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Indian Leather



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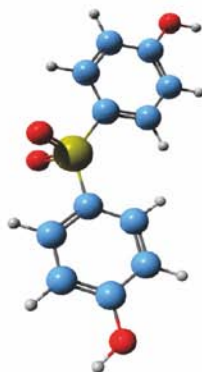
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For advertisement tariff and other details please contact:

INDIAN LEATHER, 120 Vepey High Road, Chennai-600 003.

Phone: +91 - 44 - 28343685, Cell: 9444412685

Website: [www.indianleathermagazine.com](http://www.indianleathermagazine.com)

Email: [indianleather@yahoo.com](mailto:indianleather@yahoo.com)

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On April 26, 2024, World Leather Day, is celebrated by the industry worldwide, honouring the enduring and unique qualities of leather. The theme for this year's celebration is "**Repair, Reuse, Repurpose**" emphasising the long-lasting, repairable, and versatile qualities of leather that make it the ideal material for a circular society, and following is the key message posted by *Leather Naturally*

- We celebrate the long-lasting, repairable and versatile qualities of leather, making it an ideal material for a circular society.
- The repair, reuse and repurposing of leather promotes more sustainable environmental practices. By extending the life of leather goods, we minimise waste, landfill and reduce environmental impact.
- Reusing leather goods brings economic advantages. Extending the life of leather items means we shop less and save money.
- We all need to make smarter choices to reduce our environmental impact. Up cycled from a natural by-product, leather is part of the circular economy and therefore part of the solution. Its long life and durability means it is repairable and reusable, handed down through generation after generation.
- For businesses, new revenue streams are available and customer loyalty is optimised by offering repair services or making reused leather products.
- Leather repair, reuse and repurpose not only minimise wastes but also promotes the principles of circular economics, using resources repeatedly and more efficiently

Join us on **World Leather Day 2024** as we come together to honour the unique and enduring qualities of leather.

# Introduction to Leather Industry

- Vasan Suri

A Passionate Leather Lover & Professional

*(Continued from March 2024 issue...)*



Leather Industry though, an upcycling industry of the remains of the meat industry, have evolved itself to be socially responsible.

Over the years, Leather industry have grown gradually with responsibility. Social, Environmental concerns and Economical requirements have been well addressed.

Organisations like CLRI, SGS, TUV, Intertek etc., have given immense support for testing of leathers and leather products.

While testing, any banned chemicals or contamination found they pass strict reports that, these products are not allowed to be used or exported.

Organisations like the LWG (Leather Working Group - 2005), ICEC (Institute for Quality Certification of Leather Sector - 1994) came in to active mode over the past few years, as a not for profit organisation, which drives best practices and positive social and environmental change for responsible leather production.

These organisations are working with their member tanneries for traceability of the livestock as well, to make the industry transparent.

SLF (Sustainable Leather Foundation) came in to existence from 2021 by Niccolo and grew as an organisation to ensure Environmental, Social and Governance responsibility that, is essential in today's leather industry and to support all stakeholders to learn, improve and protect for future generations.

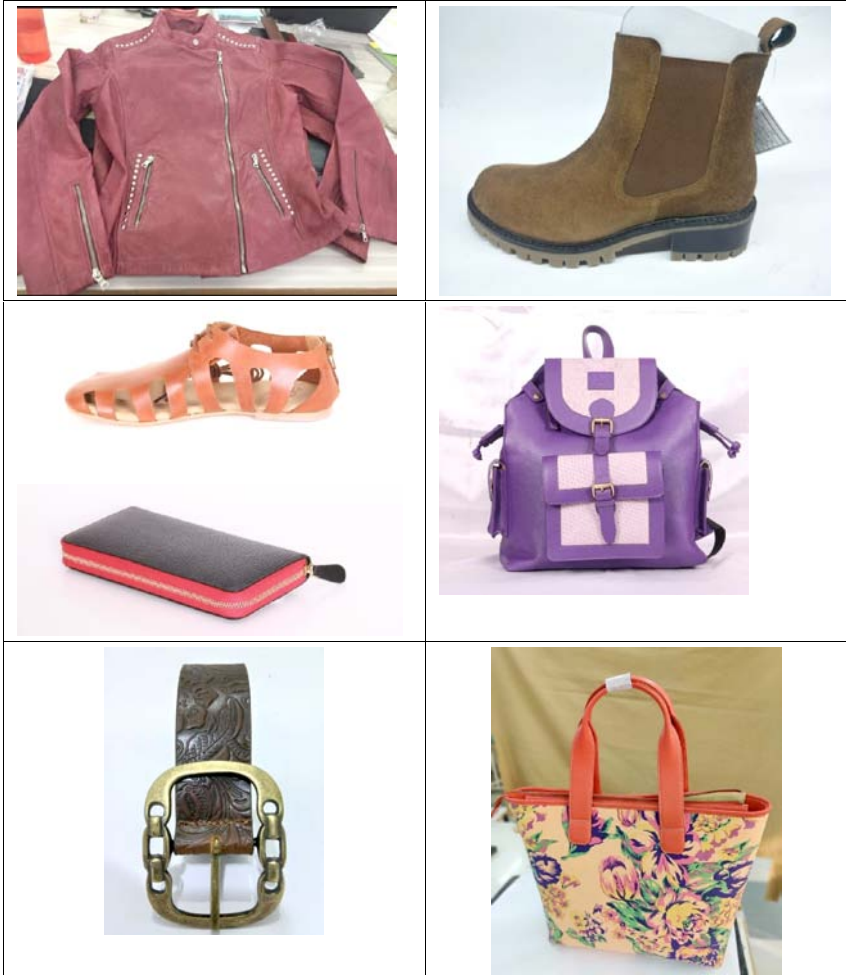
ZDHC (Zero discharge of hazardous chemicals) which came in as a foundation from 2015.

The Zero Discharge of Hazardous Chemicals (ZDHC) Programme is a collaboration of leading brands, value chain affiliates, and associate contributors committed to advancing towards zero

discharge of hazardous chemicals in the textile, leather, and footwear value chain, thereby reducing harm to the environment and human well-being.

From the above it is clear that, the leather and leather products industry is committed towards a greener and cleaner environment.

Leather Breathes, Durable and Sustainable.



*pic courtesy: Google*

I have explained about the various details and developments of the Leather Industry in the past 80-100 years, over 9 articles and would like to sum up with this.

Leather is a Natural product, Upcycling industry, moving towards sustainability.

Leather is Natural, Breathable, Durable, Compostable and Sustainable. Leather weathers all climate and never withers.

From a dead animal skin or hide a beautiful leather is created and that gets made as the most luxurious product and expensive products and on the other side caters to the safety and industrial product such as gloves, boots etc.,

Awareness from the lowest department of the Leather Industry should start and they all should feel proud about the product and the type of industry they are associated with.

Leather is the premium fashion product and gets converted in to leather pants, waist coats, Shoes, Bags, Wallets, Purses, Jackets, Belts, Gloves, Sofas, Couches, Furniture, Automotive, Horse Riding, pet collars and leashes and many more products.

It is high time, the knowledge, education and importance of Leather have to be infused at every level of Leather Industry employees, associates and partners and thereby bringing out the facts and the reality, in front of them.

We need to make constant awareness program by audio and video and by writing, to bring out the true value in to the minds of the retail customers.

"Leather is Great" should be the slogan everywhere and to be celebrated to make the younger generation aware of the value, comfort and luxury of leather.



In order to make the common consumer understand the value of leather, it is important to underline and use the following phrases, which will ring a bell everytime, about the real value and gift by Nature to the mankind. The no substitute and no alternative product called "Leather".

1. "Engineering life to the lifeless".
2. The Imperfect, perfect Natural Product
3. Leather Breathes, Feet & body eases.
4. Leather weathers, All other Alternatives wither.

Emphasis should be to promote the tag lines regularly to bring awareness to the common consumers and young generation.

Leather & Leather Products is working closely to bring newness in everything which will be the key for acceptability of leather and leather products among the consumers.

I am an individual who is blessed to live in this beautiful, Natural product industry for the past 4 decades and more.

It is also the time to give back what I have learnt from the Industry all these years and this is just a small offering & service to the Industry which have changed many people's life for good and still supporting many lives.

Let us all remember that, Leather is a Natural Product and made in to luxury products with inputs from human by means of innovation and technology.

Man-made materials like synthetics or the so-called alternatives will never stay for long.

Further, the sustainability, Decompostable nature is only in the Leather and not in other alternatives.

The Whole World went from Organic plantation to all synthetic types and are now coming back to Organic plantations. It is a cycle.

Cotton shopper bags were kept out by use of poly bags in variety of colors and designs and after a particular cycle of time, the cotton bags is back in business.

Natural product like "Leather", Cotton will stay and rest sway.

This Leather Industry absorbed me like my Mother. I have always stated that "Love for Mother, translated in to Love for Leather".

My beloved mother passed away on 15th May 1982 and I joined in the Leather Industry on 1st July after performing all the obsequious requirements of my beloved Mother. From that day, Leather is taking care of me.

This Industry has blessed me with knowledge of every leather and leather product which is a rare opportunity for anyone and I have been able to grasp all the knowledge with both the hands, mind and body.

To give back to the Industry weekly meetings are organised and reports published and it is helping many in the industry to get some finer points for their growth.

Real success is about creating successors and just not keeping it for oneself.

Leather journey continues.....

## GLOBAL LEATHER INDUSTRY NEWS

### **VIETNAM : FOOTWEAR EXPORTS REACHED \$4.85 BILLION IN THE FIRST QUARTER OF 2024.**

The strong recovery of export orders in March has contributed to the footwear industry generating export revenue of \$1.7 billion, the highest level since the beginning of the year, pushing the total exports in the first quarter of 2024 to reach the milestone of \$4.85 billion.

*In the first quarter of 2024, footwear exports increased by 11.7%, reaching \$4.85 billion.*

According to statistics from the General Statistics Office, exports of various types of footwear in March experienced a strong recovery, earning over \$1.7 billion, an increase of over \$600 million compared to the previous month.

With this level of performance, the total footwear export turnover in the first quarter reached \$4.85 billion, up 11.7% compared to the same period last year.

If we include the export turnover of bags at \$866 million (up 5.2% compared to the same period), the entire leather footwear industry brought in a total turnover of over \$5.7 billion in the first quarter of 2024.

The export growth of footwear and bags in the first quarter of this year does not fully reflect the recovery of the global footwear market, as last year, the leather footwear industry experienced a significant decrease in export turnover amounting to billions of USD. Notably, footwear decreased by nearly 15%, and bags decreased by 9%, with revenues of \$20.37 billion and \$3.76 billion, respectively.

The total export turnover of the entire industry last year reached over \$24 billion, falling short of the \$27 billion target set and significantly lower than the peak of \$28 billion in 2022, resulting in an export shortfall of about \$4 billion.

The export market of the leather footwear industry contracted last year, as export turnover to most key markets decreased, notably the US, EU, and China.

In fact, since the fourth quarter of 2022, under the impact of inflation, major export markets such as the US, EU, and Japan have all experienced a decline in consumption. While demand in export markets slowed down, high inventory levels of retailers and brands continued, leading the leather footwear industry into a severe shortage of orders in the first half of 2023.

