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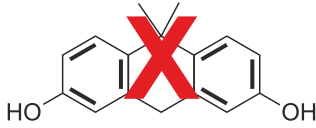


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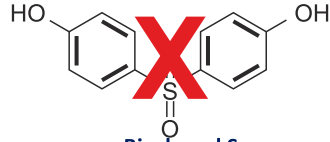
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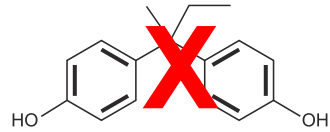
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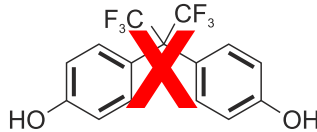
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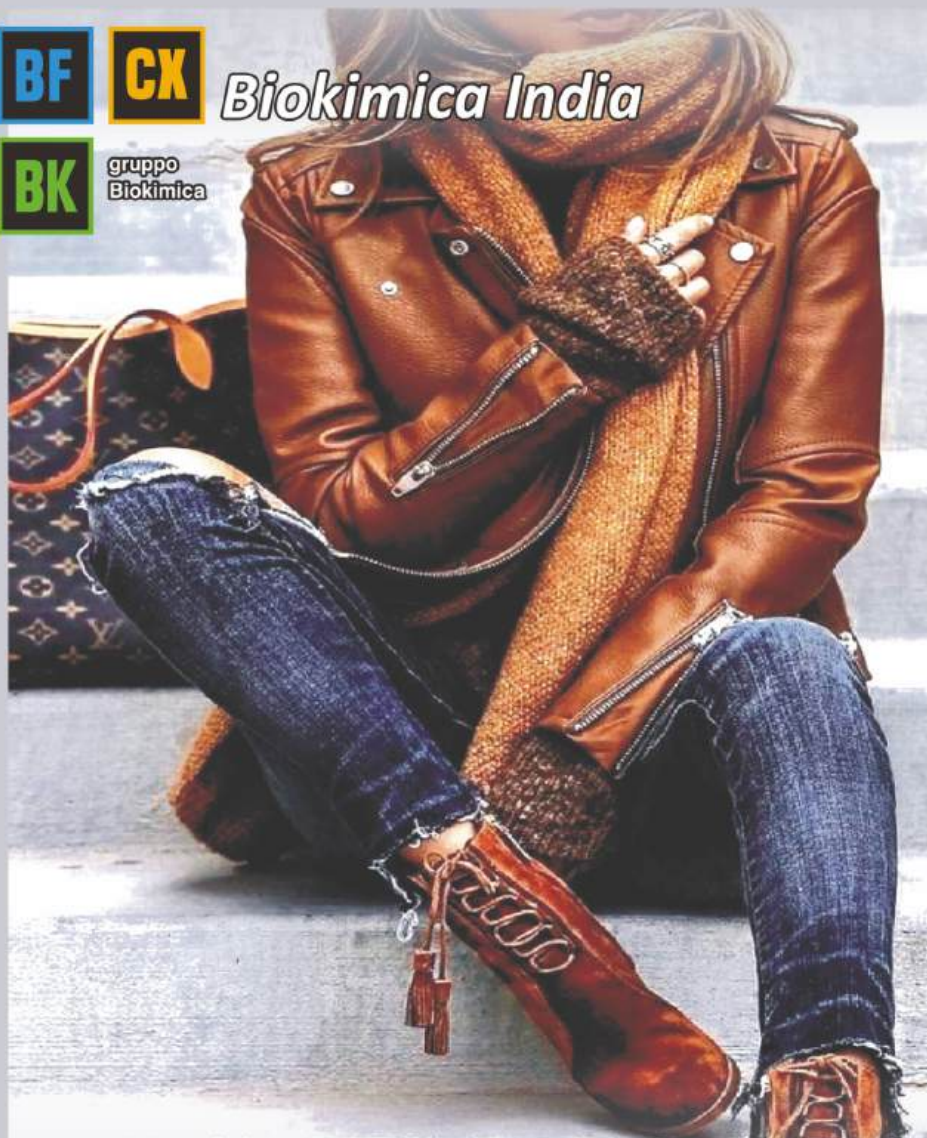
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The India-Newzealand, Free Trade Agreement (FTA), signed on 27th April, 2026, in New Delhi, eliminates tariffs on 100% of New Zealand's tariff lines. The bilateral agreement aims to boost bilateral trade and foster strategic joint ventures For the Indian leather and footwear industry, this secures immediate duty-free access, entirely removing previous tariffs that ranged from 5% to 10%. Exporters of raw hides/skins (Chapter 41), finished leather products (Chapter 42), and footwear components (Chapter 64) now enjoy a level playing field with New Zealand's other free-trade partners.

This pact heavily benefits major micro, small, and medium enterprise (MSME) clusters across India. Notably, Agra-which accounts for approximately 75% of India's leather footwear production and holds Geographical Indication (GI) tag for its leather footwear and is a flagship product under the One District One Product scheme. With the FTA eliminating duties on 100 per cent of Indian exports from Entry into Force, and bringing tariffs on leather and footwear from 5 per cent to zero, Indian exporters are set to gain a decisive competitive advantage.

Industry representatives highlighted the sector's potential to grow to USD 50 billion by 2030, driven by a strategic shift from mass production to high value-added manufacturing. New Zealand's rich raw leather resources, combined with India's manufacturing capabilities, offer a strong complementarity that both sides expressed keenness to harness.

By eliminating tariffs for Indian exporters, it significantly enhances the competitiveness of Indian industry and opens up new avenues for growth in labour-intensive sectors that are critical for job creation. It is a welcome move for the Indian leather and footwear industry. For the leather sector, this means India can effectively combine its cost-effective manufacturing strengths with New Zealand's rich raw leather resources to capture greater value in the global market.



Vasan's Voice

- Vasan Suri, A Passionate Leather Lover &
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Make in India, Made in India (PROUDLY)

The aftermath of the Iran-US war, is proving to be expensive to the whole Universe. Still, the war is not over and it continues. The block of the "straight of Hormuz", is making life difficult for the movement of petroleum products.

As a result of all these problems, the Chemical prices have gone skyrocket.

The Indian rupee getting weak and the freight costs adding insult to the injury.

In the past, two months chemical prices got revised twice and it ranges between 25-35% increase. Which will tantamount to 10% of the cost of the leather and which tannery can afford it, for the existing and committed orders.

With the International market going for a tumble and when economy is at the lowest ebb, there is no chance for increasing price and in fact, we must look at reducing our costs consciously.

This is where, the "Make in India" and "Made in India", comes to support us.

Let us stay away from the imports and adapt our process and technology with indigenously produced chemicals.

We save on foreign exchange and that makes the Indian rupee stronger and there is no freight costs, import duty which hikes up the

price of the chemicals. It is our duty to support our own manufacturing units. *Support to get supported."

Most of the International Brands are also having joint venture or their own manufacturing plants in India and this could help.

More than these, we have lot of Indian manufacturers who needs to be promoted and supported for a healthy INDIA and Indian Leather Industry.

It is high time, we try to apply ourselves to aim at saving costs rather than increasing cost and blaming the buyers for not increasing the prices. We will have tough times ahead, if we do not pull up our socks today.

Let us promote "Make in India" & "Made in India" products consciously.

The following steps may also help our costs:

- 1. Lesser input of water.**
- 2. Reduces the output of waste water in to the effluent tanks and saves on treatment costs and environment.**
- 3. Promote more liquid syntans, liquid dyes against powder syntans & dyes.**
- 4. Better tannage and reduced sludge.**
- 5. Reduced water will support reduction in chemical usage.**
- 6. Simpler drum tanning process for best results.**
- 7. Efficient finishing process for reduction in chemicals and better results**

8. More water based products and lesser solvent based to reduce air pollution.

9. Better trimming of belly and shanks in the wetblue stage to avoid wastage of chemicals and final trimming accumulation.

10. Such trimmed belly and shanks which otherwise contributes to looseness can be well utilised as leather board or bonded leather.

11. Change in the "leather education system" to bring in new curriculum wherein the young minds are trained towards saving at every stage of the process.

Let us work towards a more organised and professional leather industry and environment, and let us promote Indian products.

Having said all that, Let the Indian Chemical manufacturers also find ways to provide the best chemicals at the best prices.

Let the thinking cap change from "We" instead of "Me".

Please do not try to supply substandard materials and completely avoid paying commissions or bribes to the technical people to use the chemicals. The bribes are the worst culprit which spoils the Industry and the Country. Be committed to the management as your customer. Their well being is your well being.

Help in reduction of the range of chemicals to activate better flow of funds.

Reduce the package sizes to be in smaller volumes to avoid unnecessary stocks piling up resulting in liability and unpaid bills.

Every tannery thinks that they are wisely negotiating for a discount over the rates and it should be simply understood that the rates are hiked to accommodate the discounts. In fact, if the tannery expects a

15% discount, the price gets hiked by 20%. Plus the Technical people commission, plus the provision for bad debts.

Every chemical supplier keeps a cushion in the price between 5-10% as bad debts.

I have always been voicing against these wrong practices and unfortunately, these are eroding the profits everywhere.

Though, the topic here is about Leather Chemicals, the same applies to Leather Products department as well.

The same practices for trade discounts, technical commission, delayed payments, unpaid bills, bad debts everything gets accounted in the price.

Let us make it a fair business where payments are ensured and assured. That can happen only when fair trade practices are followed.

"When the going gets tough, the toughest gets going".

Let us come together to make a better environment for Leather Industry to prosper and the Country to grow with better balance of trade.

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THE LATEST DEVELOPMENTS SHAPING CHINA'S SOFTLINES REGULATORY LANDSCAPE

- P Venkatesan Global Leather/Footwear and PPE Manager at
SGS India.

China's softlines market, spanning apparel, footwear, leather goods and accessories, continues to tighten its regulatory grip. With stronger enforcement, new e-commerce rules and evolving product standards, the compliance bar for exporters is rising sharply.



For India's leather and footwear sector, understanding these shifts is critical to maintaining market access and competitiveness.

Enforcement intensifies, what the data shows

China's regulatory system relies heavily on high-frequency spot checks across both physical retail and online channels. In 2025, authorities allocated over RMB 323 million for market surveillance, underscoring the scale of enforcement.

