

Marketing Crocodilian Skins

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INFORMATION on the marketing of crocodilian skins has historically been the province only of buyers and tanners. Producers of skins, whether native villagers, trappers, landowners or crocodile farmers and ranchers, have in the past, had only the most general idea about the real value, grading, selling, shipping, tanning, leather distribution, manufacturing and retailing of crocodilian products.

All that is now changing. Slowly, and with perhaps grudging acceptance from many in the exotic leather industry, the informed seller is now entering the market-place. A situation which was dominated by knowledgeable buyers, is catering more and more to the producer. The confidentiality that originally surrounded knowledge about sources and supplies of skins is breaking down. More buyers are actively contacting more producers directly. Of particular importance is the increasing governmental interest in the marketing of skins. Wildlife officials and management agencies in several countries have recognized the value of crocodilians, and are aware that the extent to which that value can be used as an incentive for wetlands conservation, will be ultimately determined in the market-place.

This chapter discusses various aspects of the way in which crocodilian skins are marketed. It draws heavily on experiences gained in Florida, where the skins of American alligators (*Alligator mississippiensis*) are marketed annually as part of a broader management programme (see Hines and Abercrombie Chapter 5). Although our understanding of the intricacies of marketing is improving, there remain many fundamental areas about which we know little.

FLORIDA'S ALLIGATOR PROGRAMME

The marketing programme developed by the Florida Game and Fresh Water Fish Commission is a good illustration of how a new marketing strategy can be developed. Because of peculiar State and Federal guidelines governing the nuisance and pilot-research harvest programme in Florida, ownership of alligator skins is retained by the State.

Trappers receive 70% of revenues derived from the sale of skins through a State-sponsored sale.

Prior to 1982, the skins were offered for sale with each potential buyer providing their own skin grading. Widely varying grading standards, different methods of measuring and the inefficiency of grading the same skin two or more times forced a change. A single international grading standard was developed, that was understood by buyers and tanners around the world. The condition of a skin is represented by one of three grades (I, II or III), which is determined basically by the percentage of the skin that is usable, undamaged skin available for tanning. The grade of any particular skin is primarily determined by the presence or absence of scars, holes or buttons between the neck, forelegs, flanks, belly and rear legs.

As in Zimbabwe (see Van Jaarsveldt Chapter 39), the grading system developed by Florida also standardized skin measurements. In the past, buyers used various "rounding-off" formulae and size categories with alligator skins (see Joanen and McNease Chapter 4). Under the new method, all skin sizes are expressed in inches of total length. The U.S. is peculiar in its traditional sale of alligator skins by the linear foot, rather than by belly width, which dominates the rest of the industry. Conversion factors for calculating belly width in inches from total length in feet range from 2.1 for a 4' skin to 2.7 for 9' and larger skins (Table 1). Alligator farmers

Table 1. The relationship between the length and belly width of wild *Alligator mississippiensis* skins from Florida.

Length (feet)	Belly Width (inches)	Ratio
4-5	9-10	2.1
5-6	10-14	2.2
6-7	14-16	2.3
7-8	16-19	2.3
8-9	19-24	2.6
9-10	24-27	2.7
10-11	27-30	2.7
11-12	30-32	2.7
12-13	32-35	2.7

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Pages 397-403 in WILDLIFE MANAGEMENT: CROCODILES AND ALLIGATORS ed by Graham J. W. Webb, S. Charlie Manolis and Peter J. Whitehead. Surrey Beatty and Sons Pty Limited in association with the Conservation Commission of the Northern Territory.

Table 2. The results of *Alligator mississippiensis* skin sales held between 1977 and 1984. Sales are conducted by the Florida Game and Fresh Water Fish Commission. Information on unsuccessful bids is within brackets.