According to statistics from some large-scale manufacturing enterprises, in the past year, orders for the textile, footwear, and leather industries decreased by 25-50%, with many enterprises having to cut labor, working hours, and production scale.

Although exports showed double-digit growth in the first quarter, the Vietnam Leather, Footwear, and Handbag Association (Lefaso) believes that there are still many difficulties in the market because overall demand has not fully recovered. Vietnamese enterprises still need to closely monitor market information to devise suitable production and business plans, maximizing opportunities from FTA markets to enjoy tariff preferences.

Moreover, a series of regulations on eco-friendly products, expanded producer responsibility, supply chain traceability, requirements for carbon emission reduction for manufactured products... proposed by EU importers are posing significant challenges to supply chain links, including Vietnam's.

Source: baomoi.com / LEFASCO

## **Bangladeshi leather footwear exports continue to fall**

The downward trend continues. Bangladesh's leather footwear exports fell by around 27% year-on-year in the nine months to March 2024, leading to a decline in the overall leather exports

According to the Export Promotion Bureau of the Government of Bangladesh, in the first nine months of fiscal 2023-2024, the Asian country recorded an overall leather export decline of 13.65% to 794.19 million US dollars, on a comparable basis to the same period of the previous fiscal year. This figure was 21.16% lower than the strategic target set for the period of 1007.38 million US dollars. This result was primarily driven by the performance of the leather footwear segment.

From July 2023 to March 2024, Bangladesh's leather footwear exports totalled 391.69 million US dollars, a decrease of 26.68% from the same months of fiscal year 2022-2023. This result was 29.82% below the strategic target set for the period of 558.16 million US dollars.

Although 13.88% lower than the strategic target set of 348.48 million US dollars, the country's leather goods exports increased in the first nine months of the current fiscal year by 2.68%, reaching 300.10 million US dollars, as compared to a similar period of the prior year.

Meanwhile, exports of finished leather exports stood out in the nine months to the end of March with a growth of 9.82% to 100.74 million US dollars, on a comparable basis to the same period of fiscal 2023-2023, and 1.65% above the strategic target of 100.74 million US dollars.

Government data also shows that from July to March of this year, Bangladesh's other footwear exports amounted to 385.73 million US dollars, an increase of 7.67% as compared to the same months of the previous fiscal year. Albeit positive, this figure was 6.03% lower than the strategic target set for the period of 410.42 million US dollars.

*worldfootwear.com*

## **Seesaw: exports fall and imports rise in the quarter**

- **In the first quarter of 2024, 27.65 million pairs were sent abroad**

The Brazilian footwear sector, since last year, has been experiencing an uncomfortable situation in the trade balance. While exports are falling, the entry of foreign footwear, especially from Asia, is increasing.

Data prepared by the Brazilian Association of Footwear Industries (Abicalçados) shows that the sector's exports fell in the first quarter. In the three months, 27.65 million pairs were shipped, which generated US\$253.4 million, drops in both volume (-28%) and revenue (-22.8%) compared to the same period last year. Separating only the month of March, exports totaled 9.27 million pairs and US\$83.73 million, drops of 20.5% and 22.9%, respectively, compared to the same month in 2023.

Imports, in the same period, grew. 10.32 million pairs entered Brazil for US\$125.44 million, increases of 4.4% in volume and 12% in revenue compared to the same period in 2023. Segregating only the month of March, imports totaled 3.4 million pairs and US\$34.86 million, increases of 49.7% and 38.4%, respectively, compared to the same month of 2023.

The executive president of Abicalçados, Haroldo Ferreira, highlights that the drop in shipments to the United States and Latin American countries, historically important destinations for national footwear, continues to influence the results. "At the same time, Asians are gaining ground in these countries," he says. According to him, although the drop in shipments to the United States is less intense than in previous months, there are still difficulties in relation to North American domestic consumption. "However, our main setback has been in Argentina, our second international market", assesses the director.

## **Destinations**

In the first three months of the year, the main destination for yellow-green shoes was the United States. There, 2.66 million pairs were shipped for US\$54.57 million, a drop of 8.8% in volume and 4% in revenue compared to the same period in 2023.

The second destination for the footwear in the quarter was Argentina. During the period, the brothers imported 2 million pairs for US\$41.3 million, a drop of 38.2% in volume and 25.4% in revenue compared to the same period last year.

Spain was the third destination in the period. There, 4 million pairs were shipped, generating US\$12.3 million, drops of 30.6% and 30.8%, respectively, compared to the same period in 2023.

## **States**

The main state of origin for exports continued to be Rio Grande do Sul. In the first quarter, 8 million pairs left factories in Rio Grande do Sul for US\$ 122.63 million, drops of 15% in volume and 12.4% in revenue in the compared to the same period in 2023.

With drops of 24.34% in volume and 27% in revenue, Ceará also saw its exports fall in the first months of the year. In the quarter, 9.9 million pairs left factories in Ceará for US\$60.93 million.

Closing the podium of export origins was São Paulo, from where 1.2 million pairs were shipped, generating US\$19.7 million in the first quarter of the year. The drops, in relation to the corresponding period of 2023, were 42.2% in volume and 35.4% in revenue.

## **Asian invasion**

In the quarter, the main origin of imported products was Vietnam, with 2.86 million pairs and US\$59.6 million, increases of 19% in volume and 7% in revenue compared to the same period last year. China was the second origin, with 1.63 million pairs and US\$3.62

million, an increase of 27.3% in volume and a drop of 24.3% in revenue; and Indonesia the third origin, with 495 thousand pairs and US\$8.73 million, significant increases of 416% in volume and 379% in revenue. In addition to the trio of Asians, Abicalçados' attention was drawn to the growth of Asian countries Cambodia and Myanmar, which tripled their footwear exports to Brazil in the same period. "It is a point of attention, which indicates that production may be changing within Asia", comments Ferreira.

In parts - uppers, heels, soles, insoles, etc. -, imports in the quarter totaled US\$ 10.9 million, 52% more than in the same period last year. The main origins were China, Paraguay and the United States.

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## **Unic And Trade Unions: "EUDR Regulation Threatens The Sector"**

UNIC - Italian Tanneries and FILCTEM CGIL, FEMCA CISL and UILTEC UIL have recently published a press release concerning the alarm about the present and the future of the national leather supply chain.

After signing last March 7 the hypothesis of renewal agreement of the National Collective Labour Agreement, UNIC - Italian Tanneries, FILCTEM CGIL, FEMCA CISL and UILTEC UIL call on national and EU institutions for urgent action to avert the unnecessarily devastating impact of the EUDR on the Italian leather industry, in order to avoid serious consequences on the employment levels of the sector and to support the recovery of a virtuous and cutting-edge economic system on the international scene, which uses animal hides and livestock processing waste, implementing the principles of the circular economy, and also realizes cycles of wastewater treatment and recovery for an effective and efficient use of existing resources.

As specified in the press release, "this regulation sets objectives that Italian tanners fully share, to the point that for years the national tanning industry has been strategically committed to improving the traceability of the supply chain and contrasting any possible phenomenon of deforestation. The current formulation of EUDR, however, could, therefore, have the disastrous consequence of desertifying the economic and social fabric, making substantially impracticable its circular activity of recovery and transformation of raw hides, and nullifying its own purposes, since it would not contribute in the least to the real fight for deforestation, at the same time encouraging the competitive dumping of countries outside Europe".

The Italian tanning industry is experiencing an extremely complicated and very negative economic phase and is facing an extremely worrying scenario, where the possible consequences for the leather sector of the entry into force at the end of the year of the EU Anti-deforestation Regulation n.1115/2023 (EUDR) stand out, requiring the application of traceability tools currently not absolutely adequate, if not unavailable, and unfit to meet, in a very short time, unnecessarily strict and stringent requirements.

# "World Leather Day"

The idea of celebrating the Natural, God gifted Product as "World Leather Day" got initiated during the APLF at Dubai in 2022.

Though, it was celebrated during the event, an official date was fixed from 2023 as 26th April.

Leather Industry and Leather Products have their history dating back to the days of Adam & Eve.

Leather has been a part of our Civilization & Culture.

The Stone Age man used the leather to wrap himself and his family to protect them from the cold weather and from the bushes while walking through the forests, as a footwear.

With the advancement of the technology, requirement and taste, Leather became a fashion product, style statement and truly a luxurious product. The innovations are happening everyday to make it better and the best.

Today, Leather takes many forms from footwear, bags, purses & wallets, belts, safety & Industrial products, garments, gloves, hats, saddlery, equestrian products, pet products, home furnishing, office furnishing, Hospitality industry, sofas, automotive etc.,

Leather is the only product which can breathe. That helps to keep the comfort with the change in outside weather.

Leather industry has grown leaps and bounds to address the concern of Pollution at all levels and keeping the environmental priority and social responsibility.

Being a Natural product leather is sustainable, Decompostable and recyclable. The industry converts the waste of the meat industry into luxurious and fashionable products.

We have every reason to celebrate "THE WORLD LEATHER DAY".

Thank God for giving us such a wonderful gift of Nature.

*- Vasan Suri*

# Tell me and I forget, teach me and I may remember, involve me and I learn

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competitive advantage. By providing the possibility of sharing knowledge, we embrace our role in the dynamic leather and chemical industry. Stahl Campus® is a great opportunity to strengthen skills and capabilities in order to make working methods more efficient by sharing experiences and studying products and procedures.

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- Acid Brown : 14,15,58,75,83,97,98,106,147,161,163,165,  
188,191, 282,348,355,365,425,432,452
- Acid Green : 68:1, 114
- Direct Black : 19,155,168
- Mordant Brown : 1,79
- Mordant Black : 11

**WORKS OFFICE :**

**Nr.GIDC Estate, Mahuva - 364 290**

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**E-mail : [info@chhatariyadyes.com](mailto:info@chhatariyadyes.com)**

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# 2024 SHOWS CALENDAR



**Guangzhou  
China**

**29-31 MAY**

**Canton Fair Complex  
Area A**



**HCMC  
Vietnam**

**10-12 JUL**

**Saigon Exhibition and  
Convention Center (SECC)**



**Hanoi  
Vietnam**

**14-16 NOV**

**International Center  
For Exhibition (I.C.E.)**

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## International Exhibition of **Footwear, Leather and Accessories** Industry



 **21-23 MAY 2024**

 **Europarque, Santa Maria de Feira**

Intershoes Portugal is going to gather thousands of professionals related to footwear, leather, and accessories sectors from all over the world. Sector leading companies will find the opportunity to increase their export volume; to identify and discover the international market trends.

