

Development Strategies for the Fur Farming Industry in Greece

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How to cite this paper: Semos, N., Vasilios, D., & Vasilios, B. (2021). Development Strategies for the Fur Farming Industry in Greece. *Open Journal of Business and Management*, 9, 2683-2696.

<https://doi.org/10.4236/ojbm.2021.96148>

Received: September 9, 2021

Accepted: October 30, 2021

Published: November 2, 2021

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Abstract

In the present work, a thorough research and study was carried out to determine the conditions prevailing in the breeding and operation of the breeding units of fur animals in Greece that are bred, exclusively in the Region of Western Macedonia. Specifically, all the parameters that affect the efficiency of the breeding units were analyzed, the appropriate answers to the problems and weaknesses of the fur farming industry were evaluated and given. The work mainly concerns the practices and the situation prevailing in the industry, from a technical point of view and production process and the development perspectives through proposed strategies, which are based on findings, literature, theoretical analyses, statistical analyses and primary sources from direct personal contacts. The general conclusion that emerges from the whole effort is a dynamic development of the fur-breeding industry, since everything points in this direction and this development will contribute greatly to the improvement of the living standard of the inhabitants of the area.

Keywords

Fur Farming, Fur Animals, Production Process, Breeding Units, Development Strategies

1. Introduction

Fur farming first appeared in Greece around 50 years ago in the prefectures of Kastoria and Kozani with the main processing centers for livestock products (fur) located in the cities of Kastoria and Siatista. Fur processing companies primarily used and still use imported raw material with only a small quantity produced in the area where fur-bearing animals are bred. The last 20 - 30 years has seen effort focused on increasing the domestic production of fur with the prospect of

substituting the import of furs at least in part and making the industry more competitive. As such, the aspiration is to raise at least 50,000 breeding animals (Development of Western Macedonia SA, 2012).

The need for fur farms was prompted by the development of the fur clothing industry in the cities of Western Macedonia. As a means of improving economic efficiency, vertical small and medium-sized processing companies which incorporated the breeding and marketing of furskins were created. Thus, and given that there were similar farms in other countries, the first “bold and pioneering craftsmen” established the first fur farms (farms) around the prefectures. However, the required knowledge, prerequisite experience, and infrastructure were lacking. Today, the main problems facing the industry are the location of zones for the installation of units and the management of waste after slaughter. Furthermore, the acquisition of animal feed threatened to undermine the growth of fur-bearing animal breeding but was largely addressed through the LEADER II sectoral program which supported the development of a fur feed production unit.

The result of such disadvantages and difficulties was that the breeding of fur-bearing animals in Greece became problematic and diminished significantly after the intermittent fur crises. This situation gradually began to reverse and improve from the mid-1990s onwards when policies were first introduced which in part addressed the financial impasses of the producers and the simultaneous implementation of the first holistic development plan for the breeding of fur-bearing animals in Western Macedonia through the Leader II program (<https://www.Kozan.gr>).

Breeding and production were oriented towards mink due to the climatic factors of the region, although chinchillas and rabbits are also bred. The number of farmed animals is not constant and may fluctuate depending on international circumstances and fur prices, but in general, the licensed capacities report a total of 507,985 adult animals (2019). Fur garments are also produced from other animal species, with fur imported from foreign countries. In addition, raising animals to produce fur products is considered a livestock activity and the Greek state supports the fur industry with subsidies and other initiatives, resulting in incentives for investment in the fur sector. Furthermore, the general attitude of European countries that have either banned or are in the process of banning breeding creates an investment interest from foreign breeders for new units in Greece (Semos, 2016).

The purpose of this paper is to identify the most important factors through systematic research, which affect the development of an important local employment sector and to highlight the strategies that can be implemented for its development

2. Geographical Location and Structure of the Greek Fur Industry

The Region of Western Macedonia in the Northwestern region of Greece (see

Map 1) is widely recognized not only in Greece, but also in much of the global market for its longstanding processing of furs for the production of garments.

The fur industry was first developed in the region of Kastoria and extended to other regions of Western Macedonia such as Siatista, Grevena, and Florina, experiencing significant growth after the Second World War which continues to this day.

The factors that contributed to the development of the fur industry were the favorable conditions in the international markets, namely Northern and Central Europe, USA and Canada, that is, high demand for Greek fur products, the special legislative regulations for the region (duty free import of scraps and whole skins, free export of foreign exchange), cheap and specialized labor potential and the existence of Western Macedonian communities in Europe and the USA that functioned as channels of communication with international markets.