According to publicly available data, key trends emerging from recent inspections include:

- Apparel and footwear dominate failure cases, followed by home textiles, bags and accessories
- Infant and children's products account for a disproportionate share of non-compliance cases, reflecting tighter safety scrutiny
- Offline retail remains the primary source of failures, although online monitoring is expanding rapidly

The most common reasons for apparel failure remain:

- Incorrect fiber composition/content declarations
- Incomplete or inaccurate labelling
- Poor safety performance (cords and drawstrings *etc.*)
- Non-compliant other items such as colorfastness, pH value, removal force of attached components *etc.*

The most common reasons for footwear failure remain:

- Poor physical performance (abrasion resistance, colorfastness, flexing resistance *etc.*)
- Non-compliant chemical items such as phthalates, heavy metals, formaldehyde content *etc.*



Regulatory shift from inspection to prevention

A key shift in China's approach is the move from post-market enforcement to proactive compliance management.

A few new regulations now require:

- Full traceability systems across the supply chain
- Retention of transaction and quality records for over 2 or 3 years
- Greater accountability for e-commerce platforms and sellers

The message is clear: compliance must be built into the product lifecycle, not addressed after entry into the market.

New rules target e-commerce and textiles

China has introduced several major regulations that will reshape the softlines sector in 2026:

- Stronger control of online sales – new rules place direct liability on e-commerce platforms for product safety and quality. Platforms must verify sellers, ensure accurate disclosures and support product recalls
- Live-streaming and social commerce, both key sales channels in China, are now gradually regulated, bringing them under the same compliance umbrella as traditional retail

Textile product quality measures

New regulations on quality of textile products introduce:

- Stricter controls on raw materials, such as restrictions on using textile waste for medical purposes, used funeral textiles, other fibers contaminated with toxic or hazardous substances, etc.
- Mandatory labeling of recycled chemical materials, fiber composition, content and safety classification
- Enhanced compliance requirements for infant textile products, undergarment and school uniform categories

These rules also require manufacturers and distributors to maintain robust inspection and record-keeping systems.

Rapidly expanding standards landscape

China continues to update its standards framework at pace, issuing hundreds of new or revised softlines standards annually.

Key developments impacting leather and softlines include:

- Updated requirements for products with filling materials (GB 18383-2025), including hygiene, microbiological controls etc.
- New and revised leather testing standards covering formaldehyde (GB/T 19941.1-2025), short-chain chlorinated paraffins (GB/T 38405.1-2025) and flex resistance (GB/T 39368.1-2025) etc.
- Increased focus on functional and smart textiles

For exporters, aligning with the correct GB (mandatory), GB/T (recommended) and sector standards is essential, as product-specific requirements vary significantly.

Labeling: a persistent risk area

Labeling remains one of the most frequent causes of non-compliance in China.

Requirements of hang tag for textiles typically include:

- Product name
- Product standard
- Product basic safety category
- Name and address of manufacturer
- Country of origin (imported goods)

Requirements of permanent label for textiles typically include:

- Product size or specification
- Fiber content
- Care instruction

Errors in labeling, particularly fiber content, continue to trigger large volumes of inspection failures, making pre-market label verification critical.

Implications for Indian leather exporters

China's evolving framework presents both risk and opportunity:

- Compliance costs are increasing, particularly for testing and documentation
- Product categories such as infants' and children's footwear and apparel face higher scrutiny
- Digital transparency is becoming increasingly important, especially in e-commerce
- Differentiation through quality, safety and sustainability credentials offers growth opportunities

The way forward

To succeed in China's softlines market, Indian exporters should prioritize:

- Early alignment with Chinese standards
- Strict chemical, physical and functional testing
- Accurate, China-compliant labeling and documentation
- End-to-end traceability systems
- Continuous monitoring of regulatory updates

SGS marks: building trust in a regulated market

In an environment where compliance and transparency are increasingly visible to consumers, third-party verification marks are gaining importance.

The **SGS Performance Tested Mark** helps brands demonstrate that products meet defined **performance criteria**, such as durability, thermal resistance, waterproofing or comfort features.

For leather footwear and apparel, this can translate into clear differentiation at point of sale, especially in competitive online marketplaces. The mark also improves consumer confidence by linking performance claims to independent verification.

SGS green marks respond to the rising demand for environmental transparency in China's consumer market.

They cover a range of sustainability-related attributes, including:

- Recycled content
- Absence of hazardous substances (e.g. PFAS, PVC)
- Carbon footprint or reduction
- Biodegradability and bio-based materials
- Industrial compostable

For exporters, particularly in leather goods where chemical compliance is under scrutiny, SGS green marks provide a structured way to communicate environmental credentials in line with regulatory expectations.

China's regulatory landscape is moving towards greater accountability, transparency and technical depth. For the Indian leather industry, those who invest in compliance capabilities today will be better positioned to capture opportunities in one of the world's most demanding, but rewarding, markets.

For further information visit: <https://www.sgs.com/en/service-groups/footwear-and-leather-products>

China to dominate global ethylene capacity additions by 2030, says GlobalData

China is set to significantly expand ethylene production capacity as it seeks to reduce its high import dependence and meet surging domestic demand from its vast manufacturing, packaging, and automotive sectors. Driven by a strong capacity growth in the coming years, the country is expected to dominate global ethylene capacity additions by 2030, according to GlobalData, a leading intelligence and productivity platform.

GlobalData's latest report, "Global Ethylene Market: Key Trends, Product Analysis and Upcoming Projects to 2030", reveals that China is likely to account for more than half of the expected ethylene capacity additions worldwide by 2030.

Nivedita Roy, Oil and Gas Analyst at GlobalData, comments: "China is rapidly transitioning to a self-sufficient, top-tier producer of ethylene. A primary driver of the country's growing ethylene capacity expansion is its rapidly growing manufacturing, packaging, automotive, and construction sectors, which is creating huge demand for ethylene derivatives, such as polyethylene (PE)."

China also utilizes a diverse mix of feedstocks, with a growing reliance on coal-based methanol-to-olefins (MTO) processes. This strategy provides an alternative to traditional oil-based production pathways, enabling competitiveness.

Furthermore, China's ethylene industry is evolving to support emerging high-value downstream applications, including photovoltaic-grade ethylene vinyl acetate (EVA) and advanced membranes for electric vehicle batteries. These technological advancements are set to unlock new market segments and further solidify China's leadership in innovative ethylene derivatives.

The highest capacity addition in China is expected to come from the announced project “Shandong Yulong Petrochemical Longkou Ethylene Plant 3”. Located in the Shandong province, this project is expected to commence operations in 2030. The “SABIC Fujian Petrochemical Zhangzhou Ethylene Plant” and the “Huajin Aramco Petrochemical Panjin Ethylene Plant” represent the next two major capacity additions in the country. They are both anticipated to come online this year.

Roy concludes: “Rapid ethylene capacity growth in China is underpinned by substantial investments in integrated refinery and petrochemical projects. Ambitious projects from companies such as Shandong Yulong Petrochemical further solidify China’s petrochemical leadership, enabling the nation to dominate the global ethylene landscape.”

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Leather Naturally shares a new educational resource exploring sustainable water management practices across the global leather industry.

Water plays a critical role in leather production - from processing raw hides to achieving the performance and quality characteristics the material is known for. As a natural material rooted in the circular economy, leather depends on responsible resource use.

Why water management matters

While water is fundamental to leather production, it is also a finite and increasingly scrutinised resource. The industry has a responsibility to improve how water is measured, managed, and conserved.

Using water more sustainably helps reduce environmental impact, supports compliance with evolving regulations, and strengthens trust with customers, communities, and stakeholders. It also drives innovation, encouraging more efficient processes and technologies across the value chain.

About the new report

The report, **Sustainable Water Management in the Leather Industry**, aims to highlight water's essential role in leather making and its link to environmental sustainability and climate resilience.

It also seeks to clarify the topic and equip stakeholders throughout the



leather value chain with the knowledge and tools to understand, interpret, and work together on sustainable water management.

The report is now available to download from the Leather Naturally website. It was developed using insights gathered through a public consultation in late 2025, and draws on insights from a Life Cycle Assessment study conducted by Leather Naturally, supported technically by SPIN360.

The report explores:

- Why water remains a strategic priority for the leather industry
- The basis of sustainable water management
- How sustainable water management is implemented
- Limitations and challenges in water management
- Case studies and success stories

Supporting real-world progress

This publication is intended for industry professionals, sustainability leaders, suppliers, brands, and policymakers, to help them make real-world progress. It aims to deepen their understanding of water's role in leather production and how it can be managed more sustainably for long-term impact.

The report highlights practical examples from across the leather value chain, showcasing how tanneries and industry stakeholders are adopting new technologies, improving processes, and implementing innovative approaches to reduce water use and enhance efficiency.

Inside this report, you'll find case studies and examples from: the Confederation of National Associations of Tanners and Dressers of the European Community (COTANCE), Igualadina de Depuració i Recuperació, ISA TanTec, JBS Couros, and PrimeAsia Leather Company.



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Indian Leather has a wider readership: Tanners, Manufacturers of Chemicals & Auxiliaries, Manufacturers of Footwear, Components & Accessories, Leathergoods, Garments, Trade related Associations, Institutions etc.



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BFSHOW fuels growth projections for footwear production



The 6th edition of BFSHOW, the biggest footwear trade show in Latin America, has reinforced positive expectations in the sector for the second half of the year. Featuring around 350 Brazilian brands at the Distrito Anhembi venue, in São Paulo/SP, the trade show welcomed 11,600 visitors from all Brazilian states, including 1,150 importers from over 60 countries. BFSHOW was promoted by the Brazilian Footwear Industries Association (Abicalçados) and organized by NürnbergMesse Brasil from May 18 to 20.

The Executive President of the Brazilian Footwear Industries Association, Haroldo Ferreira, states that the event was highly effective, as exhibiting companies participated with expectations aligned with the current market scenario, acknowledging economic challenges and understanding the need to act strategically, with

assertive product launches connected to the demands of both the Brazilian and international retail markets.