**Organizer**



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## **FOOTWEAR, LEATHER AND ACCESSORIES**



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70<sup>th</sup> **Aysaf** SPRING/SUMMER '25

INTERNATIONAL EXHIBITION FOR FOOTWEAR MATERIALS,  
COMPONENTS, LEATHER AND TECHNOLOGIES

**Aysaf**  
**LEATHER**  
Leathergoods, Accessories and Trends

**Aysaf**  
**TECHNOLOGIES  
& CHEMICALS**  
Chemicals and Technologies for the Footwear, Leather Industries



**01-04 May 2024**  
Istanbul Expo Center



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## **AGRA FOOTWEAR EXPO 2024 closed with satisfactory results**

- **More than 10,000 people from the Trade and Industry were the fair.**
- **Over 150 D2C Brand visited the event.**

The maiden edition of the Agra Footwear Expo 2024 - a complete Footwear B2B trade event, organised by the Indian Footwear Development Council (IFDC), at the Agra Trade Centre, Village Singhna, Agra from 29<sup>th</sup> to 31<sup>st</sup> March, 2024 concluded with positive results

With over 100 Companies putting up 150 Stands, occupying two thousand sq mtrs space presented their latest products and fashion trends. Over 30 overseas countries, such as, France, Italy, Spain and China participated in the event directly or through their representatives/agents in India.

Agra Footwear Expo 2024 was inaugurated on 29<sup>th</sup> March, 2024 jointly by Shri R K Jalan, Chairman, Council for Leather Exports (CLE) & Shri Puran Dawar, President, AFMEC & Shri Rakesh Garg, Vice President, Laghu Udhog Bharti Nigam Ltd.

Other dignitaries present on the occasion were: Shri Anuj Kumar, Joint Commissioner of Industries, Agra, Shri Vijay Gupta, President, Laghu Udhog Bharti, Agra, Shri Lalit Arora, Secretary, AFMEC, Shri Aniruddh Tiwari, Member, AFMEC, Shri Vinod Seetlani, President, Agra Sole Shoe Manufacturers Association, Shri Amba Prasad Garg, Vice President, NCIC, Agra, Shri Manish Agarwal, President, Braj Development Foundation, Shri Shelash Pathak, IFDC Board Member, Shri Pradeep Pippal, President, Bheem Yuva Vyapar Mandal, etc...







On 30<sup>th</sup> March Knowledge Session & Panel discussion were held. The Topic of Panel discussion was “Global Marketing Trends”, “MSME Policy of Government of Uttar Pradesh”, “Health & Wellbeing of Industry Workers” & “Financial Analytics – Power in Business Growth & Financing Schemes”.

Shri Sushil Yadav, Asst. Director, MSME, Shri Shiv Nauputra, CEO, IFDC, Shri Devesh Agarwal CA, Dr. Sangeeta Bagariya, Shri Ravi Subaiya, Ms Nidhi Agarwal, CA-Anuj Kumar, Shri Neshesh Agarwal, Board Member, IFDC, Shri Shalesh Pathak, Board Member, IFDC, Ms Abhilasha Gupta were the panel members. The session was attended by Exhibitors, IFDC Members, Press/ Media & Students from Leather Training Institutes. A Networking & Gala Dinner was organised at KNCC, Fatehabad Road, Agra in the evening on the same day.

The closing ceremony of the event was held on 31st March, where the sponsors & exhibitors were honoured. The dignitaries present on the occasion were

Shri Pradip Wasan - Board Member, IFDC, Shri Shiv Nauputra - CEO, IFDC, Shri Shalesh Pathak - Board Member, IFDC, Shri Neshesh Agarwal - Board Member, IFDC, Shri Pradeep Pippal - President, Bheem Yuva Vyapar Mandal, Shri Praveen Talwar, Shri Pradeep Puri Ji - Owner - Prakrati Packs, Shri Manish Agarwal - Owner - Raavi Events, and the MD - Shri Ram Footwear Pvt. Ltd.

There was a total footfall of Approx. 10,000 Business visitors from Chennai, Kanpur, Noida, Jalandhar, Gurgaon & Agra & Overseas (Srilanka, Nepal, Dubai) & More than 150 D2C Brand Visited this Expo. The location of Agra Trade Centre (25 Km from the City) did not have any effect on the footfall in the Fair. It is anticipated that there will be further growth in Exports from Agra from the present export of Rs. 5000 crore.

As per the feedback received from the participants - they were very happy with the new Location due to excellent Infrastructure & facilities available. They were also very much satisfied with the footfall & quality of visitors from various cities & good business response. 90 % of Exhibitors have assured of their participation in the next edition.

## **40<sup>th</sup> APLF : Successful return to Hong Kong Tempered by Slow Market Demand**

- **740 Exhibitors welcomed over 12,000 visitors from 73 countries and regions.**
- **The top 10 countries were China, India, Italy, Japan, Korea, Taiwan, Thailand, Turkey, USA & Vietnam.**
- **18 National pavilions which include Australia, Brazil, China, France, Japan, Korea, India, Italy, Mexico, Pakistan, Portugal, Spain, Thailand, Turkey & U.S.A.**

After an absence of five years, APLF finally returned to its home base in Hong Kong to celebrate the 40th year of its launch in 1984.

Due to low prices and slow demand for leather, especially in the footwear sector, pre-fair expectations were mixed and somewhat muted. At the same time, there were hopes that the return of APLF could give the flagging market a much-needed boost as was expressed by Toni Baltes, President of the International Council for Hides, Skins & Leather Traders Associations (ICHSLTA) at the cocktail reception held on the evening before the fair.

No-one really knew what to expect and there was a visible sense of relief when the fair finally opened on the morning of 19 March with crowds of visitors waiting to enter the exhibition halls. The fair got off to a brisk start and was busy throughout the day.

Reports in the Italian publications *Leather Insiders* and *La Conceria* wrote that the return of APLF had been a success but wonder how much business had been transacted.

Nevertheless, exhibitors were satisfied with the movement of visitors, even though footfall was somewhat lower on the second and third days of the event.

Considering the mixed economic backdrop, APLF ended its 38th edition reflecting actual market conditions. However, the fair had served its purpose of bringing the main players of the global leather industry together, once again, on the one roof to reestablish customer contacts on a face-to-face basis.

Historically, the leather business has always been a “people business” and APLF continue this function even after and enforce five-year absence.

There were approximately 740 exhibiting companies at APLF 2024, of which almost 500 were in the two leather halls on Level 3 of the Hong Kong Convention and Exhibition Centre.

One of the significant features of the APLF Leather fair is that leading tanning countries organise national pavilions at the fair. This year there were 18 nationals’ pavilions from countries such as Australia, Brazil, China, France, Japan, Korea, India, Italy, Mexico, Pakistan, Portugal, Spain, Thailand, Türkiye, and USA amongst others.

Some of these pavilions had reduced their exhibition space compared to the last fair held in Hong Kong in 2019 for various reasons. For example, the pandemic, follow by the conflict in Ukraine impacted the global economy and companies in the leather industry were not immune from the negative consequences.

Even the world’s two leading producers of leather, China and Italy, have had a difficult 2023. Mr Chen Zhanguang, Vice Chairman of China Leather Industry Association (CLIA) reported on the performance of the China leather industry during the All China Leather Exhibition 2024 press conference. He highlighted that leather production had declined yet again in China.

In the case of Italy, at a meeting in Arzignano on 13 March, UNIC stated that production of leather in Italy had fallen to its lowest level in forty years.





Thus, it is still not possible to gauge how many companies may have gone out of business or substantially reduced their business activities. Hence, there were fewer exhibitors participating at the event.

## **Visitors**

The 2024 edition of APLF attracted around 12,000 visitors from 73 countries and regions.

The Top 10 visiting countries and regions (excluding Hong Kong) were as follows:

China, India, Italy, Japan, Korea, Taiwan, Thailand, Türkiye, USA and Vietnam

What makes the top visiting list of countries interesting is that China and India are the two major Asian economies with the highest forecasted GDP growth for 2024 and the highest levels of Consumer Confidence. This is according to the macroeconomic statistical website, Trading Economics.

This is a clear illustration of how APLF reflects economics in the Asian region and the potential demand for supplies and products related to the leather and fashion sectors.

## **Some Exhibitors Comment**

**Commercial Director of Arlei Leather from Argentina, Gabriel Barmaimon**, commented on the large number of visitors who passed through the fair on the first day, among whom were many buyers from China. International business is challenging for Argentina tanners as they are struggling with an “economic storm” at home and an unstable exchange rate when it comes to exports. There is tough competition from Brazil.

## **Brazil – Back with a Bang at APLF!**

The 55 Brazilian participants who exhibited at APLF with the support of Brazilian Leather projected sales of US\$ 185.2 million for the next



12 months, based on contacts made in Hong Kong. This number exceeds the total recorded in 2019, which was US\$181.1 million.

Sales contracts signed during APLF Leather also show positive numbers for Brazilian tanneries: US\$33.9 million worth of leather was sold over the three days of the fair, almost 30% more compared to 2019. Contacts established are also on the rise: 1.5 thousand in 2024, compared to 1.4 thousand in the most recent edition, five years ago.

The evaluation of Brazilian tanneries participating in the fair was excellent: 100% are interested in returning in 2025, and 93.94% evaluate the event as positive.

**Gruppo Mastrotto from Italy** comments that we just returned from APLF Hong Kong, the commercial hub for the leather manufacturing in Asia, there was no shortage of networking opportunities, sustainability insights and collection presentation for our upholstery and fashion customers.

**Tannery Miret from Spain** – the 2024 fair had showed good movement of visitors and he had seen various peers and customers who had visited his stand at the last fair held in Hong Kong, in 2019.

**Manager of Teknocuero from Mexico** – Miguel Angel Dominguez noted that automotive leather is buoyant, but the shoe industry has yet to “wake up”. Mr. Dominguez was very enthusiastic about APLF Leather this year as he considered the visitor flow and quality of buyers much better than the last event held in Hong Kong, five years ago.

### **Importance of Onsite Events**

Education and information form part of APLF’s onsite events agenda and are an example of APLF serving the leather industry by being part of it.

One of the key events held during APLF 2024 was the seminar on the main stage dealing with the subject of deforestation and the

regulations governing raw materials exported from the Amazon to the European Union.

The speakers came from influential organisations in the leather industry such as COTANCE, the Leather Working Group, the Sustainable Leather Foundation, and the World Wildlife Fund.

Just as the seminar on Deforestation is a clear signal of how information can be imparted about the latest topics concerning the leather industry, in the same way there were other onsite events such as Let's Talk Leather Masterclass and Leather Foundation Course for Fashion Professionals held during APLF 2024 dedicated to the leather industry.

### **Global Footwear Executive Summit 2024**

In its third edition, Global Footwear Executive Summit is an annual gathering of industry leaders, executives, and professionals from the global footwear sector. Held on 20th March 2024, participants gain valuable knowledge about the latest advancements in materials, manufacturing technologies, retail strategies, and consumer behavior.

These were some of the standout onsite events held during APLF 2024 which combined with the trade fair's commercial platform to offer education and information to all industry stakeholders attending the fair.

The APLF team is already planning the organisation of APLF 2025 as part of its ongoing mission to continue serving the global leather and fashion sectors.

The next edition of APLF will take place in Hong Kong from 12 – 14 March 2025.

[www.aplf.com](http://www.aplf.com).