Sale Date	Bidder	Total No. sold	Total Footage	Total Price Bid US\$	Average Price/Foot US\$
15 Jun. 77	Fouke Co., Greenville, SC	586	3332	56,789	17.04
	Ocean Leather, Newark, NJ	(202)	(1436)	(11,684)	(8.14)
30 Nov. 77	Fouke Co., Greenville, SC	122	864	7949	9.20
4 Oct. 78	Plott Hide & Fur Co., Griffin, GA	1556	11,005	89,876	8.17
28 Jan. 80	Fouke Co., Greenville, SC	2261	15,384	174,336	11.33
	Gordon-Choisy, Paris, France	-	(13,255)	(137,200)	(10.35)
30 Sept. 80	Fouke Co., Greenville, SC	1301	9728	113,603	11.68
	King Internat., Newark, NJ	(1282)	(9057)	(95,718)	(10.57)
4 Jun. 81	Plott Hide & Fur Co., Griffin, GA	706			
5241	80,434	15.35			
	Fouke Co., Greenville, SC		(5201)	(67,173)	(12.92)
3 Sept. 81	Plott Hide & Fur Co., Griffin, GA	1148	7767	117,521	15.13
	King Internat., Newark, NJ	(907)	(6736)	(107,466)	(15.95)
	Fouke Co., Greenville, SC	(632)	(4572)	(65,042)	(14.23)
10 Dec. 81	Barrett and Co., Wellsville, PA	878	6171	154,330	25.01
	Plott Hide & Fur Co., Griffin, GA			(138,842)	(22.50)
	Gordon-Choisy, Paris, France			(126,505)	(20.50)
	TCIM, Paris, France			(117,864)	(19.10)
	Florida Tanning & Sponge, Tarpon Springs, FL			(100,000)	(16.21)
	Fouke Co., Greenville, SC			(90,000)	(14.58)
17 Jun. 82	TCIM, Paris, France	748	5354	120,060	22.42
	Horiuchi Trading Co., Tokyo, Japan			(98,880)	(18.47)
	Plott Hide & Fur Co., Griffin, GA			(45,363)	(8.47)
2 Dec. 82	Berlinski Bros., Metairie, LA	REFUSED	12,265	105,601	8.61
		NO SALE			
	Gordon-Choisy, Paris, France			(94,460)	(7.70)
17 Feb. 83	TCIM, Paris, France	1723	12,265	112,795	9.20
	Berlinski Bros., Metairie, LA			(61,938)	(5.05)
7 Jul. 83	Gordon-Choisy, Paris, France	538	3780	35,327	9.35
	Plott Hide & Fur Co., Griffin, GA			(30,265)	(8.01)
	Berlinski Bros., Metairie, LA			(23,625)	(6.25)
19 Jan. 84	Plott Hide & Fur Co., Griffin, GA	1791	13,103	198,125	15.12
	Disbrok Trading Corp., Jersey City, NJ			(173,620)	(13.25)
	TCIM, Paris, France			(171,621)	(13.10)
	Gordon-Choisy, Paris, France			(160,250)	(12.23)
	Berlinski Bros., Metairie, LA			(145,051)	(11.07)
	Horiuchi Trading Co., Tokyo, Japan			(134,875)	(10.29)
	Inoue and Co., Tokyo, Japan			(133,749)	(10.21)
12 Jul. 84	Berlinski Bros., Metairie, LA	817	6306	105,689	16.76
	Horiuchi Trading Co., Tokyo, Japan			(103,788)	(16.45)
	Plott Hide and Fur Co., Griffin, GA			(103,669)	(16.44)
	Athena Leather, Waldwick, NJ			(101,905)	(16.16)
	Inoue Co. Ltd., Tokyo, Japan			(98,261)	(15.58)
	Gordon-Choisy, Paris, France			(97,742)	(15.50)
	Disbrok Trading, Long Island City, NY			(96,110)	(15.24)
13 Dec. 84	Ever Trading Co. Ltd., Tokyo, Japan	1717	13,000	287,287	22.10
	Gordon-Choisy, Paris, France			(263,957)	(20.30)
	Plott Hide & Fur Co., Griffin, GA			(261,288)	(20.10)
	Berlinski Bros., Metairie, LA			(243,960)	(18.77)
	Disbrok Trading Co., Long Island City, NY			(235,637)	(18.13)
	Inoue & Co. Ltd., Tokyo, Japan			(234,771)	(18.10)
	Horiuchi Trading Co., Tokyo, Japan			(224,657)	(17.28)

within Florida, do however sell by belly width. The width is recorded to the nearest centimetre and is measured at the third dorsal scale posterior to the front legs (Fig. 1).

Each individual skin is graded by an independent grader for the State-sponsored sales, and computerized grade sheets are provided to buyers and tanners. These list the total linear inches of each 1-foot size class, in each of the three grades (with additional notations for belly buttons, slip scale etc.),

along with bid instructions and the deadline for submitting bids. The State awards the successful bid. The entire transaction takes place without handling the skins more than twice (once for grading and once for shipping), and without potential buyers needing to inspect skins on site before bidding.