According to Haroldo Ferreira, BFSHOW's performance reinforces positive prospects for the second half of the year. "In the first quarter, we recorded a drop of around 7% in production, reflecting a still challenging scenario. However, the results seen at the trade show indicate that the market is recovering and give us confidence that this performance will be reversed in the coming months," the Executive President predicts.



An optimistic tone was also present in the remarks of Arthur Trindade, Trade Marketing Coordinator at Bebecê Calçados (Três Coroas/RS). According to him, the May 2026 edition of the trade show significantly outperformed the edition held in the same month last year.

In addition to presenting Summer collections, BFSHOW also generated immediate business for ready delivery. The collections presented were highly attractive from both an aesthetic and innovation standpoint.

Traditionally, BFSHOW attracted a large number of international buyers. This edition was no different. Over the three days, more than 1.15 thousand importers from 60 countries attended the trade show.

According to the visitors, the event was very well organized, easy to navigate, and highly digital and modern. Brazilian products stand out for their unique design, colors. This edition of BFSHOW was large, well segmented, and featured a strong selection of exhibitors.

The next edition of BFSHOW will take place from 10 - 12 November, 2026, once again at the Distrito Anhembi venue, in São Paulo/SP.



Indian Leather

Digest of Leather News

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13 - 16 JUNE 2026 | RIVA DEL GARDA - ITALY

From 13 to 16 June 2026, Riva del Garda will welcome back Expo Riva Schuh and Gardabags, confirming its position as the essential international marketplace for the volume footwear, bags and leather goods industry. With exhibitors joining from over 40 countries, the exhibition highlights a multicultural supply chain where **China continues to play a pivotal manufacturing role**. This upcoming edition will feature a strategic focus on **two of China's most prestigious manufacturing clusters**: the athletic hub of Jinjiang and the fashion footwear district of Huidong

In recent years, **the fashion and retail world has been undergoing one of the most profound technological transformations** in its history. According to the “State of Fashion Technology 2026” report, **over 75% of international fashion brands now consider artificial intelligence and digital technologies a strategic priority** to improve customer experience, supply chain and sustainability. The theme of sustainability is also accelerating innovation: Europe is introducing increasingly stringent regulations on the Digital Product Passport and supply chain traceability, pushing brands and retailers to completely rethink production processes, data management and product life cycles. After 5 years and 10 editions, Innovation Village Retail confirms itself as a privileged observatory for intercepting the technological solutions that are transforming the sector. A fair within the fair, an exhibition village open to startups, companies, institutions and professionals, designed to share the culture of innovation and create networking and business opportunities between emerging realities and established players.



Leather to be excluded from the EUDR scope: A historic day for the tanning industry

COTANCE welcomes the European Commission's proposal to exclude hides, skins and leather from the scope of Regulation (EU) 2023/1115 on deforestation-free products (EUDR).

The exclusion was proposed on 4 May, 2026 through a Draft Delegated Act - aiming to amend Annex I of the EUDR - a targeted legal instrument that allows the Commission to adjust the regulation's product scope without reopening the legal text. The official Delegated Act will enter into force by summer, after a 4 weeks public consultation period.

For the European leather industry, this is more than just a regulatory adjustment. It is the formal recognition of a position COTANCE has held, and defended with evidence, since the regulation's inception: hides, skins and leather are merely by-products of the meat and dairy industries. They do not drive cattle farming. They do not drive deforestation. Their inclusion in the EUDR was never grounded by a dedicated impact assessment - and their exclusion is a straightforward act of regulatory proportionality.

This outcome reflects a sustained, evidence-based regulatory policy and advocacy effort by COTANCE. It vindicates the principle that good regulation must be fair, proportionate and grounded in scientific evidence.

A decision grounded in evidence

COTANCE and European tanners are not opposed to the EUDR's

objective. However, we believe - and provide substantial technical evidence in support of this view - that bovine hides are not a driving factor of cattle farming and therefore cannot be considered a cause of deforestation.

The European leather industry has never tried to escape environmental accountability. What it has sought - consistently, and from the outset - is regulation that is proportionate, properly assessed, and grounded in fact.

Recognising that a dedicated impact assessment - foreseen by the original text of EUDR in Art. 34 - for leather had not been conducted, COTANCE and UNIC commissioned an independent academic study to provide the evidence the debate required. The Sant'Anna School of Advanced Studies at the University of Pisa carried out the research - drawing on over 94 million data records, 29,200 active serial titles, 330,000 books, and 28 stakeholder interviews - and reached a conclusion: there is no scientific evidence linking leather to deforestation.

Leather derives from the tanning of raw hides that are a by-product of the meat and dairy industries, it does not drive cattle farming, and it does not drive land-use decisions. Keeping it in the EUDR product scope would not directly save a single tree - but it would disrupt supply chains, increase compliance costs, and risk shifting production to regions with significantly weaker environmental standards. Inclusion in the EUDR would not advance the regulation's objectives.

This finding is independently reinforced by research from Montana State University, which established that leather demand has no measurable influence on cattle hide supply - confirming that leather and beef operate as distinct economic drivers.

A united global industry voice

In the weeks leading up to this decision, the global leather industry - from the United States to Australia, Africa and New Zealand - united under the International Council of Tanners, with the support of the International Meat Secretariat and the International Union of Hides, Skins and Leather Trade Associations, to address a joint letter to President von der Leyen and the European Commission, calling for the removal of HS Chapter 41 products from Annex I.

"Today's European Commission saved more 30 000 jobs across European tanneries and sent a clear signal to the world: the leather industry is not a problem to be regulated away - it is a solution to be invested in. The European leather industry is the innovation edge of a global sector, producing the most sustainable and technically advanced leather in the world. This outcome allows us to keep our focus where it belongs: on the future" **said Manuel Rios, President of COTANCE.**

Edoardo De Paola, Secretary General of COTANCE, added :
"This is a historic moment for the tanning industry. The Commission has rectified a fundamental flaw that has existed since the EUDR proposal was first put forward, confirming what logic has long suggested: converting a by-product of livestock into leather does not drive deforestation. Since biblical times, leather has symbolized the transformation of a natural by-product into something useful and enduring. Today, this legacy continues."

"This is fantastic news! Thanks to all the perseverance and support received from the global leather industry, convincing the Commission that leather is not a driver of deforestation was a collective movement and therefore also a collective achievement!" - said Gustavo Gonzalez-Quijano, former Secretary General, COTANCE

COTANCE's commitment to traceability remains unchanged

COTANCE wishes to be clear: this outcome does not diminish the industry's commitment to responsible sourcing and supply chain transparency. COTANCE will continue its work on securing the official CEN recognition of the Leather Traceability Cluster standard EN 18199. The industry's ongoing investment in traceability infrastructure (e.g. Hide Eco Track by LINEAPELLE-UNIC) reflects a genuine commitment to accountability.

European tanners operate under some of the most stringent environmental and social standards in the world. COTANCE's European Social and Environmental Report, its Code of Conduct, and its active participation in EU skills and sustainability initiatives demonstrate an industry that takes its responsibilities seriously - and that will continue to do so.

In case of any additional questions or inquiries, please contact the COTANCE Secretariat at cotance@euroleather.com

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SACE, SIMEST and Assomac together to support the international growth of Italian companies in Kenya

- *The agreement, signed on the occasion of the Italy – Kenya Economic Forum, aims to promote joint initiatives to support Italian companies operating in technologies for footwear, leather goods and tanning, with a focus on Kenya and other African markets of mutual interest*

On the occasion of the Italy–Kenya Business Forum, organized by the Italian Ministry of Foreign Affairs and International Cooperation and the Italian Trade Agency (ITA), SACE, SIMEST (CDP Group) and Assomac – the National Association of Italian Manufacturers of Footwear, Leathergoods and Tanning Technologies – signed an agreement aimed at promoting joint initiatives to support the internationalization of Italian companies, with a focus on those active in technologies and components for the footwear, leather goods and tanning sectors. The signing took place within the framework of the Forum, which focused in particular on infrastructure, energy and connectivity, agro - industry and leather, innovation and finance.

The agreement is intended to support the international growth of Italian companies within the supply chain by fostering new export and investment opportunities in Kenya and in other African countries of shared interest. The initiative aims to bring together expertise, tools and supply chain capabilities to

support internationalization processes and enhance the contribution of Italian technologies to the development of increasingly structured and competitive production systems.

Specifically, the collaboration will focus on promoting synergies between instruments and initiatives, organizing joint promotional activities and events, and fostering continuous information exchange through regular training, information and in-depth sessions. The shared objective is to strengthen the international competitiveness of Italian companies and support their access to new markets, also through coordinated actions across territories and along the relevant value chains.

“Kenya represents a market of growing strategic interest for Italian companies and a key gateway to East Africa. With this agreement, we aim to support the international growth of our companies by leveraging expertise, tools and supply chain capabilities in a sector of excellence of Made in Italy. This initiative is fully aligned with the spirit of the Mattei Plan, in which Kenya is one of the priority countries, and confirms our commitment to fostering long-term, shared growth with the African continent, further strengthened by the launch of SACE’s Africa Task Force”, said **Michele Pignotti, CEO of SACE.**

Vittorio de Pedys, Chairman of SIMEST, stated: *“Africa is today one of the main engines of global growth – a dynamic and rapidly evolving continent offering significant opportunities for Italian companies ready to invest in innovation, sustainability and the development of local production chains. In this context, Kenya confirms its role as a strategic hub for East Africa, thanks to its key position in industrial development processes and its increasing attractiveness for international investments. SIMEST is already actively engaged through the Africa measure of the*

Mattei Plan, with the aim of concretely supporting internationalization projects and strengthening the presence of the Italian production system in African markets. This commitment is based on a responsible, long-term approach: Italian investments aim not only at economic growth, but also at territorial development, skills enhancement and the valorization of local workforces.

The agreement signed today fully aligns with this direction: an institutional collaboration that brings together expertise and tools to support companies along a structured growth path, contributing to the development of one of the territories with the highest global potential”.

