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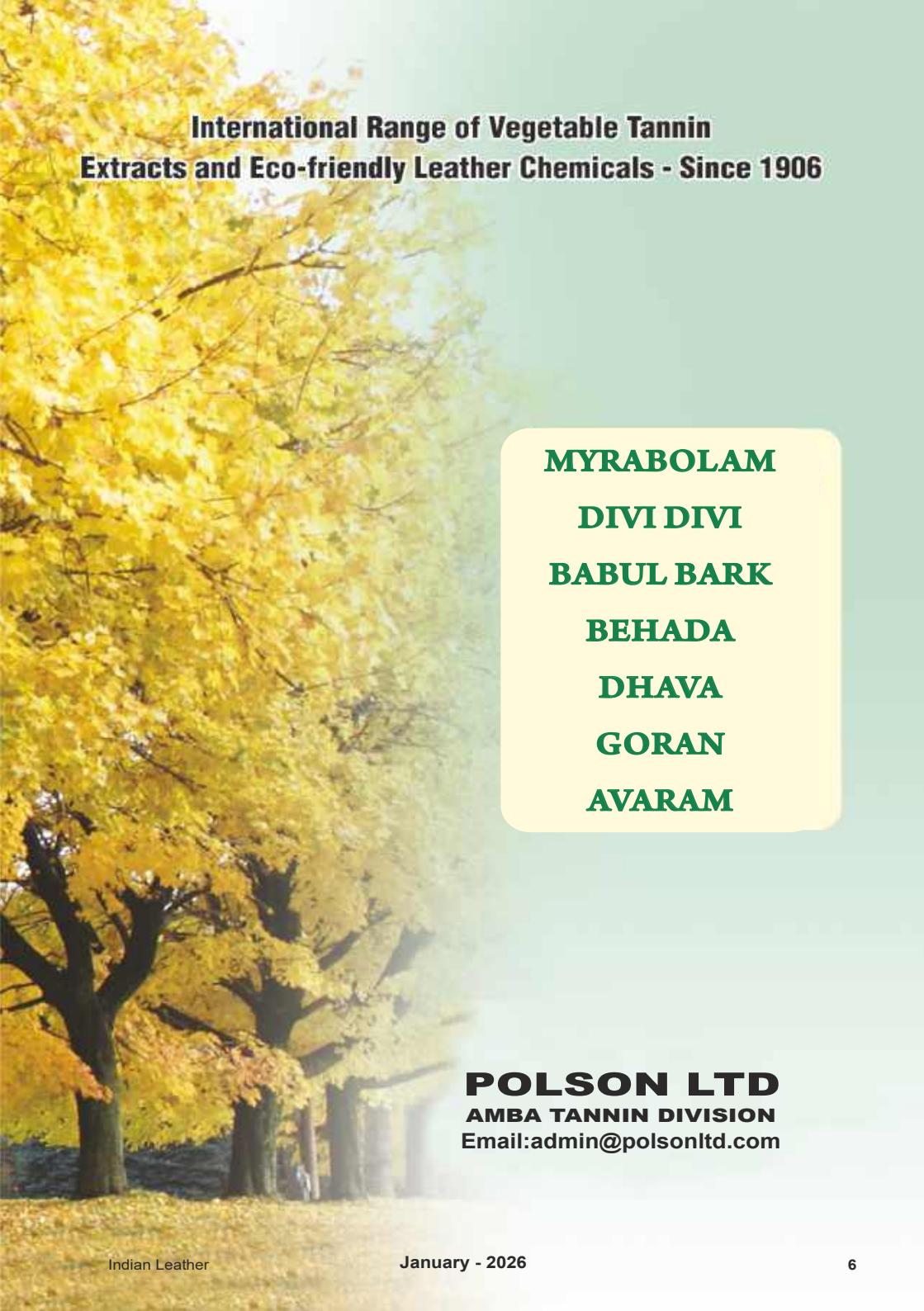
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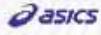


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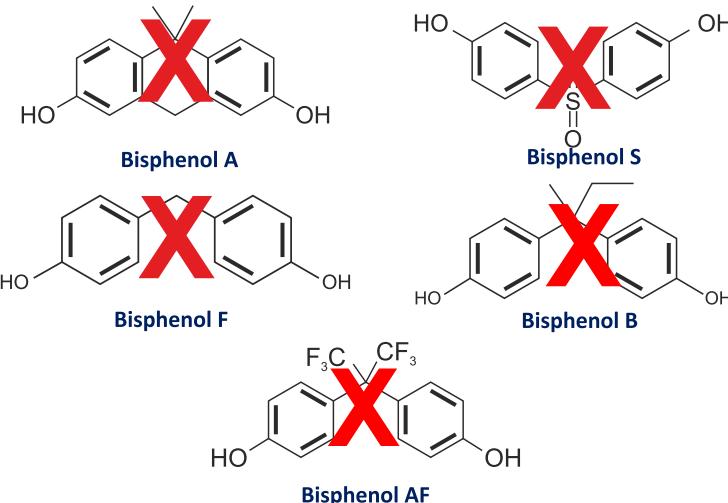


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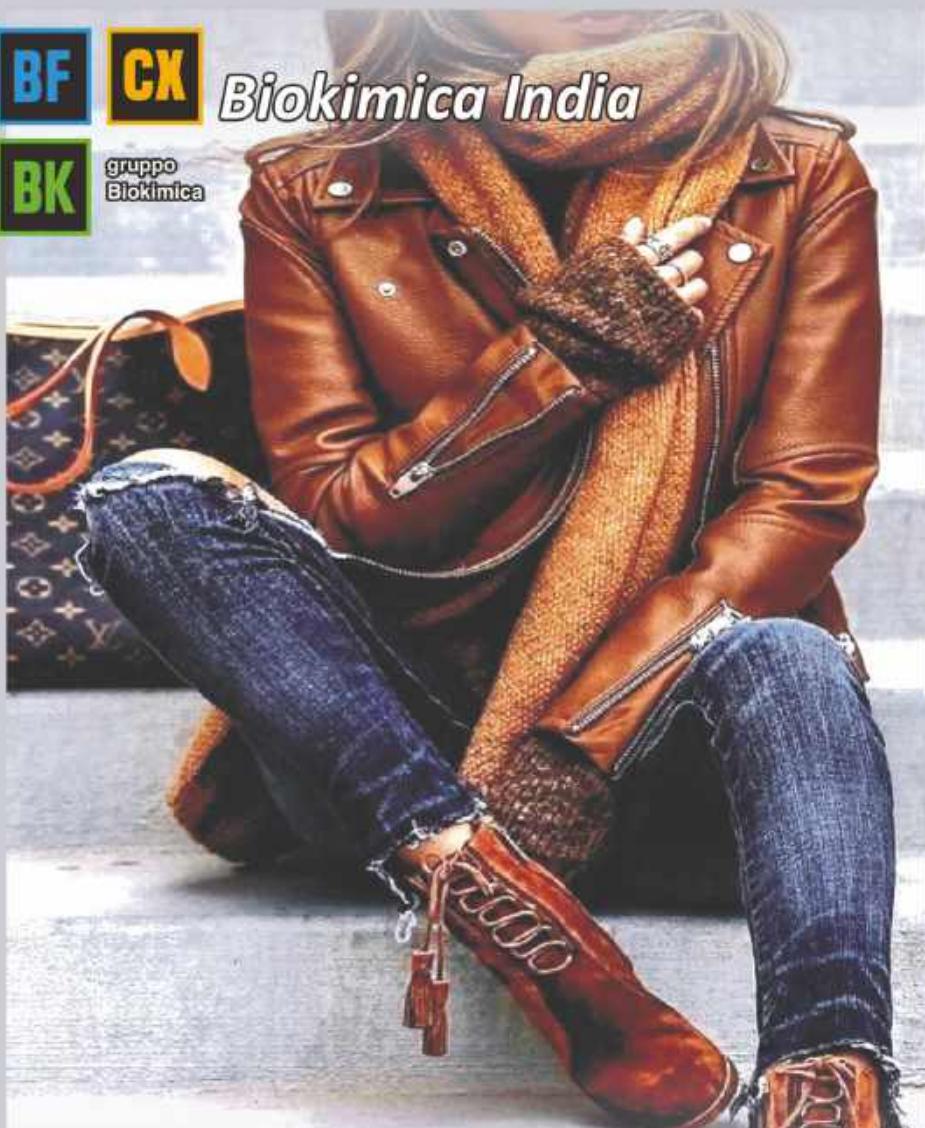
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The 39<sup>th</sup> edition of the India International Leather Fair (IILF), organised by the India Trade Promotion Organisation (ITPO), in association with the Council for Leather Exports (CLE), with the support of Trade Associations is being held at the Chennai Trade Centre, Nandambakkam, Chennai.

Since its beginning, as a great discussion board for providing multi-faceted splendour of the Indian leather industry, IILF 2026 will have on display, the entire range of products relating to leather industry from raw materials to finished products, such as finished leather; shoes; shoe components; leather garments, fashion accessories, leather goods, machinery & equipment and chemicals etc. IILF has all along been a vivid presentation of the leather industry. The fair highlights the export prowess of the Indian leather entrepreneurs, aims to feature their achievements, the latest technologies as well as new innovations with eco-friendly tag.

At this edition, there are about 430 participants which include 66 overseas exhibitors, from over 16 countries, occupying an area of 20,000 sq mtrs. Italy and Germany have set up their National Pavilions. As part of the Fair activities, Technical Seminars, B2B meetings are being organised in the Fair venue. As usual, Asia's Biggest Leather Fashion Show, organised by the Indian Finished Leather Manufacturers & Exporters' Association (IFLMEA) is being held on 1st February 2026 at the ITC Grand Chola.

Now, the leather industry is greatly impacted by various factors, such as global political instability, wars in different regions of the world, economic slowdown, inflation, unemployment, leading to low productivity, sales etc.. The Govt of India has taken a number of measures for the overall growth and development of the industry. The Government is in the advance stages of finalising US\$ 1 billion (approx Rs 8300-Rs 8400 crore) support package for the footwear industry, to counter the impact of a 50% US tariff on Indian Footwear, to boost domestic footwear manufacturing industry, increase exports and reduce dependency on imported components, especially from China.

***Indian Leather wishes all the Participants in IILF 2026  
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## **Shri Ramesh Kumar Juneja takes over as Chairman, Council for Leather Exports (CLE)**



Mr. Ramesh Kumar Juneja, Vice – Chairman, Council for Leather Exports (CLE) has taken charge as Chairman of CLE in the 184<sup>th</sup> meeting of Committee of Administration of CLE held in Chennai on 6.1.26 through Hybrid mode.

Mr. Juneja's association with the Leather Industry spans over four decades. As the founder of JC Group, Mr. Ramesh Juneja transformed the industry by tying up with retailers to become a nominated tanner of finished leather for them in the 1980s. Under his leadership, the company has seen excellent growth and has become a leading name in the finished leather manufacturing. Overtime, the group, forward integrated into manufacturing products, accessories and shoes for retailers across the world. Mr. Juneja has been a board member in CLE for over 15 years and is serving as the Regional Chairman of the Eastern Region since 2014. He is the Vice Chairman of Council for Leather Exports since April 2024. Mr. Ramesh Juneja has contributed his specific skills and knowledge, helping to steer the organization and industry towards achieving its highest exports in leather goods and safety wear during his tenure.

Mr. Juneja is also serving as Vice-Chairman of Indo - Italian Chamber of Commerce and has been instrumental in ensuring significant investments in collaboration between Italy and India in footwear and leather sector.

Having been a Founding Committee member of Calcutta Leather Complex Tanners' Association and its President for over a decade, he was instrumental to get investment of Rs.800 crore from the Government of West Bengal the up gradation of the Common effluent treatment plant and other infrastructures at the Calcutta Leather Complex.

*Indian Leather* congratulates Shri R K Juneja on becoming Chairman of CLE and best wishes for continued success



## Shri Sanjay Leekha appointed as New Chairman of LSSC



The Leather Sector Skill Council (LSSC) at its 36th Governing Council Meeting held in Noida, UP, on 2nd January, 2026, has announced the appointment of **Mr. Sanjay Leekha**, as its new Chairman.

Members of the Governing Council acknowledged and commended the valuable contribution of **Mr. Mukhtarul Amin**, who concluded his tenure as Chairman. His guidance and leadership over the years received formal appreciation from the Council.

After detailed discussions, the Governing Council reached a unanimous decision to entrust the leadership of LSSC to **Mr. Sanjay Leekha**, citing his vast industry experience, strategic vision, and sustained efforts toward advancing India's leather and allied industries.

Mr. Leekha is a prominent name in the leather sector and presently heads Alpine Apparels Pvt. Ltd. as its Chairman and Managing Director. The company has established a strong presence in the manufacturing and export of leather products. Over the years, his leadership has contributed to improved quality standards, innovation-driven growth, and global market expansion.

In addition, Mr. Leekha, has previously held the position of Chairman, Council for Leather Exports (CLE), the national export promotion body operating under the Ministry of Commerce & Industry, Government of India. During his term, he actively worked on strengthening export policies, enhancing international outreach, and addressing sectoral challenges related to sustainability, trade efficiency, and competitiveness.

Recognized for his comprehensive understanding of the leather ecosystem-including footwear, garments, accessories, and allied segments-Mr. Leekha has remained a strong advocate of skill development, workforce empowerment, and technology-led progress within the industry.

*Indian Leather* wishes Shri Sanjay Leekha all the very best.

## **National Quality Conclave (NQC) 2026**

The Quality Council of India (QCI), Department of Promotion of Industry and Internal Trading is organizing a National Quality Conclave (NQC) on 23th February, 2026 at Bharat Mandapam, New Delhi. The objective of the Conclave is to launch a sector-specific quality roadmap aligned with India's Viksit Bharat priorities. 'Leather and Footwear' has been identified as one of the priority sector for this Conclave. The Conclave is envisaged as a national platform to deliberate upon and define a sector- specific quality roadmap, aligned with India's manufacturing, export and ease-of-doing-business priorities

As India advances towards Viksit Bharat 2047, the manufacturing sector will play a pivotal role in driving economic growth, job creation, and export competitiveness. The Hon'ble Prime Minister has emphasized that India's growth must focus on quality, reliability, and global trust in Indian products, with MSMEs at the core of this transformation.

