with key informants. • Engagement workshop. • Focus group discussions. • Enterprise surveys.	• Qualitative • Quantitative	• One of the marble sector focusing on Shaaq-Al Taaban • Other on leather tanning focusing on Robbiki city.	• A consultative workshop including all stakeholders. • Pitching of study output. • Consultation & recommendations.	• Finalizing and submitting the two studies.

Key indicators:

• No. & size of companies and complexes. • Percentage of unregistered projects. • Productivity, cost structure, & profitability. • Export levels and growth potential. • Workforce size, skills, conditions, & formality. • Growth & value-addition obstacles. • Policies & regulatory framework.	• Value chain analysis and market structure. • The most important obstacles and priority gaps to deal with to increase productivity. • The root causes behind these obstacles. • Proposing areas of intervention through the project and implementation partners. • Other recommendations.	• The final version of the two studies. • Interventions and final recommendations.
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Measuring productivity is critical to assessing sectoral contributions to economic development and improved living standards. Productivity can be viewed across three dimensions: labour productivity (output per worker or hour worked), capital productivity (output relative to capital inputs such as machinery and equipment), and multi-factor productivity (MFP), which captures the combined efficiency of labour, capital and other inputs such as technology and materials. Quantitative measurement of productivity in this study was hindered by significant data limitations, including outdated and fragmented statistics, a high level of business informality, and a lack of reliable data on production volumes, working hours and capital utilization. Given these challenges, productivity was primarily assessed qualitatively through field observations, stakeholder interviews, and focus group discussions, complemented by quantitative insights drawn from an enterprise survey.

► 2. The broader context

According to Egypt's 2017/18 economic census, micro, small and medium-sized enterprises (MSMEs) make up over 98 per cent of the private sector, with micro enterprises constituting nearly 95 per cent of all establishments. MSMEs operate mostly in the trade and services sectors, with fewer in manufacturing. In terms of employment, MSMEs provide an estimated 75 per cent of private sector jobs in Egypt (CAPMAS 2019). Despite their limited capital intensity, MSMEs – especially micro enterprises – serve as important entry points into the labour market and offer employment to low-skilled workers, particularly in informal settings.

Egypt's informal economy represents around 40 per cent of GDP (ILO, 2024). Recent policy reforms, including the MSME Law 152/2020 and tax reforms announced in 2024, seek to encourage formalization and ease compliance burdens, though uptake remains limited due to weak outreach efforts and lack of coordination across regulatory bodies.

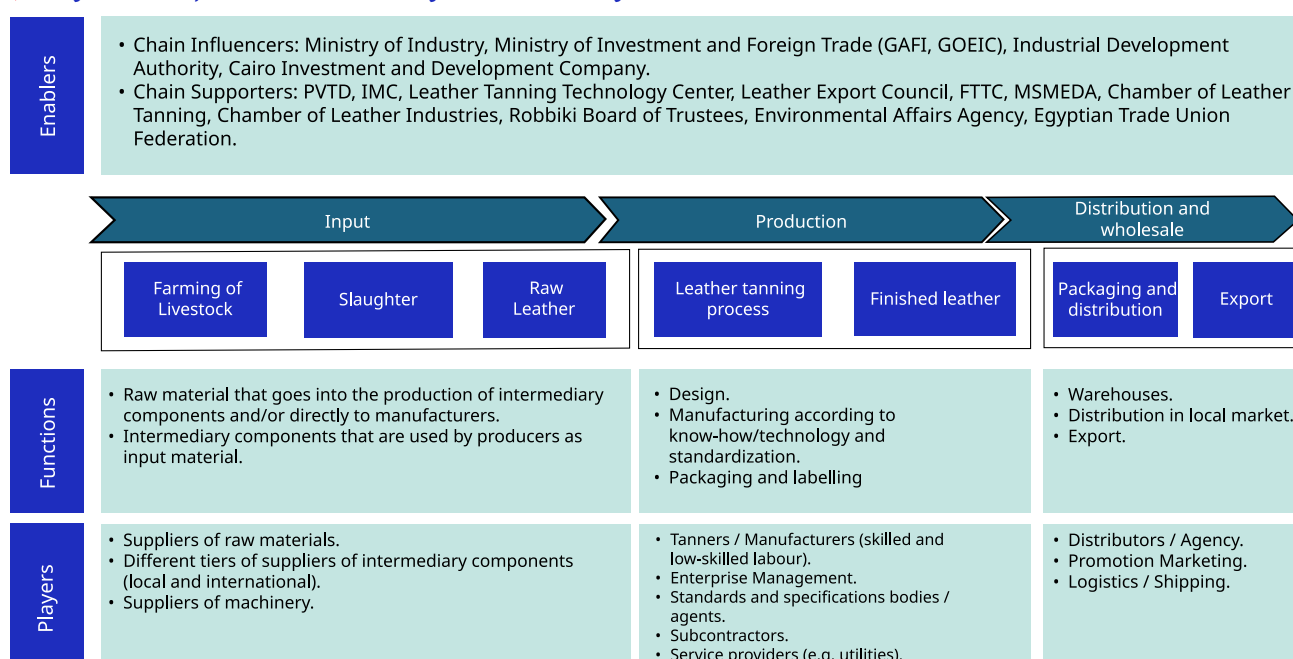
Informality is also a defining feature of Egypt's labour market. Around 67 per cent of total employment was considered informal as of 2021, including own-account workers and contributing family workers (CAPMAS 2019). Informality is especially prevalent in agriculture (97 per cent of agricultural workers are informal) but also significant in industry and construction (ILO 2025). Workers in informal employment often face harsh working conditions, low wages, absence of written contracts and lack of social protection.