“With this agreement, we strengthen a model of collaboration that integrates technologies, Italian industrial expertise and financial instruments supporting internationalization processes. Our commitment is to contribute to the development of structured and competitive production chains, enhancing the role of Made in Italy technologies and machinery in industrial transformation and in the creation of added value across the entire leather value chain. In Kenya, we continue our work, initiated through an intensive joint effort with national and Kenyan institutions and industry organizations, to support the industrial advancement of the sector, recognizing technology as a key strategic asset for the development of production systems. Looking at a broader horizon, the path undertaken can represent a concrete reference model for the evolution of the leather sector across the African continent, contributing to the growth of increasingly advanced local supply chains and to the strengthening of opportunities in international markets”, commented **Mauro Bergozza, Chairman of Assomac.**



ASSOMAC COMPLETES ITS SERIES OF LOCAL MEETINGS AIMED AT SUPPORTING COMPANIES IN AN INCREASINGLY COMPLEX SCENARIO

AS PART OF THE INITIATIVE – IN COLLABORATION WITH SACE, CREDEM EUROMOBILIARE AND STUDIO RUSSO DE ROSA – THE ECONOMIC AND FINANCIAL REPORT ON THE ITALIAN TANNERY, FOOTWEAR AND LEATHER GOODS MACHINERY SECTOR WAS PRESENTED

THE ANALYSIS HIGHLIGHTS AN OVERALL SOLID INDUSTRY, EXPOSED TO STRUCTURAL CHANGES IN THE MANUFACTURING SYSTEM AND GROWING INTERNATIONAL COMPETITION, WHICH ARE IMPACTING ITS RESILIENCE

Following the stages held in Vigevano, Santa Croce sull'Arno and Civitanova Marche, the series of local meetings promoted by **Assomac**, the national association of Italian manufacturers of footwear, leather goods and tanning technologies, concluded on 14th May, 2026, in Arzignano. Organized in collaboration with **SACE, Credem Euromobiliare and Studio Russo De Rosa**, the roadshow brought together member companies and financial partners for a direct discussion on the most pressing challenges facing the future of the sector - including business continuity, governance and extraordinary finance - with the aim of strengthening an industrial model that represents one of the driving forces of Made in Italy within an increasingly complex global context, while consolidating Italy's role within global markets.

As part of the initiative, the **Economic and Financial Report on the Italian Tannery, Footwear and Leather Goods Machinery Sector**, prepared by the Assomac Research Center, was presented. The report provides an integrated analysis of the **sector's evolution from 1995 to 2024**, with the objective of offering a comprehensive overview of industry trends, international competitive positioning and the economic and financial conditions of companies operating in the sector.

The analysis shows how the **Made in Italy supply chain is increasingly exposed to globalization processes, production delocalization and growing competitive pressure.** Technologies, materials and final products are all part of a single ecosystem, sharing market dynamics and economic cycles that affect the entire sector across the board. In this framework, the **close integration between technology and manufacturing represents a distinctive feature of the Italian model,** enabling the maintenance of high quality standards and customization capabilities throughout the production chain. This positioning has progressively evolved as a consequence of a structural transformation: production volumes have gradually declined in favor of **increasingly higher quality, with a stronger concentration in high-value segments, particularly those linked to luxury and premium products.**

Exports is the main driver of this highly specialized sector with a strong international orientation, experiencing growth and contraction phases closely tied to the global economic cycle. At the same time, a shift in the composition of the sector's offering has emerged, with **increasing importance of tanning machinery and spare parts compared to footwear machinery.** Out of the more than €290 million in total exports of technologies and machinery recorded in 2024, €119 million relate to tanning machinery, €53 million to traditional footwear machinery, €30 million to leather goods machinery, and €89 million to parts and components.

From an economic and financial perspective, the analysis of **company financial statements portrays an industry that is overall solid in terms of assets and financially balanced.** However, the sector is currently facing slower growth and intensified international competition, with repercussions also on company profitability.

Over the period analyzed in the Report, **the rapid development of China** has emerged in particular, with the country becoming the world's leading exporter in 2024, overtaking Italy and creating an increasingly polarized global market between the two countries.

While Beijing has achieved a dominant position in the footwear

machinery segment — thanks to price competitiveness and its ability to serve high-volume markets such as Vietnam, Indonesia and Bangladesh, which are linked to large-scale manufacturing production — **Italy still maintains leadership in tanning machinery, leather goods machinery and spare parts.**

The ability to maintain a leading role on the global stage will depend on combining financial solidity, innovation and strategic vision, proactively and synergistically addressing the ongoing transformations affecting production supply chains and reference markets.

To manage business continuity, generational transition and the evolution of competitive structures, it is also essential to **adopt governance tools and organizational models capable of supporting corporate transformation processes**, including wealth planning, family agreements and advanced corporate structures, combined with forms of industrial integration ranging from mergers to partnerships, knowledge sharing and the development of complementary offerings. At the same time, access to advanced financial instruments and export insurance solutions represents a key strategic lever to support internationalization and growth in foreign markets, while **investments in innovation and development** remain essential to strengthen competitiveness and seize new international opportunities.

Mauro Bergozza, President of Assomac, stated: *“Italian manufacturing represents an industrial and productive heritage that must be protected and strengthened over time, preserving an integrated supply chain model that is unique at an international level. To maintain this role, throughout our series of local meetings we highlighted how essential it is to adopt coherent, long-term strategies capable of supporting company competitiveness and the evolution of the production system in an increasingly challenging global scenario. In this journey, platforms such as Simac Tanning Tech are taking on an increasingly central role, not only as exhibition events, but also as places where innovation, industry and market converge, capable of bringing together the entire supply chain and enhancing Italian technological excellence”.*



Back to School Column

Dr N K Chandra Babu

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System Development in Tanneries

This article has been written based on the document prepared under the project 'Bench Marking in Ethiopian tanneries' in which System Development was one of the important components. The major contribution of my 'Maanaseega Guru' Late Mr Valliappan who served as one of the two experts assigned the responsibility of this component in the project in the preparation of the manual is kindly acknowledged. The idea of writing this article under this column is not to claim credit by this author but to share this immensely useful article based on true life experience in developing system in tanneries with the Indian tanneries. In fact, we had the plan to publish this as a book after our return from Ethiopia but it was not accomplished due to the sudden and untimely death of Mr Valliappan.

One of the main reasons for writing about system development under this Column (deviating much from the earlier articles which were mainly focussed on technical/scientific issues related to Leather Science and Technology) is primarily due to the feedback from some of the knowledgeable readers. They feel that the discussion should also deal with issues related to other important issues, for which there are not many well developed documents available in public domain. Needless to say, System Development in tanneries is an important aspect which requires a detailed manual to help the tanneries to improve the efficiency of their organisations. In my experience working with industries in different parts of the world, I was very much impressed with very robust and well developed Systems put in place in many tanneries including some in Ethiopia. On the whole, I expect this article would help the tanning industry to

review the systems followed in their tanneries to fine-tune the same for achieving better efficiency.

SYSTEM

A “system” may be defined in one of the following ways.

A combination of related parts organised into a complex whole.

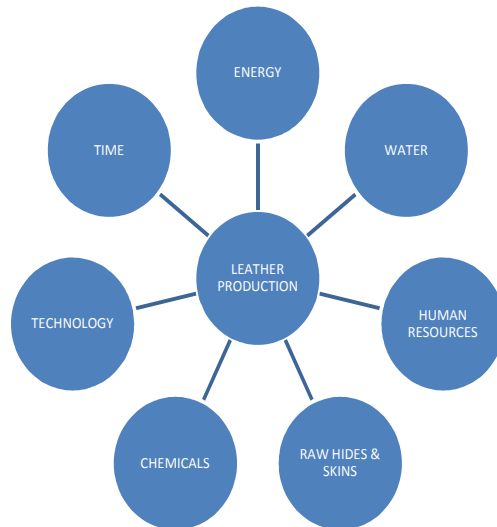
A scheme of ideas or principles by which something is organised.

A way of proceeding.

A method or a set of procedures for achieving a goal.

Orderliness - the use of careful planning for achieving an objective.

LEATHER PRODUCTION - RESOURCES & IN PUTS



Based on the systems practiced by the tanneries worldwide and the requirements of the tanneries in developing countries,

the following set of elements has been identified as a part of “system development”.

- 1- Organization structure
- 2- Raw materials management
- 3- Production planning & Production management
- 4- Chemicals purchase & inventory management
- 5- Machinery maintenance
- 6- Water management
- 7- Energy management
- 8- Productivity & performance efficiency improvement
- 9- Product quality assurance
- 10- Customer relationship & Delivery schedule management
- 11- Export marketing
- 12- New product development
- 13- Human resources development
- 14- Profitability enhancement
- 15- Management information system
- 16- Quality management system
- 17- Environment management system

Each of the identified elements is described and explained in detail, emphasizing the relevance and importance of the elements.

Simple and easy – to - use recording and documenting formats have been included for use by the tanneries.

The tanneries may modify the formats of these suggested documents to suit their local conditions without losing the essential details. The tanneries are requested to carry out an

assessment of the systems currently in use and identify and prioritize the elements for development.

Once the tanneries have tried out using the formats for capturing the required data, they will be able to derive useful information from the data logged in which will enable them to make decisions based on real time valid information instead of basing their decisions on assumptions or data which do not reflect the current situation.

1. ORGANIZATION STRUCTURE

- Every organization must have a clearly documented structure defining the hierarchical relationships between the functions / departments , with well defined functional responsibilities.
- The reporting relationships must be outlined explicitly in an organization chart.
- The standard departments / functions suggested for a tannery are listed below.
- The suggested organization chart is also presented.
- These suggestions are made on the principle - “form follows function”.
- Based on this the departments have been grouped based on their possible physical locations (1) Head office / Corporate office or (2) Factory / Production site, for the sake of convenience.