The Quality Council of India (QCI) established in 1996 is an autonomous body under DPIIT, aimed at creating quality infrastructure and promoting quality culture across sectors. It has set up accreditation boards for testing and calibration laboratories, certification bodies, education & training, and hospital & healthcare. The QCI is also engaged in initiatives like ZED for MSMES, NABL accreditation, coal quality testing, and Swachh Survekshan, strengthening India's quality infrastructure.

As a preparatory exercise, it is proposed to schedule structured stakeholder consultations from second week of January onwards. It

is requested that kind cooperation may be extended to the QCI team to facilitate meaningful interactions for identifying shop-floor and value-chain quality challenges; highlighting priority reform priority reform areas; and addressing skill, infrastructure and compliance-related constraints that impact quality outcomes.

The initial phase shall include stakeholder interactions and on-ground visits to industry associations and manufacturing clusters. This will be followed by "Gunvatta Manthan" consultations in early-February 2026.

Insights emerging from these engagements will culminate in an Outcome Document on the National Quality Roadmap, outlining fiscal and non-fiscal measures, policy interventions, incentives and systemic reforms, to be released at the Conclave. The Roadmap/Action Plan will help build an industry-led quality ecosystem for India's manufacturing sector.

In view of above it is requested to designate a Single point of Contact to assist the QCI team in meeting coordination and follow-up activities.



*Digest of Leather News*

59<sup>th</sup> Year of Publication

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## ILTA (SR) organises felicitation function for Dr P Thanikaivelan

The Indian Leather Technologists Association (ILTA), Southern Region, had organised a function, on 22nd December, 2025 at the CARE Seminar Hall in CSIR- Central Leather Institute to felicitate the newly appointed Director, Dr P Thanikaivelan.

Shri N R Jagannathan, President, ILTA Southern Region, in his welcome and felicitation address, said, Dr P Thanikavellian is always seen with a smile, tackling challenges with ease, yet addressing them seriously and consistently, delivers effective and correct solutions. He spoke about Dr Thanikaivelan's successful research works, particularly the development of **water-free chrome tanning** which has earned accolades from the industry. This system is already being successfully implemented in Kanpur tanneries, he said. He congratulated Dr Thanikaivelan on behalf of Shri Arnab Jha, President, ILTA and Shri Susanta Mallick, General Secretary, ILTA.



Shri Jagannathan, emphasised the need for stronger ties between the industry and the institute and requested the new director to foster collaboration with the industry.

Dr S Rajamani, Vice-President, ILTA, Chairman, Asian International Union of Environmental Commission, congratulating Dr P Thanikaivelan, praised his research works and his active participation in seminars and conferences. He said, out of 39-40 CSIR Laboratories, the Central Leather Research Institute is doing a lot of

applied work and maintains close relationship with the industry, and requested the new director to further strengthen the bond.

Dr Rajamani, in his address, expressed his concerns over the changing trends in the leather industry. He said 20-25% of the raw hides and skins are not going for leather processing and are diverted to gelatin making industry. Thirty per cent from seventy to eighty billion tons of raw hides have been reduced to fourteen to thirteen billion for leather making. Even full leather, some proteins, collagens are ending up in landfills. He requested the director to address this important issue.

Dr B Chandrasekhar, former Director, CSIR-CLRI, spoke about the issuance of various certifications and in this respect, he requested the new director to revamp the process, and offered his best wishes to the new director. Dr J Raghava Rao, CSIR-CLRI. Emeritus Scientist, CSIR-CLRI, fondly recalled his close association with Dr P Thanikaivelan during their research work at the institute.

Shri S Govardhanan, ATC Chemicals India Pvt Ltd., Dr Subhendu Chakraborty, formerly Senior Scientist, CSIR-CLRI, Dr Mathivanan, Head, SPDC, CSIR-CLRI, Dr Krishna Raj SPDC. Dr Swarna V Kanth, Head, Chord Dvn, CLRI., Dr Nishad Fathima, IPCL CLRI and Dr Vaidyanaathan, CARE, CSIR-CLRI were among those who felicitated the new director.

Dr P Thanikaivelan, Director, CSIR-CLRI.in his thanks-giving address, has said that his primary goal is to maintain the current momentum and elevate the institute to its full potential.

He said, currently, the industry is facing with several challenges, such as, the sustainability or circular economy or carbon neutrality or traceability or solid waste utilization etc. The Director assured that the CSIR-CLRI institute has technologies in place, and is also developing more. He expressed hope that in the near future the institute would try to interact with the industry. Dr P. Thanikaivelan, concluded his address, by extending his sincere gratitude to every one, especially, the past directors for their kind words and support. He committed to working closely with everyone to take the industry to new heights.

The function came to a close with Dr R Mohan, Secretary, ILTA, Southern Region proposing the vote of thanks.



## **ENVIRONMENTAL CHALLENGES & SUSTAINABLE DEVELOPMENT IN ASIAN LEATHER SECTOR**

**Dr S. Rajamani**

Vice President – Indian Leather Technologists Association (ILTA) & Chairman – Asian International Union of Environmental (AIUE) Commission

### **1. INTRODUCTION**

As per the 2024-25 evaluation, about 14 million tons of hides and skins were used for leather making by the world tanneries, a gradual reduction of more than 20% from the level of 18-20 million tons during the pre-covid period. This is mainly due to the conversion of raw hides and skins into the low-grade protein, gelatin, as well as even landfill, etc. because of declining of leather market. The declining trend of leather production and products is likely to continue and diversion of hides and skins for other usage may increase to the level of 50% (i.e. approx. 6 to 8 million tons) by the year 2030.

Currently about 7 million tons of hides and skins are processed in Asian countries such as India, China, Vietnam, Bangladesh, etc. They use about 3 million tons of chemicals and salts. During the leather process, the industrial units generate more than 2 million tons of solid wastes such as hair, raw hide trimmings, fleshing, wet blue trimmings and shavings per annum.

Out of 3 million tons of chemicals used for the raw to semi-finishing operations only less than 30% of chemicals are fixed in the semi-finished leather and more than 70% of chemicals such as lime, sulphide, etc. used in the beamhouse operations are only as an

aided chemicals and discharged along with solid waste and effluent. Sustainable conversion of solid waste and sludge from the effluent treatment plants are major challenges for the survival of tannery units and to control the declining trend of leather production.

Effective disposal of large volume of chrome containing sludge which is about 4 million tons per annum from World Leather Sector is one of major challenging issues. The cleaner productions and non-chrome tanning agent and re-tanning agent which are a trend in the past few years and will be much more popular and mandatory in future due to the market demand and new regulations. This article deals with new technological development on cleaner production, innovative treatment process such as adoption of jet aeration, ozone treatment, etc. and sustainable solid waste management taking into account of conversion of raw hides and skins process line into other products such as gelatin, collagen, etc.



**Figure - 1: Major Leather Producing Countries China, India, Bangladesh, Vietnam, Indonesia, Russian Federation, Turkey**

## **2. ENVIRONMENTAL REGULATIONS & MANAGEMENT**

The leather processing industrial units in Asia adopt environmental pollution control standards matching the current updated norms & standards of United States, European Union and other developed countries. In view of the serious environmental issues and restrictions in use of chemicals, it has become necessary to modify the leather process to reduce the pollutional discharge and upgrade the treatment systems in ETP/CETP's with huge investments. The relocation and resettlement of tanneries from urban towns to designated industrial areas, sustainable management of Total Dissolved Solids (TDS) are the recent developments in India, China, Turkey, etc., with major investments. In addition to the challenges in meeting the stringent environmental regulations with high cost, the declining trend for the leather market, increase in alternative market demand for other products such as gelatin, collagen, etc. the conversion of hides and skins into other products will continue to grow. The gradual reduction in leather process by the tannery clusters and change in the product line, results in the characteristics of the effluent discharged to the CETPs are also becoming major challenges in the operation and maintenance in meeting prescribed standards. The cluster of urban tanneries in many locations are forced to relocate from the cities to new industrial zones with CETPs integrated with sewage treatment systems. In India, China and in other countries new tanneries or expansion of the existing tanneries are permitted only in authorized industrial zones with CETPs.

## **3. LEATHER PRODUCTION TREND & ENVIRONMENTAL CHALLENGES IN INDIA**

There are nearly 1800 tanneries mostly in medium and small sector located in clusters such as Ambur, Vaniyambadi, Ranipet,

Pallavaram, Dindigul in Tamilnadu and Kanpur & Unnao in Uttar Pradesh, Kolkata in West Bengal & Jalandhar in Punjab. The total average processing capacity is nearly 3000 tons of raw material in terms of salted hides and skins. Prior to 2015, with a share of 50% in Tamilnadu, 20% in Kolkata, 20% in Kanpur region, 5% in Jalandhar and balance 5% in other areas. During the past 20 years, owing to the market sluggishness and as well as enforcement of stringent regulations such as ZLD, the leather processing share in Tamilnadu is decreased to less than 30% from 50%. There is a moderate increase in Uttar Pradesh from 20-25% mainly due to the recent upgradation of the Jajmau CETP and also plan for new leather complex, good increase in share capacity of 30% from 20% in Kolkata mainly due to the establishment of Kolkata Leather Complex (CLC) with flexible environmental norms for discharge of treated effluent to the backwater leading to the sea. The total effluent generation was more than 120 million liters per day (MLD) during 2015 and it is currently reduced to less than 100 MLD due to introduction of cleaner production and also owing to the overall capacity reduction in leather process.

Management of high chlorides, salinity and sulphide in the tannery effluent has become a serious environmental threat particularly land locked tannery clusters such as Tamilnadu, Punjab, etc. The tannery clusters mainly in South India have adopted membrane system for water recovery and costly treatment of the saline rejects from the membrane system. Multiple Stage Evaporators have been adopted for evaporation of the saline stream from membrane system with huge cost and disposal of the mixed contaminated salt recovered from the evaporator is a major challenge in spite of technology upgradation and financial support from the Govt. of India. The capacity of leather process has been reduced mainly in Tamilnadu due to the declining of leather market

demand. In addition, sustainability of the tannery clusters with CETPs having ZLD system is becoming a major challenge in South Indian Leather Sector.

#### **4. ENVIRONMENTAL RISK IN CONTINUED USAGE OF SODIUM SULPHIDE**

Continued usage of sodium sulphide in beamhouse process is a major environmental challenge and threat for the sustainability of leather tannery sector especially in India. Less than 10% of Indian tanneries have direct link with slaughter houses and adopt green fleshing process. Another 10-20% of the tanneries reduced the sodium sulphide usage from the level of 2-2.5% to 1-1.5% in liming process by partly replacing with degradable chemicals such as enzymes. More than 80% of the tanneries continue to use sodium sulphide as an aided chemical in liming and unhairing process and the entire sulphide is discharged as waste along with fleshing, effluent and sludge.

The effluent discharged from beamhouse operations contains high concentration of Sulphide, BOD, COD, Suspended Solids (SS), etc. and becomes anaerobic condition in few hours of time and start emitting  $H_2S$  in the collection tank, wastewater conveyance system to the ETP / CETP. Major accidents and deaths occurred due to the emission of  $H_2S$  during the cleaning and maintenance of the collection wells and conveyance system. One of the high-risk factors is the human being can sense the odour of  $H_2S$  emission if it is within the low limit and cannot sense if it exceeds 300 ppm and the death will be fatal.

The high risk and major environmental challenges of sulphide usage are: Serious occupational health & safety issues in tannery premises, emission of  $H_2S$  and toxic fumes beyond the permissible

limits, high cost and energy to reduce sulphide in the effluent, fleshing become unfit for conversion into useful by-products. In addition, oxidation of sulphide into sulphate in aerobic condition and reversal of sulphate into sulphide/H<sub>2</sub>S in anaerobic condition in sewer line, failures in treatment systems are some of the major issues. Due to the major seriousness of this issue, the environmental authorities in India and other countries planning to ban the usage of sulphide in leather process in addition to other banned chemicals by European Union. The adoption of alternative and viable chemicals with required process change in lieu of sulphide may likely to increase in cost of production.

## **5. SUSTAINABILITY IN MEETING ENVIRONMENTAL CHALLENGES**

The leather production activities especially raw to semi-finishing process are being shifted from the developed nations such as United States, West European countries, to Asian, North African and Latin American countries. Asian tanneries mainly from India, China, Turkey, etc. are facing challenges due to declining market demand, enforcement of stringent environmental regulations. The sustainability of the small-scale units is becoming a serious issue. Major investment is being made for environmental protection and resettlement of tanneries from the urban areas to the industrial parks with common effluent treatment plants. The viable option for salinity and TDS management for land locked areas, segregation of saline streams such as soak, pickle and chromium for separate process and recovery of quality reusable chemical and salt. The other sectional streams with low TDS can be treated adopting conventional physicochemical treatment and the treated effluent may be mixed with treated domestic sewage, similar to the CETP projects in Uttar Pradesh, Pallavaram & Madhavaram in Tamilnadu. The upgraded

treatment system adopted in Pallavaram CETP in Tamilnadu with introduction of advance oxidation systems using jet aspiration, ozone treatment, ceramic UF membrane and discharge of treated effluent through pipeline to the Sewage Treatment Plant (STP) in Perungudi for mixing / dilution with treated domestic sewage for TDS management is First its kind in Asia.



### New treated effluent conveyance system from PTIETC CETP to Perungudi STP

New regulations and restrictions such as REACH on the use of certain chemicals such as Sodium Sulphide, Bisphenols, restrictions in the presence of Hexavalent chromium in the finished leather, salinity and water recovery under zero discharge concept, sustainable and safe disposal / management of solid waste chrome containing sludge, etc. envisaged continued applied Research & Development activity. In addition, upgradation of technologies for conversion of low-grade hides & skins and waste trimmings, etc. to products such as gelatin, collagen, etc. for getting better demand and market value under circular economy.