► 3. The leather tanning sector in Egypt

3.1 Sector overview

The below figure explains briefly the leather tanning value chain is presented and analysed including key functions, supply chain influencers and enablers, key regulations, and productivity constraints. It gives an overview of the leather tanning value chain, from the farming of the livestock to the selling of the tanned leather on local or international markets.

► Figure 2: Simplified leather tanning value chain stages



Source: Authors, designed based on the primary and secondary research

The leather tanning sector plays a vital role in Egypt's economy and makes a significant contribution to global leather supply chains. Spanning from small, family-run tanneries with limited mechanization to large export-oriented firms, the sector combines deep historical roots with a high degree of informality. Recent modernization efforts, particularly the relocation of tanneries from the middle of Cairo city to Robbiki Leather City (RLC), aim to boost competitiveness and environmental compliance.

According to the Industrial Modernization Centre (IMC), as of 2023 Egypt hosted 160 leather tanning factories, 874 leather product factories, and 976 footwear factories (Arab Finance 2025). The latest available data from CAPMAS shows that the broader leather industry² employed 33,414 individuals, only 5 per cent of whom were women.

Within the RLC cluster, small enterprises form the overwhelming majority. According to the focus group discussions, only 5-6 of the currently operating 152 tanneries are large, 10 are medium, and approximately 135-136 are small. Larger companies dominate export activity. For example, one large firm outside the RLC alone accounts for 40 per cent of Egypt's tanned leather exports.

²ISIC 15, according to the International Standard of Industrial Classification of all Economic Activities.

Around 57 per cent of enterprises in the leather manufacturing sector operate informally (CAPMAS 2019). Informality restricts access to finance, business development services and compliance-driven market opportunities. It also constrains firms' ability to increase wages and offer competitive benefits.

The growth of the global leather tanning market is primarily driven by the rising demand for leather in various applications, including footwear, upholstery, garments and leather goods. Key drivers include rising demand for leather products, especially at the luxury end of the market, and the improved reputation of the leather tanning industry globally through technological advancement.³ Egypt has significant potential to export manufactured leather products, and recent reports show that its exports have been rising, reaching a value of around US\$114 million in 2023 (Cairo Scene, 2024). Recent growth is attributed primarily to the development of the Robbiki leather city industry hub, which aims to further elevate Egypt's export capacity to exceed US\$1 billion annually.

3.2 The Robbiki leather cluster

Magra El Oyoum, located in Old Cairo, served as the historical hub for leather tanning since the early 19th century. Despite its long-standing economic significance, the area became known for negative environmental impacts, characterized by the discharge of substantial amounts of solid waste, including animal hair and fat, as well as hazardous chemicals such as chromium and sulfuric acid. Due to limited land availability, the factories in this densely populated area often expanded vertically, adding additional floors to accommodate machinery that could weigh up to 30 tonnes. This vertical expansion resulted in high construction costs to ensure structural stability.

In 2003, a special ministerial committee led by the Prime Minister issued a decree to relocate the tanneries about 40 km east of Cairo along the Suez desert road, in the Robbiki area between Badr city and the 10th of Ramadan city in Sharqia governorate. The RLC geographic location is characterized by its connection to the Cairo Ismailia – Cairo Suez Road network, which facilitates access to Red and Mediterranean Sea ports, such as Sokhna, Suez, Port Said, Damietta, and Alexandria. In addition, it is connected to the electric railway network, which facilitates the transport of raw materials and the export of finished products. The goal was to create the largest eco-industrial cluster in the leather industry within the region, attract local and foreign investment, and allow Egypt to move from mainly processing and exporting raw leather to focusing on value addition and exports of higher-value products. Besides addressing the logistical and environmental challenges of the previous location, the cluster was further designed to alleviate population pressures in the Nile valley by creating job opportunities for Egypt's youth and improve regional infrastructure. The project faced significant delays and remained stalled for nearly 12 years, so it was only in 2015 that Robbiki's establishment as Egypt's first leather industrial city began to take shape.