In summary, the key factors influencing the development of the industry are Political, Economic, Sociological, Technological, Legal and Environmental that influence an economic sector from the external environment and essentially guides decision makers to identify the external factors that affect the economic sector (Dagkalidis, 2012).



Map 1. Geographical position of western Macedonia in the Greek territory (<https://www.google.com/search?q=Maps>).

Until a few years ago, this activity was mainly limited to the manufacture of fur products—garments made from furskins bought by furriers at foreign auctions. Engaging in fur processing created an important experience for entrepreneurs and provided the impetus to produce furs themselves in their own locales.

Table 1 below gives an overview of the distribution in the prefectures of Western Macedonia, while Fig X shows the evolution of fur production over time as well as the trend for the same period. The size of the farms refers to the number of fur-bearing animals kept per holding. This depends on the availability of labor to serve the animals, mainly family but also foreign, the availability of feed, and on the funds of each breeder.

If farms are classified according to the number of farmed animals, there are three size categories according to the Panhellenic Association of Fur Breeders: Small farms hold up to 1000 animals per farm, medium farms up to 10,000 animals and large farms more than 10,000.

Fur production and processing in Greece developed over the course of 400 - 500 years from a handicraft to an industry with centers in Kastoria and Siatista.

These cities and their suburbs were, until 20 years ago, the world's largest producers of fur products annually processing more than 13,000,000 furs which constituted a third of global fur production (Karagiannidis 2012; Fur Europe, 2016).

Western Macedonia together with China is currently the two largest fur production centers in the world. This was essentially the driving force for pioneers, creative and adventurous furriers to set up their own fur farms initially with mink, fox, and ferrets (Fitz-Eltis) to secure their own source of raw materials (furskins).

The fur-breeding industry is considered an important economic sector of Western Macedonia. It is perhaps the main lever of development in the region and one of the last solutions to its widespread unemployment. It is an alternative occupation proposal for the rural population of the area to raise additional income. In addition, it is noteworthy that the supply and payment of skins is guaranteed, since the sales are made through auctions abroad and are to international customers.

Table 1. Distribution of fur farms in the prefectures of the Region of Western Macedonia.

a/a	Prefectures	2015	2019
1	Kastoria	29	37
2	Kozani	47	60
3	Grevena	8	10
4	Florina	2	4
	Total	86	111

(Data source: Region of Western Macedonia General Directorate of Regional Agricultural Economy).

In a relatively recent study by the Hellenic Statistical Authority, fur products occupied 12th place among the 15 most important Greek exportable products. In the EU, there are an estimated 6500 fur farms which employ 106,000 full-time workers and 108,000 part-time workers. The value of furs from farms in the EU is in the region of 625 million euros (Karagiannidis 2012; Fur Europe, 2016).

The production of furs is a complex and multi-member process which necessitates a main breeding unit, feed mills, transport companies, specialized auction houses, veterinarians, and seasonal workers. This network becomes truly international at the stage where the fur is sold through the mode of raw materials auctions (USITC, 2004). A large number of workers in other livestock activities supplement their income from the fur farming sector, thus, this sector contributes to the survival of rural communities. Moreover, thanks to the breeding of fur-bearing animals, animal husbandry in general remains an economically viable activity in areas where climatic conditions limit farmers' choices regarding what they can produce and promote profitably in the market (Vlachvei et al., 2010; Dagkalidis, 2012).

3. Regional Development and Business Performance

From the early 1980s until 2000, a number of fur farms were set up mainly farming mink, foxes and to a lesser degree chinchilla, but only 10 of them survived. This was attributed principally to the lack of experience of the breeders, a lack of state care, a lack of proper food supply and the turmoil in the fur and fur clothing market.

Efforts to increase domestic fur production in the 1990s were aimed at modernizing and verticalizing fur treatment plants (fur farming, tannery, design, production, marketing, exports), locally, nationally and internationally, which are elements that still exist today. Notably, while other similar (labor-intensive) industries have not withstood local and international crises, local fur production has proved to be highly resilient and has not been affected by similar situations. This is accredited largely to its human resources in the region which is its main competitive advantage. The accumulated experience and local specialized know-how transferred formally and informally through the generations is considered the key feature of the success of the industry and the dynamics of its local development (Artelaris & Chatzimichalis, 2016).