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# **AI and its impact in Leather & Leather Products Industry**

**- Vasan Suri**

**A Passionate Leather Lover & Professional  
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## **About Leather**

Leather is a Natural Product. The quality of a finished leather is always judged by its feel and finishing. Leather Products have always been attracting their customers by their visual appearance, style, color, utility and above all the feel and touch. The past few years have been posing severe challenges to the entire World and we all in the Leather Fraternity have been struggling with all its ups and downs. International weather conditions, socio, economic, trade wars, Global warming, natural calamities have all posed many challenges for every industry and in particular the Leather & Leather Products Industry.

Leather is associated strongly with Luxury and Fashion markets. The above said uncertainties have been a real time hurdle to crossover. At the same time, from the Covid period by the end of 2019, the advancement in IT industry have been phenomenal.

As they say, the developments have all happened so quickly and swiftly which otherwise could have taken 10 years more.

## **What do we learn from here is this?**

Every challenge comes with an opportunity. Having been forced to live with challenges in the Leather Industry, let us take a look at the opportunities that comes up along with the challenges.

## **AI versus HI**

I am a firm believer that anything artificial gets its prominence only with Human Intelligence. This is true with the AI also. It is the Human Brain which feeds in all the data to make the AI work and of course, being a machine and with all its capabilities the speed with which the results get accomplished is much faster.

### **Will AI be able to do Raw Skin Inspection?**

### **Will AI be able to determine the process of tanning?**

### **Will AI be able to define a finishing process?**

Definitely, AI will play a big role in block chain management, perfection in the output of the machines from thickness, softness etc.,

## **AI in Block Chain Management**

Block Chain Management is essential to be introduced in every tannery and leather products factories. With the involvement of AI, we could assure and ensure a trouble free running of the machines and equipments. Particularly, in tanneries, the machines are expensive and requires efficient running to get the right results.

For example, a good splitting machine provides the right thickness and gives a good split value. Rotary plating machines with variety of rollers 3 or 4, requires perfect maintenance to ensure trouble free results. On the products side, Pattern making machines, Die-less cutting machines are all valuable performance machines.

## **AI in Data Collection**

AI can play a big role in the collection, consolidation and corroboration of records.

Results of raw material buying and in comparison with their output in wetblue results by selection and area.

Orders follow up, warnings on raw material availability, Chemicals availability, rejections all could be brought in one table in the dash board every day to highlight the performance.

Similarly, output of products on a line of production on a day to day basis which could help in improvisation and motivating the team.

Though, these data control could exist, with AI, the updates could be spontaneous.

### **AI in Tannery**

#### **How does AI could help the raw material selection?**

With the advancement that is happening in AI by creating and cloning a dead person to come alive and sing or making International leaders to dance on a floor. There could be a possibility, by introducing AI to check at the livestock and stamp it with a QR code so that, the selection can be determined clearly. There could be a possibility of wetblue inspection with the right inputs for foolproof inspection. The finished leather grading could be very well possible with the AI. Similarly, Chemicals usage and consistency in tanning and dyeing evenness could all be done by AI.

One area where HI cannot be replaced is where the feel and touch is to be determined and probably with Robot technology, this could be achieved as well.

### **AI in Shoe Business**

The recent technology advancement on AI is to make customised shoes for every individual by asking that individual to get his feet scanned and the shoe gets made as per his feet.

There is no one general size offered, it is all customised to secure the feet in comfort. The 3D design facility is already taking the shoe designing and approval to a different level these sort of customisation which is just now been introduced in Japan will take a very short time to reach the other Countries of the World.

### **AI in Leather Products & Accessories**

Sampling costs will be considerably reduced as all virtual designing tools, with the help of AI, could help in making the decision faster.

As customisation happens in footwear, it may not take too long to get bags, garments, gloves and other accessories customised and the next generation will have no fit complaints.

From Finished Leather selection to cutting of the leather, AI might play a big role. The final checking and packing of the leather products could become more easier with AI scanners, scanning for defects and suggesting improvements.

### **AI in Upholstery & Automotive**

The AI is also going to remodel the way of working on Home furnishings, upholstery and the upholstery in automobile. From the steering wheel to the seat covers and overall interiors of the cars will get everything customized and no more generalized.

### **Summing up**

As per the recent study and the understanding of the advancement that is happening, before the end of 2026, we will see AI getting in to our Leather & Leather Products Industry in a big way.

Of course, it will have its own positive and negative impact.

Positive will be perfect product everywhere.

More accountability and with clear data of functioning from the stage of animals in the farm to the fashion house covering all requirements of carbon emissions, environmental concerns properly documented.

Workers & technocrats, quality inspectors might have the fear of losing their jobs but, must be thankful for the upgradation opportunity of their skills to live with the technology advancements.

We should not fear technology as though it is going to eat away the job but, try to gain more knowledge to be a master who would be able to govern such machines and technology.

"Necessity is the mother of Invention"

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## Back to School Column

**Dr N K Chandra Babu**

[babunkc@yahoo.com](mailto:babunkc@yahoo.com)

### **Issues Concerning Hexavalent chromium in Leather – Origin and Prevention**

In my long experience working with the leather industry, I have identified the following issues as major challenges in front of leather industry in general and Indian leather industry in particular.

- Global sourcing of suitable raw material at competitive price
- To remain competitive in the global market by
  - \* Cost Reduction
  - \* Value Addition through quality improvement and property enhancement
- Improving unit value realization from Leather, especially lower ends and splits
- Environmental compliance
  - \* Cleaner Leather Production with reduced pollution with reduction/elimination of toxic and Eco sensitive chemicals and formulations
  - \* Zero Waste Water Discharge in Tamil Nadu
  - \* Secured land fill sites for solid wastes from ETPs and CETPs

- \* Compliance to eco footprints like water, energy and carbon footprints
- \* To achieve overall sustainability of the industry
- \* Securitization of solid wastes from processing/Getting value added products from solid wastes/enhancing atom efficiency/economy in leather processing
- Compliance to eco bans/restriction on some compounds / substances by importing countries/Eco labels/green groups
- \* PCP
- \* Azo Dyes based on certain Arylamines
- \* Hexavalent Chromium, Free Formaldehyde.... And the list is expanding on almost on a daily basis.

The issue for discussion in this column relates to the last aspect listed above, Compliance to Eco ban/restriction on substances in leather and leather products. Apart from tackling pollution related problems associated with leather industry, it has become imperative to prevent the presence of a number of Eco sensitive and toxic substances in leather and leather products to comply with regulations concerning such substances in consumer articles.

What started with chlorophenols and certain arylamine based dyes in the nineties of the last millennium, the list is expanding on almost daily basis. Hexavalent chromium is one of the substances which have been receiving constant scrutiny.

## **Reasons for concern on the presence of Cr(VI) in leather**

Chromium is unique among the metal ions regulated based on oxidation states. As discussed earlier in the column on chrome tanning, Cr(III) and Cr(VI) are the two of the stable oxidation states. While Cr(III) is an essential micro nutrient, and is known to play an important role in glucose, lipid and protein metabolism, Cr(VI) is considered highly toxic, mutagenic and carcinogenic to humans and animals. There are numerous regulations on permissible limits of Cr(VI) in consumer articles like leather products and many of them specify 3 mg/kg as the maximum permissible limit. The presence of such substances in consumer articles arises obviously due to health concerns.

Since, major proportion of the leathers produced globally undergo chrome tanning as the main tanning system and hence the issues related to hexavalent chromium assumes greater importance to leather industry. Unaware of the difference in the toxicity between Cr(III) and Cr(VI), technologists, many times even leather researchers often talk about chromium being toxic and carcinogenic without referring to oxidation state of the metal ion. International forum for leather technologists and scientists, IULTCS has categorically objected to the statement that chromium is toxic in loose manner and has requested technologists/scientists to take initiatives to dispel the false concern raised against chrome tanning in general.

## **Origin of Hexavalent chromium in leather**

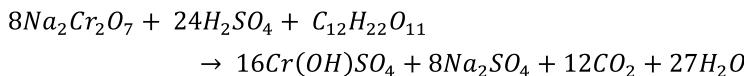
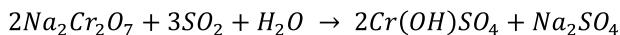
Unlike in old two bath chrome tanning, hexavalent chromium is not directly used in leather industry any more and only ready-to-use Cr(III) based BCS products are supplied by well established and reputed manufacturers for the purpose of tanning. In that scenario, the exact origin of Cr(VI) in leather is not well understood and in fact,

even today there are researchers who argue that Cr(VI) problem is an imaginary problem, and the issue has been created to discredit the leather industry. They argue that it is difficult for Cr(VI) to survive in the reducing environment prevailing in leather matrix. But in practice, one comes across the presence of hexavalent chromium far exceeding the above mentioned permissible limit. Some researchers have come out with the justification for the survival of Cr(VI) in leather matrix by stating that there exists a continuous dynamic equilibrium between Cr(VI) formation and conversion back to Cr(III) vice versa.

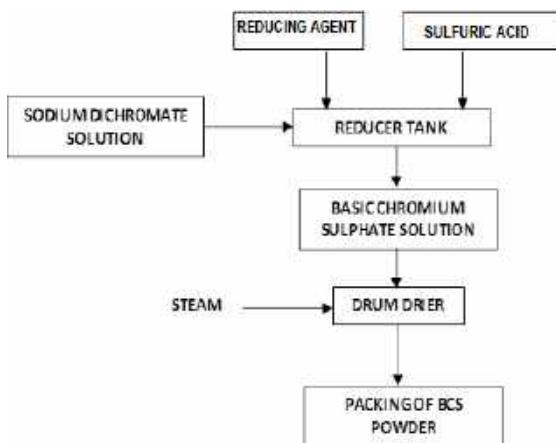
Poor quality basic chromium sulphate (BCS) with traces of unreduced Cr(VI) can be the main source. In fact when a systematic study was conducted in chromium based Chemical industries in a particular geographical location in India, we observed to our dismay that there were no proper quality control measures in place to ensure the absence of unreduced Cr(VI) in BCS. In this context, one may recall our discussion in the column on chrome tanning, where the method of preparation of preparation of BCS starting from dichromate which contains chromium in hexavalent form was outlined. For the benefit of new readers, same has been summarized here.

Manufacture of Basic Chromium Sulphate (BCS) using  $SO_2$  or cane sugar/molasses as reducing agents

The chemical reactions involved with both the reduced agents are as follows:



The process flow diagram for the manufacture of BCS is as follows:



Metal complexes dyes based on chromium and pigments based on lead chromate could be the other direct sources of hexavalent chromium. Lead chromate based pigments have been phased out but we could detect the presence of Cr(VI) even in some non-yellow colored pigments. Apparently some yellow pigments containing lead chromate (from non-standard sources) are still used unknowingly as shading components in the pigment formulations by some suppliers. The direct sources of hexavalent chromium can be eliminated completely by putting in place good quality checks by both the suppliers and tanners. But the most worrisome fact is the possibility of formation in matrix by oxidative conversion of leather bound Cr(III) to Cr(VI) by residual oxidizing functionality present in chemicals/auxiliaries used in leather processing.

#### **Possible mechanisms/means for Cr(VI) formation during processing**

It follows from solution chemistry that redox reactions of too perfectly good materials can lead to conversion/oxidation of Cr(III) in chrome

tanned leather to hexavalent chromium. As mentioned earlier, residual oxidizing functional groups/substances present in chemicals and auxiliaries are the main culprits. Oxidative bleaching agents used for some reason can directly be involved in the oxidative conversion of trivalent chromium to hexavalent state. Fatliquors based on sulfited unsaturated oils are also implicated in the Cr(VI) formation in leather. Many times catalysts are also used during the sulfited fatliquor preparation to accelerate the oxidation of oils, which if present even in small amounts have the potential to convert Cr(III) to Cr(VI) in leather. Residual oxidizing agents such as persulfate used in binder manufacture could also play a role if present even in traces.

In addition, post tanning processes and procedures carried out with sensitive auxiliaries/chemicals at high pH constitute a higher risk factor for the formation of Cr(VI). High thermal conditions have been shown to lead to Cr(VI) in BCS and chrome tanned leather. Leather treated with ammonia was found to contain Cr(VI) after heating at 80° C. Exposure to UV Light has also been shown to give rise to Cr(VI).