Grade deductions vary depending on the buyer, but are scaled to a basic first grade price; they average 25% less for grade II and 50% less for grade III. Skins with scale slippage (scales already

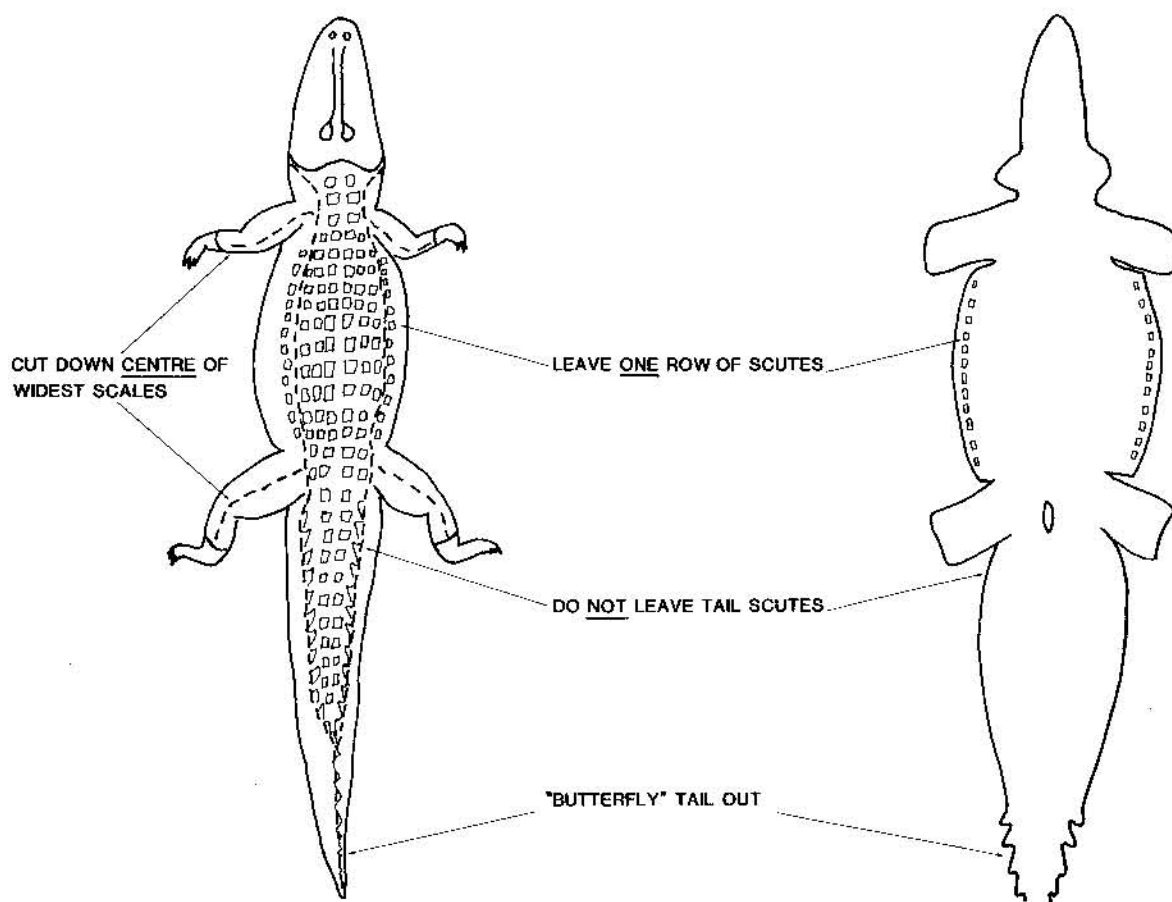


Fig. 1. Diagrams which accompany the skinning instructions for *Alligator mississippiensis* that are issued to trappers in Florida, USA.

separating from the skin) generally bring 50% of what would otherwise be the value of the skin. Buyers sometimes offer deductions on certain size classes of skins, for example those with belly widths smaller than 20 cm or greater than 50 cm, if they are trying to buy for a specific leather product market. Payments are generally made under letters of credit, certified cheques or wire transfers. A complete list of bidders, for all Florida sales between 1977 and 1984 is in Table 2, along with details of successful and unsuccessful bids.