\* \* \*

# Global Footwear Executive Summit 2024, Hong Kong



## Addressing Challenges and Shaping the Future of the Footwear Industry

The Global Footwear Executive Summit, held on the second day of the Asia Pacific Leather Fair (APLF), gathered industry leaders and experts to dissect the challenges and opportunities within the footwear sector. With sessions ranging from production and supply chain management to material sustainability and retail branding strategies, the summit provided a comprehensive overview of the current landscape and future trajectories of the footwear industry.



Nerisha Jairaj – Director South African Export Council (SAFLEC), Benjamin Lau – Partner China of Materialise 3D, Lazaro Rogerio – Director Footwear Gap Inc, Rosy Wang – Director Footwear Eram Group and William Wong – Consultant of HK Footwear Association

## Session on **Footwear Production and Supply Chain**

Under the moderation of William Wong, Consultant of the Hong Kong Footwear Association, the first session delved into the critical issue of balancing supply and demand in the footwear market.

Lazaro Rogerio from Gap Inc. shared his insights, stating, “The industry has faced significant shifts over the past five years, with supply often outstripping demand. We must adapt our supply chain strategies to meet evolving consumer preferences.”

Benjamin Lau, Partner China of Materialise 3D, emphasized the need for innovation, stating, “Technological advancements like 3D printing offer opportunities to streamline production and reduce waste. Embracing these technologies will be crucial in addressing supply chain challenges.”



## Session on **Footwear Material**

Moderated by Joel Lecroq of Super Lecroq Consulting Co Ltd, the second session explored the sustainability of footwear materials.



(R-L) Joel Lecroq – Super Lecroq (Xiamen) Consulting Co Ltd, Neil Wright – National Sales Manager of Kamu Safety Footwear, Bernie Rhodes – Director of Rhodes Management Consultancy Ltd, Dr. Thomas Schmidt – Director HuaFeng Textile Group, Carl Flach – Senior Director for Operational Strategies of ISA Tantec and Herman Wong – Co Founder of Affinity Network

Neil Wright from Kamu Safety Footwear highlighted the importance of sustainable materials, stating, “Consumers are increasingly seeking environmentally friendly options. It’s imperative for brands to prioritize sustainable materials in their product offerings.”

Herman Wong, Co-Founder of Affinity Network, echoed this sentiment, stating, “The future of footwear lies in materials that are both eco-friendly and high-performing. Brands that embrace sustainability will not only meet consumer demand but also drive positive change in the industry.”





Session on: **Footwear Retail and Branding**

**“Marketing isn’t just about the product. It’s about the Market.”**

stated Amit Chopra, Managing Director of Shoes & Accessories Magazine, while he led the final session, focusing on the future of footwear retail and branding.



Amit Chopra – MD Shoes & Accessories, Andrew Wood – Commercial Director Asia Pacific Steve Madden, Vikas Bagga – Business Strategy Consultant, Rajesh Kadam – CEO of Inc.5 Shoes & Adang Zheng – Footwear Director of Kolon Sport, Anta Group

Andrew Wood from Steve Madden emphasized the importance of customer-centric strategies, stating, “In a crowded market,

understanding and catering to consumer needs is paramount. Brands must prioritize customer experience to stay competitive.”

Rajesh Kadam, CEO of Inc.5 Shoes, emphasized the role of branding, stating, “Authenticity and relevance are key in building brand loyalty in today’s marketplace.”

Vikas Bagga, Zoom Shoes, emphasized the role of story telling, stating, “Brands must tell compelling stories and create meaningful connections with consumers.”



Shri. Amit Chopra, Managing Director of Shoes & Accessories Magazine



The summit concluded with a dynamic Q&A session, where attendees engaged with panelists to delve deeper into the key themes and insights shared throughout the day. As the footwear industry continues to navigate through unprecedented challenges and opportunities, events like the Global Footwear Executive Summit serve as vital platforms for collaboration, innovation, and collective progress.

Source: [shoesandaccessories.in](http://shoesandaccessories.in)



## **Fighting misinformation and greenwashing in the footwear sector**

The Erasmus+ VETting Green project was recently launched to support the European Union efforts to put an end to Greenwashing on consumer products. The partnership, composed by footwear producers, vocational training providers and consumer representatives from 5 European countries (BE, GR, IT, PT and SP) aim at preparing footwear companies to tackle greenwashing with the necessary training tools and materials.

In line with the United Nations 2030 Agenda for Sustainable Development and its 17 Sustainable Development Goals (SDGs), the EU is implementing the Circular Economy Action Plan (CEAP), a building block of the EU Green Deal, to become the first climate-neutral continent by 2050. Special attention is given to tackle misleading green claims that have during the last years while consumers demand for transparency and veracity. Europe has responded with two Directive proposals, the Directive on Consumer Empowerment for the Green Transition and the Directive on new rules for substantiating green claims, aimed at consumers and manufacturers respectively, both of them about to be approved.

The VETting Green project was conceived to support the implementation of these legislative proposals, by helping footwear managers, workers, and also consumers differentiate environmentally sustainable business practices from empty marketing strategies that constitute greenwashing. For this purpose, the project will generate new knowledge and Vocation Education Training (VET) courses on how to display and base substantiated claims and avoid greenwashing. Partners will develop attractive courses for VET students and professionals thanks to digital tools



with a learner-centred approach, based on augmented reality modules, explanations, good practices, templates and quizzes with a gamification approach that will allow learners to interact more in the process, making learning more enjoyable and fun. In addition, the project will support policy makers and public authorities on the transition towards greener policies in the footwear and related sectors, while tackling unscrupulous practices that exploit consumers' willingness to protect the environment.

By the end of the project, VETting Green wishes to generate knowledge among current and future workers in the sector, as well as among consumers of footwear and other textile products, so to reach a common understanding of sustainable practices and concepts that improve transparency and avoid intentional or unintentional greenwashing by companies in the footwear sector and beyond. More than ever, it is crucial to combat misinformation and greenwashing, and to advocate greater corporate social and environmental responsibility, which could help reduce the sector's environmental impact and combat climate change.



## **Erasmus+ SHOEGAME: It's time to play!**

On the occasion of the final physical meeting of the project on 7th and 8th March, project partners from Belgium (CEC), Greece (Cre Thi Dev), Portugal (CTCP and Virtual Campus), Romania (TUIASI) and Spain (INESCOP) gathered in Romania to plan the final stages of the project.

The Erasmus+ ShoeGame project aims at attracting younger generations to footwear manufacturing studies, preventing school drop-out and maintaining students' interest and motivation with an innovation training approach such as a serious game in VET education.

The game, the main project outcome, has been designed as a learning tool for current or future VET students in footwear manufacturing, who will in addition will develop digital skills by playing.

The game will be available on the project website at the end of March 2024. Once the final version has been launched, partners will begin the piloting phase. This involves gathering as much feedback as possible on the game from its target audience, namely VET students and teachers. To this end, the partners in Portugal (CTCP), Greece (CTD), Spain (INESCOP) and Romania (TUIASI) will be organising webinars to explain the concept of the game to teachers and students and will allow participants to interact with it while giving their feedback to the authors. These webinars should take place between 8 and 12 April. Follow our SHOEGAME Facebook page in the coming weeks for more information!

If you are interested in getting involved with the Erasmus+ SHOEGAME project, you can contact any of the partners to find out the opportunities of being an active actor. The methodology has been designed to be replicated in VET studies of other manufacturing industries. You can also follow the progress of the Erasmus+ SHOEGAME project on our website and social media.

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***Please visit our website:***

***[www.indianleathermagazine.com](http://www.indianleathermagazine.com)***



## EU Digital Product Passport - Putting Power into Consumer's Hands When Buying Clothes



### Meeting the Challenge of Sustainability in Plastics

We all rely on clothes to protect us, make us feel good and help us operate effectively in our work and leisure environments. Unfortunately, clothing is one of the most resource-intensive and pollution-generating consumer product industries on the planet.

Distinguishing truth from fiction can be difficult when looking at environmental claims. An EU study from 2020 described 53.3% of environmental product claims as “vague, misleading or unfounded” and found 40% were unsubstantiated by verifiable evidence.<sup>1</sup>

The EU is acting to ensure that consumers are empowered to make better clothing purchasing decisions by giving them access to consistent, reliable and trusted environmental information about the products they choose. By introducing far-reaching regulatory changes that will impact all industrial sectors it aims to create a safer and more sustainable economy.

In response to the trend for ‘fast fashion’ that has dominated the first quarter of this century, they want to make clothing more sustainable by altering the way we choose, maintain and dispose of items at the end of their useful life. To achieve this, they seek to ensure consumers have the information they need to become more environmentally responsible citizens.

## **Digital Product Passport**

Apparel markets have been flooded with environmental claims in recent years. Claims like ‘planet-friendly’ or ‘good for the environment’ are, at best, ambiguous and, at worst, misleading, leading to confusion among consumers who are just trying to do the ‘right thing.’

The EU aims to stop the influence of such claims in all consumer product markets through the use of a Digital Product Passport (DPP). This will sweep away broad, ill-defined claims and replace them with clear, consistent and comparable information on a product’s environmental performance.

For the first time, apparel brands will be required to have the environmental performance of their clothes independently assessed and certified. The information declared in the DPP will give consumers information they can trust to better inform their purchasing decisions.

The DPP will typically report important environmental factors such as:

**Durability, Repairability, Recyclability, Recycled content, Greenhouse gas emissions, Water consumption.**

The key element for consumers is that the ‘scores’ for each of these environmental factors will be calculated in the same way, against a common standard, by an impartial, third-party assessment body using a defined set of methodologies.

However, the DPP does a whole lot more than just report six sustainability scores. In effect, it is also the product's digital twin, in this case, clothing. A QR code attached to the inside of the garment can be scanned by a smartphone, revealing a host of information relating to ownership, maintenance and repair. These records will be updated throughout the product's life cycle, from manufacture to disposal, creating a complete digital biography for the garment.

## SGS Solution

bluesign<sup>®</sup>, an SGS company, is making it possible for apparel brands to comply with the demands of the EU Digital Product Passport.

The bluesign<sup>®</sup> SYSTEM, a holistic approach based on input stream management, helps clothing and textile brands and retailers guarantee consumer safety while reducing the impact of their products on people and the environment through responsible use of resources.



**Dr. Daniel Waterkamp**

Head of bluesign<sup>®</sup> ACADEMY,  
an SGS company

bluesign has been working with environmentally responsible global brands, manufacturers and chemical companies in the apparel and textile industry for over a quarter of a century and is ideally placed to help companies adapt to the introduction of a common standard for the way environmental impacts are reported. Our clients will benefit from customizable solutions, including environmental appraisal and supply chain assessment, all designed to meet the requirements of the DPP.

## References

<sup>1</sup> Enabling sustainable choices and ending greenwashing

# SGS explores why fashion companies need traceability in their supply chains

## Why Fashion Companies Need Traceability in Their Supply Chains

Evelyn Ma, PhD, Softlines – Global Technical Innovation & CN R&D, SGS asks brands: Are your customers familiar with the materials used in your clothing, footwear or accessories? Do they have insight into the origins of these fabrics or where they are assembled to create the product they buy? Not all stakeholders prioritize these questions, but they are crucial for the fashion industry.