#### Curing Cr(VI) problem

- Use of good quality BCS, Metal complex dyes, pigments free from Cr(VI)
- Screening of post tanning auxiliaries with oxidative impurities
- Screening of finishing auxiliaries for residual redox catalysts
- Strict analysis of chemical inputs and leather

- Using chlorinated hydrocarbon containing synthetic fatliquors and selective vegetable tannins such as Tara and Gambier in wet finishing operations
- At the end of wet finishing, including a wash with a reducing agent (sodium bisulfite)
- Possible use of solvent soluble reducing agents like citric acid in the finished leather and products if Cr(VI) is detected in them

**Our R &D Efforts in understanding Cr(VI) formation and designing process interventions for prevention of formation and scavenging if found in leather**

During the tenure at CLRI, the author was involved in studies to unravel and understand the hexavalent chromium formation in leather, identification of potential chemicals/auxiliaries involved in the process as well as to standardize suitable process intervention to avoid Cr(VI) formation and scavenge it if found in leather. The R&D efforts are summarized as follows:

- Screening of post tanning auxiliaries and finishing auxiliaries for oxidative impurities and redox catalysts
- Devising Simple methods for screening of auxiliaries - method based on oxalic acid as a probe has been used for determining residual oxidizing functionality standardized.
- Presence of oxidizing functionality in the potential auxiliaries estimated as persulfate
- Standardization of methods for elimination of Cr(VI) formed using various reducing agents

- Potential auxiliaries were chosen and mixed with BCS solution to check if Cr(VI) is formed
- Potassium persulfate was used as model oxidizing agent to understand the conversion of Cr(VI) in BCS and leather which provides a reducing environment

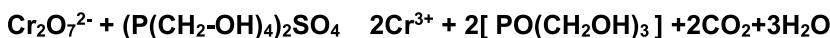
### **Lessons from the Screening Studies**

- All three commercial BCS selected for the study (2 of which are molasses reduced and one is sulfur dioxide reduced) tested positive for free hexavalent chromium
- Potential auxiliaries such as fatliquors, acrylic syntans and binders indeed leads to Cr(VI) formation in BCS and chrome tanned leathers. Residual Redox initiators and catalysts used in the preparation of such auxiliaries may be the culprits.
- Method based on oxalic acid gives reliable estimation of oxidizing functionality in auxiliaries
- However, there is no one to one relationship between oxidizing functionality and Cr(VI) formation – probably due to the differences in the nature of oxidizing agents
- In the study with persulfate as model oxidizing agent, though the Cr(VI) formation increases with increase in persulfate concentration, the stoichiometry is not followed in the reactions with both BCS and chrome tanned leathers
  - pH condition may not be favorable
  - reducing agents in BCS and reducing functional groups in leather matrix may have accounted for some of persulfate

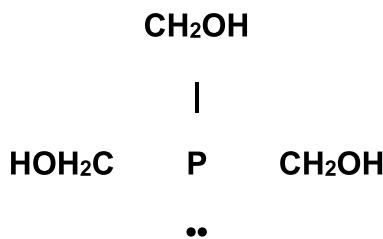
## Studies on elimination of Cr(VI) in leather using reducing agents

- Selection of reducing agents from solution chemistry and familiarity to industry
- A wet finishing process using potential auxiliaries implicated in Cr(VI) formation to check the efficiency of the reducing agents – No dyeing to avoid interference from dyes in analysis
- Assessment of efficiency of these reducing agents in scavenging Cr(VI) in low concentration in leather matrix(accessibility may be an issue) under the pH conditions prevailing during wet finishing
- Assessment of efficiency of reducing agents when Cr(VI) is present in high concentration by external addition of Cr(VI)

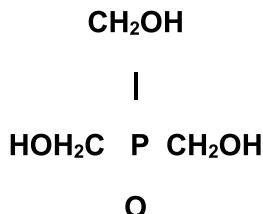
### Solution chemistry of chosen reducing agents



THPS was proposed to assume the following structure at pH 3.5 – 4.0



As is evident, it is having a lone pair of electrons with phosphorous oxidation state of 3+ and being a very reactive molecule reduces Cr(VI) to Cr(III) vigorously at this stage. However, at pH above 4.0, it is believed to change to the following structure in which form, it is inert.



## **Summary of the results in the study with reducing agents**

- Sodium bisulfite and THPS are more efficient than hypo in scavenging Cr(VI) in leather
- With studies with high Cr(VI) levels(external addition of Cr(VI)
  - The reduction is more efficient with THPS than sulfite
  - But Efficiency of THPS is pH sensitive
- Sodium bisulfite tend to bleach dyeing but THPS enhances dye richness
- THPS is expensive and sodium bisulfite is very cost effective
- Bisulfite can scavenge free formaldehyde in addition to Cr(VI) whereas THPS may increase formaldehyde

The research work relating to hexavalent chromium was published as research papers in Journal of Cleaner Production and Journal of American Leather Chemists Association. If any one is interested in accessing complete information relating to the work, they may refer these papers.

1. Screening of leather auxiliaries for their role in toxic hexavalent chromium formation in leather posing potential health hazards to the users,  
**NK Chandra Babu, R Venba et.al. Journal of Cleaner Production,**  
Vol. 13, 2005, pp. 1189-1195.
2. Elimination of hexavalent chromium in leather using reducing agents  
**Chandra Babu N.K, Venba R, Jothi G, Ramanaiah B, Radha G, Asma K, Rose Kumari I, Journal of the American Leather Chemists Association, 100, 2005, 354-359.**

For any feedback, please mail to [babunkc@yahoo.com](mailto:babunkc@yahoo.com)

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# **India's Design Journey: Leather and Leather Products Design for Tomorrow**

**Md. Sadiq**

**Md Sadiq** is a former Chief Scientist at **CSIR-Central Leather Research Institute (CLRI)**, with nearly four decades of professional experience in the Indian leather, footwear, and fashion products industry. His work spans **design development, technology integration, product innovation, and strategic capability building**, with a sustained focus on enhancing India's position in global value chains.



Throughout his career, he has worked closely with **manufacturers, exporters, designers, academic institutions, and industry associations**, contributing to initiatives in **design-led product development, international benchmarking, trend analysis, and knowledge dissemination**. He has played an active role in bridging **science, design, and industry practice**, and has been associated with several national-level programmes aimed at strengthening the leather and footwear ecosystem.

Post his tenure at CSIR-CLRI, he continues to engage with the sector through **advisory, academic, and thought leadership roles**,

sharing insights drawn from long-standing industry experience and institutional research. His interests lie in promoting **design thinking, material intelligence, sustainability, and future-ready skills** as key enablers for the next phase of growth in India's leather and footwear industry.

## **Introduction: From Manufacturing Hands to Design Minds**

India's leather and leather products industry has long been admired for its craftsmanship, resilience, and scale. Over the decades, it has evolved from a predominantly labour-driven manufacturing base into a globally integrated production ecosystem. Yet, beyond capacity, compliance, and cost competitiveness lies a more profound transformation - **India's gradual but decisive journey towards design maturity.**

Design, once viewed as an external input or buyer-driven requirement, is today emerging as a strategic lever for value creation, differentiation, and long-term competitiveness. This article traces India's **design journey through the decades**, examining how the industry has evolved in response to changing global dynamics, and why the future demands a renewed focus on **Design for Tomorrow** - rooted in Indian material intelligence, sustainability, and relevance to both global and domestic markets.

### **The 1980s: India as a Resourcing and Job-Working Partner**

The 1980s marked a foundational phase for India's leather and footwear industry. During this period, India primarily functioned as a **resourcing and job-working destination**, supplying stitched shoe uppers and leather components to overseas manufacturers. Design ownership resided almost entirely with international buyers, while Indian factories executed predefined specifications.

This phase played a crucial role in **employment generation**, skill development in stitching and clicking operations, and the creation of a disciplined manufacturing workforce. However, value addition remained limited, margins were modest, and India's identity was largely confined to that of a dependable back-end supplier.

Design, at this stage, was neither internalised nor perceived as a strategic capability. The focus was on execution efficiency rather than creative input -an inevitable reality for an industry still finding its footing in global trade.

### **The 1990s: Graduation to Full Shoe Manufacturing**

The 1990s marked a significant inflection point. Indian manufacturers began graduating from upper-making to **full shoe production**, particularly in men's leather footwear. This decade came to be associated with the dominance of **classic brown leather shoes**, catering largely to European and UK markets.

With full shoe manufacturing came improved **product understanding**, better control over quality, and enhanced export earnings. Factories invested in machinery, quality systems, and process improvements. Yet, design continued to be largely **buyer-led**, with Indian manufacturers executing established styles rather than originating concepts.

While the decade strengthened India's manufacturing credibility, design was still viewed as a functional necessity rather than a value driver.

### **The 2000s: Components, Consolidation, and Design Awareness**

The early 2000s witnessed the **consolidation of the Indian footwear ecosystem**, particularly through the growth of the **components industry**. Indigenous development of soles, heels,

lasts, insoles, and accessories reduced dependence on imports and enabled faster product development cycles.

More importantly, this period marked the **first serious recognition of design as a strategic input**. Exposure to global trade fairs, international buyers, and evolving fashion cycles made it increasingly clear that manufacturing excellence alone was insufficient for sustained competitiveness.

Design cells began to emerge within larger organisations, often supported by institutions such as CSIR-CLRI and academic partners. While design maturity was still evolving, the foundation for a more integrated approach-linking materials, components, and product aesthetics - was firmly laid.

### **The 2010s: Global Integration and Design Execution**

The 2010s represented a phase of **global integration** for the Indian leather and footwear industry. Indian manufacturers increasingly designed for **international brands**, participated actively in global trade fairs, and expanded their portfolios across **men's, women's, children's, and casual footwear categories**.

Design capabilities improved significantly, supported by better access to trend information, digital tools, and international exposure. Indian factories demonstrated their ability to translate global design briefs into commercially viable products at scale.

However, despite this progress, design often remained **brief-driven rather than narrative-driven**. Indian design execution was strong, but India-origin design identities were still evolving. The challenge was no longer competence - but confidence in defining one's own design voice.

## The 2020s: India as a Source of Ideas

The current decade marks a subtle yet powerful shift. India is increasingly being recognised not merely as a manufacturing base, but as a **source of leather ideas, surface innovation, and design development**. Global brands are looking to India for material experimentation, sustainable solutions, and design concepts that balance aesthetics with responsibility.

India's strength lies in its **material intelligence** - deep understanding of leather, finishes, textures, and processes - combined with a growing emphasis on sustainability, traceability, and ethical manufacturing. Design today is no longer confined to silhouettes; it encompasses **materials, processes, and purpose**.

At the same time, the rapid growth of **non-leather and sports footwear** has introduced new dynamics. While diversification presents opportunities, it also raises an important question: how does India protect and elevate leather's premium design positioning in a rapidly changing market?

## Exports and Markets: A Snapshot

India's leather and leather products exports continue to serve a diverse range of markets. Europe remains a key destination, with countries such as Germany, Italy, France, Spain, and the Netherlands valuing India's leather craftsmanship. The UK maintains strong demand for classic leather footwear, while the USA increasingly absorbs casual and private-label products. Japan represents a quality-driven niche market, and the Middle East continues to demand formal and occasion footwear.

Yet, alongside exports, the **Indian domestic market** is emerging as a powerful opportunity - young, aspirational, design-aware, and increasingly willing to support homegrown brands.

## The Luxury Paradox and the Indian Opportunity

Recent years have witnessed a curious phenomenon: **global luxury brands offering deep discounts**, challenging the long-held belief that high price automatically equates to high value. This moment prompts a deeper reflection on what consumers truly value today—relevance, design integrity, sustainability, and authenticity.

For India, this presents a unique opportunity. The future does not lie merely in replicating global luxury, but in **redefining value through Indian design narratives**. There is immense scope for India-first brands, startups, and MSMEs to create products that resonate with local sensibilities while meeting global quality standards.

Design for the Indian market need not be inward-looking; it can be confident, contemporary, and globally relevant - rooted in Indian materials, climate, culture, and craft.

## Design for Tomorrow: The Way Forward

The next phase of India's design journey must be intentional and integrated. Design for Tomorrow demands:

- Design rooted in **material science and sustainability**
- Integration of **craft, technology, and contemporary aesthetics**
- Building **India-origin design identities**
- Strengthening collaboration between **industry, institutions, and young designers**
- Moving decisively *from Made in India to Designed in India*

Design is no longer an embellishment; it is a strategic necessity. Those who invest in design thinking today will define India's position in the global and domestic markets tomorrow.

### **Conclusion: A Journey Still Unfolding**

India's design journey in leather and leather products is far from complete. It is a journey that mirrors the industry's broader evolution - from execution to ideation, from compliance to creativity, from manufacturing strength to design leadership.

The question before us is no longer whether India can design - but what India chooses to design for.

**The answer lies in Design for Tomorrow.**



Email: [maythree@outlook.com](mailto:maythree@outlook.com)

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# **Quantification and Reporting of GHG Emissions and Removals in a tannery**

***Viswanathan Munusamy, Dr. Onur Gorgun, Suresh Balasubramaniam, Rajesh George, Kavipriya Sugumar***

## **Introduction**

Greenhouse gases (GHG) trap heat from the Sun by the process known as Greenhouse effect. While the natural greenhouse effect is essential for maintaining life on Earth, anthropogenic GHG emissions beyond certain thresholds are widely recognised by scientific studies as a major driver of climate change. Among the various greenhouse gases, carbon dioxide (CO<sub>2</sub>), methane (CH<sub>4</sub>), and nitrous oxide (N<sub>2</sub>O) were considered in this study, as they represent the most relevant and significant sources of emissions associated with leather manufacturing processes.

The quantification and reporting of GHG emissions were conducted in accordance with the requirements of ISO14064-1 which specifies principles and requirements for the quantification and reporting of GHG emissions and removals at the organisational level.

The GHG quantification was carried out for BAB Leather Products International, a leading leather manufacturer located in Tamil Nadu, India. The company produces a wide range of finest leather for furniture, automotive, and lifestyle accessories from tanned bovine hides. The company has two facilities for leather manufacturing, one in Pernambut, processing from tanned to crust leather and another finishing unit in Thirumudivakkam, near Chennai, processing from crust to finished leather. This tannery group has capacity to produce about 500,000 sqft of finished leather per month. For the purpose of this GHG quantification study, both facilities were included within the organisational boundary.

## **Objectives of the GHG quantification**

The main objectives of the GHG quantification for BAB Leather Products International are to (1) establish the GHG emission benchmark at the organisation level (2) identify carbon intensity of finished leather produced (3) identify areas for reducing the GHG emissions. This quantification study is voluntary by the company.

## **Business operations of the organisation**

The organization buys wetblue and vegetable tanned leathers, from several suppliers and sent to Pernambut facility. In this facility, the tanned leathers are processed up to crust leather. The main operations are wet processing in drums using water and chemicals. The unit processes adopted in drums are wetting back, rechroming, neutralisation, retanning, dyeing and fatliquoring. The leathers are then subjected to unit mechanical operations such as setting, toggle drying, vacuum drying and staking to make crust leather.

The wastewater generated at the Pernambut unit is sent to Pernambut Common Effluent Treatment Plant, in which the wastewater is treated 5 stages of treatment and process water is recovered. The recovered water is sent back to tannery for leather processing, thus the plant is operating on Zero Liquid Discharge basis.

The crust leathers are transported to Thirumudivakkam facility for further processing to finished leather. The leathers are sent to mechanical operations such as buffing, dry milling, toggling and then sent to autospray machine. Finishing chemicals are applied on leather in autospray machine and then the leathers are subjected to ironing and plating operations. The finished leathers are checked for quality parameters and then packed and dispatched to customers or leather product manufacturing units.