In recent years, there has been an increase in the breeding of fur-bearing animals in the Region of Western Macedonia, mainly in the prefectures of Kastoria and Kozani, while some units also operate in the prefectures of Grevena and Florina (Graph).

The above number of farms, as shown in **Figure 1**, does not remain constant from year to year. Nor is the distribution in the four prefectures the same. Meanwhile, **Figure 2** depicts the evolution of fur production over time as well as the trend for the same period. It can be seen that the trend equation shows an upward tendency in production with a significant exponent as a function of time (1591).

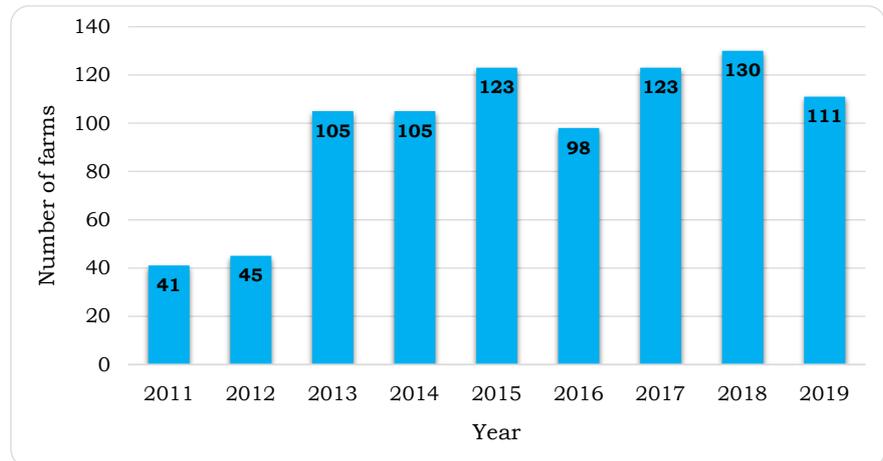


Figure 1. Change of fur farms in the region of the Region of W. Macedonia (2011-2019).

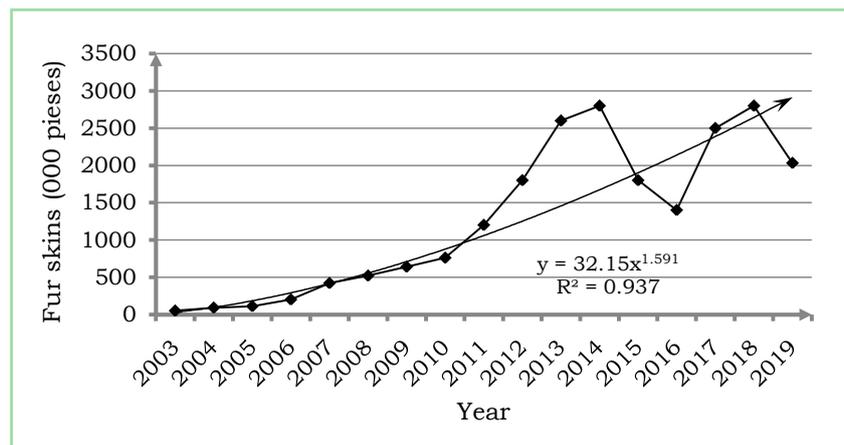


Figure 2. Development of fur skins production 2003-2019 in Greece.

4. The Synthesis of Development Strategies

In section 3 presented the evolution of farming over time and identified the critical points of their development. In the section 4 will be identified forms of strategy that can be applied for the development of the industry.

When formulating strategies for the development of an industry or business it is imperative to be precise and to clarify certain issues, namely the current state of the industry, the practices and activities followed by the industry, its short-term and long-term perspectives, its position in the market, the needs of the area it intends to serve and how it will achieve the desired purpose. The basic sequence of formulating a strategy consists of four stages:

- Analysis of the internal and external environment;
- Formulation of the strategy;
- Implementation of the strategy and;
- Evaluation and control of the strategy.

The above four stages have a logical sequence in conducting the study of the fur-breeding industry. For each stage there is a result that results from the study

of the previous one.

All the factors that potentially affect the activity of businesses and industries can be considered in terms of the external and internal environment. The external environment includes society, the economy, and politics, is subject to constant change and creates significant uncertainties for the course of the industry, while analysis of the internal environment of the industry aims to enable strategy planners to formulate an effective strategy.