Robbiki Leather City (RLC) is managed by the Cairo for Investment and Industrial Development (CID), an Egyptian joint stock company established in 2016 with the mandate to manage, operate, invest in, maintain, develop, and promote the RLC.

The Industrial Development Authority (IDA) is implementing RLC's development in three interconnected phases, each dedicated to different segments of the leather manufacturing value chain. It has so far completed Phase 1, which relocated enterprises from Old Cairo and constructed numerous chemical and leather storage facilities, as well as public service buildings and utilities.

A planned phase 2 is aimed at attracting companies specializing in chemical production to support leather processing, while phase 3 will focus on value-added industries such as footwear and leather goods manufacturing. Additional space is planned for general and industrial wastewater and chromium treatment.

³Based on ITC Trade Map data on export and import data of leather products.

► Table 1: Key stakeholders

Category	Stakeholder	Role
Government regulatory and development bodies	Ministry of Industry (MoI)	Oversees industrial policies, regulations and sectoral development.
	Industrial Development Authority (IDA) - under MOI	Regulates industrial zones, facilitates business registration, and ensures compliance.
	General Authority for Investment and Free Zones (GAFI) - Ministry of Investment and Foreign Trade (MIFT)	Facilitates domestic and foreign investment, manages free zones, and promotes economic incentives.
	Egyptian Environmental Affairs Agency (EEAA)- Ministry of Environment	Oversees environmental regulations, ensuring compliance with sustainability standards in leather processing.
	Ministry of Labour	Regulates employment laws, workplace safety, and worker protections in the tanning sector. Offers advice, support for better regulatory compliance and related trainings.
Industry development and investment facilitators	Cairo for Investment and Development (CID) – Established by IDA	Main developer and manager of the RLC, responsible for infrastructure, investment facilitation, and industrial expansion.
	Executive Agency for Industrial and Mining Projects (IMPA) – MOI	Implements industrial infrastructure projects and manages development plans.
	Leather Tanning Technology Centre (LTTTC) – MOI	Provides R&D, training, and third-party manufacturing services to support smaller tanneries.

Category	Stakeholder	Role
Leather-specific industry support and representation	Leather export council	Supports market access and international trade opportunities for Egyptian leather producers.
	The board of trustees for RLC	Represents and advocates for the enterprises within the RLC.
	Chamber of leather industry (FEI)	Represents broader leather production, including footwear, garments and accessories.
	Chamber of leather tanning – FEI	Represents and advocates for businesses in the tanning industry.
Training, research, and capacity building institutions	Industrial Modernization Centre (IMC) – MOI	Supports SME growth through technical assistance, innovation and modernization programmes.
	Foreign Trade Training Centre (FTTC) - MIFT	Develops and implements training programmes on export readiness, international trade compliance and access to export markets.
	Productivity and Vocational Training Department – MOI	Enhances workforce skills through vocational training programmes tailored to industry needs.
Private sector and market participants	Enterprises (tanneries, leather manufacturers and supporting businesses)	Businesses driving production within the RLC.
	Workers (skilled and unskilled labour; managerial and non-managerial)	Workforce responsible for operations in tanneries, processing plants and support industries.

► 4. Constraints on enterprises

In order to better understand productivity constraints in the leather sector, the Productivity ecosystem for decent work in Egypt project conducted an enterprise survey, supplemented by desk research, interviews and focus group discussions. The survey sample included 29 tanneries and 1 chemical company, covering enterprises with a range of characteristics.⁵ Over half of the enterprises surveyed had up to 10 employees, while 4 out of the 29 had more than 50 employees. One third of the enterprises had been established over 50 years ago, and about another third since 2017. However, all enterprises except for two had only been officially registered since 2017 or later.

Over 60 per cent of the surveyed enterprises did not export, while about a quarter sold more than half of their output abroad. For the nearly 40 per cent of enterprises that export, the main markets are India, followed by China, Italy, Turkey and Portugal.

More than 70 per cent of reporting enterprises (15 out of 21) said that they utilised less than 50 per cent of their capacity, indicating a large potential for productivity gains. The average labour productivity across the 21 RLC enterprises that provided data on employees and production was 127 square feet per day per employee, or around half the labour productivity of a hypothetical “model tannery” as described by Buljan and Kral in a 2012 UNIDO study.⁶

The top five productivity constraints highlighted by enterprises in the survey were high prices of raw materials and inputs (mentioned by 26 enterprises), lack of availability of high-quality raw material ((mentioned by 17 enterprises), lack of access to skilled labour, especially skilled maintenance technicians (mentioned by 13 enterprises), outdated equipment and technology (mentioned by 11 enterprises), and lack of available training programmes.