## **Boundary conditions for quantification of GHG emissions**

For the quantification of GHG emissions, the two tanning facilities, located in Pernambut and Thirumudivakkam are considered. For reporting of GHG, all operations and activities performed within the two sites and all significant indirect emissions that are relating to the two sites are included. The reporting boundary includes Upstream from transportation of raw hides from slaughterhouse to end of its life. Cradle to grave approach is adopted for the calculations and reporting.

The boundary of both factories is chosen so that to arrive at a carbon intensity of leather manufacturing from slaughterhouse, which will provide an opportunity to benchmark the carbon intensity of similar operations conducted elsewhere around the world.

### **Assessment period**

The assessment period was one year, starting April 2024 to March 2025.

### **GHG emissions categories**

The following emissions categories were considered in this study.

#### **Category 1: Direct GHG emissions and removals**

The direct GHG emissions and removals associated with operations undertaken by the organisation in both sites, namely, Stationary combustion of fuels for industrial and domestic purposes, refrigerant and foams, and GHG sinks.

## **Category 2: Purchased electricity**

The purchased electricity from Tamil Nadu Generation and Distribution Corporation, electricity supplier in both facilities is considered for the calculation of GHG emissions.

## **Category 3: Indirect GHG emissions from transportation**

All transportation related emissions are dealt in this Category, namely, Transportation of materials within the facilities, Upstream road transportation – tanned leather, Upstream road transportation of chemicals, Upstream sea transportation of chemicals, Downstream transportation road and sea - finished leather, Downstream road transportation - solid wastes and Employee commuting, business travels.

## **Category 4: Indirect GHG emissions from products used**

The products such as raw materials used by the facility, tanned leathers, chemicals, water, wastewater, solid wastes and purchased services including job work on mechanical operations on tanned leather are factored-in in this category.

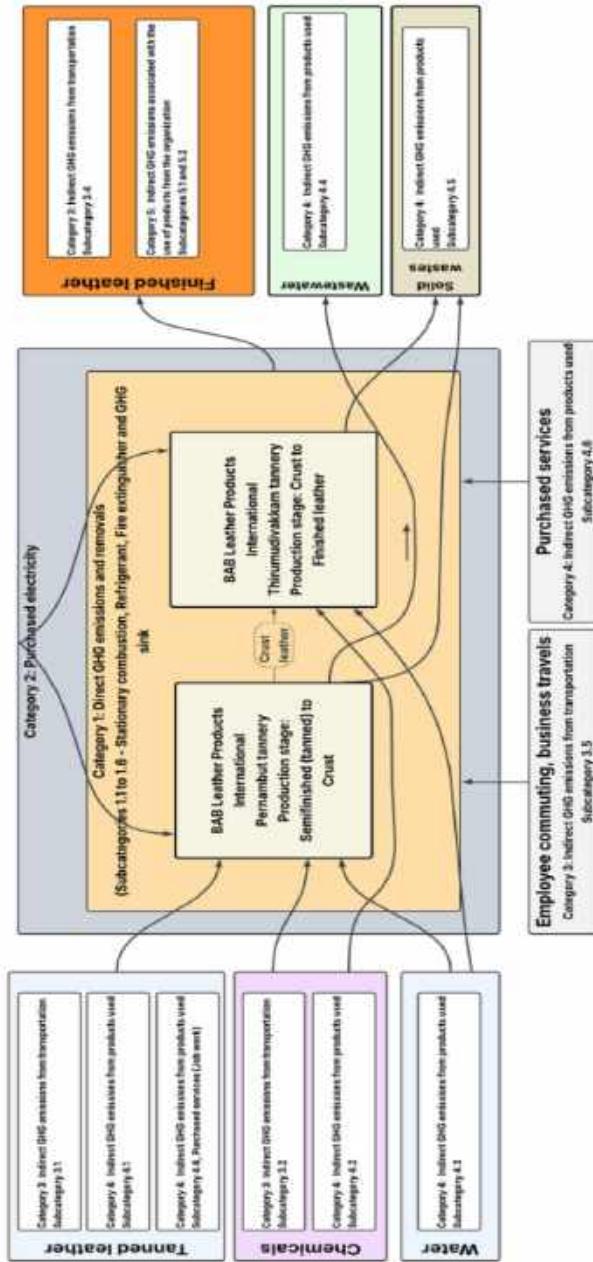
## **Category 5: Indirect GHG emissions associated with the use of products from the organization**

This category incorporates the GHG emissions in manufacturing leather products which is using the finished leather and disposal of the products at the end of its life in landfills.

## **Category 6. Indirect emissions from other sources**

The other sources of indirect emissions are insignificant, hence not considered.

## Boundary conditions for GHG Quantification in B&B Leather Products International



## **Emission factors**

Identification of emissions factors is a critical aspect in this study, which took considerable time and efforts. The emission factors are obtained from the following sources:

Intergovernmental Panel on Climate Change (IPCC) Emissions Database

Central Electricity Authority (CEA), Government of India

Government of India database, data.gov.in

Department for Environment, Food & Rural Affairs, Government of UK

Leather Working Group (LWG) Life Cycle Assessment

Leather chemical manufacturers' published carbon intensity for leather chemicals

## **GHG inventory**

The GHG inventory is quantified in 5 categories as per the ISO 14064-1 standard. The inventory is now under verification by a Certifying Body.

## **Preliminary findings**

### **Carbon intensity:**

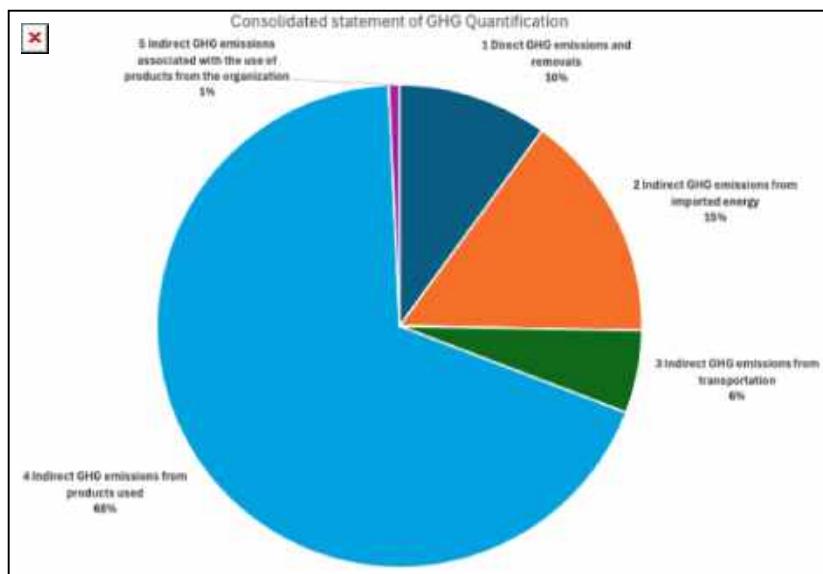
The carbon intensity of finished leather manufacturing at the organisational level in terms of area of leather produced is 11.82 kgCO<sub>2</sub>e/m<sup>2</sup>. The carbon intensity of core operations is 2.99 kgCO<sub>2</sub>/m<sup>2</sup>, which is about 25% of overall emissions. The carbon intensity by weight of finished leather is 14.14 kgCO<sub>2</sub>e/kg. The carbon intensity on revenue is 0.0141 kgCO<sub>2</sub>e/INR.

## **Anthropogenic biogenic carbon emission:**

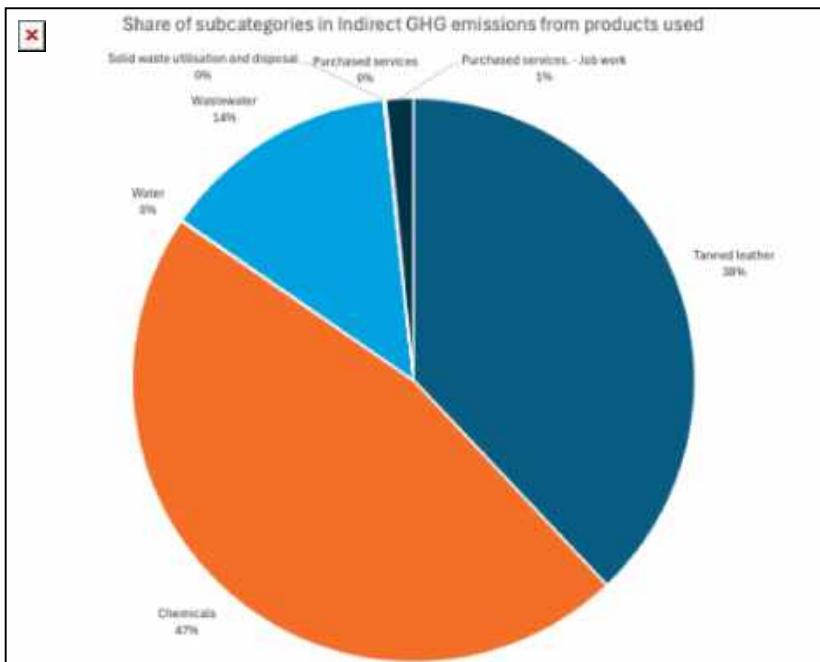
The anthropogenic biogenic carbon emissions come from two sources, namely one from the use of firewood in both the facilities and use of firewood in evaporator in CETP. The share of biogenic carbon emission is 17%.

## **GHG emission by category:**

Among the five categories of GHG emissions, the category 4, which is attributed to the materials used by the organization forms the major part of GHG emission contributing to 68% of overall GHG emissions.



Within Category 4 of indirect emissions the subcategories of chemicals contribute to majority of GHG emission holding about 47% within this category. The share of chemicals among the overall GHG emission is 32%.

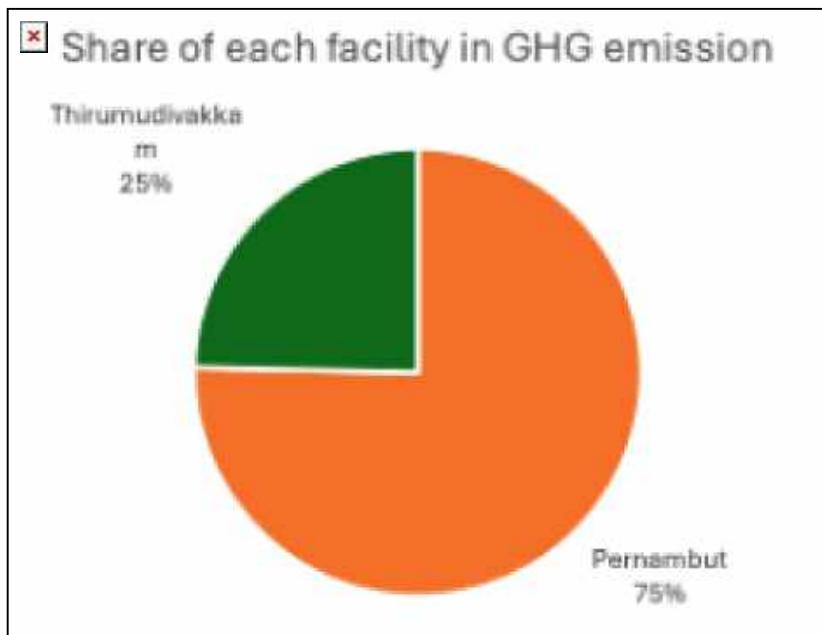


### **GHG Emissions from effluent treatment:**

The facility which is using large quantity of water in processing is Pernambut facility. During the assessment period, the facility consumed 3444 m<sup>3</sup> of fresh water and 3141 m<sup>3</sup> of recovered water. The wastewater from the facility is sent by pipeline in gravity mode to Pernambut common effluent treatment plant. The CETP is operating ZLD plant. The wastewater is treated in 5 stages of effluent treatment and clean water is obtained. This recovered water is sent to tanneries for processing. Reject stream in the CETP is evaporated in multiple effect evaporator. This ZLD plant consumes huge amount of energy. However, the major part of this energy is anthropogenic biogenic carbon emissions contributed by wood used for evaporation. The high energy consumption in ZLD plants was an aspect for carbon emissions. The emissions including biogenic carbon emission contributes to 9% of overall GHG emissions.

### Share of manufacturing facilities:

Pernambut contributes for major share in GHG emissions, the main reason is GHG emission allocated for incoming tanned leather, whereas the same has not been allocated for Thirumudivakkam facility. If the allocation for tanned leather is removed, then the share is almost equal among the two facilities.



### Risks in accuracy of quantification

The main risk in the quantification comes from the chemicals used in both facilities. Most of these chemicals are proprietary in nature. Further, the GHG emissions data for all proprietary chemicals is still not available. The available data for GHG emissions for leather chemicals is from carbon intensity published by two major leather chemical manufacturers. Average of carbon intensities from these published data is applied for arriving at indirect GHG emission for using chemicals under Category 4.

## Opportunities for improvement

The quantification of GHG emissions and removals in BAB Leather Products International provided ample of opportunities for improvement, i.e. to reduce the GHG emissions. The organisation is seriously looking ahead to reduce the GHG emissions and bring down the carbon intensity of products.

*The Principal Investigator for this study can be contacted at [mviswanathan@outlook.com](mailto:mviswanathan@outlook.com).*

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## **BAB Leather Products International @ CCKC 2025**

### **18<sup>th</sup> Kaizen Competition by Quality Circle Forum of India**

The 18<sup>th</sup> Quality Circle Forum of India (QCFI) Chennai Chapter Kaizen Competition, also known as CCKC 2025, took place on November 15, 2025, at Sri Sairam Engineering College, Chennai. It featured participation from 159 teams from 37 organizations, with 468 total participants. The QCFI Chennai Chapter Kaizen Competition is an annual event where employee teams from various organizations present case studies on process improvements to a panel of judges.

The competition, organized by the QCFI since 2005, aims to promote continuous improvement, team building, and employee involvement culture in an organization. The teams compete for Gold, Silver and Bronze awards which are given based on the judges evaluation of their case study presentations. Teams present case studies that demonstrate their Kaizen (continuous improvement) efforts. These presentations include a 15-minute oral presentation followed by a 5-minute question-and-answer session.