An evaluation of the bids received during the Florida sales reflects the growing interest and competitiveness for alligator skins. The trend also signals more direct participation in open sales, rather than the more traditional dependence on brokers or confidential sources. It also indicates the strong emergence of Japan as a primary market for alligator skins, thereby offering a direct challenge to previous European dominance (particularly by France) of the supplies of some "classic" skins.

SKIN CARE AND QUALITY

The first and often most important step in securing a product market for classic skins, is to ensure a high quality product is being offered for sale. Within Florida, continual emphasis is placed on

the need for careful and standardized methods for skinning, curing and handling of skins. Trappers are provided with diagrams (Fig. 1) and written skinning and scraping instructions. These provide for one row of the enlarged dorsal scutes to be left along the entire belly area of the skin (Fig. 1), but not the tail. All meat and fat must be scraped from the skin using paint scrapers, beehive tools or other blunt, chisel-like instruments. Since the State receives all skins for sale, any which are not adequately scraped are not accepted until they are rescraped by the trappers.

Several methods of curing skins with salt have been used by Florida trappers, in an effort to eliminate losses due to red heat and scale slippage (see David Chapter 40). The most common method has been the use of salt boxes in which skins are rolled and stored after being scraped and salted. Salt is rubbed into a skin and a 0.5" to 1" (1-2.5 cm) deep layer of salt is applied to it before it is rolled tightly. Skins are resalted with fresh salt after three to five days curing (the original salt is discarded).

Alternative methods of preserving salted skins include refrigeration, brine solutions and the use of chemical bactericides. Bactericides used in conjunction with salt include "Clorox" bleach (sodium hypochlorite), general purpose detergents, borax, and more recently, chlorophenol based bactericides

(sodium pentachlorophenate). Success varies between chemicals and storage techniques, but brine storage and a chlorophenol dip are the most successful ones for controlling red heat and scale slippage (see David Chapter 40).

Although there may be many different ways in which crocodilian skins are gathered to some central collection point for sale to tanneries, the benefits to be derived from having standardized skinning, handling and grading procedures cannot be over-emphasized. It instills confidence in buyers and assures them of consistent quality; this in turn is reflected in increased prices and therefore an increase in the overall value of the resource.

MARKETING STRATEGIES

The major "classic" crocodilian skins traded include those of: *Crocodylus porosus* (saltwater crocodile) from Australia and Asia; *Crocodylus niloticus* (Nile crocodile) from Africa; *Crocodylus novaeguineae* (New Guinea freshwater crocodile) from Papua New Guinea and Indonesia; *Crocodylus johnstoni* (Australian freshwater crocodile) from Australia; and, *Alligator mississippiensis* (American alligator) from the southeastern U.S. *Crocodylus porosus* have the most valuable classic skin, because of their relatively small scale size (their trade name is "Singapore small-scale"); that value is traditionally about 20% more than that of other classics. There is some contention on the value rank of the remaining types of skins, depending on the buyer or market one addresses. No further ranking can consistently be justified.

The locations of the major tanneries of classic crocodilian skins, in order of volume processed, are France, Japan, Italy, the United States and West Germany. Depending on the source, many tanneries still use agents and brokers to both purchase their skins and organize shipment. Appendix I lists the major tanneries and some of the brokers and agents that have participated in the Florida programme over the past few years. The list is by no means complete, but it does represent the most comprehensive list known, and covers all major market regions.

While some producers may benefit from consistently selling skins to a single buyer, based on an average price, the case made here favours the maintenance of a standard grading system, with which skins can be offered to the world market. In Florida, where this approach has been adopted, the value of skins has increased conservatively by 15%.

An international marketing system offers the obvious advantage of not having to rely on individual buyer-seller relationships, but rather on familiarity and confidence in the grading system itself. It creates an international market-place which can efficiently accommodate the most competitive of buyers.

An established grading system ensures high quality skins are recognized as such, and improves the general quality of skins offered for sale. Grading provides the incentive and establishes standards for producers to aim at. Where several trappers or farmers provide skins to be marketed collectively, grading rewards those who provide quality skins and penalises those who do not.