### Supply chain traceability in the fashion industry

In recent years, supply chain traceability and transparency have emerged as a critical issue in the fashion industry's sustainability transformation. Traceability is the process of identifying the origins of a product.<sup>1</sup> It involves a series of interconnected stages along the supply chain, including the sourcing of raw materials, processing, production, transportation and distribution.

However, due to the complexity and globalized nature of fashion industry supply chains, brands and retailers often need help seeing their complete value chain.

This lack of visibility leads to inefficiencies and challenges in tracking a product's journey. Brands may struggle to verify the origin of a particular material, ensure compliance with labor standards or accurately assess the environmental impacts of their products.

The fast-paced nature of the fashion industry, driven by trends and consumer demand for new products, can also create further complications when trying to improve traceability. Short production cycles and frequent product launches make it difficult for brands to prioritize traceability initiatives and invest in robust monitoring systems.

Furthermore, the increased use of preferred materials, such as recycled or bio-based fibers, amplifies the demands placed on sourcing raw materials as brands need to provide solid evidence to ensure the veracity of product sustainability claims.

## **Traceability drivers**

A primary driver for traceability is regulatory compliance. Governments and regulatory bodies are imposing ever-stricter regulations and non-financial information disclosure requirements on businesses. For example, the EU cooperative sustainability due diligence directive (CSDDD) asks companies to identify and address potential and actual adverse human rights and environmental impacts across their operations, subsidiaries and value chain.<sup>2</sup>

The EU deforestation-free product regulation, which entered into force in 2023, makes the demand that goods such as timber, leather and rubber must not originate from areas of deforestation or forest degradation.<sup>3</sup>

Companies under the scope of these regulations are required to conduct strict due diligence across their complete value chain. These regulations prioritize the need for traceability since non-compliance may lead to legal sanctions, reputational damage and financial losses. Moreover, the increasing awareness of product sustainability among consumers is also driving the need for greater traceability. Ethical and sustainable practices have become significant factors influencing purchasing decisions. Brands that can demonstrate transparency and responsible sourcing practices are more likely to gain consumer trust and loyalty.

The third factor is the corporate image. Traceability allows companies to evaluate supplier performance, identify and address financial and operational risks proactively, and weed out inefficiencies. In addition, traceability initiatives enable brands to improve their corporate image by showcasing a commitment to ethical sourcing, sustainable production and social responsibility.

## **Promoting traceability**

To enhance supply chain traceability in the fashion industry, brands can work closely with suppliers to map the entire supply chain, identify potential risks and establish corresponding monitoring mechanisms. Conducting regular audits and inspections of suppliers' facilities is essential for ensuring compliance with labor standards, environmental regulations and ethical practices. Using robust monitoring systems will also help companies track a supplier's performance, allowing them to promptly address any deviations from established criteria.

Brands can also apply and promote innovative digital methods, such as blockchain technology, to enhance the collection, management and analysis of supply chain data. Fashion brands can create transparent and tamper-proof records for each stage of production and transaction, from raw material sourcing to product distribution. This enables real-time traceability and provides consumers with verifiable information about the origins and journey of their garments.

### **SGS Solution**

SGS offers comprehensive traceability services to support the fashion industry in achieving its traceability goals.

#### **Solutions include:**

- Traceability management program setup – supply chain mapping and traceability standard operation procedures development and implementation
- Traceability management training – tailor-made training content, including traceability standards and requirements
- Traceability digital platform (SGS SMART Source) – order data collection, management, query and analysis
- Product order review – verify the completeness and consistency of order documentation
- Facility on-site verification – assess a supplier’s traceability management performance
- Tracer solution – employ a pigment tracer to track a product along the supply chain

Solutions can be combined and customized to meet the demands of the brand or retailer.

Working in partnership, SGS provide services that support companies to enhance traceability and transparency in their supply chains to enable a more sustainable and circular future.

### **References**

1. GS1 Global Traceability Standard
2. Corporate sustainability due diligence - European Commission
3. Regulation on Deforestation-free products - European Commission

For further information, please contact:

**Jackie Brown, PR Account Executive, Sugarloaf Marketing Ltd.**

Email: [jackie@sugarloafmarketing.com](mailto:jackie@sugarloafmarketing.com),

<http://www.sugarloafmarketing.com>



## **EU agencies: more work needed to make chemicals safe and sustainable**

The transition towards safer and more sustainable chemicals is progressing in some areas, while in others, it is just beginning. This is the finding of a first, joint Europe-wide assessment of the drivers and impact of chemical pollution by the European Environment Agency (EEA) and the European Chemicals Agency (ECHA) published today. The benchmarking found that more work is still needed to reduce the impact of harmful substances on human health and the environment.

The number of industrial chemicals scrutinised under the EU's chemicals legislation to determine their safety has increased substantially. Authorities now have much better knowledge about the hazardous properties of chemicals that are used across the EU, resulting in many actions to minimise and control the risks of several groups of substances.

According to the joint EEA-ECHA synthesis report on the EU indicator framework for chemicals, the overall use of the most harmful chemicals (in particular those that are carcinogenic, mutagenic and reprotoxic) is still growing but more slowly than the overall chemicals market growth. Pressure is increasing to avoid the use of so-called substances of concern and to implement the principles of the safe and sustainable by design framework.

There is a need to more effectively ensure that consumer products do not contain the most harmful substances, for example chemicals that are endocrine disrupting, that negatively affect the hormone system, or substances that are persistent, bioaccumulative and toxic, which present a risk for years to come even after their use has ceased.

More data and information are needed to better understand human and environmental exposure to those most harmful chemicals and

their impacts. Still, the indicators show clearly that the shift to safe and sustainable chemicals must continue and should even be accelerated.

*“The health of European citizens and our environment should be a priority and this first-ever benchmarking shows that while chemicals have a positive role to play in our lives, further action is urgently needed to address the risks posed by the use of unsafe and unsustainable substances. The knowledge that is being generated in this assessment will help us shift to safe and sustainable chemicals in the future,”* said Leena Ylä-Mononen, EEA Executive Director.

*“We need to accelerate the transition towards safe and sustainable chemicals. Action by authorities and industry has helped to minimise and control the risks from hazardous chemicals. But we need to further increase knowledge on chemicals and support risk management of groups of chemicals to protect people and the environment,”* said Sharon McGuinness, ECHA Executive Director.

The report is based on a set of 25 key indicators, also published today, which monitor the drivers and impacts of chemical pollution in Europe.

The indicators will be regularly updated to monitor chemical pollution and measure the effectiveness of European chemicals legislation. The report provides an overarching assessment of progress under the EU’s chemicals strategy for sustainability towards a toxic-free environment (CSS).

## **Key findings**

- Transition towards safer and more sustainable chemicals is progressing in some areas while in others it is just getting started.
- Action by authorities and industry has supported minimising and controlling the risks from several groups of hazardous chemicals. Efforts are ongoing to increase knowledge on chemical hazards and support risk management action where needed.

- Available data suggest that there is little evidence of progress towards eliminating substances of concern from waste and secondary materials. This is a barrier to the transition towards a more circular economy.
- Emissions of certain chemicals to water and air have fallen following specific EU regulations (e.g., on industrial emissions) and international actions, but further measures are needed to reach concentration levels that are not harmful for human health and the environment.
- Emissions from industry still lead to major costs in terms of damages to human and ecosystem health.
- Human biomonitoring offers the opportunity to understand human exposure to chemicals from multiple sources and thus health risks associated with chemical pollution. As such, biomonitoring forms a key tool to measure the effectiveness of chemicals legislation in protecting human health and the environment.

### **The EU indicator framework for chemicals**

The EU's chemicals policies aim to tackle the challenge of producing and using chemicals to address societal needs while respecting planetary boundaries and avoiding harm to humans and the environment. The EU's chemicals strategy for sustainability (CSS) aims to achieve this vision through a number of measures including actions to support innovation for safe and sustainable chemicals, strengthening the protection of human health and the environment, simplifying and strengthening the legal framework on chemicals and building a comprehensive knowledge base to support evidence-based policy making.

The EEA, ECHA and the European Commission have developed a set of key indicators to support the goals of the strategy.

The framework has an online dashboard and the indicators are also accessible through this dashboard.

**For further information :** <https://echa.europa.eu/>

## **Micam with 3 days format in September**

The next edition of the Milan-based fashion trade fairs, MICAM Milano, MIPEL, TheOne and Milano Fashion & Jewels will be held at Fieramilano (Rho) from the 15th to the 17th of September 2024.

Contrary to previous announcements, the four trade fairs dedicated to fashion and accessories will now last only three days. Visitors who want to see the SS 2025 collections will be able to do so from the 15<sup>th</sup> to the 17<sup>th</sup> of September at the usual venue, Fieramilano Rho.

Under the banner #GREATIFY, the February edition of Milan's trade fairs welcomed 40 821 visitors, 45% of whom were from abroad.

On the other hand, Lineapelle, the international exhibition of leather, accessories, components, fabrics, synthetics and models, will take place at the same venue from the 17<sup>th</sup> to the 19<sup>th</sup> of September, as expected.

---

## **BFSHOW - (21<sup>st</sup> - 23<sup>rd</sup> May 2024)**

The 2nd edition of BFSHOW takes place at the Transamerica Expo Center, in São Paulo/SP, between the 21st and 23rd of May, and registration is now open on the website [www.bfshow.com.br](http://www.bfshow.com.br).

The largest Brazilian footwear fair, BFSHOW already has more than 220 confirmed brands 183 of which are exclusive. The companies are betting on the national exhibition, held by the Brazilian Footwear Industry Association (Abicalçados) in partnership with NürnbergMesse Brasil, to launch their Spring/Summer collections, the most important season of the year for Brazilian footwear and which absorbs more than 70 % of total industry sales.

BFSHOW will have more than 80% of national footwear production represented at the event Grendene, Alpargatas, Petite Jolie are some of the leading footwear manufacturers who will be showcasing their popular brands at the fair. More than 10 thousand buyers and professionals in the activity, both from Brazil and the international market are expected to visit the fair.



## **THE SUPREME FUR FASHION DESTINATION**

The 49<sup>th</sup> KASTORIA International Fur Fair will be held from April 25 to 27, 2024, at the International Exhibition Center of Kastoria (IECK) in Kastoria, Greece.

Luxury fur outerwear takes on another dimension at this year's International Fur Fair. Urban trends, with a touch of the carefree, convey refined charm and subtle elegance, spreading positive energy. This ode to color and rich textures will never cease to amaze the visitor, reflecting the magic and beauty of fur!

With the participation of a large number of Greek and foreign fur-making firms, the Fur Fair will present the latest trends for the AW2024-2025 season in women and men's ready-to-wear fur and leather garments, fur skins, fur plates, accessories, services, machinery, among other things.

Kastoria is the ideal meeting point for commercial collaborations, offering a huge variety in all product lines and guaranteeing the highest quality work by the most significant fur-makers in the fur sector. Fashion, innovation and luxury take center stage in this unique event, held in a unified exhibition space of 13,000 m<sup>2</sup> (140,000 ft<sup>2</sup>), where the furriers' creations will be showcased.