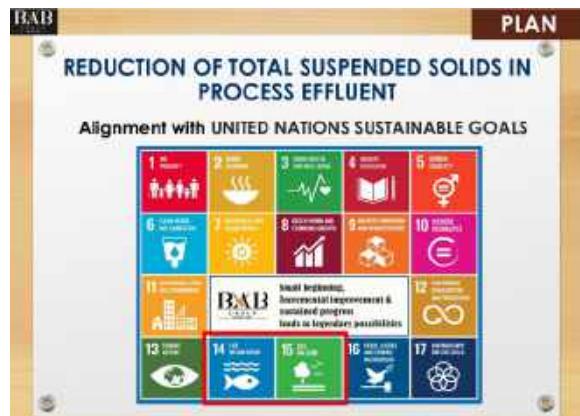
BAB Team's presentation started with a briefing on the 4<sup>th</sup> generation BAB Leather Products International's business journey since 1945 to date as an ISO 9001, ISO 14001, ISO 45001, ZED, LWG, DECLARE label certified tannery, with three factories and three show rooms worldwide.

This was followed by introducing the tannery's main products and clients. The Team then explained about what is leather, why leather industry is considered as an upcycling industry, and then briefed about the leather manufacturing process.



BAB team's Kaizen project aligns with the United Nations Sustainable Development Goals (SDGs) 14 AND 15. The team distinctly explained the **"Reduction of Total Suspended Solids (TSS) in Process Effluent"**.

The project **PDCA cycle**, started from goal **planning** and budget setting with Genuine Consultancy Service and the Company team. **Doing** by showing photo evidence



from several tannery sites, **checking** the result by monitoring effluent discharge by electromagnetic flow meter, third party laboratory test reports, and calculation (Referenced by UNIDO) showing cost saving due to TSS reduction along with other 7 benefits, and finally **acting** by operational control procedure and horizontal deployment by CO emission monitoring.



BAB Leather scripted history by becoming the first tannery to participate in the QCFI Kaizen Competition and also winning the gold award. BAB Leather team utilized this forum well to burst some myths about the Leather Industry and show their true commitment towards protecting the environment.

BAB Education & Charitable Trust established **Kalaimagal High School** in the year 1983 as part of BAB's Corporate Social Responsibility (CSR). The school started with just 10 students, currently operates with nearly 1000 students and offers free education up to 8<sup>th</sup> standard along with extra-curricular activities. Plans are to develop it as a high school and then into a polytechnic college with a health care center.





GCSs partnership with BAB Leather Products International extends beyond regular consultancy services. GCS also provides support to train the smart youngsters of Kalaimagal High School. Four students attended the CCKC 2025 competition along with BAB Leather team and surprised the audience by giving a short presentation on 5S; the five-step methodology that creates a more organized and productive workspace.

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## CONTACT US

P. Venkatesan

Global PPE & Footwear / Leather Manager

m: +91 90030 80029

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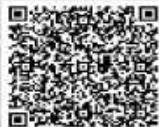
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# Indian Leather Industry amidst Challenges including Tariff Scenario

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

UMTA Management & Texstyles Academy, Vapi, Gujarat, India <sup>1&2</sup>

nsk\_sriya@yahoo.com <sup>1</sup> textiles.vapi@gmail.com <sup>2</sup>

Indian Leather Industry amidst Challenges including Tariff Scenario
Introduction, Some of the highlights of the Indian leather industry, The Futuristic Vision of Leather Industry,
Vision Document-2030 for the leather and footwear industry, EXPORT TREND, Current Export Data, Indian leather industry – Challenges, Strategy to overcome and Solutions,
Indian Leather Industry in Tariff Scenario - Highlights, Negative impact, Domestic market relief measures,
Strategic adaptations and government support, Future outlook, US Tariffs Set to Slash Indian Leather Industry Revenue by 10-12% in FY26,
Strategies Followed in Leather Industry for Growth & Development, Strategies for Enhancing the Competitiveness, Government initiatives,
LEATHER & FOOTWEAR INVEST IN INDIA, How Can India Revive its Leather Industry? US tariff effect on Indian leather industry - dos and don'ts,
US tariff effect on Indian leather industry- Action plans from government and industry, Long-term outlook, References,

## 1. Introduction

India is a significant and dominant player in the global leather and leather products market, exporting a diverse range of leather products. Also, India exports several leather products, including footwear, accessories, leather bags, wallets, garments, and home décor, which are in high demand on the global market.

However, India's leather industry is a major export powerhouse, best known for its footwear and leather products. With a strong presence in footwear and a

developing reputation for textiles, India is a major player in the global leather business.

Leather exports from India have the potential to be very profitable, but it requires a smart strategy. High-quality leather, a thoroughly researched target market, and efficient manufacturing procedures are all essential.

Balancing these elements with considerations like global economics and trade policies is critical for maximizing profit margins. Finding a market niche, whether through a specific product category or consumer emphasis, is also a viable technique. By adopting sustainability and constantly innovating with design and production techniques, leather exporters can set themselves up for long-term success in this dynamic industry.<sup>1</sup>

## **2 Some of the highlights of the Indian leather industry<sup>2</sup>**

- Raw Material: India has a variety of raw material bases with approx. 3 billion sq. ft. of leather processed in a year.
- Global Production and Export Leader: India is among the top 5 countries in global leather goods exports today. India is one of the largest global producers of leather footwear and leather garments, after China. Leather footwear from India accounts for 42.6% of the total leather exports.
- Massive Workforce in Different Regions: The leather industry employs approximately 4 to 4.5 million people, including a significant female workforce. The key states of India that produce leather include West Bengal, Tamil Nadu, Uttar Pradesh, and Karnataka.
- Government Support: Leather was a priority in the Make in India initiative, while offering incentives and infrastructural support. The Council of Leather Exports (CLE) supports exporters through policy guidance, market promotions, and industrial networking.

These factors make India a powerhouse in the leather industry, but a global leader with strong foundations in raw materials, skilled labour, and export-ready infrastructure.

## **3. The Futuristic Vision of Leather Industry lays emphasis on -**

- Growth & Development, Sustainability, Circular Economy, Innovation, Certifications,
- Strategies & Policies, Negative Publicity About Leather Done & Counter Measures,
- Harmonious Living – Leather and Synthetics, Environmental Impact,
- Greener Products and related initiatives and scenarios.

### 3.1 The Council for Leather Exports (CLE) and the Leather Export Promotion Council have prepared a Vision Document-2030 for the leather and footwear industry<sup>3</sup>

The document outlines the global outlook of the industry, current status in India, global benchmarking and best practices, market and industry pulse analysis, policy, regulatory and infrastructure landscape, overview of multi prolonged action agenda to achieve the vision for 2030, domestic market vision and export market vision for 2030.

The Vision Document aims to increase production and exports in the next 5-7 years and reach the total turnover (industry size) of around **USD 47.1 billion** by 2030 against the present USD 17.26 billion turnover<sup>1</sup>. These target figures include both, domestic sales and export.

- The present industry size is USD 17.3 billion comprising Domestic turnover of USD 12 billion and Export turnover of around USD 5.3 billion.
- From here the industry is looking to increase the Industry Size to USD 47.1 billion consisting of Domestic turnover of USD 33.4 billion and Export turnover of around USD 13.7 billion.
- It is also pertinent that out of USD 47.1 billion target the share of footwear sector ( both Leather & Non-Leather ) is around 50%. Which shows the importance of Footwear sector in accelerating production and exports.

#### 4. EXPORT TREND FIGURE 4 A



- India is the second-largest exporter of leather garments, the third-largest exporter of saddlery & harnesses and the fourth-largest exporter of leather

goods in the world. The garments sector accounted for 7.62% of the country's total leather exports in FY25 (April-December).

- Out of the total leather and leather products exported out of India, the footwear segment accounts for the majority of exports, with FY25 (April-December) exports valued at Rs. 1,26,902 crore (US\$ 1.51 billion).
- Footwear (Leather Footwear, Footwear Components & Non-Leather Footwear) holds the major share of 51.9% in the total export of leather and leather products with an export value of US\$ 598.58 million.

Source : Figure 4 A. Leather Industry and Exports, CLE.IBEF, India Brand Equity Foundation.

#### **4.1 Current Export Data – April – August 2025-26 Vs April – August 2024-25<sup>4B</sup>**

Export of Leather, Leather Products and Footwear :

- April – August 2025-26 - 2147.75 Million US\$
- April – August 2024-25 - 2050.33 Million US\$
- Current year has a very slight edge up to April – August 2025-26.

#### **5. Indian leather industry – Challenges**

- The Indian leather industry faces challenges including environmental compliance, especially with effluent treatment, which has led to tanneries shutting down. Other
- key issues include stiff international competition from countries like China, raw material scarcity due to restrictions on cattle trade, and a large skill gap due to an untrained workforce.
- The industry also struggles with outdated technology, poor infrastructure, adapting to fast-changing fashion trends, and rising costs, exacerbated by new taxes and fluctuating export duties.

#### **5.1 Environmental and regulatory challenges Table 5 A**

##### **5.1 Environmental and regulatory challenges Table 5 A**

- Pollution:** Tanneries, particularly in hubs like Kanpur, have discharged large amounts of untreated effluent, leading to severe pollution of water bodies and soil contamination.
- Stricter norms:** Tighter environmental regulations from bodies like the NGT and UPPCB have resulted in the closure of many tanneries that lack the capacity for proper waste treatment.
- Raw material supply:** Restrictions on cattle slaughter and trade have created a shortage of raw materials, impacting production.

### 5.1 Environmental and regulatory challenges Table 5 A

- **Increasing costs:** The Goods and Services Tax (GST) and other regulatory hurdles have increased costs, especially for small and medium enterprises (MSMEs).
- **Export tariffs:** The industry has been negatively impacted by trade issues, including a significant tariff imposed by the US on Indian leather products

### 5.2 Technology and infrastructure challenges Table 5 B

#### 5.2 Technology and infrastructure challenges Table 5 B

- **Outdated technology:** Many manufacturers use outdated technology, which limits their productivity and ability to meet global quality standards.
  - **Inefficient processes:** Turnaround times for product sampling and delivery are significantly longer than those of competitors like China.
- **Poor infrastructure:** A lack of adequate infrastructure increases costs, as companies must keep higher inventories of chemicals and spares to guard against delivery delays

### 5.3 Workforce and market challenges Table 5 C

#### 5.3 Workforce and market challenges Table 5 C

- **Skill gap:** A large part of the workforce is untrained, illiterate, and lacks awareness of health and safety practices, leading to low productivity.
  - **Health and safety risks:** Workers are often exposed to hazardous chemicals without adequate protection, leading to respiratory, skin, and other chronic health issues.
- **Global competition:** Indian leather products face stiff competition from low-cost manufacturing countries like China, Vietnam, and Bangladesh.
  - **Changing consumer preferences:** The growing demand for synthetic and vegan alternatives to leather threatens traditional products unless the industry adapts with more sustainable practices.
    - **Dependence on western markets:** The industry remains heavily dependent on specific export markets, making it vulnerable to trade disputes and tariffs.

Source : 5. & Tables – 5 A & 5 B & 5 C

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

## 6. Indian leather industry challenges - Strategy to overcome and Solutions<sup>6</sup>

The Indian leather industry faces significant challenges, primarily related to **environmental compliance, raw material shortages, technology gaps, and fierce global competition**. To overcome these, a multi-pronged strategy focusing on sustainability, technology adoption, skill development, and market diversification is required.

### 6.1 Strategies and Solutions Table 6 A

6.1 Strategies and Solutions Table 6 A
<ul style="list-style-type: none"><li>• Embrace Sustainability and Green Technology:<ul style="list-style-type: none"><li>○ Adopt eco-friendly practices: Implement the "Waterless Chrome Tanning Technology" developed by CSIR-CLRI and promote chrome-free alternatives.</li><li>○ Upgrade Effluent Treatment: Transform Common Effluent Treatment Plants (CETPs) into advanced "Clean Integrated Resource-Conserving Leather Ecosystems" (CIRCLES) and explore Zero Liquid Discharge (ZLD) micro-treatment plants with government financial assistance (Viability Gap Funding).</li><li>○ Promote Ethical Branding: Introduce a "Bharat Leather Mark" backed by sustainable sourcing and ethical labor audits to appeal to environmentally conscious global consumers.<ul style="list-style-type: none"><li>• Invest in Technology and Infrastructure:</li></ul></li><li>○ Modernize Units: Utilize schemes like the Indian Footwear and Leather Development Programme (IFLDP) to secure financial assistance for modernization, capacity expansion, and technology upgrades.</li><li>○ Establish Tech Hubs: Set up a National Leather Tech Hub under CSIR-CLRI to foster R&amp;D and collaboration with MSMEs for developing innovative products and processes.<ul style="list-style-type: none"><li>○ Improve Logistics: Develop better logistics and infrastructure, potentially within Mega Leather Clusters, to ensure a resilient supply chain and timely delivery of products.</li></ul></li></ul></li></ul>

### 6.2 Strategies and Solutions Table 6 B

6.2 Strategies and Solutions Table 6 B
<ul style="list-style-type: none"><li>• Address Raw Material and Skill Gaps:<ul style="list-style-type: none"><li>○ Improve Domestic Sourcing: Enhance leather collection and</li></ul></li></ul>

## 6.2 Strategies and Solutions Table 6 B

processing infrastructure domestically and educate the workforce on techniques for producing high-quality raw material to reduce import dependency.

- o **Upskill Workforce:** Leverage the Leather Sector Skill Council (LSSC) and government schemes like PM Vishwakarma Yojana to provide targeted training in modern, sustainable techniques, automation, and quality management.
- o **Improve Labor Welfare:** Formalize informal labor with "Digital Udyog Cards" to provide access to health benefits and accident insurance, and establish Worker Wellness Missions to provide mobile health labs in clusters.
  - Enhance Market Position and Competitiveness:
- o **Diversify Export Markets:** Reduce dependence on traditional European and US markets by exploring new destinations like Australia, South Africa, and Brazil.
- o **Leverage E-commerce & Branding:** Utilize digital marketing and e-commerce platforms to reach a global audience and promote "Made in India" brands through strategic collaborations with global fashion houses.
  - o **Position as 'China Plus One':** Strengthen compliance and design innovation to position India as a reliable and ethical alternative sourcing hub in the global value chain.