The fur-breeding sector in the Region of Western Macedonia is a unique and peculiar livestock activity not only for the region but also for the whole of Greece. Its particularities pertain to the production process and the end product as well as its market forces.

Animals are kept in special facilities in cages throughout their life. The product (furskins) emerges once a year from productive animals at the end of their life and is not intended for human consumption but for clothing. The fur-bearing animals in the area focused on in this study are carnivorous and require a special diet. Of course, there are also cases of livestock farming, but the products are developed over many years and most of them are intended for food.

Fur farms as livestock farms and economic activities have no competitors in the sense that the final product has no substitutes, and looking at the sector as a whole, individual companies do not compete with each other. As such, the elements which should underpin the formulation of strategies that can be followed in order to create the appropriate conditions for the development of the whole industry must be identified.

Finally, the companies, which as a whole form a branch, are inextricably linked to the social whole of the region since they provide an important source of work through which income is generated. Therefore, the direction of the development strategy must take the interests of the local community into account and respect their decisions while acknowledging the contribution of state aid.

Analysis and evaluation of the external environment requires an explicit understanding that while influencing the course of the industry, these factors cannot be controlled strategically by the sector. Such factors can relate to the economy and political and social fields, among others. Numerous methods have been used to identify these factors and various models have been developed, the most well-known of which is PEST analysis, an acronym of Political, Economic, Social and Technological. Hence, the four categories of factors encompassed by PEST in shaping the external environment of an economic sector are political factors, economic factors, social and cultural factors, and technological factors (Petromanolaki, 2017).

To the above model (PEST) two other categories of factors considered significant in the operation of the sector were added, namely legal and environmental. Thus, PESTLE analysis was created (Political, Economic, Social, Technological, Legal, Environmental) which includes the additional aspects of Law and Environment (Rastogi & Trivedi, 2016).

As aforementioned, when a business or sector is planning a future activity, exploring and analyzing the internal and external environment is essential for success. SWOT analysis is a strategic planning tool commonly used for this purpose. By combining the use of PEST or PESTLE and SWOT analyses, a comprehensive overview can be achieved whereby the risks, weaknesses and advantages of the sector within the framework defined and analyzed by PEST or PESTLE analysis can be identified (Rastogi a& Trivedi, 2016).

Because the breeding of fur-bearing animals is a livestock activity in the area of focus in this study, research is required to determine the economic context and profitability, particularly the productivity and profitability of investments in fixed breeding facilities as well as the funds available for the operation of farms in general. Exploring these issues is imperative in order to formulate development strategies that will be attractive to any potential investor breeder.

Besides structured analysis using PEST or PESTLE and then SWOT, the factors integral to the breeding process should be investigated in order to identify and optimize their utilization, thus achieving both premium quality and an optimal economic outcome. Such factors are nutrition (quantity and composition of food), animal hygiene (living and diseases), stables, and the proper location of stables. This can be undertaken with the application of various econometric, mathematical and statistical models, introducing the above mentioned factors as independent variables and the final quantity of the product (furskin), or the final value of production as dependent variables. This analysis will establish the significance of each factor in the final product and will determine its future involvement in production and its contribution to the development of the industry. Through practice but also from empirical analyses it emerged that the methods of breeding fur-bearing animals depend on certain basic parameters, such as (Rastogi & Trivedi, 2016; Weeks, 2020):

- 1) Environmental conditions;
- 2) Animals' state of health;
- 3) Diet.

Specifications have now been implemented for these parameters which must be meticulously observed in order to achieve the best possible results. Of these parameters, nutrition is the most important. The killing of fur-bearing animals also plays a crucial role in the quality of fur. The main concern, however, is that the contribution of each factor to the configuration of the final product for the purpose of strategic planning is not known precisely.

After what has been stated above regarding the fur-breeding industry, it would be remiss not to mention the prospects and the connections with the fur industry. The fur-bearing animal industry is inextricably linked to the fur-processing industry and the production of fur products and garments. As previously pointed out, the Region of Western Macedonia hosts most companies producing fur garments, which require large quantities of fur the vast majority of which is imported. The needs of the processing units are mainly met by imports of fur piec-

es from Bulgaria, Germany, USA and other countries. As such, it is necessary to investigate the competitiveness of the fur trade at the international level since the profitability of this trade also affects the further development of the fur-breeding sector.