The International Exhibition Center will once again be transformed into an international crossroads of business activity while commercial visitors will have the opportunity to source a wide range of ready-to-wear garments made of fur, leather and a combination of materials directly from the only place in the Western world where furs are produced, the Greek town of Kastoria.

The list of Exhibitors is available at the following link: <https://www.furfairkastoria.com/exhibitor/ecatalogue>

The Fashion Gala has been scheduled for the first day of the event at the Exhibition



## 32nd Shoes & Leather - Guangzhou



**China Import & Export Fair Complex Area A**  
Line 8 Xingangdong Metro Station (Exit A)

**29-31 MAY 2024**

- **A One-Step Sourcing Expo for Footwear & Leather Industry**
- **Visitor registration is open <https://slgztorepute.com.cn> to get a unique QR code**
- **More than 800 exhibitors are expected to welcome 20000 + visitors**

The 32<sup>nd</sup> edition of the **Shoes & Leather - Guangzhou**, the International Exhibition on Shoes & Leather Industry - Guangzhou, incorporating, International Footwear Exhibition, (IFLE), Guangzhou International Leather Exhibition (GILE), Guangzhou International Tanning Technology & Machinery Exhibition (GITTME) and International Trade Fair for occupational Safety and Health Goods, organised by Top Repute Co Ltd and the Association of Guangdong Shoes Manufacturers, will take place at the China Import and Export fair Complex, Guangzhou, China from 29-31 May 2024.

### **EVENT HIGHLIGHTS**

- **An excellent platform for industry professionals**
- **Exchange information, showcase products, and establish new partnerships with industry practitioners**
- **Feature the latest trends and innovations in the industry**

- Exhibits include advanced machinery and quality material
- FINISHED PRODUCTS zone is newly incorporated this year

In 2023 edition there were exhibitors from 13 countries & regions and professional visitors from 50 countries & regions. The Shoes & Leather - Guangzhou 2024 is expected to have 800+ exhibitors and 20000+ visitors. The exhibits will include advanced shoe-making machines, cutting solution, leather, synthetic leather, materials, sewing technology, automation, chemical, garment, 3D printing, components and many more.



### **Footwear Machinery Expo Be Ready for the Future**

The Shoes & Leather - Guangzhou 2024 will mainly consist of shoe machinery show and leather & material trade fair. Facing this worldwide economical challenges, and the event will stimulate market recovery by offering a unique opportunity to connect with large number of new potential customers. Exhibitors from all over the world have the opportunities to re-establish and strengthen the relationship with visitor as well as buyers, and to boost their global business network.

### **Leather & Material Fair : Pursuit of Quality**

The Shoes & Leather - Guangzhou 2024 will present a wide range of quality exhibit collections, covering the supply chain of the footwear and leather industries. International exhibitors will present the latest footwear materials, leathers, synthetic leathers, components, hides, chemicals and many more

## **Technical Seminars : Material Innovation to Design**

Technical seminars will be taking place during the Shoes & Leather - Guangzhou 2024. International speakers will present their latest market technologies and fashion trends, which will be extremely helpful for the business planning and decision making. In 2023, many professional speakers presented topics included the latest innovative material technologies, emerging trend in footwear R&D as well as the comfort design in footwear

## **Inspire and Create**

One of the concurrent events in the Shoes & Leather - Guangzhou 2024 will be the **DESIGN WALK**. It is a non-profit platform sponsored by renowned shoe manufacturers, federations, and international footwear associations. It showcases stylish footwear, leather products, and accessories, while sharing new creativity and inspiration to positively impact the industry.

## **IFDC by CIFA : A Platform for World-Wide Designer**

The 12th edition of the International Footwear Design Competition (IFDC), organized by the Confederation of International Footwear Conference (CIFA), was sponsored and co-organized by Top Repute Co. Ltd. Since 2008, IFDC has been introducing multi-national designers' concepts, while also offering opportunities for young designers to connect with manufacturers.

The event also aimed to promote the importance of original product design, fine production skills, and quality to build unique branding. In 2023, a total of 84 entries were received from 7 countries and regions, including Beijing, India, Indonesia, Malaysia, Philippines, Taiwan and Thailand.

The winning entries were announced and awarded during the Opening Dinner Banquet and displayed during the exhibition. The juror committee consisted of 8 renowned professionals, including international designers, trend experts, footwear consultants, lecturers, and representatives of global footwear associations.



## "Footwear Discovery"

The "Footwear Discovery" is an area in Shoes & Leather - Guangzhou 2024, The trade and industry associations and academies are invited to display their finished products and designs, bringing the latest market information to everyone. Manufacturers can connect with next generation designers.



### **Sourcing Meets Designs, Brands and Beyond**

The International Footwear Exhibition (IFLE) - Guangzhou will be on 29-31/5/2024 in China Import and Export Fair Complex (China), simultaneously with Shoes & Leather - Guangzhou 2024. It will showcase a wide range of finished footwear for business sourcing. The IFLE-GZ will focus on high quality footwear from factories across mainland China and Asia

### **Fair Opening Time**

On 29th & 30th May the Fair opens from 09-00 am - 17-30 pm

On 31st May 09-00 am - 15-30 pm

### **HONG KONG OFFICE**

Unit 2802, West Tower, Shun Tak Centre,  
168 - 200 Connaught Road Central, Hong Kong  
Tel: (852) 2851 8603 Fax: (852) 2851 8637  
Email: [topreput@top-repute.com](mailto:topreput@top-repute.com)

### **GUANGZHOU OFFICE**

Room C513, China Hotel Office Tower, 122 Liu Hua Lu,  
Guangzhou 510015, China  
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*Dr VS Sundara Rao*

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Web : [www.indianleathermagazine.com](http://www.indianleathermagazine.com)

# Global Leather Industry PART – I

## NSK SRINIVASAN <sup>1</sup> & HASMUKH SHAH <sup>2</sup>

UMTA Management & Textstyles Academy, Vapi, Gujarat, India <sup>1&2</sup>  
nsk\_sriya@yahoo.com<sup>1</sup> textiles.vapi@gmail.com <sup>2</sup>

*(Contd. from March issue)*

### 7. Innovations in Strategy

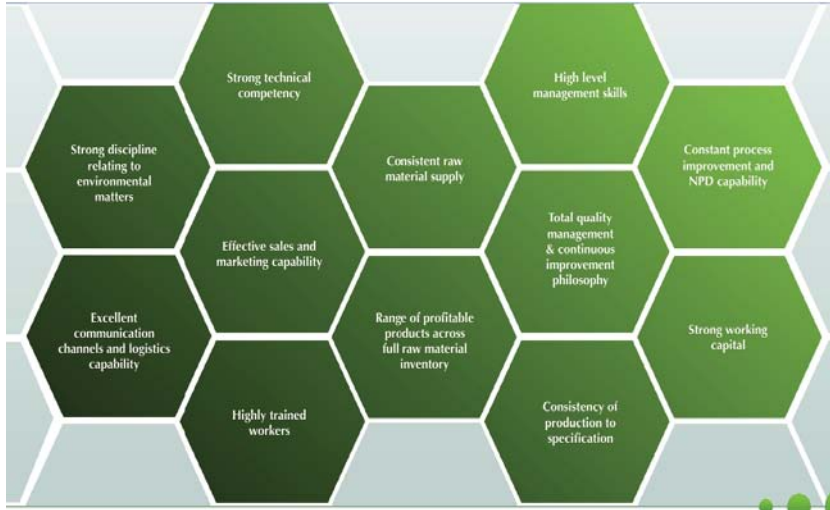
**Strategies** - Leading players in the global industry including Leather Industry, have adopted various strategies to achieve additional market share. Key strategies adopted by these players include product launch, joint venture, acquisition, partnership, expansion, and investment.

### 7.2 Challenges encountered by Leather Industry

#### Challenges encountered by Leather Industry

- Leather Alternatives – Synthetic Leather & Lesser extent from Recycled Leather, Bio Leather & Bio Fabricated Leather. Harmonious Living of Global Leather Industry
  - Environmental and economic issues – Responsible Manufacturing
    - Social pressures – Traceability
    - Technological changes – Safe Products & Processes
  - Challenges to nations with natural abundance of raw materials:
    - Factors driving the future of global leather sector
      - Macro changes impacting leather sector
- Review of process chemistry and tanning technologies in leather sector: a demand of the hour
  - Negative Publicity done about Leather
- Higgs Index & Leather Industry – Leather Industry Calls for Higg Index Review
- What is the future of (chrome) tanning? Leather manufacture in the new millennium.
- Leather Sustainability • Recycling of Leather • Leather 4.0 and Industry 4.0 to 5.0

**7.3 In order to be able to compete in the global market, the following essential criteria must be Followed Figure – 7 A**



**7.3 In order to be able to compete in the global market, the following essential criteria must be Followed Figure – 7 B**



Reference: Figures – 7 A & 7 B. Creating New Productive Capacity for the Leather Industry National Leather Roadmap November, 2018. This Strategy was commissioned by the Ministry of Trade and Industry (MOTI) and Ethiopian Investment Commission (EIC), in coordination with the Ethiopian Leather Industry Development Institute (ELIDI), Ethiopian Leather Industry Association (ELIA), for their valuable comments and technical support.

## 8. Leather Market Size - Global Industry, Share, Analysis, Trends and Forecast 2022 – 2030 <sup>8</sup>

The Global Leather Market Size accounted for USD 419.3 Billion in 2021 and is estimated to achieve a market size of USD 708.7 Billion by 2030 growing at a CAGR of 6.2% from 2022 to 2030. Rising disposable consumer income, increasing standards of living, evolving fashion trends, as well as more international and domestic tourism, are the primary drivers for the leather market growth. Furthermore, increasing adoption of comfortable, contemporary, and fancy leather garments, footwear, & accessories, as well as growing brand awareness, are likely to benefit the leather market value.

### Global Leather Market Overview Figure – 8 A



Source : 8 & 8.1 & Figure – 8 A Leather Market Size - Global Industry, Share, Analysis, Trends and Forecast, 2022 – 2030. Acumen Research and Consulting

## 8.1 Global Leather Market Dynamics <sup>8.1</sup>

### 8.1.1 Market Drivers

Increasing demand from the footwear industry. Rise in disposable income among consumers. Changing fashion trends among millennials. Rising domestic and international tourism.

### 8.1.2 Market Restraints

Strict laws prohibit the production and usage of natural leather. Impacts of PU and PVC used in synthetic leather manufacture.

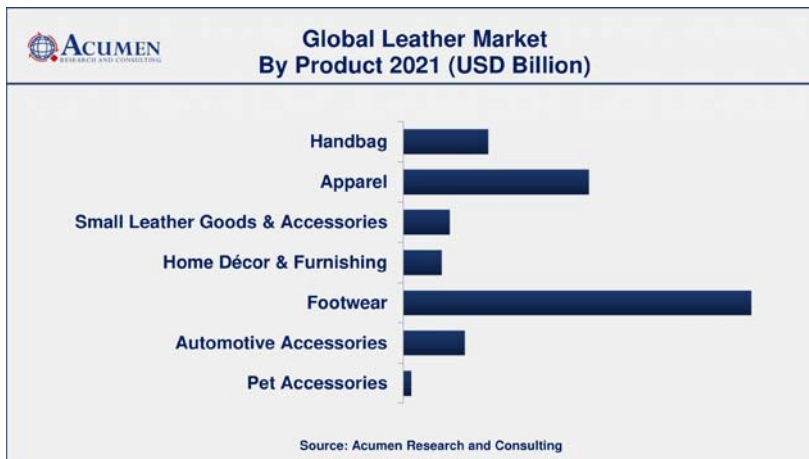
### 8.1.3 Market Opportunities

Constantly increasing e-commerce retail market. Concentrate on the creation of bio-based synthetic leather.