HEAD OFFICE / CORPORATE OFFICE

- 1 – Finance department
- 2 – Marketing ,sales & export department
- 3 – Purchase & import department
- 4 – Raw hides & skins purchase department

5 – Legal & statutory compliances department

6- Human resources development department

FACTORY / PRODUCTION SITE

1- Production department

2 – Maintenance department

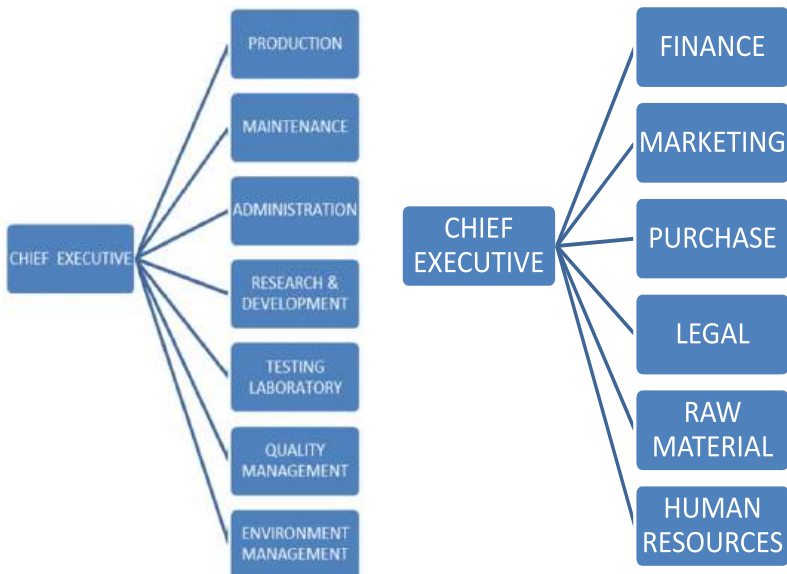
3 – Administration department

4 – Research & development department

5 – Testing laboratory

6 – Quality management department

7 – Environment management department



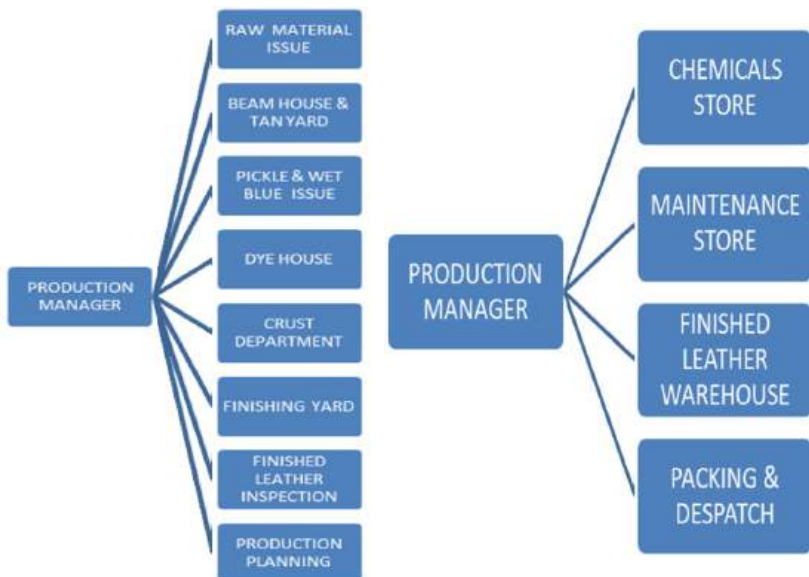
ALL THESE DEPARTMENTS WILL REPORT DIRECTLY TO THE CHIEF EXECUTIVE.

Based on the specific requirements of each tannery, the suggested structure may be modified.

PRODUCTION MANAGER

The following departments at the tannery will report to the production manager .

- 1 – Raw materials issue department
- 2 – Chemicals store
- 3 – Beam house & tanning department
- 4 – Pickle & wet blue department
- 5 – Dye house
- 6 – Crust department
- 7 – Finishing department
- 8 – Maintenance materials store
- 9 – Finished leather inspection & grading department
- 10 –Finished leather warehouse
- 11 – Packing & despatch department
- 12 – Production planning & scheduling department



In case, the tannery desires to have separate technicians in the beam house and tanning yard - one each for (1) cow (2) goat and (3) sheep and in the dye house -one each for (1) cow (2) goat and (3) sheep, it must select and appoint one among the 3 beam house technicians as the chief technician for (1) beam house & tanning yard and one among the 3 dye house technicians as the chief technician for (2) dye house.

This will ensure a clear line of reporting to the production manager and effective delegation of authority with responsibility and accountability.

The production manager must have only one person each from (1) beam house & tanning yard ,(2) dye house and (3) finishing department reporting directly to him in order not to overload his attention span with multiple persons reporting to him.

This plan for organization structure has been based on the optimum number of departments required for a tannery in general based on clearly designated functional responsibilities.

The tannery may modify the suggested plan for organization structure based on the requirements specific to the local conditions.

2.RAW MATERIALS - HIDES & SKINS

RAW HIDES AND SKINS - STOCKS, GRADING AND ISSUE

Raw hides and skins form the major component of the material inputs for the tanning industry .

They constitute about 60 % to 70 % of the cost of the finished leather.

The raw hides and skins may be received in the following conditions of preservation.

- air dried
- wet salted
- fresh

RECEIPT AND STORAGE

Raw Hides & Skins Received Must Be Stored Under Proper Conditions Of Temperature And Humidity.

GRADING, TRIMMING , DESALTING , SIZING AND ISSUE.

They must be trimmed to remove the unwanted portions , graded into the required categories , desalted to remove the salt used in curing , segregated into the required number of sizes – small , medium , large and extra large.

As far as possible the different sizes must be issued as separate lots. When it is not feasible to issue the lots in different sizes and it is necessary to mix sizes ,it is important to restrict the size mixing to two adjacent size ranges .--- small and medium; --- medium and large; --- large and extra large

RECEIPTS AND ISSUES DOCUMENTATION

The details of daily receipts , grading and issues must be documented in relevant documents.

3-PRODUCTION – PLANNING & MANAGEMENT

PRODUCTION PLANNING

- The top management must carry out detailed production planning and define the quantities to be produced in the specified time period.
- The production plan must define the measurable / quantifiable objectives and targets of the production activity ,list out the resources available , identify further resources required, the time schedules and the review points.

- Many times individuals do the planning mentally but they do not document the plan resulting in a lack of transparency of the plan to the team members.
- When a documented plan is not available to the team the individuals become more important than the system.
- In the absence of a properly documented plan deviations from the plan are not detected and evaluated in time to take the required corrective actions to achieve the targets and objectives.
- The performance against the plan itself cannot be evaluated, when a documented production plan is not available.
- **A properly documented production plan is a “must” for the tanneries and is not “optional”.**
- **The production plan is the “foundation” and “back bone” of the production activity.**

PRODUCTION PLAN

The production plan will focus on achieving the “optimum utilization of the available machines, skilled manpower, technical skills, investments made, working capital deployed and available raw materials and time.

Details to be taken into account while drawing up a production plan

- ***Machinery production output***
- Machines available
- Machine wise production output / shift pieces / sq. Ft
- Number of shifts / day

- Number of operators available / shift
- Operation wise production output / day (operations which do not involve the use of machines – trimming , grading , inspection)
- **Equipment capacity**
- **Beam house**
- Pits / paddles / soaking-liming drums / tanning drums
- Load capacity per pit / paddle / drum - in kg of dried / wet salted hides / skins
- Load capacity / drum -- pelt weight in kg / pieces
- Fleshing

BEAM HOUSE - PRODUCTION PLANNING

The planning of production in beam house is rather simple as it just requires the issue of - dried or wet salted or fresh – raw hides & skins to match the capacity of the soaking equipment - paddles or drums on a daily basis.

The beam house and tanning processes and the mechanical operations are the same for different types of raw materials – cow , goat and sheep.

The out – put capacities of the few machines in the beam house are generally balanced to match the soaking capacities or slightly in excess of the soaking capacities.

The number of chemicals used in the beam house and tan yard are limited and most of these chemicals are used for all the types of raw materials.

(to be continued)



Södra introduces vegetable tannin from Swedish bark

The leather and chemical industries are facing growing pressure to replace fossil-based inputs without compromising performance, quality or the ability to operate at industrial scale.

Södra, a Sweden-based forest industry group supplying customers worldwide, and one of Europe's leading producers of wood-based industrial materials, is now introducing a vegetable tannin derived from Swedish bark. The product has been developed for chrome-free tanning and is based on raw material from family-owned forests in southern Sweden. Production takes place in a patented process fully integrated into Södra's industrial site in Värö, Sweden.

By producing the tannin close to the forest raw material, dependence on long transport routes is reduced, while tanneries gain access to a vegetable tanning agent produced in a stable, fossil-free industrial environment.

For the leather industry, this means:

- a vegetable tannin produced in Sweden
- support for chrome-free tanning in industrial processes
- a raw material based on an existing industrial side stream
- a material developed to meet industry requirements for performance, quality and long-term availability

Viktor Odenbrink, Sales Director at Södra, is available for interview and can share insights on:

- why interest in chrome-free tanning and bio-based alternatives is increasing in the global leather industry
- how Södra's vegetable tannin has been developed to function in modern industrial leather production
- how raw material from family forestry in southern Sweden is utilised in an integrated, fossil-free industrial process

For details please contact: Viktor Odenbrink, Sales Director, Södra, email: viktor.odenbrink@sodra.com



“Stability in an Unstable World: Samer Al Jabi, TFL interim CEO on the Real Impact of the Gulf Conflict on Global Supply”

- **An Interview with TFL interim CEO Samer Al Jabi on Gulf Situation**

How is the ongoing conflict in the Gulf region currently impacting TFL’s supply chain and operations worldwide?

CEO:

We are operating in an increasingly complex global environment. The ongoing conflict in the Gulf region is creating significant and sustained disruptions across logistics routes, energy availability, and raw material supply chains worldwide.

As with many industries, the leather sector relies heavily on interconnected global value chains-from raw material sourcing through to finished products reaching end markets. As a result, procurement conditions, freight flows, and production planning have all become considerably more challenging and less predictable.

Are these developments limited to certain regions?

CEO:

Some regions are affected earlier or more strongly, but the impact is global. Recently, we have seen a particularly sharp spike in cost pressure in key sourcing and manufacturing regions such as India. Energy constraints and gas-based production limitations there have amplified the situation. However, in an interconnected supply chain, we see the impact affecting our production facilities in all regions.

Some observers point to easing crude oil prices. Would that not immediately improve the situation?

CEO:

That is a common misconception. Even if energy prices ease temporarily, it does not mean that supply chains will normalize overnight.