Source : 6 & Tables – 6 A & 6 B.

<https://www.google.com/search?q=indian+leather+industry+challenges+strategy+to+overcome+and+for+solutions>

## 7. Indian Leather Industry in Tariff Scenario - Highlights <sup>7</sup>

- Indian leather industry's tariff scenario is currently defined by significant challenges, primarily stemming from new U.S. tariffs, while navigating efforts by the Indian government to support the sector.
- The industry, which relies heavily on exports, is experiencing a downturn in revenue and volume, even as it seeks to offset losses through a growing domestic market and trade with other partners.

## 7.1 Negative impact from U.S. tariffs Table 7 A

Since August 2025, the U.S. has imposed a combined 50% tariff on Indian leather goods. The tariffs, reportedly a result of India's purchase of Russian oil, consist of a 25% reciprocal duty and an additional 25% penalty.

#### Negative impact from U.S. tariffs Table 7 A

- **Export decline:** Crisil Ratings predicts this will cause a 10–12% drop in the industry's total revenue for FY26. Export volumes are expected to fall by 13–14%, with export revenue seeing an even steeper drop of 14–16%.
  - **Reduced competitiveness:** The 50% tariff puts India at a significant disadvantage compared to competitors like Vietnam, Italy, and Cambodia, which face lower U.S. tariffs of 15–20%.
- **Finished goods hit hardest:** Exports of high-value finished products like shoes and accessories, which are central to the U.S. market, are most affected, leading to sharper revenue cuts.
- **Factory shutdowns:** The steep tariffs have triggered order cancellations and factory closures, particularly affecting micro, small, and medium enterprises (MSMEs) in key production hubs like Tamil Nadu's Ambur region.

#### 7.2 Domestic market relief measures Table 7 B

In an attempt to counter the export slump, the Indian government has introduced measures to stimulate domestic demand.

#### Domestic market relief measures Table 7 B

- **GST reduction:** The Goods and Services Tax (GST) on leather products was reduced from 18% to 12%, aiming to make them more affordable and boost consumption in India.
- **Customs duty elimination:** The Union Budget 2025–26 provided a much-needed boost by eliminating the export duty on crust leather and import duty on wet blue leather. This is intended to strengthen the domestic tanning industry and help manage raw material costs.
  - **Increased disposable income:** A higher income tax threshold is expected to increase middle-class disposable income, further supporting domestic spending on leather goods.

#### 7.3 Strategic adaptations and government support Table 7 C

The industry is responding to the new tariff regime with strategic adjustments, backed by continued government initiatives.

#### Strategic adaptations and government support Table 7 C

- **Market diversification:** Exporters are actively looking for new markets and exploring partnerships in countries with more favorable tariff

### Strategic adaptations and government support Table 7 C

structures to limit their losses.

- **New trade agreements:** The recently signed Free Trade Agreement with the United Kingdom is a key measure that could help mitigate the drop in export revenue.
- **Mega clusters and PLI scheme:** The government's Indian Footwear and Leather Development Programme (IFLDP), with a budget of ₹1,700 crore, supports infrastructure, modernization, and mega-cluster development. In early 2025, a focused Production-Linked Incentive (PLI) scheme was announced to boost competitiveness and generate employment.

### 7.4 Future outlook Table 7 D

The industry's future trajectory will hinge on several key factors.

#### 7.4 Future outlook Table 7 D

- **Bilateral trade talks:** India and the U.S. are negotiating a bilateral trade agreement, and the outcome of these talks, expected around late 2025, will be crucial in determining the future tariff structure.
- **"China Plus One" strategy:** Amid U.S.-China trade tensions, India is strategically positioning itself as an alternative manufacturing hub, which could attract global buyers seeking reliable sourcing options.
- **Sustainability and innovation:** To stay competitive, the industry is embracing more sustainable and eco-friendly practices to meet evolving consumer demands and international standards.

Source : 7 & Tables – 7 A & 7 B & 7 C & 7 D

<https://www.google.com/search?q=Indian+Leather+Industry+in+Tariff+Scenario+highlights>

### 8. US Tariffs Set to Slash Indian Leather Industry Revenue by 10-12% in FY26<sup>8</sup>

- CRISIL Ratings projects a 10-12% revenue decline for the ₹56,000 crore Indian leather industry in FY26 due to new US tariffs. The US has imposed a 50% tariff on Indian leather products, causing potential order cancellations and production halts. Exports may drop 13-14% in volume and 14-16% in revenue.

- The industry, which relies on exports for 70% of its revenue, faces profitability compression and stock market declines. Potential relief measures include a UK Free Trade Agreement and GST reductions. Future outlook depends on tariff structures, market diversification, and forex volatility.
- The Indian leather and allied products industry is bracing for a significant downturn, according to a recent projection by CRISIL Ratings. The industry, valued at ₹56,000 crore, may face a 10-12% revenue decline in FY26 due to the imposition of hefty US tariffs.

### 8.1 Impact of US Tariffs Table 8 A

**The United States has imposed tariffs totalling 50% on Indian leather products, comprising:**

- 25% reciprocal duty
- 25% penalty for India's Russian oil purchases

**This move has severely impacted the industry, potentially leading to:**

- Widespread order cancellations
- Production halts
- Expected 13-14% drop in export volumes
- Projected 14-16% fall in revenue to \$3.9-4 billion

### 8.2 Export Market Breakdown

The Indian leather industry heavily relies on exports, with 70% of its revenue coming from international markets. The export landscape is dominated by two major regions : EU – over 50% and US – Around 22%.

### 8.3 Financial Implications

The industry may face significant financial challenges :Metric and Impact.

- Overall Operating Profitability - Contraction by 150-200 bps.
- Exporters' Profitability Compression - 250-300 bps
- Fixed Costs - 25-30% of total costs

### 8.4 Potential Relief Measures

Despite the gloomy outlook, some relief measures are under consideration:

- UK Free Trade Agreement

- GST reduction on leather products from 18% to 12%
- Lower GST on intermediate goods from 12% to 5%

## 8.5 Future Outlook

The industry's future trajectory will depend on several factors:

- Evolution of tariff structures
- Pace of market diversification
- Impact on European re-exports
- Foreign exchange volatility

As the Indian leather industry navigates these challenging waters, stakeholders will need to closely monitor these factors and adapt their strategies accordingly.

Source : 8. Tables – 8 A .US Tariffs Set to Slash Indian Leather Industry Revenue by 10-12% in FY26

Updated on 23 Oct 2025, 05:40 PM Reviewed by Radhika Sahani ScanX News Team.

## 9.Strategies Followed in Leather Industry for Growth & Development

5. Strategies Followed in Leather Industry for Growth & Development
<p>1.Merger &amp; Acquisition Strategies . 2.New Product Launch.</p> <p>3.Cooperation and Support for Effective &amp; Customer Oriented Marketing by suitable Sourcing and Product Modification &amp; Formulation Strategies.</p> <p>4.Forward &amp; Backward integration in manufacturing for Market Share, Environmental Advantage &amp; Cost Advantage. Also having activities in allied industries for better survival, growth development and sustainability.</p>
<p>5.Intelligently connecting production plants and technologies to efficiently use resources and leverage expertise.</p> <p>Production plants, energy and material flows, logistics, and site infrastructure are all integrated</p> <p>6.Product modification and formulation for the Customized Requirements of Customers.</p>

Competitive Strategy is taking offensive or defensive action to create a defendable position in an industry to cope successfully with five competitive forces such as Potential entrants (threats of new entrants), Industry competitors (rivalry among existing firms), Buyers (Bargaining power of buyers), Suppliers (Bargaining power of suppliers), Substitutes (threat of substitute

products/service) and thereby yield a superior return on investment for the firm. In coping with five competitive forces there are three potentially successful strategies- Overall Cost Leadership, Differentiation & Focus.

### **9.1 Strategies for Enhancing the Competitiveness of Leather Industry in India<sup>9 A</sup>**

Efficient Clustering and Networking would allow Leather SMEs to compete globally. Cluster means a geographical concentration of Leather SMEs engaged in the production of related goods, which have common opportunities and face similar challenges. Networks are groups of firms that cooperate on a joint development project complementing each other and specializing in order to overcome common problems, achieve collective efficiency and penetrate markets beyond their individual reach. Through Clustering and networking the Leather SMEs can -

1. Overcome the disadvantages of economies of scale
- 2 .Access skilled & educated labour
3. Have better cost effectiveness due to sharing of common costs
4. Have quicker dissemination of information leading to better responsiveness to market challenges
5. Increase competitiveness by sharing best practices in the areas of organizational capabilities, technological innovations, flexible structure and faster decision-making process.
- 6.Have better negotiating power

### **9.2 Government initiatives for the leather industry - Indian Footwear and Leather Development Programme (IFLDP)<sup>9 B</sup>**

The IFLDP scheme was launched to develop the infrastructure, increase production, facilitate investments and generate employment in the leather industry of India. Under this scheme, Rs. 1,700 crores (US\$ 220 million) has been allocated till 2026. It is a central sector scheme. Following are the six sub-schemes under IFLDP:

- Sustainable Technology and Environmental Protection (STEP) – The STEP initiative is aimed at sustainable and environment-friendly industrial and tanning activities which are particularly linked to environmental concerns. Considering these issues, zero liquid and wastewater discharge is made mandatory in some states. Assistance for the upgradation of Common Effluent Treatment Plants (CETPs) and vision document preparation is provided under the scheme.
- Integrated Development of Leather Sector (IDLS) – The main objective of this scheme is to encourage entrepreneurs to diversify and set up new units leading to better productivity.

- Establishment of Institutional Facilities – The scheme aims to provide infrastructure upgradation of campuses of the Footwear Design and Development Institute (FDDI)
- Mega Leather Footwear and Accessories Cluster Development (MLFACD) – The scheme is launched to assist entrepreneurs by providing modern infrastructure, technology, training and skill development, and human resource development inputs.
- Brand Promotion of Indian Brands in Leather – The scheme aims to provide Indian footwear and leather manufacturers international branding support to provide better product visibility.
- Footwear Sector and Development of Design Studios – This scheme will provide design support, technical assistance, and opportunities for employment and business.

### **9.3 Strategies for Reducing Waste and Maximizing Efficiency in Leather Production**<sup>9C</sup>

The leather production process can generate significant waste and have negative impacts on the environment and the economy. Therefore, it is important for companies in the leather industry to implement strategies to reduce waste and maximize efficiency - Various strategies that companies can implement to achieve these goals, including water conservation, chemical management, energy efficiency, waste management, material efficiency, and transparency and traceability measures. By adopting these strategies, companies can improve their environmental performance, reduce costs, and increase their competitiveness in the market.

### **10. LEATHER & FOOTWEAR INVEST IN INDIA**<sup>10</sup>

- India's leather and footwear sector, rich in skilled talent and eco-conscious innovation, is poised for dynamic growth, offering robust investment opportunities
- \$47 Bn - Turnover target of Indian footwear and leather industry by 2030
- \$315.48 Mn - FDI inflow in leather, leather goods, and pickers from April 2000 to September 2024
- \$4.28 Bn - India's export of leather and leather manufactures during 2023-24
- With an aim to reach a turnover of **\$47 Bn by 2030**, the government of India has launched the **Indian Footwear and Leather Development Programme (IFLDP)** with an allocation of INR 1,700 Cr to boost the current

infrastructure and dispense various incentives to the industries and manufacturing units engaged in the sector.

- India aims to establish itself as a hub to meet the increasing demand for leather products through various sub-schemes, including the establishment of leather footwear and accessories clusters, institutional facilities, and the promotion of Indian brands in the sector. This is being achieved by setting up design studios across the nation through various industrial collaborations like CSIR-CLRI and offering shoe/garment designing courses.
- Industry is increasingly adopting eco-friendly tanning processes and waste reduction initiatives, embracing innovation and sustainable practices to minimising environmental impact. Being a vital pillar of the garments and footwear industry, the leather sector, combining tradition, innovation, and economic sustainability, remains a driving force in India's growth journey, offering vast opportunities for advancement.

### **10.1 Why Invest in Leather & Footwear Table – 10 A**

<b>10.1 Why Invest in Leather &amp; Footwear Table – 10 A</b>
<ul style="list-style-type: none"><li>• <b>Robust Government Support</b></li></ul>
<p><b>The Indian government supports the modernization of the leather and footwear sectors through various initiatives..</b></p> <ul style="list-style-type: none"><li>• <b>Availability of Raw Materials</b></li></ul>
<p><b>India is endowed with 33% of the world's cattle &amp; buffalo and 11% of the world's goat &amp; sheep population.</b></p> <ul style="list-style-type: none"><li>• <b>Robust Demand</b></li></ul>
<p><b>India is the 2nd largest producer, with 11.6% of the global footwear production, and consumer, with 12.4% of global consumption, of footwear in the world.</b></p> <ul style="list-style-type: none"><li>• <b>Strong Domestic Market</b></li></ul>
<p><b>India has a strong domestic market with rapid premiumization seen in the leather and footwear sector.</b></p>

### **10.2 Major Investors Incentives & Schemes Table – 10 B**

<b>10.2 Major Investors Incentives &amp; Schemes Table – 10 B</b>
<ul style="list-style-type: none"><li>• <b>Guidelines for Integrated Development of Leather Sector (IDLS)</b></li><li>• <b>Guidelines for Brand Promotion of Indian Brands in Footwear and</b></li></ul>

## 10.2 Major Investors Incentives & Schemes Table – 10 B

### Leather Sector sub-scheme of Indian Footwear and Leather Development Programme(IFLDP)

- Guidelines for Establishment of Institutional Facilities in Footwear and Leather Sector sub-scheme of Indian Footwear and Leather Development Programme(IFLDP)
- Guidelines of the Mega Leather Footwear and Accessories Cluster Development Sub-Scheme of Indian Footwear and Leather Development Programme (IFLDP)
- Guidelines for Sustainable Technology and Environmental Promotion (STEP) sub-scheme of Indian Footwear and Leather Development Programme
- Footwear made from leather and other materials – quality control – order, 2022

Source : 10 & Tables - 10 A & 10 B. LEATHER & FOOTWEAR INVEST IN INDIA

## 11. How Can India Revive its Leather Industry? Table – 11 A

### 11. How Can India Revive its Leather Industry? Table – 11 A

#### § Transform CETPs to CIRCLES:

- o Transform Common Effluent Treatment Plants (CETPs) into CIRCLES (Clean Integrated Resource-Conserving Leather Ecosystems).
- o Fund decentralised Zero Liquid Discharge (ZLD) micro-treatment plants through Viability Gap Funding (VGF).
- o Mandate digital effluent metering and traceability, linked to a central Green Leather Compliance Dashboard (similar to the PARIVESH portal for environment clearances).