## 8.2 Leather Market By Product

Handbag, Apparel, Small Leather Goods & Accessories, Home Décor & Furnishing, Footwear, Automotive Accessories, Pet Accessories.

### 8.2.1 Global Lather Market By Product 2021 ( USD Billion ) Figure – 8 B



According to the leather industry analysis, the footwear segment will hold the largest market share in 2021. With the desire for leather athletic footwear rising, major brands in the footwear market, including Nike, Adidas, Puma, New Balance, Reebok, Allbirds, as well as Converse, have begun to venture into the leather athletic manufacturing market.

Source : Figure – 8 B. Leather Market Size - Global Industry, Share, Analysis, Trends and Forecast, 2022 – 2030. Acumen Research and Consulting.

## 8.3 Trends in the Leather Market <sup>8 C</sup>

- **Sustainability:** There is a growing demand for eco-friendly leather products, with consumers becoming more conscious of the environmental impact of their purchases.
- **Alternative materials:** Innovations in materials science have led to the development of alternative materials, such as vegan leather, that offer a more sustainable option for consumers.
- **Customization:** The trend towards personalization and customization is leading to an increase in demand for made-to-order leather products.
- **The growth of e-commerce and the use of technology in the fashion industry** is driving the adoption of digitalization in the leather market.
- **Automation:** Automation and robotics are being increasingly used in the leather industry, leading to improved efficiency and reduced costs.
- **Luxury goods:** The leather goods industry is dominated by high-end luxury brands, which are investing in research and development to create new and innovative leather products.
- **Recycling and upcycling:** The growth of the circular economy is leading to an increase in the recycling and upcycling of leather waste, reducing waste and promoting sustainability.

### 8.3.1 Leather Market Dynamics <sup>8 C</sup>

- **Growing demand for leather products:** The increasing demand for leather goods, such as footwear, clothing, and accessories, is driving the growth of the leather market.
- **Growth of the circular economy:** The growth of the circular economy is leading to an increase in the recycling and upcycling of leather waste, reducing waste and promoting sustainability.
- **Expansion of personal protective equipment market:** The increasing demand for personal protective equipment is driving

the growth of the leather market in industries such as construction and manufacturing.

- Investment in research and development: Companies in the leather industry are investing in research and development to create new products and improve production processes.
- Increasing use of leather in automotive interiors: The use of leather in automotive interiors is increasing, driven by consumer preferences for luxury and comfort in vehicles.

### **8.3.2 Growth Hampering Factors in the Leather Market <sup>8 C</sup>**

- High Competition: The increased competition in the leather market has led to a decrease in profits for leather companies.
- Changing Consumer Trends: Consumers are becoming more conscious of animal welfare and environmental sustainability, leading to a decrease in demand for leather products.
- Synthetic Alternatives: The popularity of synthetic alternatives such as faux leather and vegan leather is growing, affecting the demand for natural leather products.
- High Production Costs: The cost of producing leather products has increased, making them more expensive for consumers.
- Strict Environmental Regulations: Strict environmental regulations regarding the production of leather products have led to higher costs and reduced profits.
- Volatility in Raw Material Prices: Fluctuations in the prices of raw materials such as hides, skins, and leather chemicals make it difficult for leather companies to maintain consistent profit margins.
- Trade Restrictions: The implementation of trade restrictions and tariffs on leather products has affected the international trade of leather goods.



## 8.4 Top 10 Largest Leather Producing Countries in 2020 Table – 8 D

Top 10 Largest Leather Producing Countries in 2020 Table – 8 D			
Rank	Country	Ave. annual production (million sq.ft)	Share of global production
1	China	6,170	25%
2	Brazil	2,360	9.50%
3	Russia	1,652	7%
4	India	1,560	6.40%
5	Italy	1,521	6.30%
6	South Korea	1,140	4.80%
7	Argentina	804	3.40%
8	US	719	3%
9	Mexico	642	2.70%
10	Turkey	529	2.20%

Source : Table – 8 D. Global Leather Industry Factsheet 2020: Top 10 Largest Leather Producing Countries, Largest Exporters & Importers April 29, 2020. BizVibe

## 9. Global Overview- Footwear Market <sup>9</sup>

The global footwear market size is valued at \$ 365.5 Bn in 2020 and is estimated to reach \$ 530.3 Bn by 2027 with a Compound Annual Growth Rate (CAGR) of 5.5 per cent from 2020 to 2027.

The global footwear market is segmented into type, material, end users, distribution channel, and region.

By type, the market is categorized into athletic and non-athletic. Depending on material, it is bifurcated into leather and non-leather. On the basis of distribution channel, it is classified into hypermarket/supermarket, specialty stores, brand outlets, online sales channels and others. 3.1 Pairs of Shoes were produced in 2018 for each person on earth.

## 9.1 Country & Footwear Produced in Mn Pairs - Table – 9A

Rank	Country	Footwear Produced (Mn pairs)
1	 China	13,478
2	 India	2,579
3	 Vietnam	1,300
4	 Indonesia	1,271
5	 Brazil	944
6	 Bangladesh	461
7	 Turkey	447
8	 Pakistan	411
9	 Mexico	268
10	 Italy	184

## 9.2 Consumption

- Asia is the largest consumer of footwear globally with a share of 53.8 per cent followed by Europe and North America with shares of 15.2 per cent and 14.5 per cent respectively.
- In terms of the countries, China is the largest consumer of footwear with a world share of 18.4 per cent followed by India at 11.7 per cent and US at 10.7 per cent.

## 9.3 Exports

- The value of global export of footwear is valued at \$ 142 Bn as of 2018. Asia is the largest exporter of footwear having a world share of 83.8 per cent. China is the largest exporter of shoes with a world share of 64.7 per cent. There have been increasing trends towards textile footwear.
- In 2009, only 17 per cent of the footwear in terms of the number of pairs being exported were textile. However, this percentage has almost doubled to 32 per cent as of 2018.
- On the contrary, the share of leather footwear in terms of number of pairs has reduced from 19 per cent in 2009 to 14 per cent in 2016. Although given the higher average price, the leather footwear represents 39 per cent of the value exported.

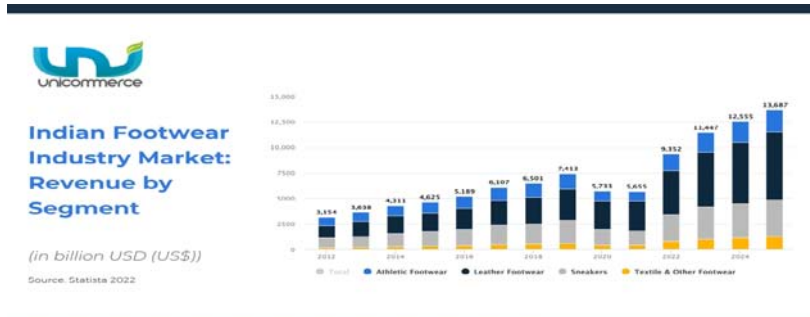
Source : 9 & Tables – 9 A. Non-Leather Footwear Industry in India By Mishika Nayyar, Arushi Chawla & Seerat Kohli SEPTEMBER 09, 2020

## 9.4 Indian Footwear Industry <sup>9.1</sup>

Indian footwear industry is one of the top employment generating industries in the nation. While it holds an important position in the Indian Government's drive, the sector dramatically contributes to the nation's economic growth.

As per [Statista](#), the footwear market amounts to US\$9,352m in 2022 and is predicted to expand annually by 13.53% (CAGR 2022-2025).

### 9.4.1 Indian Footwear Industry - Revenue by Market Figure – 9 B



The footwear industry in India is a combination of both the traditional and modern sectors, manufacturing both leather and non-leather footwear. India is the second-highest producer of footwear in the world, making it one of the leading providers of footwear and leather products.

Coming over to the future growth and predictions, as per an article by News On Air, the fast-growing industry of footwear is expected to expand at 11% in the next five years.

### 9.4.2 Footwear Market Growth in India Table - 9 C



Source : 9.1 & Figures - 9 B & 9 C. Footwear Industry in India - Trends, Challenges & Solutions

### 9.5 India Footwear Market, Industry Analysis and Forecast (2022-2027)<sup>9D</sup>

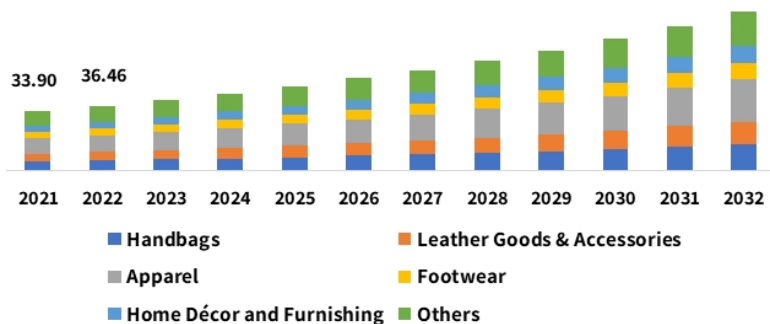
**India Footwear Market** size was valued at US\$ 13.49 Bn in 2021 and the total revenue is expected to grow at a CAGR of 12.83% through 2022 to 2027, reaching nearly US\$ 27.84 Bn.

### 9.6 Leather Goods Market Global Forecast, 2023-2032 Figure – 9E



#### 9.6.1 Global Leather Goods Market Size, By Product 2021-2032 ( USD Billion) Figure – 9F

Global Leather Goods Market Size, By Product 2021 - 2032 (USD Billion)



Source: www.gminsights.com

Source : Figures – 9E & 9F. Leather Goods Market - By Type (Genuine Leather, Synthetic Leather, Vegan Leather), By Product (Handbags, Leather Goods & Accessories, Apparel, Footwear, Home Decor & Furnishing), By Distribution Channel & Global Forecast, 2023-2032. Global Market Insights Inc.

## **9.7 The global leather goods market <sup>9G</sup>**

The global leather goods market was valued at USD 419.0 billion in 2022 and is anticipated to grow at a CAGR of 6.5% from 2022 to 2030. The global leather goods market is expected to reach USD 693.4 billion by 2030. Asia-Pacific is expected to grow the fastest during the forecast period.

Source : 9G. Leather Goods Market Size By Type (Genuine Leather, Synthetic Leather, and Vegan Leather), By Product (Footwear, Home Décor, and Furnishing), Global Industry Analysis, Share, Growth, Trends, and Forecast 2022 to 2030. The Brainy Insights.