⁵The survey sample is not necessarily representative of enterprises in the cluster, as there is no complete dataset with the characteristics of all enterprises in RLC.

⁶Some 21 enterprises out of the 29 tanneries provided data on both average monthly production and number of employees. In order to calculate labour productivity, the monthly production was divided by an estimated number of employees and number of working days (22), with an assume 8-hour working day. As the number of employees was given as a range, the middle value was used.

► **Figure 4: Support requested by surveyed enterprises (number requesting)**



Source: Enterprise survey

4.1 Informality

The transition to Robbiki leather city has significantly altered the structure of the leather industry. Around 80 per cent of the businesses in the old hub of Magra El Oyoun operated informally, while the RLC only accommodates formalized businesses with official ownership. While larger firms have benefited from government incentives, upgraded infrastructure, and improved environmental compliance, smaller tanneries have faced financial constraints, lack of access to credit, and challenges in meeting formalization criteria. Many small-scale tanners which were previously operating informally were unable to relocate, leading to the loss of many traditional tanning businesses and an increased concentration of production within a small number of larger firms.

Among the enterprises surveyed, only one was currently informal. Most enterprises in Robbiki that are not fully registered reportedly have moved relatively recently and are in the process of obtaining a license.

4.2 Lack of supply chain integration

One of the unanticipated challenges of the relocation has been the lack of full supply chain integration within Robbiki, particularly in upstream rawhide sourcing and downstream finishing. Many firms still rely on scattered suppliers and processors outside the industrial zone, introducing inefficiencies and additional costs.

4.3 Leather defects

Enterprises surveyed reported a high share of defects (29 per cent on average) in the final product (processed hides), with a large variation across firms of between 5 and 95 per cent. This is partly due to outdated machinery and partly due to lack of skills within the Robbiki cluster. However, it is also due to similar problems in other parts of the supply chain, resulting in a lack of high-quality raw material.

4.4 Reliance on outdated equipment and labour-intensive methods

While significant investments have been made in the physical infrastructure of Robbiki, private-sector investment in upgrading production facilities and technology adoption remains relatively limited. Many firms continue to operate with legacy equipment and semi-manual processing techniques, missing opportunities to enhance productivity and meet emerging international sustainability requirements.

Unlike industrial sectors that have transitioned toward capital-intensive production, much of Egypt's leather industry still employs labour-intensive methods with varying degrees of efficiency. While these conditions preserve jobs in the short term, they also result in significant inconsistencies in product quality, production delays and inefficiencies that limit the sector's competitiveness and growth. They also reduce its capacity to offer more and better jobs, higher wages and improved working conditions.

4.5 Access to skilled labour

Findings from the survey confirm that many firms are struggling to attract qualified personnel or improve technical competencies based on international best practices in leather tanning. This limits firms' operational efficiency and readiness to compete in higher-value markets. Some 35 per cent of surveyed enterprises reported difficulties accessing skilled labour, while 38 per cent identified lack of relevant training programmes as a key challenge. In addition, 20 per cent of enterprises reported high labour turnover, reflecting challenges in workforce stability and possible dissatisfaction with working conditions or career development prospects.

4.6 Environmental aspects

While most enterprises surveyed reported no challenges complying with environmental regulations, very few have put in place significant measures regarding resource efficiency.⁷ Further, they highlight substantial barriers to implementing sustainable practices, particularly lack of knowledge and the cost and lack of supervision.

⁷Based on key informant interviews and the SCORE baseline assessment.

► 5. Working conditions

Focus group discussions were held with seven workers from four different enterprises based in the RLC in February 2025. Responses were cross validated with data from the enterprise survey and through field observations conducted during site visits.

5.1 Awareness of labour laws and rights

During focus group discussions, workers demonstrated knowledge of labour laws and rights, often appears to understand them in detail. Several mentioned that the law is visibly posted on the walls of all factories, as required by regulation, and frequently discussed among workers. Despite this awareness, most workers seem to accept the current suboptimal working conditions.

5.2 Social insurance

According to participants' estimates, only about 10 per cent of workers across the cluster have social insurance, though this figure may reach 50 per cent in some larger facilities. Among the participants in the workers' focus group, only the two participating supervisors had social insurance. (In contrast, the employer surveys reported coverage rates of up to 20 per cent in small enterprises, approximately 50 per cent in medium-sized enterprises, and between 80 per cent to 95 per cent in exporting enterprises.) While all participants acknowledged the benefits of social insurance, they also pointed out that transitioning to the social insurance scheme meant deducting the employee's share from their current wage, a change many workers said they were unwilling to accept.

5.3 Pay and benefits

Supervisors are paid a fixed monthly salary and have social insurance that grants them the right to paid leave in accordance with labour laws. Other workers are paid weekly based on the number of days worked (typically six days per week). Their daily wage for a worker in the cluster is around 200 Egyptian pounds per day, with slight variations. Some jobs in production are paid based on productivity (number of units or pieces handled per day), leading to more or less the same daily rate. When no transportation is provided by the enterprise, the daily wage typically increases to compensate for two-way public transport costs (estimated at around 60 pounds per day).