Combined with the previous exploration of the source and synthesis of development strategies, investigation of the external and internal environment of the farms and of the international trade of fur garments is intended to identify the necessary elements for the determination of the strategic decisions for development.

The breeding of fur-bearing animals has developed on a very limited scale in Greece in spite of past endeavor. In the last 20 - 25 years, a concerted effort has been made to raise fur-bearing animals with the prospect of substituting at least a share of the imports and making the industry more competitive. The results of this research are aimed at this objective (*Development of Western Macedonia SA, 2012*).

5. Results of Analyses

5.1. Results of PESTLE and SWOT Analysis

The data for this analysis were derived from the general literature concerning the area of the Region of Western Macedonia (*PDM, 2012, 2015a, 2015b*), from various laws of the state (PD 890/81, art. 2, Laws. 4014/11, 4056/12, CMD no. 2026/89667/2012) from interviews with professional bodies and from discussions with interested breeders. They include elements of policy decisions on the operation of fur farms, the economy of the region, the reactions of the inhabitants, the legal background of the state concerning the operation of the farms, the experience and technology used and finally the impact that the fur-breeding sector and consequently the fur industry have on the wider environment of the region.

The results of this analysis can be summarized as follows:

- The fur industry is classified as one of the specialized sectors in the Region of Western Macedonia as it meets the characteristics (significant percentages of participation in regional GDP and the degree of its interconnection with other sectors, as well as employment).
- The main aim of the policy is to empower the producers and entrepreneurs in the fur-breeding sector—leather products with main characteristics by adapting to the conditions that affect the production process of furskins and their processing into fur garments.
- The political climate is generally favorable for the further development of fur farms.
- The fur apparel industry and consequently the production of furskins is 100% export since the fur products are sold either directly in foreign markets or indirectly to tourists from the Greek market. The demand for Greek fur is high as the quality of the products positions it competitively.

- Greek fur industry buys 5% - 7% of world fur production and distributes 8% - 10% of ready-made garments. According to the data on the imports of furskins, the breeding of fur-bearing animals has huge potential for development in order to satisfy to a greater extent the needs of the production of fur products in Greece. It is noted that Greek exports from the production of fur products amount to 400 million euros per year, while estimates project a potential of 800 million.

- The shift of many entrepreneurs and independent breeders to the establishment of mink breeding units is aimed mainly at the verticalization of farms—fur businesses, with the aim of reducing production costs, securing raw materials and possibly participating in international fur auctions to ensure the production of finished fur products.

- The average number of farms in the last decade is approximately 100 while the average production of furs has reached over 2.5 million skins.

- The number of fur companies operating in the Region of Western Macedonia is around 3000 and the population of the area that benefits directly or indirectly extends to 8000 people with some variations per season and per year.

- The technology used in all phases of the production process, from the beginning of breeding to the final product (fur) is appropriate and does not differ in any way from that used in other advanced countries with high production of fur.

- The integration of fur-bearing farms as a livestock activity and the legalization of the licensing of facilities as livestock facilities was paramount in helping the development of the sector.

- Finally, the impact of fur farms on the environment of the area is negligible. A major problem is the disposal of corpses after skinning, where a tolerable way of deposition has not yet been found to avoid contamination of the environment of the area.

5.2. Results of SWOT Analysis

The SWOT analysis of an agricultural enterprise and specifically of a production sector, such as the fur farming sector in the Region of Western Macedonia, is beneficial in establishing development strategies and improving competitiveness. In essence, the SWOT analysis examines two main parts of the sector, the internal environment, ie its strengths and weaknesses, and the external environment, ie the opportunities and threats. Analysis of the strengths, weaknesses, opportunities and threats relative to the industry is presented below:

Strengths

- The uniqueness in the breeding of fur-bearing animals in the area, with significant potential to accommodate an increase in production.

- Extensive accumulated experience and know-how in the breeding of fur-bearing animals.

Favorable climatic conditions for the smooth operation of the farms are with the smallest losses during annual breeding.

- The competitive quality of the fur pelts facilitates their positioning in the international markets at very high and advantageous prices for the breeder in relation to the cost of production.

Weaknesses

- Considerable problem of spatial distribution of breeding at the level of peripheral units and at regional level.

Marginal coverage of food needs by an existing feed production unit for the existing number of parents.

- Reduced health monitoring of animals due to a lack of specialized veterinary scientific staff in the area, inadequate preventive practices, veterinary intervention and examinations to maintain the health of animals due to the lack of special laboratories.