The number of damaged skins within any lot offered for sale affects the average price paid for all skins. Wild Florida alligator skins average 65% grade I, 34% grade II, and less than 1% grade III. Buttons (osteoderms in the ventral scales) are particularly common in wild alligator skins from Florida (about 20% of skins have them) and result in an average price deduction of 25% for affected skins.

Buttons are not a significant problem with farm-raised skins, partly because average market sizes are smaller (5-6' long; 12-18" wide). However, farm skins also have fewer scars and are less damaged during skinning. They often grade at 85% grade I, or more if experienced skimmers are used. Most deductions on farm-raised skins are associated with knife cuts, particularly around the foreleg and rear leg "armpits", where the skin is thin and the skinning more difficult.

Another strategy for marketing skins is through negotiated or set prices. This is accomplished by offering skins at a price that is based on the current prices other producers have been receiving for similar lots of skins. Skins are offered to buyers in some order of preference or loyalty, based on prices the producers have received from them in previous sales. If none of the "preferred" buyers accept the price, the lot may then be offered by telex to a number of other buyers or brokers, or open offers may be requested for a given quantity of skins. At this point, a producer has three options: accept the highest offer; attempt to negotiate a slightly higher price; or, elect not to sell his product at that time.

Several considerations must be evaluated when opting not to sell skins that are ready for sale. The direction and how rapid prices are moving; future demand; the producers immediate financial dependence on the skins being offered; the extent of skin deterioration and loss that might be incurred during storage; the relative strength of various currencies; the potential loss of a customer to other producers or products; and, the choice between a continuing or strained relationship with particular buyers.

The relationship between a producer and a buyer is a complex but potentially important association. The highest "spot price" offered for a consignment of skins is not always the best choice for a sound, long-term marketing strategy. There are disagreements on this point, but generally there are a range of prices available to producers, from established

and not-so-well established markets. A consistent and balanced offering to an established market, will ultimately prove to be the best long-term marketing strategy. Producers of skins should use their marketing leverage of consistent supply, predictable quality and loyal business relationships to develop a network of available markets. Whether actual prices are up or down, both buyer and seller have a vested interest in a fair price. The worst marketing strategy is producers that singly, or as groups, try to shop the "spot market prices" and play one offering off against another. While the approach may work to some extent during "sellers" markets, commonsense and experience with other commodities, indicate that "buyers" markets inevitably return, and the marketplace has a good memory.

Crocodilian skin prices, like any commodity, are subject to fluctuations in response to supply and demand. But they are also influenced by several other somewhat unique pressures. Because of the rather small nature of the industry, a relatively small number of large tanneries ultimately finish a significant proportion of all available skins. Therefore, if one or two larger processors have ample supplies, and decide for whatever reason not to pay above a certain value, prices may theoretically be depressed. They will often spiral downward when producers from different regions react to declining prices by shifting excess stock rapidly onto the market. However, organized producers could also limit the supply of skins to the market, and, over time counterbalance sharp drops in market prices.

Producers also tend to think in terms of annual production and market conditions, while buyers, tanners and manufacturers are often taking a much longer view of the market. It can take as long as 18 months to launch a new product line in the "western-wear" business, and the leathers they decide to feature in national and international advertising campaigns may have dramatic effects, both up and down, on exotic leather markets over a 3-5 year period. When you multiply that effect by all fashion or western-wear companies continually using a variety of exotic leathers while following industry-wide product trends, the value of the longer-term view becomes more evident. When consumer preferences, the availability and price of alternative exotic leathers, and worldwide economic conditions are also considered, the complexity of the marketing factors and trends that influence the price of crocodilian skins are almost overwhelming.

But it is not impossible to begin to understand some of the market influences. For example, the prices of finished leather seldom fall or rise as sharply as raw skin prices, regardless of the changing markets. When raw skin prices in Florida were US\$15.00/foot (\$6.00/inch; \$2.40/cm), finished leather was selling at \$5.75/cm. In 1984, raw skin

prices rose to more than \$20.00/foot (\$8.00/inch; \$3.20/cm), a 33% increase, but finished leather only increased to about \$7.00/cm or 21%. There is a reduced margin and upper price limit to even luxury leather demand. This also reflects an averaging of the prices paid and profits accrued by tanners; decreasing profits when raw skin prices are high and somewhat increased profit margins when raw skin prices are depressed.