Some workers operate on a daily ad hoc basis, arriving at the cluster each morning and waiting in cafes or designated areas to be hired. Despite the uncertainty, many prefer this arrangement because they feel it allows them to earn a higher total monthly income (up to 300 pounds per day).

Almost all wage payments in the Robbiki leather cluster are made in cash. Only one large enterprise has recently started to pilot digital payments.⁸

None of the workers that participated in the FGD were entitled to paid annual leave, but they did receive payment for official public holidays. Sick leave is granted based on the submission of a medical report. Hot meals are not provided in most enterprises.

⁸Source: SCORE Baseline Assessment.

5.4 Workers' safety

Workers in the tanning industry generally face a range of occupational hazards that continue to be observed in the RLC. These include chemical risks due to exposure to chromium salts and solvents, mechanical risks from sharp tools and moving parts, ergonomic strains from repetitive tasks and manual lifting, and slipping hazards due to wet processing areas.

The workers interviewed showed low to moderate awareness about chemical risks. They indicated that the most recognized mechanical risks were leather cutting machines and pressing and drying operations, particularly machines involving rollers. To mitigate risks, only experienced workers are permitted to operate these machines and be present in high-risk areas. While some modern equipment comes with built-in safety features that reduce the likelihood of accidents, this is not necessarily the case for much of the equipment currently used in the RLC. Moreover, there are no structured or clearly defined safety measures in place across the cluster, and only a few of the larger-scale tanneries have (partially) implemented safety protocols.

When accidents occur, employers reportedly take responsibility for providing medical care and hospitalization if needed, though compensation is handled on a case-by-case basis without a formalized or standardized system. Under Egyptian labour law, employers are required to formally record and report work-related injuries and illnesses to relevant authorities, including the labour inspectorate and insurance agencies, though this procedure reportedly is often overlooked in practice.

There is an absence of systematic data collection on occupational diseases, such as long-term exposure to carcinogenic tanning chemicals. Except for one study based on a large factory outside Robbiki,⁹ there are no available structured statistical data on the adverse health effects and life expectancy of workers in the leather tanning sector in Egypt.

PPE is largely absent from most facilities. As confirmed during field visits, some PPE is available in the larger-scale tanneries, but usage is not consistently enforced. Workers generally use PPE only during audits or official visits to meet compliance requirements. There is a strong belief among participating workers that the available PPE is not suitable for this industry because it hinders comfort and productivity. This perception contributes to low adoption rates, with workers preferring to prioritize speed and efficiency. Employers interviewed during field visits even expressed concerns that strict enforcement could lead employees to leave for other tanneries with less stringent safety requirements. This issue likely stems from a lack of availability or awareness of industry-specific PPE tailored to leather tanning processes, though may also be due to cost barriers that prevent enterprises from investing in high-quality gear.

⁹Kasemy, Zainab A., 2017, "Health related disorders on occupational exposure to chromium in a leather tanning factory," Menoufia Medical Journal 30(1):92-98.

5.5 Access to training

There are no structured or certified training programmes available for workers within the cluster. Training is mostly informal and workplace-based, with limited access to external skills development programmes. Larger-scale tanneries may provide some in-house training, particularly for handling modern machinery and chemical processes. While only 10 per cent of firms reported technical knowledge gaps, field observations suggest that such gaps are more widespread but either underrecognized or undocumented. The problem is further compounded by the lack of practical and tailored training in sustainability, occupational health and safety, and chemical handling, all of which are essential for meeting the expectations of international buyers.

The lack of access to technical training limits the ability of workers to adapt to new technologies and processes in the industry. Moreover, the lack of a standardized certification system for tanning skills makes it difficult to establish a clear career progression path. Nevertheless, some workers are sceptical about the value of training, believing that on-the-job experience is sufficient.

A training centre is part of the plan for phase 3 of Robbiki leather city, though will require equipping and operationalization to serve its intended purpose of preparing potential workers.

Past training and apprenticeship initiatives reportedly have struggled with low retention, partly due to the absence of financial incentives for participants. According to the chair of the RLC board of trustees, this highlights the need to design future programmes with appropriate compensation mechanisms.

5.6 Channels to voice concerns and complaints

Workers do not have a structured or formal mechanism for voicing complaints or addressing workplace grievances, and there is no established worker union or official representation within the cluster to advocate for their rights or concerns.¹⁰ Instead, complaints are typically raised informally through direct communication with supervisors or factory owners, with response depending on individual employers' attitudes and willingness to address issues.