This situation goes far beyond fluctuations in crude oil and gas prices. The Middle East accounts for roughly 25% of global commodity chemical exports, with the majority of these flows passing through the Strait of Hormuz; a critical chokepoint.

What we are seeing is a disruption across the entire value chain: from raw materials and intermediates to production, transportation, and overall availability. Rebuilding inventories, restoring logistics flows, and stabilizing lead times will take months, not weeks.

You also mentioned raw-material availability. How serious is that issue?

CEO:

It is a very serious concern. The leather industry depends on a wide range of chemicals, many of which have been directly impacted by this crisis. For example, sulphur, urea, and ammonia are essential for beamhouse processes; phenol and other organic ingredients are critical for the wet-end; and acrylics, polyurethanes, and crosslinkers are key components in finishing.

Quite simply, you cannot produce a finished leather article without consistent access to these inputs.

At TFL, we are relatively well positioned thanks to our diversified global production footprint and multiple sourcing options for raw materials, which have enabled us to maintain operations so far. However, the situation is becoming more challenging over time, and securing reliable access to these materials is increasingly critical to ensure we can continue to serve our customers effectively.

TFL introduced temporary surcharges. Why was that step necessary?

CEO:

We introduced temporary surcharges to ensure continuity of supply. In the current environment, securing critical raw materials often comes at significantly higher costs, and this step was necessary to maintain reliable operations.

From the outset, we took a transparent approach with our customers and partners, clearly communicating that these surcharges are strictly linked to specific cost drivers-such as product groups, manufacturing locations, and logistics routes. We also emphasized that this is a temporary measure, which will be reduced or removed as soon as conditions stabilize.

We fully understand that surcharges are not welcome and can put pressure on customer relationships. However, acting early and transparently was the responsible decision to safeguard supply reliability.

We continue to monitor the situation closely and are working every day with our suppliers and customers to ensure a smooth supply chain. Like everyone else, we hope for a swift resolution to the current challenges.

ECHA to play key role in protecting Europe's waters from chemical pollution

The European Chemicals Agency (ECHA) will take on new scientific tasks under the EU's updated water protection legislation, which will strengthen the protection of Europe's water resources from harmful effects of chemicals.

The updated EU water protection framework strengthens the protection of Europe's waters – including rivers, lakes, estuaries, coastal waters and groundwater – by amending the Water Framework Directive, the Environmental Quality Standards Directive and the Groundwater Directive. It also introduces new scientific tasks for ECHA.

ECHA will provide the technical and scientific basis to support the European Commission in decision-making on water pollutants. The Agency will prepare scientific reports for:

- identifying priority substances for surface water and groundwater pollutant lists, including the development and updating of related (environmental) quality standards;
- identifying substances to be included on watchlists for surface water and groundwater; and
- where necessary, proposing harmonised environmental quality standards for river basin specific pollutants and harmonised threshold values for regional groundwater pollutants.

It will report to the European Commission (Commission) on potential updates to the main pollutant lists and associated water quality standards every six years, in line with the EU water management cycle. The Agency will also report on watchlist substances every three years, drawing on monitoring data collected by Member States.

The Commission will use ECHA's scientific reports as the technical and scientific basis for preparing legislative proposals to update priority substance lists and watchlists under EU water legislation. Through these tasks, ECHA will work closely with the Commission and Member States to help reduce surface water and groundwater pollution and support the achievement of good chemical status across EU waters.

Close cooperation between ECHA and the European Environment Agency (EEA) will be essential for the effective implementation of the updated framework, building on existing collaboration and supporting transparent communication with stakeholders.

SAD DEMISE



Janab Mecca Irshad Ahmed Sahib, Managing Director of Farida Shoes Private Limited, Director of other multiple group entities, and beloved son of Janab Mecca Rafeeqe Ahmed, Chairman, Farida Group, passed away on 22nd May 2026. He was 57.

A charming and straightforward leader with exceptional business acumen, he steered the group to glorious heights.

His demise is an irreparable loss to the industry.

Indian Leather conveys its heartfelt condolences to the members of the bereaved family and all at FARIDA Group



Footwear prices rise 4.2 per cent in April as pressures are not easing

- FDRA's Statement on April CPI Report WASHINGTON, D.C.,

Matt Priest, President and CEO of Footwear Distributors and Retailers of America (FDRA), on 12th May 2026, has released the following statement:

“Families are feeling a significant strain right now, and the footwear industry sees it firsthand. While much of the current conversation focuses on how rising oil prices drive inflation, the reality for footwear is that tariffs are driving inflation more than oil right now. The latest data shows these pressures are not easing, as footwear prices rose 4.2 percent in April - the fastest increase in nearly 4 years. This is a direct result of tariff impacts more than higher transit costs, which is evidenced by the fact that footwear prices climbed faster than overall inflation across men's, women's, and kids' shoes. “While oil prices are a growing concern, shoes with historic tariffs are already on the shelves, meaning these higher costs are now fully baked in. Shoes are a basic necessity, not a luxury.

Our industry is doing everything possible to manage costs, but the burden continues to build. Import costs are already up nearly 14 percent, and as the government pushes forward with more tariffs in this environment, there is a limit to what companies can absorb. “If policymakers are serious about helping families deal with rising costs, they must address one of the most punitive factors: footwear tariffs. Reducing these tariffs is the most direct and immediate step available to ease the pressure. Without action, these government-imposed costs will continue to escalate, and families will keep paying the price.”

European Union expands trade agreements to Australia and Indonesia.

In an environment where the multilateral order of international trade has been repeatedly challenged, the European Union has been strengthening its trade policy through agreements with strategic partners, namely India, Australia, Indonesia, and Mercosur. These agreements, while distinct in nature and ambition, aim to facilitate market access and enhance the creation of new global value chains. For the footwear cluster, it is important to assess their impacts in detail, taking into account the specificities of each market and the competitive position of Portuguese companies.

In the case of India, it is a large market with high growth potential, but with significant structural limitations in the short term. India already benefits from relatively low tariff levels on access to the European market, around 5%, which will also be eliminated when the agreement comes into force – and it already has a consolidated presence in the main destinations for Portuguese exports.

From the European Union's perspective, despite the significant reduction in tariff barriers faced by European products – in the order of 20%, which will be eliminated upon its entry into force – the immediate impact on the Portuguese sector should be limited, given the low average purchasing power, reduced consumption levels, and the relatively low openness of the Indian economy, which is heavily dependent on the domestic market.

In this context, according to the APICCAPS Research Office, the EU-India agreement is not expected to significantly alter competitive conditions, and in the short and medium term, it does not represent a

relevant threat to the Portuguese cluster, nor a significant opportunity for expansion.

In the case of Indonesia, the scenario is more sensitive. It is one of the world's leading producers and exporters of footwear, specializing in segments similar to those of the Portuguese cluster, namely leather footwear. Unlike the Indian case, the tariffs currently applied to Indonesian exports to the European Union are still somewhat significant – around 9%, eliminated at the outset – so their elimination could strengthen the competitiveness of these producers. Simultaneously, Indonesia already has a significant presence in the main destination markets for Portuguese exports. In this context, the agreement could translate into increased competitive pressure in the European market. As with India, opportunities for penetration into the Indonesian market remain limited due to low purchasing power, reduced consumption, and strong domestic production.

Regarding Australia, the context is different. It is a developed market with high purchasing power and consumption patterns similar to those of Europe, as well as insignificant domestic production and a strong dependence on imports, factors that, in principle, favor the presence of Portuguese products. Even so, the impact of the agreement should be reduced. The tariffs currently faced by European products are already low – around 5% to be eliminated at the start – and their elimination should therefore not translate into significant changes in the market structure, nor into substantial gains for the sector.

Finally, the provisional entry into force of the agreement between the European Union and Mercosur on May 1st will allow for the early application of trade provisions. However, the impacts on the footwear cluster are not symmetrical. On the European side, the gains are limited and with significant exclusions, being concentrated in specific

segments, such as leather footwear, with a gradual liberalization of tariffs of around 30% over 15 years.

Conversely, Mercosur producers benefit from a faster elimination – around 7 years – of tariffs on entry into the European market, currently around 10%. However, in the segments relevant to the Portuguese footwear cluster, the tariffs in force that Mercosur member countries face are already relatively low, and none have significant production in these segments.

In general terms, the analysis of these agreements suggests that, in the short and medium term, they should not pose either a significant threat or a relevant opportunity for the Portuguese footwear cluster. The agreements with India and Australia have limited impacts, albeit for different reasons, while the agreement with Indonesia presents some more evident competitive risk, and the agreement with Mercosur may have more structural, albeit gradual, effects.

In the long term, however, the economic evolution of these markets could alter this balance. Sustained growth in income and demand, particularly in India and Indonesia, could allow for the emergence of new consumer segments compatible with the positioning of Portuguese footwear, while progressive liberalization within Mercosur could open up additional opportunities-albeit in a context of increased competition.

According to Luis Onofre, “the new agreements between the European Union and partners such as Australia and Indonesia may open significant doors for the internationalization of the footwear cluster.” However, the President of APICCAPS warns that “they require a rigorous analysis of their impacts, especially regarding tariffs, rules of origin, and sustainability.” “For our part, we will continue to defend free, fair, and balanced trade,” he concluded.

Strategy and Leather Industry Part – II

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(Contd.. from April Issue)

10. The Rise of Sustainable Leather in India: Practices, Challenges, and Future Trends-

The future of leather sustainability – Tables – 10 A & 10 B & 10 C

The future of leather sustainability is evolving rapidly, driven by growing environmental awareness, technological advancements, and changing consumer preferences. Here are some key trends and developments shaping the future of sustainable leather:

The future of leather sustainability – Tables – 10 A

The future of leather sustainability – Tables – 10 A

10.1 Alternative Materials

- **Plant-Based Leathers:** Innovations in materials like Piñatex (made from pineapple leaves), mushroom leather (Mylo), and apple leather are gaining traction. These materials are often more sustainable than traditional leather, requiring fewer resources and generating less waste.

- **Lab-Grown Leather:** Companies are developing lab-grown or "cultured" leather, which mimics the properties of animal leather without the environmental impact of livestock farming. This technology could revolutionize the industry by reducing reliance on animal hides.