Producers must also consider price averaging when selling. As Table 2 reflects, the 7-year average for nearly 16,000 alligator skins sold in Florida is \$14.59/foot, with a range of more than 300%; from \$8.17 to \$25.00/foot average prices. The option to hold skins or even delay harvesting during low prices may have a profound effect on supplies and prices.

Classic crocodilian skins are a luxury item priced for a luxury fashion and western-wear market. But, other exotic leathers can and are being substituted for classics in some markets. This is often apparent in the U.S. market and to a much lesser degree in the European market. The flank skins of South American *Caiman* species can compete directly by substitution in the belt and flat-goods leather trade, particularly when consumers do not know the value difference between classic and *Caiman* skins. Lizard, snake, elephant, pangolin, kangaroo, buffalo and ostrich are all, in varying degrees, favoured exotic leathers whose supply, demand, and price relationship to crocodilians, as well as to one another, is not currently well understood. Ostrich and classic crocodilian skins are comparably priced and are the most expensive, luxury, exotic leathers available.

MANAGEMENT AND CONSERVATION IMPLICATIONS

An increase in diversity and use of the skins of exotic animals has, in the last decade, complicated the understanding of traditional market demands, by offering an ever increasing number of new skins into the market-place. This leads to a major criticism of the exotic leather industry; namely, that it has a tendency to move from one species to the next based solely on supply, demand and prices, rather than on the results of co-ordinated management and conservation programmes for what are valuable natural resources. The criticism is largely deserved.

However, emerging programmes with classic crocodilians, which involve managed wild harvests, ranching and farming operations, are establishing a significant new trend that should not be lightly dismissed. Here we see the value of crocodilians as a renewable natural resource, creating the economic incentive to manage both the resource and the habitats upon which it depends. In today's world it is a far greater conservation tool than simple protection through legislation, yet its effectiveness depends on there being a viable market.

The crocodylian management programmes in Papua New Guinea, Zimbabwe, Australia and the United States are all examples of this relatively new conservation-utilization ethic. The extensive research, management, licensing, tagging, inspecting, and permit controls are all strong evidence of a firm commitment to conservation as well as utilization of renewable resources.

The approximate 1984 value of the 60,000 or so legally traded classic crocodylians, throughout the world, was some US\$10 million at the producer level [based on average current prices for skins, meat (where markets exist), and other by-products]. The annual production of skins in the U.S., Papua New Guinea, Zimbabwe, Australia and Thailand is expected to increase by 65% in the next five years to 100,000 classic crocodylians, worth more than \$18 million. About half that increase is expected to be in American alligators.

These estimates do not include the sizeable but not quantifiable trade in *Crocodylus niloticus* from Africa, or *Crocodylus porosus* and *C. novaeguineae* from Indonesia. That trade could match, or even exceed all other known legal trade. Most informed sources agree that the total classic leather trade (illegal and legal), has reached at least 300,000 skins a year in the last ten years. But confirmed information on the sources of these alleged skins is lacking, as is verifiable data on the extent of trade in them. Unfortunately, CITES reports are often incomplete and in some notable instances, are simply inaccurate and misleading.

While not the major focus of this chapter, similar confusion or lack of information exists in the *Caiman* trade. Again, most informed sources agree that the annual trade in skins *could* have reached one million per year in the previous decade. But, they also point out that such volumes are not possible without harvest and export from the Amazon basin, specifically from Brazil, which supposedly prohibits all such activities. There is great difficulty in getting reliable data on the extent of *Caiman yacare* populations, and any information

concerning their export, from the neighbouring countries of Bolivia and Paraguay, are equally difficult to obtain. Thus the problem of quantifying trade in *Caiman* skins is enormous.

In its simplest form, there is not a clear and documented understanding of world trade in either classic or *Caiman* skins. This lack of information makes it difficult to assess the viability of various management options that can potentially be applied to crocodylian resources. It also hinders and constrains serious discussion about how the conservation of crocodylians will be affected by either stimulating trade, diverting trade, or even efforts to replace the trade in crocodylian skins with some other product. The lack of information about trade also confuses the objective evaluation of "similarity of appearance" issues, which are embodied within regulations and requirements controlling trade in crocodylian skins and products. Finally, it does not help explain the extreme volatility of average skin prices, which for alligators in Florida, have ranged from about \$8.00 a foot to more than three times that, within five years.