- Complete lack of education—training of both new and experienced breeders is negligible. Acquiring empirical knowledge alone is not sufficient.

- Poor representation of professional organizations in the industry.

Opportunities

- The high demand for Greek fur, with which the fur-bearing industry is inextricably linked, is a strong indicator of the potential for development of the industry.

- The amortization of investments in farming companies is short due to the high return on invested funds.

- The integration of the fur-bearing farming sector in livestock production simplified important procedures for the licensing, establishment and operation of fur-bearing farms in Greece.

- Incorporation of fur farms into state and European subsidy policies.

Threats

- The emergence of new producers in countries with high competitiveness is a key threat.

- The degradation of Greek fur garments will reduce their demand and will drive down the demand for Greek fur.

- The unorganized and uncontrolled creation of fur farms creates problems of orderliness in farms and degrades the quality of furskins.

- The extroversion of entrepreneurs incurs the risk of transferring Greek know-how to foreign competitors.

- The ecological and animal welfare movements that oppose the breeding and exploitation of fur-bearing animals as well as the increase of natural fur substitutes are a significant threat.

6. Industry Development Strategies

From the theoretical PESTLE and SWOT analyses undertaken in this study, important data emerged which informed the formulation of a comprehensive strategy and individual strategies for the development of the fur-breeding sector in the region of Western Macedonia.

- The first major finding is that conditions in the area for industry development are favorable. The PESTLE theoretical analysis indicated that the general political, social and environmental conditions lend themselves to the development of the fur-breeding industry in the region.

- The SWOT analysis highlighted the strengths and weaknesses within the industry, as well as the threats to the external environment, and pointed to the opportunities available to address the threats and eliminate the weaknesses. Specifically, there were weaknesses in spatial planning and distribution of farms, animal health problems, a complete lack of education of those employed on farms, insufficient supply of food to farms and poor representation of professional organizations.

- The first key strategy to be adopted is to eliminate weaknesses. The actions to be taken are:

1) Systematic research and supervision for each new fur-bearing animal breeding unit, in terms of the size of the unit, the installation site ensuring that the unit is fully serviced, all aspects concerning the installation site, catering, communications, environment, operation and method of storage of corpses.

2) In order to deal with competing countries, but also to maintain premium quality of the fur produced and of the fur garments, initiative must be taken to create specialized personnel for both farming and processing.

3) In order to serve a larger number of units and consequently a larger number of fur-bearing animals, the expansion or the creation of a production ready-to-eat feed unit to improve the feed of the animals but also to free the farms from the process of preparing the food must be taken seriously in the formulation of the industry development strategy. At the same time, the quality of the diets will be improved since they will be prepared with greater scientific accuracy.

4) Establishment of at least one scientific center which deals exclusively with fur-bearing animals primarily from a health perspective, but also regarding other breeding issues.

- The second key strategy is to address the identified threats arising from the external environment, mainly the international threat. Managing these threats requires:

1) Continuous monitoring of the developments of the international market in matters of quality of furskins and fur garments and in matters of the development of innovative practices in processing, so that any deviation from the requirements of the market is addressed immediately.

2) Technology in every production process is an important factor in improving production. Therefore, any form of technology that is part of the production process, such as feeding techniques, breeding systems, should increase the level of competitiveness and improve the production and quality of the final product. Therefore, this effort must be integrated into the general framework of the development strategy.

3) The growing distrust of the operation of the farms that source mainly from abroad but also in many cases domestically is something that must be mitigated. Informing the public that raising fur-bearing animals is a livestock activity which does not affect the fauna of the area and provides a significant income directly or indirectly to the inhabitants of the area is a potential approach (Mintzberg & Waters 1985; Mintzberg, 1987).

7. Conclusion

The analyses undertaken in this study make plain that the fur farming sector is a critically important livestock and economic activity for the specific region but also for Greece as a whole.

- Although significant advantages related to the breeding experience, the suitability of the space, the human resources and the acceptance of the society as a whole are evident in the sector, it nevertheless presents considerable weaknesses and is in need of significant changes and development strategies.

- The breeding sector has substantial growth potential and is an attractive field of investment and engagement with strong prospects for successful and profitable outcomes.

This study points to a dynamic effort in the development of the fur-breeding industry and this development will arguably contribute greatly to the improvement of living standards of the inhabitants of the area.

Conflicts of Interest

The authors declare no conflicts of interest regarding the publication of this paper.

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