10.2 Improved Leather Processing

- **Eco-Friendly Tanning:** Traditional tanning processes are notoriously harmful to the environment, involving toxic chemicals like chromium. Eco-friendly alternatives, such as vegetable tanning, are being adopted, along with new methods that reduce water and chemical usage.

The future of leather sustainability – Tables – 10 A

- **Closed-Loop Systems:** Some companies are implementing closed-loop systems in leather production, recycling water and chemicals to minimize waste and pollution.

10.3 Circular Economy Models

- **Upcycling and Recycling:** The leather industry is seeing a shift towards upcycling waste materials into new products and recycling leather to extend its life cycle. This reduces the need for new raw materials and minimizes waste.
- **Second-Hand Market:** The growth of second-hand and vintage leather markets is another aspect of sustainability, as it encourages the reuse of existing products rather than the production of new ones.

The future of leather sustainability – Tables – 10 B

The future of leather sustainability – Tables – 10 B

10.4 Transparency and Traceability

- **Supply Chain Transparency:** Consumers are increasingly demanding transparency about the origins of leather products. Brands are responding by providing more information on sourcing, production processes, and environmental impact.
- **Certification Programs:** Certifications like the Leather Working Group (LWG) and others are helping to set industry standards for sustainable practices, making it easier for consumers to identify environmentally friendly products.

10.5 Regulatory Changes

- **Stricter Environmental Regulations:** Governments worldwide are implementing stricter regulations on environmental impacts, including waste management, emissions, and chemical usage in leather handbags production. This is pushing the industry towards more sustainable practices.

The future of leather sustainability – Tables – 10 B

- **Animal Welfare Considerations:** The growing emphasis on animal welfare is leading to increased scrutiny of leather sourced from animals, encouraging the adoption of alternatives or more humane practices.

10.6 Consumer Awareness and Demand

- **Ethical Consumerism:** As consumers become more aware of environmental and ethical issues, demand for sustainable leather products is rising. Brands that fail to adapt may face backlash or lose market share.
- **Customization and Local Production:** There's a trend towards customized and locally produced leather goods, which can reduce waste and the carbon footprint associated with transportation.

The future of leather sustainability – Tables – 10 C

The future of leather sustainability – Tables – 10 C

10.7 Technological Innovations

- **3D Printing:** The advent of 3D printing in the leather industry could lead to more efficient use of materials and the ability to create complex designs with less waste.
- **Blockchain for Traceability:** Blockchain technology is being explored as a way to enhance traceability in the leather supply chain, ensuring that products meet sustainability criteria from start to finish.

10.8 Global Collaboration

- **Industry Partnerships:** Collaboration between industry players, NGOs, and governments is essential for driving systemic change in leather sustainability. Initiatives like the Sustainable Leather Foundation aim to bring stakeholders together to address common challenges.
- **The future of leather sustainability will likely be characterized by a combination of traditional craftsmanship with cutting-edge technology and a strong emphasis on ethical and environmental responsibility. As**

The future of leather sustainability – Tables – 10 C

these trends continue to evolve, the leather industry could become a model for sustainable practices in fashion and beyond.

- **Sustainable men's leather backpack is an alternative to traditional leather that seeks to reduce environmental impact and improve social responsibility throughout its production process.**

Source : Tables – 10 A & 10 B & 10 C. The Rise of Sustainable Leather in India: Practices, Challenges, and Future Trends Nera Powered by Neraexim
SEPTEMBER 12, 2024

11. The future of leather sustainability – Pros ¹¹

11.1 Environmental Benefits

- **Reduced Carbon Footprint:** Sustainable leather crossbody bag often use less energy and water, and may emit fewer greenhouse gasses compared to traditional leather.
- **Minimized Waste:** Sustainable leather processes often utilize by-products from other industries, like food production, reducing waste.
- **Biodegradability:** Depending on the type of sustainable leather, it can be biodegradable, unlike synthetic leathers made from plastic-based materials.
- **Eco-friendly Tanning:** Some sustainable leather uses vegetable tanning or other environmentally friendly methods, avoiding the harmful chemicals (like chromium) used in conventional tanning.

11.2 Ethical Considerations

- **Animal Welfare:** Some sustainable leather options, like lab-grown leather or leather alternatives (e.g., mushroom or pineapple leather), eliminate or reduce the need for animal slaughter.
- **Fair Labor Practices:** Companies focusing on sustainable leather may also adhere to ethical labor practices, ensuring fair wages and safe working conditions.

11.3 Innovation and Durability

- **Innovation:** The push for sustainability has led to innovative materials and processes, such as lab-grown leather or leather made from plant-based sources.
- **Durability:** Like traditional leather, many sustainable leathers are designed to be durable and long-lasting, reducing the need for frequent replacements.

12. The future of leather sustainability – Cons ¹²

12.1. Cost

- **Higher Price:** Sustainable real leather bags are often more expensive due to the costs of eco-friendly materials and ethical production processes.
- **Limited Accessibility:** The higher cost can make sustainable luxury leather goods less accessible to a wider audience.

12.2 Availability and Variety

- **Limited Availability:** Sustainable Italian bags are not as widely available as traditional buffalo leather bags, making it harder to find and purchase.
- **Limited Variety:** The range of work backpacks for women and finishes available in sustainable leather may be more limited compared to traditional leather.

12.3 Perception and Performance

- **Perception:** Some consumers may perceive vegan leather bags as inferior to traditional fine leather goods in terms of quality or luxury.
- **Performance:** Certain types of sustainable quality leather purses, especially those made from plant-based materials, may not match the performance, durability, or appearance of traditional genuine leather purses.

12.4 Scalability

- Challenges in Scaling: Scaling sustainable soft leather handbags to meet global demand can be challenging, especially for innovative materials that are still in development or have limited production capacity.
- Sustainable handmade leather bags offer significant environmental and ethical advantages over traditional black leather bags, but it also comes with challenges related to cost, availability, and consumer perception. As technology and processes improve, these challenges may diminish, making sustainable leather a more viable option for a broader audience.

Source : 11 & 12 . The Rise of Sustainable Leather in India: Practices, Challenges, and Future Trends Nera Powered by Neraexim SEPTEMBER 12, 2024

13. ESG, Carbon Credit and Product Life Cycle in Leather Industry ¹³

The leather industry is addressing significant Environmental, Social, and Governance (ESG) challenges by scrutinizing its product life cycle and exploring carbon credit opportunities. The traditionally carbon-intensive and polluting nature of leather production is driving a shift toward more sustainable practices, from the sourcing of hides to innovative manufacturing and end-of-life solutions.

13.1 ESG in the leather industry

13.1.1 Environmental Table – 13 A

13.1.1 Environmental Table – 13 A

- **Pollution and waste: Conventional tanning processes use large quantities of water and hazardous chemicals like chromium, which lead to water pollution and contamination if wastewater is not properly treated. The industry also generates substantial amounts of solid waste, including trimmings and sludge.**
- **High carbon footprint: A significant portion of the leather industry's carbon footprint comes from the upstream livestock sector, primarily**

13.1.1 Environmental Table – 13 A

through methane emissions from cattle farming and deforestation for grazing land. The energy-intensive tanning process, often powered by fossil fuels, further increases emissions.

- **Resource depletion:** Leather production places a high demand on natural resources, particularly water for livestock and processing, as well as land for farming.

13.1.2 Social Table – 13 B

13.1.2 Social Table – 13 B

- **Worker safety and community health:** Workers in tanneries can be exposed to dangerous chemicals, posing long-term health risks. Communities near processing facilities often suffer from water and air pollution.

- **Animal welfare:** Ethical concerns surrounding the treatment of animals in livestock farming are a major social issue for the industry.

- **Ethical sourcing:** Consumers and stakeholders are increasingly demanding transparency about the supply chain, including the ethical sourcing of raw materials.

13.1.3 Governance Table – 13 C

13.1.3 Governance Table – 13 C

- **Regulation and compliance:** Companies face pressure to comply with increasingly stringent national and international environmental regulations, such as those related to chemical use and wastewater treatment.

- **Transparency and accountability:** There is a growing demand for clear, demonstrable commitments to sustainability. Third-party certifications, such as those from the Leather Working Group (LWG) and the Sustainable Leather Foundation (SLF), are becoming critical for verifying ethical practices.

13.1.3 Governance Table – 13 C

- **Industry initiatives:** The industry is seeing more collaborations and multi-stakeholder initiatives to drive sustainable improvements across the value chain.

13.2 Carbon credits and the leather industry Table – 13 D

The industry is beginning to engage with carbon credit markets to offset emissions and fund sustainable projects.

13.2 Carbon credits and the leather industry Table – 13 D

- **Emissions reduction projects:** Companies can invest in projects that directly reduce emissions. For leather, this includes upgrading to more energy-efficient processing equipment or switching to renewable energy sources to power tanneries.
 - **Upstream credits:** Some programs could focus on reducing emissions at the farm level, for instance, by supporting regenerative farming techniques that improve soil health and carbon sequestration.
 - **Offsetting through sustainable investments:** As an alternative to buying credits on the open market, some leather companies may choose to invest directly in environmental projects within their own supply chains to generate verifiable carbon reductions.
 - **Challenges in implementation:** A key challenge is accurately calculating the carbon footprint across the supply chain, from the farm level to finished goods, to establish a credible carbon credit program.

13.3 Product life cycle in the leather industry

13.3.1 Raw material sourcing Table – 13 E

13.3.1 Raw material sourcing Table – 13 E

- **Farming and slaughter:** The life cycle begins with livestock farming, which has a major environmental impact through land use, deforestation, and greenhouse gas emissions (especially methane).

13.3.1 Raw material sourcing Table – 13 E

- **By-product status:** The industry maintains that it utilizes a by-product of the meat and dairy industries, but studies show that using hides for leather still has a higher climate impact than disposing of them in landfills.

13.3.2 Manufacturing and processing (tanning) Table – 13 F

13.3.2 Manufacturing and processing (tanning) Table – 13 F

- **Beamhouse operations:** Hides are soaked, cleaned, and fleshed. This stage uses large amounts of water and produces contaminated wastewater that requires careful management.
 - **Tanning methods:**
 - o **Chrome tanning:** The most common method, it is fast and efficient but relies on heavy metals that can lead to water and soil pollution.
 - o **Vegetable tanning:** An older, more natural method that uses plant-based tannins. It is more eco-friendly but slower and more water-intensive.
 - **Post-tanning and finishing:** Steps like re-tanning, dyeing, and finishing enhance the leather's properties and appearance but also involve significant chemical and energy use.