5.7 Gender

Women are almost entirely absent from the production processes in the RLC. According to workers interviewed during focus group discussions, this is due to the physically demanding and potentially hazardous nature of the work.

Workers in focus group discussions mentioned strong cultural perceptions that discourage women from working in industrial tanning processes. The physical intensity of the work, combined with the long hours and exposure to chemicals, reportedly makes the sector socially and practically unsuitable for most women. In addition, the workplace infrastructure in the cluster is (so far) not adapted to women's needs, as there are no dedicated facilities such as changing rooms or rest areas for female workers.

There are reportedly only five women in the whole cluster working in shopfloor operations, all doing light physical work. Most other women working in the sector are employed in administrative and other office roles. In larger-scale factories, some women work in quality control, bookkeeping, and customer service.

¹⁰Leather tanning workers are technically represented under the textile and weaving union.

► 6. Suggested activities

Through structured exercises and facilitated dialogue, stakeholders participating in an ILO productivity workshop in February 2025 collectively developed the following shared vision for the future of Egypt's leather industry:

Vision 2030: *A fully integrated cluster that has created a well-known brand (Made in Robbiki) for leather products, adheres to environmental and social standards, attracts foreign direct investment, promotes innovation, and has increased exports by US\$300 million.*

This vision reflects the sector's aspirations to shift from a low-margin, commodity-based model to a high-value, export-driven industry that prioritizes quality, sustainability and technological advancement. It is also in line with the Government's vision of increasing exports and added value. The vision emphasizes the importance of modernized production processes, stronger institutional support, and global market alignment, all of which are necessary to position Egypt as a leading regional player in the leather sector.

The following graphic summarizes the core elements of this stakeholder-driven roadmap, illustrating the strategic objectives for guiding future activities and policy measures. The vision serves as the foundation for the targeted activity framework, ensuring that efforts to improve productivity, competitiveness, and sustainability are both realistic and industry-led.

► **Figure 5: A vision for the Robbiki cluster**

Sectoral level	• Learn from other countries' experiences (e.g. India) especially regarding incentives for tanning (tax, customs). • Facilitate investments e.g. FDI (tax and customs incentives in collaboration with GAFI). • Target new markets (e.g. Africa). • Promote industry-academia collaboration. • Promote transfer of international Know-How.	Vision 2030 "A fully integrated cluster that has created a well-known brand (Made in Robbiki) for leather products, adheres to environmental and social standards, attracts FDI, promotes innovation, and has increased exports by 300 million USD."
Cluster level	• Build water treatment plant. • Increase access to finance for cluster (e.g. deals with banks, FDI). • Improve communication and collaboration to advance integration of cluster. • Promote cluster e.g. through exhibitions. • Promote R&D (e.g. through R&D office). • Ensure cluster-wide commitment to environmental standards, formalization, OSH, and decent work.	
Enterprise level	• Improve collaboration between enterprises (improve "collective action culture"). • Increase access to sustainable finance for enterprises (e.g. support with sources and applications). • Improve access to inputs, especially but not only chemicals (e.g. production of certain substances, better use, better collaboration). • Train enterprises on costs and pricing, OSH, working conditions, certifications, formalization etc. (coaching rather than punishment).	

Source: Own reproduction of discussion results from workshop with key stakeholders (February 2025)

The identification of strategic entry points for activities was grounded in a comprehensive assessment of productivity constraints and their root causes, a will-skill analysis of stakeholders, the stakeholder-driven shared vision for RLC, and insights from successful global leather clusters. Together, these elements inform a structured intervention framework to ensure that resources are directed toward high-impact, practical solutions that drive value addition, productivity enhancement, export readiness for SMEs, and improved working conditions.

The strategic entry points for activities are grouped into four interconnected pillars:

- 1 Creating a dynamic and well-functioning ecosystem to unlock synergies within the cluster by strengthening sector governance and coordination, where public and private stakeholders work together to drive policy, investment and value chain integration.
- 2 Upgrading enterprise management and fostering collaboration among tanneries and suppliers to enhance productivity, improve quality compliance, and increase productivity and competitiveness.
- 3 Expanding access to export markets by helping businesses comply with global trade standards, develop high-value leather products, and establish stronger international partnerships.
- 4 Improving access to raw materials and inputs by strengthening local sourcing, raw hide quality, and supply chain efficiency, ensuring that Egyptian tanneries can meet the demands of premium global markets. Linked to that, improving efficiency of use to reduce cost and impact on the environment.

Building on the aforementioned entry points, the following sections outline targeted activities to address identified market failures, institutional bottlenecks and enterprise-level deficits affecting productivity and the potential for decent work in Egypt's leather tanning sector, particularly in the RLC.

6.1 Strengthening cluster governance and institutional coordination

Objective: Establish a functional and inclusive cluster governance system led by the Robbiki Company for Leather Tanning Technology (RCLTT) to coordinate services, foster collaboration, and enable strategic development of the Robbiki leather city as a competitive, sustainable cluster.