With major long-term investments in research and infrastructure being made by wildlife agencies, land management companies and alligator and crocodile farmers, a much better understanding of market forces is needed. Only with this can the longer-term fluctuations in the market be understood and assessed.

To this end, an International Alligator-Crocodile Trade Study (IACSTS Project), which monitors trade and collects and collates essential trade data (especially in classic crocodylian skins) is being pursued. The data provided should give insights into the effects of the increasing legal trade on the illegal trade, and be a means of evaluating the effectiveness of international regulations governing the trade in classic crocodylian skins. It should also lead to informed suggestions on harvest, control and enforcement standards that can be considered by countries implementing crocodylian management programmes that incorporate utilization.

APPENDIX I

The major tanners, brokers and agents who have submitted bids or in other ways been associated with the *Alligator mississippiensis* skin sales in Florida, USA.

Steven Pappas — Athena Leather Creations, Inc., 122 Hooper Avenue, Waldwick, NJ 07463.

Maurice Atkins — Robert R. Nathan Associates, Inc., 1301 Pennsylvania Avenue, NW, Suite 900, Washington, D.C. 20004.

Barrett and Co. Inc., P.O. Box 176, Wellsville, PA 17365.

Guerry B. Berins, President — Berlinski Brothers, Inc., 3301 W. Esplanade Avenue, North #18297-C, Metairie, LA 70002.

Bob Childs — Flemings of Buckhead, 2823 Peachtree Road, Atlanta, GA 30305.

Clicker City Corp., Box 151, Haverhill, MA 01830.

Fred Distenseld — Disbrok Trading Co. Inc., 34-18 Northern Boulevard, Long Island City, NY 11101.

Dreher International Mfg. Corp., 49 Vesey Street, Newark, NJ 07105.

The Fouke Company, Route 15, Box 168, 8100 White Horse Road, Greenville, SC 29611.

Pierre Grawitz — Gordon-Choisy, 17 Boulevard Jules Ferry, Paris, France 75011.

Walter Herd — Feinleder, Vertretungen-Grosshandel-Fabrikation Import-Export Bregenzer Stasse 7 D-6050 offenback (Main) — Bieber, West Germany.

Herth and Cie, SA, 14 rue de Messageries, Paris, France 75010.

Herman Hirsch — Hirsch Osterreich, Lastenstrabe 34, A-9021 Klagenfurt, Austria.

Tetsue Horiuchi, President — Horiuchi Trading Co. Ltd, Shinsho-kanda Bldg., 2nd Floor, No. 2-17-6, Tsukasacho, Kanda Chiyoda-ku, Tokyo, Japan.

Takashi Inoue, Senior Vice-President — Inoue and Co. Ltd, No. 5-1, 2-Chome Kaminarimon, Taito-ku, Tokyo, Japan.

M. Shimizu, President — Ever Trading Co. Ltd, No. 19-11, Higashiueno, 1 Chome, Taito-ku, Tokyo, Japan.

V. Margossian, Director — Excelsior Hides and Skins Ltd, Suite 8, De Walden Court, 85 New Cavendish Street, London, England W1M 7RA.

Jay Wilson — Florida Reptile Tanning, Inc., 8118 S.W. 81st Terrace, Miami, FL 33171.

Steven Neumann — Steven Neumann Leather Corp., 46 Johnson Street, Newark, NJ 07105.

Peter Pohl International, P.O. Box 197, West Liberty, IA.

S. and T. Trading Co. Ltd, No. 28-5, 4-Chome Matsugaya, Daito-ku, Tokyo, Japan.

Daniel Lagesse, General Secretary — Tanneries Des Cuirs D'Indochine et de Madagascar, 59, rue du Faubourg Saint-Martin, Paris, France 75010.

Italeretile Lauorazione Pell: Diretile, 26010 Montodine, Cremona, Italy.

King International Ass., Inc., 49 Vesey Street, Newark, NJ 07105.

Conrad Overt — John G. Mahler Co., P.O. Box 47067, Dallas, TX 75247.

Chris Plott — Plott Hide and Fur Co. Inc., 312 W. Solomon Street, Griffin, GA 30223.

Rosenberg and Lenhart, Rauchwarengrosshandel + Pelzkonfektion, Mainzer Lanstrasse 65, 6000 Frankfurt/Main, West Germany.