13.3.3 Distribution and consumer use Table – 13 G

13.3.3 Distribution and consumer use Table – 13 G

- **Transportation:** The global nature of the industry means raw materials and finished goods are transported over long distances, adding to the carbon footprint.
 - **Product longevity:** High-quality leather is durable and can last for decades, which reduces the frequency of new production cycles and is a key sustainability argument. The growth of second-hand and upcycled leather goods also extends product life.

13.3.4 End-of-life Table – 13 H

13.3.4 End-of-life Table – 13 H

- **Landfill:** When discarded, leather products can decompose anaerobically in landfills, releasing methane.
- **Recycling and upcycling:** Scraps from manufacturing can be recycled into bonded leather or repurposed. Old products can also be upcycled to give them a new life.
- **Innovation:** The development of biodegradable and lab-grown leathers offers potential future solutions for reducing end-of-life impact.

Source : 13. & Tables – A & B & C & D & E & F & G & H

<https://www.google.com/search?q=esg+carbon+credit+and+product+life+cycle+in+leather+industry>

14. Global leather industry highlights ¹⁴

The global leather industry is a multi-billion-dollar sector driven by increasing demand for both traditional and synthetic materials, a strong online market presence, and the luxury goods segment. Key highlights include the market's projected growth to over \$405 billion by 2030, with a compound annual growth rate (CAGR) of 6.6% from 2023-2030. The industry is also seeing a rise in environmental regulations and a shift toward sustainable practices, alongside the increasing importance of digital channels for marketing and sales.

14.1 Market and growth Table – 14 A

14.1 Market and growth Table – 14 A

- **The global leather goods market is projected to reach approximately \$405.28 billion by 2030, with a CAGR of 6.6% from 2023 to 2030.**
- **Leather goods, apparel, and footwear are key segments experiencing significant growth.**

14.1 Market and growth Table – 14 A

- **Luxury and premium products are a major growth driver, fueled by increasing global affluence and demand for quality, exclusivity, and brand prestige.**

14.2 Key product segments Table – 14 B

14.2 Key product segments Table – 14 B

- **Footwear: A significant portion of the market, with a wide range of styles and materials, including a growing demand for both genuine and synthetic leathers.**
- **Apparel: Expected to increase at a CAGR of 7.32% during the forecast period.**
- **Leather Goods and Accessories: This sector includes items like handbags, wallets, and other accessories. Online sales and direct-to-consumer models are particularly strong in this area.**

14.3 Geographic and economic highlights Table – 14 C

14.3 Geographic and economic highlights Table – 14 C

- **China is the world's top leather exporter.**
- **India is a major player, holding 13% of the world's leather production, and is the second largest producer of footwear and leather garments globally.**
- **The industry is a significant employer, particularly in rural areas, with women holding a substantial share of the workforce in the leather products sector.**
- **Factors like raw material availability (India has a high population of cattle, buffalo, goats, and sheep), skilled labor, and technological innovation contribute to the industry's strength.**

14.4 Trends and drivers Table – 14 D

14.4 Trends and drivers Table – 14 D

- **Sustainability:**

There is an increasing focus on environmental and ethical sustainability, with new legislation influencing production methods and a growing demand for more eco-friendly products.

- **Digitalization:**

The growth of e-commerce, social media marketing, and influencer collaborations is changing how brands connect with consumers and reach niche markets.

- **Synthetic and bio-based alternatives:**

The market is seeing growth in synthetic leather, driven by its lower cost and heavy-duty construction, and environmentally friendly alternatives.

- **Consumer preference:**

A growing demand for customization, new designs, and unique styles is influencing product development and marketing strategies

Source : 14.& Tables – 14 A & 14 B & 14 C & 14 D & 14 E.

<https://www.google.com/search?q=global+leather+industry+highlights>

15. The global leather industry – Opportunities & Challenges ¹⁵

The global leather industry faces challenges such as environmental concerns from tanning, high costs from raw materials and regulations, and competition from synthetic alternatives. However, opportunities exist in the growing demand for sustainable and ethically sourced leather, innovation in plant-based and recycled materials, and a strong domestic market in countries like India, which benefits from government support and abundant raw materials.

15.1 Opportunities Table – 15 A

- **Sustainable and ethical production:**

There is a growing consumer demand for environmentally friendly and

15.1 Opportunities Table – 15 A

ethically sourced leather. Brands are focusing on sustainable practices and traceability, which can help penetrate markets and build consumer trust.

- **Innovation in materials:**

The development of eco-friendly alternatives like plant-based and recycled materials provides new opportunities to cater to a wider range of consumers and stay on-trend.

- **Luxury goods demand:**

The market for luxury leather goods is rising, driven by strong consumer spending in this sector.

- **Strong domestic markets:**

Countries like India have robust domestic markets with a growing appetite for premium leather products, creating a strong base for growth.

- **Government support:**

Some governments, such as India's, offer initiatives to modernize and support the leather and footwear sectors, including providing raw materials and promoting exports.

15.2 Challenges Table – 15 B

15.2 Challenges Table – 15 B

- **Environmental impact:**

Traditional leather tanning is a major source of pollution due to the generation of solid waste and hazardous chemicals like chromium, which are released in industrial sewage and can harm ecosystems and human health.

- **High costs:**

The industry faces high costs from raw materials, labor, energy, and the need to comply with environmental regulations.

15.2 Challenges Table – 15 B

- **Competition from synthetics:**

Leather competes with lower-cost synthetic alternatives, which can capture a significant market share.

- **Regulatory compliance:**

Manufacturers must navigate a complex web of regulations, which can be particularly challenging for small businesses that may lack the resources to comply.

- **Supply chain issues:**

The supply chain can be vulnerable to disruptions and challenges, such as flaying and curing defects during the slaughter process, which impact the quality of the raw material.

Source : 15.& Tables – 15 A & 15 B.

<https://www.google.com/search?q=global+leather+industry+opportunities+and+challenges>

16. The future of the global leather industry is promising ¹⁶

The future of the global leather industry is promising, with market growth driven by increasing disposable incomes, a demand for durable and luxurious products, and fashion trends. However, the industry faces significant pressure to become more sustainable and ethical, leading to a rise in eco-friendly practices, the adoption of new technologies, and a focus on innovative materials. Brands that prioritize sustainability and transparent, responsible production are expected to thrive in the coming years.

16.1 Key growth drivers Table – 16 A

16.1 Key growth drivers Table – 16 A

- **Rising disposable incomes:**

Increased spending power, particularly in emerging economies, is boosting demand for premium leather goods.

- **Demand for durability:**

16.1 Key growth drivers Table – 16 A

Consumers are increasingly choosing high-quality, long-lasting products over fast fashion, a key strength of genuine leather.

- Fashion and luxury:

Leather remains a core material in fashion, driven by its aesthetic appeal in apparel, accessories, and furniture.

- E-commerce expansion:

The growth of online retail has made it easier for brands to reach a wider global audience.

- Technological innovation:

The integration of smart technology into leather products and advanced manufacturing techniques are creating new opportunities.

16.2 Sustainability and ethical challenges Table – 16 B

16.2 Sustainability and ethical challenges Table – 16 B

- Environmental impact:

The industry faces scrutiny over its environmental footprint, including chemical use and waste management.

- Ethical sourcing:

There is a growing consumer expectation for ethical sourcing and responsible production practices, including worker welfare.

- Competition from alternatives:

Sustainable synthetic and bio-based leathers (e.g., from mushrooms, pineapple leaves) are gaining traction as eco-friendly alternatives.

- Need for transparency:

The industry must work to improve consumer understanding of natural leather's benefits and combat misinformation.

16.3 Industry response and future opportunities Table – 16 C

16.3 Industry response and future opportunities Table – 16 C

- **Adoption of sustainable practices:**

Manufacturers are increasingly using eco-friendly materials, reducing waste, and adopting greener manufacturing processes, such as water-based and solvent-free methods.

- **Innovation in materials:**

Development of new bio-based leathers and improvements in water-based polyurethane are key areas of growth.

- **Focus on craftsmanship:**

There is an increasing appreciation for artisanal and custom-made leather products, particularly in the luxury market.

- **Government support:**

Industries like the one in India are seeking government support to help navigate challenges like tariffs and to promote domestic brands.

Source : 16.& Tables – 16 A & 16 B & 16 C.

<https://www.google.com/search?q=future+of+global+leather+industry>

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12, 2024

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16.& Tables – 16 A & 16 B & 16 C.

<https://www.google.com/search?q=future+of+global+leather+industry>

(Continued in Part- III)

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www.indianleathermagazine.com

LEATHER: Studies for Information and Self-Training



Richard Daniels

(The author – Richard Daniels – has wide technical experience of leather manufacture, other leather-related practices, within formal education and counterpart training. The third study in the series -Leather: the technology of manufacture - is presently undergoing edit)

Two studies are available for download free of any charge from the website www.indianleathermagazine.com

1] Leather: AN INTRODUCTION (Volume 1 of 3)

This has been created for people who need a better general understanding of what leather is, and for those who need a better understanding of how leather is made.

It describes the versatility of this unique material, its natural origins, how it is manufactured, and why its properties are so comprehensive. It enables comparisons with plastics, laminates and conglomerates of binders/natural materials - as long as their origins, composition and environmental profiles are similarly detailed.

2] Leather: AN OVERVIEW OF MANUFACTURE (Volume 2 of 3)

This second study is for people who wish to become leather technicians, and those who need more than the most basic understanding of leather and its manufacture.

It follows the processes and operations used, and their purposes, for making different leathers from bovine hides, sheep and goat skins.

This is a very comprehensive self-learning package in 10-parts. It has been created for ease-of-study, comprises 30,000 words, and supported by 300 technical images and diagrams. It is designed for use by the individual via smart phone, tablet and computer. However, it can be used for support within more formal training and education.

These studies have been subjected to review by leather making professionals. Also, it has been accredited and recommended by the UNIDO, IULTCS, ALCA and SLTC.

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