Constraints identified:

- Absence of a formal cluster management entity with operational capacity.
- Fragmentation and poor coordination among service providers.
- Lack of inclusive representation and weak voice for smaller firms and workers.
- Limited collective advocacy and negotiation capacity.
- Limited coordination and collaboration among cluster members.

Key activities:

- Support the formalization and operational setup of RCLTT as the Cluster Management Entity through legal structuring, staffing, institutional development and a company governance framework.
- Develop a Cluster Charter and internal governance framework that defines roles, responsibilities, and decision-making structures.
- Align RCLTT's functions with the mandates of the Leather Tanning Technology Centre (L TTC), which it would co-manage with public partners.
- Provide tailored capacity building for RCLTT board and staff on cluster governance, strategic planning, stakeholder engagement, public policy advocacy, and service delivery.
- Support the RCLTT to:
 - Establish multi-stakeholder working groups focused on priority themes such as supply chains and bulk purchases, skills development, market access, OSH, and technology;
 - utilize RCLTT as a platform to convene public-private dialogue, promote social dialogue, and engage with trade union structures and worker associations (dialogue should include communication with government and quasi-governmental organizations, international development partners and service providers);
 - position RCLTT to lead data collection, market intelligence and cluster-level promotion efforts.

6.2 Upgrading skills and workforce development

Objective: Bridge the critical skills gap in the leather tanning sector by modernizing training systems, fostering enterprise-based learning, and building a workforce capable of supporting productivity, compliance and innovation across different enterprise sizes.

Constraints identified:

- Severe mismatch between the supply of training and the skill needs of enterprises.
- Lack of structured enterprise-based training systems.
- Limited access to affordable, quality training, especially for smaller firms.
- Underrepresentation of women and youth in technical and support functions.
- Weak training provider–industry linkages.

Key activities:

- Co-develop industry-driven training curricula with the service providers (for example, LTTC, IMC and PVTB), covering tanning technicalities, OSH, machine operation and management, quality control, certification and lab testing.
- In coordination with RCLTT, deliver modular, demand-responsive training for different sizes of enterprise, with cost-sharing options for MSMEs.
- Scale up the ILO SCORE¹¹ training tool in Robbiki.
- Facilitate enterprise-based apprenticeships, internships and coaching schemes with cost-sharing and mentoring support.
- Certify training content through national and international institutions to ensure credibility and transferability.
- Provide training for supervisors and line managers on management, coaching techniques and inclusive practices.

6.3 Enhancing technology and innovation

Objective: Boost the productivity and competitiveness of Robbiki enterprises by facilitating access to modern technology, promoting joint innovation, and improving technical capabilities across different sizes of firms.

Constraints identified:

- Outdated machinery, limited technical innovation, and low productivity.
- Limited capacity to meet buyer or market technical specifications.
- Lack of cooperation between upstream and downstream actors in the value chain.

Key activities:

- Operationalize the technology centre as a shared service innovation facility for all enterprises. (PE4DW Project's role should be complementary to the support provided by the Italian Cooperation and focused more on effective operations.)
- Provide enterprise-level technical assistance on production optimization, process re-engineering, and energy efficiency.

¹¹Sustaining Competitive and Responsible Enterprises (SCORE) is an ILO tool based on the intrinsic link between productivity and working conditions.

- Facilitate access to the modernization credit line through tailored support for investment planning, documentation, and application coaching, especially for MSMEs.
- Support digital transformation pilots in machine operation logs, process monitoring, and maintenance systems in order to improve efficiency and reduce downtime.
- Promote joint technology trials and collaborative product development initiatives between tanneries and downstream manufacturers (for example footwear and leather goods), leveraging planned integration in future phases of the RLC.

6.4 Improving market access and export readiness

Objective: Strengthen the market position of RLC enterprises by improving their compliance with buyer requirements, increasing their visibility in premium markets, and enhancing their integration across the leather value chain to boost local value added.

Constraints identified:

- Limited compliance with export requirements.
- Weak branding and visibility in domestic and global markets.
- Inadequate buyer linkages, especially for MSMEs.
- Insufficient understanding of target market needs.
- Fragmentation across upstream and downstream actors in the value chain.
- Cash flow challenges and mistrust hindering local supply coordination.

Key activities:

- Deliver modular export readiness training in collaboration with FTTC, the Export Council, and the RCLTT.
- Support participation in business-to-business platforms and trade fairs, particularly in fashion, automotive, and footwear segments.
- Launch a “Made in Robbiki” branding initiative featuring sustainability, traceability, and certification.
- Assist firms in developing digital marketing presence and basic promotional materials.
- Map domestic and international buyers and help broker deals, particularly linking tanneries to higher-value local shoe and article manufacturers under structured and cash-flow-sensitive supply agreements.
- Facilitate dialogue and technical alignment between upstream and downstream firms to co-develop quality specifications and delivery protocols.