## **9.8 The global leather goods market <sup>9H</sup>**

The global leather goods market size reached US\$ 390.9 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 598.4 Billion by 2032, exhibiting a growth rate (CAGR) of 4.8% during 2024-2032. The increasing preferences for premium quality leather-based apparel, rising inclination towards e-commerce platforms, and the growing demand for aesthetically appealing designs in home interiors are some of the major factors propelling the market.

## **9.9 Leather Goods Market Trends/Drivers <sup>9H</sup>**

### **9.9.1 Increase in changing fashion trends**

The fashion industry's constant evolution and embracing of leather in contemporary designs is another key driver. Designers are continuously experimenting with leather to create innovative and unique products, which range from clothing to accessories. Collaboration with renowned designers and use of sustainable practices in leather production is also attracting fashion-conscious consumers, thus fueling the demand.

### **9.9.2 Rise in sustainable and ethical considerations**

Consumer awareness about environmental sustainability and ethical sourcing has grown significantly. Many leather manufacturers are adopting

eco-friendly practices, using vegetable tanning, recycling, and sourcing from responsible suppliers. These measures appeal to environmentally conscious consumers, and thus are driving demand for leather products that are aligned with these values.

### **9.9.3 Growing marketing and celebrity endorsements**

The strategic marketing of leather products through advertisements, celebrity endorsements, and influencer partnerships has heightened consumer interest. High-profile collaborations and association with popular culture icons has made leather goods more appealing to a broader audience. By fostering a connection with public figures admired by many, brands are strengthening consumer trust and aspiration, thereby driving sales and interest in leather goods.

Source : 9H. Leather Goods Market Report by Product (Footwear, Leather Products), Material (Genuine Leather, Synthetic Leather), Price (Premium Products, Mass Products), Distribution Channel (Clothing and Sportswear Retailers, Departmental Stores, Supermarkets and Hypermarkets, Online Stores, and Others), and Region 2024-2032. IMARC Services Private Limited

## **10. Leather Industry Leather Produced by Animal Type - Animal Type, # of Hides (millions) & Total Weight (tons) <sup>10</sup>**

Bovine & Buffalo (364.3 million, 7,200,186 tons). Sheep & Lamb (550 million, 454, 703 tons).

Goat & Kid (486.3 million, 380,598 tons). Total (1400.60 million, 8,035,487 tons).

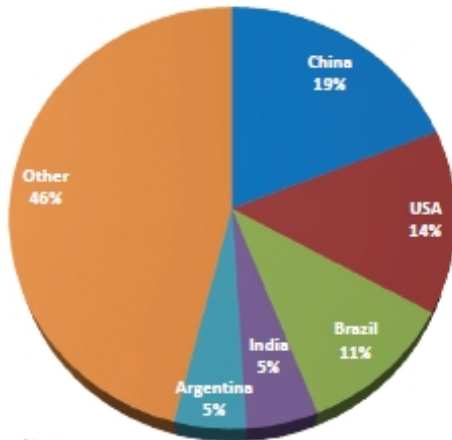
### **10.1 Leather Industry Leather Produced by Animal Type - Animal Type & % of All Leather <sup>10</sup>**

Cattle & Buffalo -67%. Sheep/Lamb-12%. Pig-11%. Goat/Kid-10%. Others- Less Than 0.5%.

## **11. RAW MATERIALS OF LEATHER: GLOBAL SCENARIO <sup>11</sup>**

### **PRODUCTION OF BUFFALO HIDES, CATTLE HIDES, GOAT SKIN & SHEEP SKIN IN THE WORLD 2013 Figure – 11 A & 11 B & 11 C & 11 D**

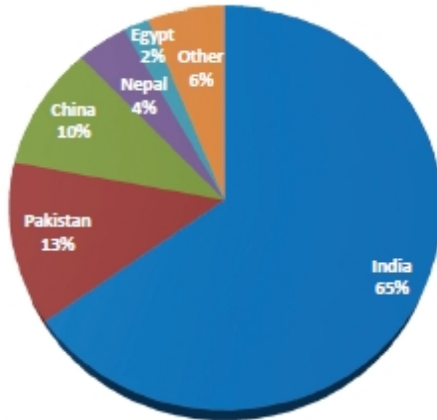
Key Producers of Cattle Hides in the World: 2013



Total (2013): 8121 thousand tonne

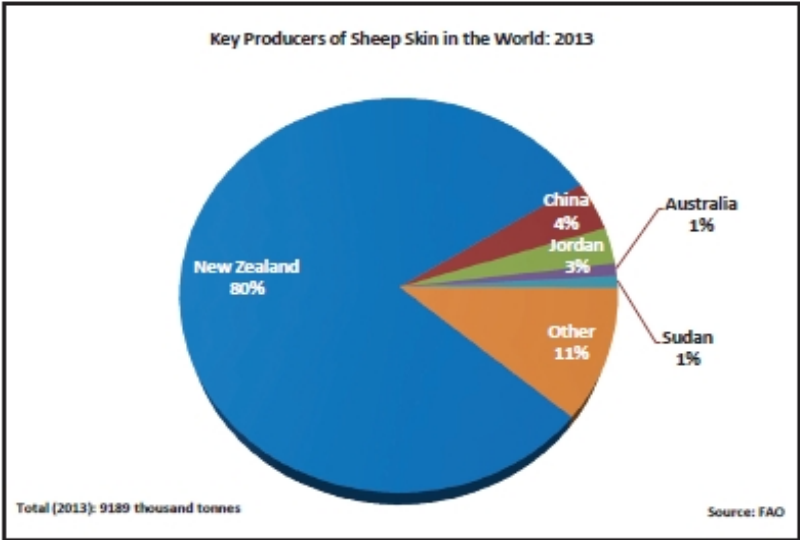
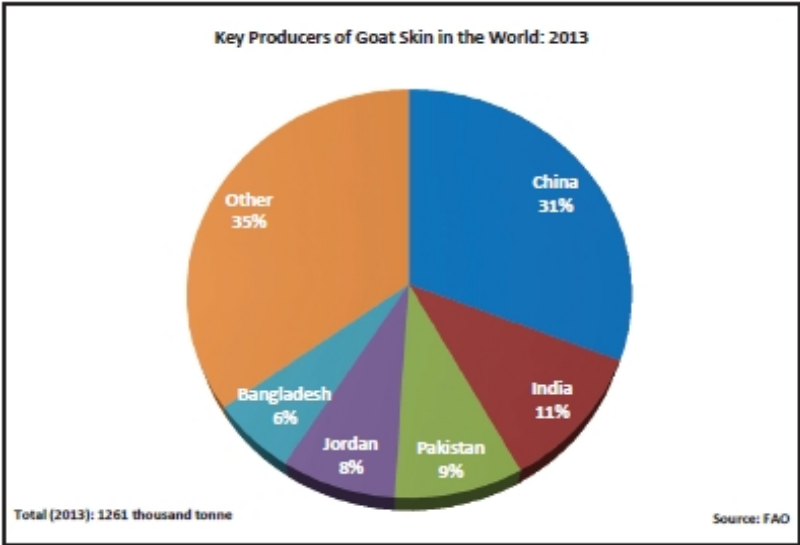
Source: FAO

Key Producers of Buffalo Hides in the World: 2013



Total (2013): 957 thousands

Source: FAO



Reference: 10 & Figures – 11 A & 11 B & 11 C & 11 D - Indian Leather Industry: perspective and strategies, EXPORT-IMPORT BANK OF INDIA, November 2015 WORKING PAPER NO. 46



## 12. Indian Leather Industry

The Leather Industry holds a very prominent place in the Indian economy and is one of the oldest manufacturing industries in India.

- In the past few decades, Indian leather industry has undergone a drastic change from being an exporter of raw materials in the 60's and 70's to exporter of various finished and fashionable leather goods.
- The Indian leather industry accounts for around 12.93 per cent of the world's leather production of hides/skins.
- India has abundant raw materials. India is home to 20% of world cattle & buffalo and 11% of world goat & sheep population
- In addition to the availability of raw materials, the skilled workforce, innovative technology, and increased industry compliance to international standards have made the Indian leather industry an attractive investment option. It provides employment to about 2.5 million people in the country
- India is the second largest producer of the footwear, the second largest exporter of leather garments and third largest exporter of Saddlery & Harness in the world.
- The Leather industry in India stands at USD 17.85 billion of which Exports are USD 5.85 billion and Domestic market consumption is USD 12 billion as of January 2019. India's total leather exports in FY2018-2019 amounted to a total of USD 5.7 billion. <sup>12</sup>

*(to be continued...)*

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# “Making Leather : An overview of Manufacture”



**Mr Richard P Daniels**, one of the renowned leather technologists, has recently come out with a study **“Making Leather: an overview of manufacture”** intended for people entering the leather sector who aspire to become technicians. This study is based on his rich technical experience from training (basic to MSc level and counterpart both directly also distance learning modules that he has authored plus numerous profiles/reports and field works etc.etc).. This was released at the IULTCS Congress in Ethiopia and is recommended by UNIDO, IULTCS and SLTC (going on their websites).

It contains information for those who need more than the most basic understanding of commercial leather manufacture. It follows the processes and operations used, and their purposes for making leather from bovine hides, sheep and goat skins. This study is intended for self-training and distance learning within the global leather sector. This great work is divided into 10 parts comprising 30,000 words in a condensed format and 300 integrated technical images/diagrams. It is essentially a self learning package and designed for use by smart phone, tablet and computer. It suits display and use by suitably qualified staff within formal education for discussion and expansion.

The author has gracefully made this comprehensive study available to readers at free of cost in our website. It is about making leather!

Please visit our website:

[www.indianleathermagazine.com](http://www.indianleathermagazine.com)

and click “Articles Tab” to view this great work.

# High Performance Fat Liquors

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Synthetic Fat Liquor with highly penetrating property and Light Fastness

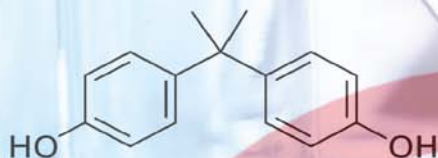


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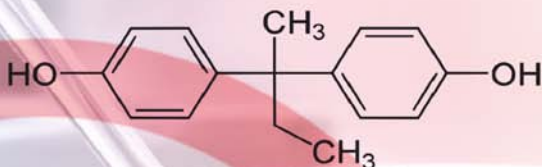
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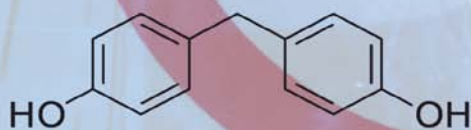
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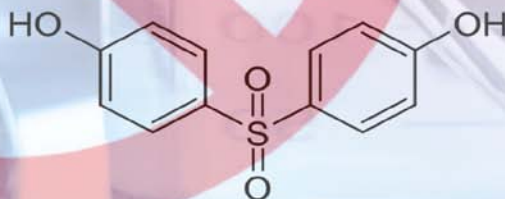
**BISPHENOL B**



**BISPHENOL AF**



**BISPHENOL F**



**BISPHENOL S**