6.5 Promoting technical, environmental and social compliance

Objective: Improve environmental performance and social compliance across the cluster by enabling firms – particularly MSMEs – to adopt sustainable practices, comply with national and international standards, and enhance working conditions.

Constraints identified:

- High environmental footprint of tanning processes, especially chrome and water usage.
- Limited enterprise capacity to comply with buyer audits and environmental/social standards.
- Poor working conditions, including low adoption of OSH standards and weak use of personal protective equipment (PPE).
- Low uptake of certifications related to sustainability, traceability and quality (for example LWG, ISO, ZDHC).
- Lack of centralized support for navigating compliance and audit processes.

Key activities:

- Support chrome recovery pilots for medium and large tanneries; document results and develop scale-up plans.
- Provide tailored training on compliance with responsible working conditions and relevant local and international regulations.
- Support the establishment of a local compliance facilitation desk under RCLTT to assist firms with buyer audits, documentation and remediation plans.
- Deliver targeted technical assistance to support compliance with sustainability certifications such as LWG, ZDHC, and ISO, as well as traceability systems, with a focus on practical, scalable steps.
- Promote group certification schemes for cluster members to reduce costs and ease entry into certified supply chains.
- Train enterprise staff on environmental data collection and reporting to facilitate monitoring, documentation and audit readiness.
- Provide training on testing procedures and lab interpretation for quality control staff in both the LTTC and at enterprise level.
- Support digitization of product quality tracking and machine operation logs to improve process control and certification readiness.

6.6 Facilitating access to finance and investment

Objective: Enable enterprises in the RLC (especially MSMEs) to invest in modernization, productivity, compliance and quality upgrades by improving financial literacy, supporting access to credit and leasing instruments, and aligning investment incentives with cluster development goals.

Constraints identified:

- Limited awareness of available financial instruments and initiatives.
- Poor financial documentation and low bankability, especially of MSMEs.
- Insufficient advisory support to navigate credit procedures.

Key activities:

- Support awareness-raising in the cluster (especially among MSMEs) of the Italian-funded credit line, including its purpose, terms, and application process.
- Organize group briefings and one-on-one coaching to help MSMEs prepare business plans and documentation for bankable investment projects.
- Facilitate partnerships with leasing companies and banks to develop flexible asset acquisition solutions for smaller tanneries.
- Develop standardized financial templates and guides tailored to RLC enterprises, in coordination with RCLTT and service providers.
- Integrate basic financial literacy modules into existing training initiatives to build enterprise capabilities.

6.7 Empowering sector institutions and service providers

Objective: Strengthen the capacity, coordination and responsiveness of national and local institutions serving the leather tanning sector to deliver high-quality, demand-driven support to enterprises and workers in the RLC and beyond.

Constraints identified:

- Underutilized support service institutions and limited institutional responsiveness.
- Weak coordination among support entities.
- Limited institutional innovation and outreach.
- Weak linkage with private sector needs and modern technology and skills.
- Fragmented delivery of training, export promotion and technology services.

Key activities:

- Strengthen coordination between RCLTT and national training and export support institutions, such as LTTC, PVTDC, FTTC, IMC and export councils.
- Build institutional staff capacity through tailored technical training, exposure visits and results-based performance incentives.
- Support the digitization of core services such as training registration, audit scheduling and certification tracking, to enhance transparency and access.
- Mobilize donor co-financing (for example through The productivity ecosystem for decent work in Egypt project and Italian Cooperation) for institutional innovation pilots and service delivery improvements.
- Establish joint planning and feedback mechanisms with enterprises to align institutional offerings with industry needs.

6.8 Fostering social dialogue and worker representation

Objective: Establish inclusive and institutionalized mechanisms for dialogue between employers, workers and public authorities to promote decent work, productivity and conflict resolution in the RLC.

Constraints identified:

- Absence of structured dialogue platforms.
- Limited worker awareness of – and willingness to participate in – rights and representation mechanisms.
- Lack of organized worker representation or trade union structures in the cluster (and sector).
- Weak enterprise-level mechanisms for communication and grievance handling.

Key activities:

- Utilize RCLTT as a platform for structured dialogue between employers, workers and government.
- Raise awareness among workers and employers on the trade unions Law, the social insurance law, and on freedom of association and collective bargaining.
- Support the establishment of a trade union in the cluster, starting with informational sessions and capacity building, raising awareness regarding the benefits of unions and addressing enterprises' concerns regarding the risks of abusive strikes.
- Integrate dialogue and grievance mechanisms into enterprise-level training.
- Facilitate tripartite consultations on working conditions and productivity improvement.

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