#### § Position India ‘China Plus One’:

- o India can strategically position itself as a “China Plus One” hub in the global leather value chain amid rising US-China trade tensions.
  - o India can attract global buyers seeking reliable alternatives.
- Strengthening eco-compliance and design innovation will make India a preferred sourcing destination.

#### § Addressing the Innovation Gap:

- o A National Leather Tech Hub can be established under the Council of Scientific and Industrial Research – Central Leather Research Institute

## 11. How Can India Revive its Leather Industry? Table – 11 A

(CSIR-CLRI) and the Atal Innovation Mission to foster innovation in the leather sector.

- o This hub can collaborate with startups and MSMEs to co-develop biodegradable tanning agents, chrome-free alternatives, and smart wearable leather composites.

## 11.1 .How Can India Revive its Leather Industry? Table – 11 B

### 11.1. How Can India Revive its Leather Industry? Table – 11 B

#### § Unlock Ethical Luxury Branding for Indian Leather:

- o Introduce a “Bharat Leather Mark”, backed by sustainable sourcing and ethical labour audits.
  - o Launch a ‘100 Indian Leather Stories’ global branding campaign showcasing heritage artisanship from Kanpur, Ambur, Tamil Nadu and Kolkata.
  - o Encourage luxury collaboration with global fashion houses under Make in India.

#### § Formalise the Informal:

- o Provide Digital Udyog Cards for every tannery worker to ensure access to skilling, health benefits, and accident insurance.

#### § Skill the Sector, Heal the Worker:

- o A dedicated Worker Wellness Mission should provide mobile health labs in leather clusters.
- o By integrating PM Vishwakarma Yojana artisans can be upskilled in modern, sustainable techniques. This will reduce attrition and boost productivity by 30–35%, securing a healthier and more resilient workforce.

Source : Tables – 11 A & 11 B. India's Leather Industry Drishti The Vision Foundation, India 22 Apr 2025

## 12. US tariff effect on Indian leather industry - dos and don'ts <sup>12</sup>

The US tariffs of a combined 50% (a 25% reciprocal duty plus a 25% penalty) have severely impacted the Indian leather industry, leading to significant revenue decline and loss of market share. Indian exporters must adapt their strategies to remain competitive.

## 12.1 Dos and Don'ts for the Indian Leather Industry - Effects of US Tariffs on the Indian Leather Industry Table – 12 A

Dos and Don'ts for the Indian Leather Industry - Effects of US Tariffs on the Indian Leather Industry Table – 12 A		
Category	Do's	Don'ts
Market Strategy	<b>Diversify export markets:</b> Explore new markets with more favourable trade terms, such as the EU (where tariffs are lower) and countries with which India has a Free Trade Agreement (e.g., the UK, Australia, UAE).	<b>Don't rely solely on the US market:</b> The high concentration of exports to the US (around 22% of total) proved to be a vulnerability.
Operations	<b>Explore relocation/outsourcing:</b> Consider shifting some manufacturing operations to countries with lower US tariff rates (e.g., Bangladesh, Vietnam, Ethiopia) to bypass the steep levies.	<b>Don't absorb the entire tariff burden:</b> Demands from US buyers to absorb the full tariff hit are not viable long-term and will severely impact profitability.
Product & Quality	<b>Focus on quality and sustainability:</b> Leverage the reputation of Indian leather goods for quality to retain buyer loyalty and differentiate from competitors.	<b>Don't compromise on quality:</b> Maintaining high standards helps in retaining existing customers despite the price challenge.
Advocacy & Support	<b>Appeal for government support:</b> Continue to engage with industry bodies (like the Council for Leather Exports) to seek government intervention, such as interest equalisation schemes, soft loans, and export aid to ease cash flow issues.	<b>Don't wait for immediate government action:</b> While the government is in discussions, benefits may take time to materialise, so proactive measures are essential for survival.

Dos and Don'ts for the Indian Leather Industry - Effects of US Tariffs on the Indian Leather Industry Table – 12 A		
Category	Do's	Don'ts
Domestic Focus	<p><b>Capitalise on domestic demand:</b> Utilise the robust domestic market, which has seen growth due to GST reductions (from 18% to 12% on products) and other positive macroeconomic factors, to offset export losses.</p>	<p><b>Don't neglect the domestic market:</b> The local market can provide a crucial buffer against international volatility.</p>

Source : 12 & Tables – 12 A

<https://www.google.com/search?q=us+tariff+effect+on+Indian+leather+industry+dos+and+don%27ts>

### 13. US tariff effect on Indian leather industry - Action plans from government and industry

#### 13.1 Action Plans Table – 13 A

13.1 Action Plans Table – 13 A	
<p><b>Government Actions and Proposed Measures</b></p> <ul style="list-style-type: none"> <li>• <b>Diplomatic Engagement:</b> The Indian government has condemned the tariffs as "unfortunate" and is engaging in diplomatic talks and ongoing bilateral trade agreement negotiations with the US to find a mutually beneficial solution.</li> <li>• <b>Fiscal and Financial Support (Proposed):</b> Industry bodies like the Council for Leather Exports (CLE) and the Federation of Indian Export Organisations (FIEO) have appealed for government intervention, including: <ul style="list-style-type: none"> <li>○ Reintroduction of an interest equalization scheme (subsidized credit).</li> <li>○ Temporary export aid or cash support to ease cash flow issues.</li> <li>○ Lowering the Goods and Services Tax (GST) on finished leather products from 18% to 12% and on intermediate goods from 12% to 5% to boost the domestic market and provide some relief.</li> </ul> </li> </ul>	

### 13.1 Action Plans Table – 13 A

- **Market Access Initiatives:** The government is working to fast-track Free Trade Agreements (FTAs) with the UK and EU to offset US market losses and promote market access to other regions like the Middle East and the GCC (Gulf Cooperation Council) countries.
- **Scheme Implementation:** Existing schemes under the Indian Footwear and Leather Development Programme (IFLDP) are being leveraged to provide infrastructure support, technology upgrades, and skill development, though immediate financial assistance is still under discussion.

### 13.2 Industry Adaptations and Strategies Table – 13 B

#### 13.2 Industry Adaptations and Strategies Table – 13 B

- **Market Diversification:** Exporters are actively rerouting shipments and exploring alternative markets in Europe, the UAE, Australia, and other non-US destinations where tariffs are lower or trade agreements are in place.
  - **Relocation of Operations:** Some tanneries and manufacturers are relocating parts of their operations to countries with lower tariff rates, such as Vietnam, Bangladesh, Indonesia, and Ethiopia, to bypass the steep US levies.
  - **Material Shifts and Value Engineering:** Manufacturers are adapting by switching to alternative materials (e.g., non-leather footwear) and using value engineering to keep product lines competitive.
- **Negotiation and Pricing Pressure:** US buyers are demanding discounts, forcing Indian suppliers to absorb some of the tariff burden or risk losing orders.
  - **Appeals for Support:** Industry associations continue to lobby the government for urgent and targeted support to sustain operations and prevent large-scale job losses.

Source : Table 13 A & 13 B

<https://www.google.com/search?q=us+tariff+effect+on+indian+leather+industry+action+plans+from+government+and+industry>

## 14.US tariff effect on Indian leather industry action plans and strategies to save Indian leather trade

### 14.1 Action plans and strategies Table – 14 A

#### 14. US tariff effect on Indian leather industry

##### 14.1 Action plans and strategies to save Indian leather trade

###### Table – 14 A

###### 3.1.1 Export diversification:

**Existing markets:** Focus on increasing exports to existing partners like the European Union, United Kingdom, UAE, Japan, Canada, and Australia.

**New markets:** Tap into emerging markets in Latin America, Africa, Eastern Europe, and East Asia.

###### 3.1.2 Domestic market stimulation:

**GST rationalization:** Consider reducing Goods and Services Tax (GST) on intermediate leather products to boost domestic demand and help offset export losses.

###### 3.1.3 Government support:

**Free Trade Agreements (FTAs):** Push for FTAs, such as the one with the UK, to provide some relief to exporters.

**Local initiatives:** Implement and expand programs like One District One Product (ODOP) to provide skills, tools, and financial assistance to small businesses.

###### 3.1.4 Industry support:

**Financial assistance:** Provide support to exporters to manage financial stress caused by delayed payments and stretched working capital.

**Production adjustments:** Some factories may need to reduce production or halt operations, while suppliers face piling up inventory.

### 14.2 Long-term outlook Table – 14 B

#### 14. US tariff effect on Indian leather industry

##### 14.2 Long-term outlook Table – 14 B

- The long-term recovery of the industry will depend on tariff stability, successful market diversification, and the management of foreign exchange volatility.

#### **14. US tariff effect on Indian leather industry**

##### **14.2 Long-term outlook Table – 14 B**

- Some reports suggest a possible recovery or stabilization of overall turnover in the following fiscal year (2026–27).

Source : Tables - 14 A & 14 B

<https://www.google.com/search?q=us+tariff+effect+on+indian+leather+industry+action+plans+and+strategies+to+save+indian+leather+trade>

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<https://www.google.com/search?q=indian+leather+industry+challenges+strategy+to+overcome+and+for+solutions>
- 7 & Tables – 7 A & 7 B & 7 C & 7 D  
<https://www.google.com/search?q=Indian+Leather+Industry+in+Tariff+Scenario+highlights>

8. Tables – 8 A .US Tariffs Set to Slash Indian Leather Industry Revenue by 10-12% in FY26

Updated on 23 Oct 2025, 05:40 PM Reviewed by Radhika Sahani ScanX News Team.

9 A - Strategies for Enhancing the Competitiveness of Leather Industry in India, Mrs. Anamika Singh, Lecturer-Marketing, Bharati Vidyapeeth Institute of Management Studies and Research, Conference on Global Competition & Competitiveness of Indian Corporate. 9 B- Leather Industry in India LAST UPDATED ON OCTOBER 11, 2023 BY CLEARIAS TEAM. 9 C Reducing Waste and Maximizing Efficiency in Leather Production.Deskera.

10 & Tables - 10 A & 10 B. LEATHER & FOOTWEAR INVEST IN INDIA

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12 & Tables – 12 A

<https://www.google.com/search?q=us+tariff+effect+on+Indian+leather+industry+dos+and+don%27ts>

Table 13 A & 13 B

<https://www.google.com/search?q=us+tariff+effect+on+indian+leather+industry+action+plans+from+government+and+industry>

Tables - 14 A & 14 B

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## About the Authors

**Shri NSK Srinivasan** has About 50 Years' experience in the area of Colouration of Textiles, Leather and Paper. Done M.Tech from University of Madras as well as awarded FSDC – a fellow of the Society of Dyers and Colourists, UK for the contribution in the area of Colouration of various substrates for more than four decades.



He has served in Atul Limited Atul (29 Years), Central Leather Research Institute, Madras (6.5 Years), Centre of Excellence, Vapi (13 Months) and In Leather Manufacturing Area - A. Abdul Shukoor & Co, Vaniyambadi, Tamilnadu (2.5 Years) and associated with UMTA Management & Texstyles Academy, Vapi for more than three years.

He has rich experience in Technical Services, Quality Assurance, Product Promotion and Marketing, Projects, Providing Solutions to Customers and within the Organization. Participated in National & International Fairs and presented Papers on Leather, Textiles, Dyestuffs and Quality. Visited Customers in India extensively for Technical Discussion, Promotional efforts, Trials & Demonstrations, Business Development and Receivable Management.

Widely travelled in India visiting customers from Textile, Leather Paper and related application areas. Visited USA, UK and Turkey for Technical Services, Business Promotion, Marketing and Innovation Approaches. Lived in Turkey for one and half years for Technical Services, Business Promotion and Marketing

Contributed to the sustainable & profitable growth and diversification of the Organization. From QA, Business Development, Product Management, Promotional Efforts, Paper Publishing and Presentation, Customer Interactions and Corporate Image Enhancement.

Papers Published - More than 60 Nos. Papers Presented - Lectures - 50. Consultancy Projects carried out - 3 Nos in the areas of Colourants, Textiles, Leather, and Colouration and related areas. Also participated and interacted in more than 200 seminars.

He is presently with UMTA Management & Texstyles Academy, Vapi - a non-profit & service-oriented organisation involved in creating awareness as well as imparting training & skill development in Eco Needs and Sustainable Solutions.

Born at Madurai in 1951, married, having two well settled daughters, one in USA & another in Pune and settled in Valsad with wife.

**Shri Hasmukh M Shah** has more than five decades of experience in Textile Field involving Yarn Trading for handlooms and power looms, Yarn Dyeing and Yarn Mercerizing as well as Supplying of products including RFD yarn and Fabrics for standardization of Dyes, Pigments and Auxiliaries and preparation of Shade Cards, Lab Instruments and Standards for Textile and Colour Industry.



He has been awarded the Life Time Achievement Award for his contribution in the field of Textiles by Textile Association of India (TAI) in the seminar organized by TAI at Vapi on 22nd April, 2017

He has served as a board member of Bombay Yarn Merchants Association for 25 years and is actively associated with Vapi Industries association, Vapi - holding the position of Chairman for the committee of Textiles, Railway as well as Skill Development. He is also a member of SDC, UK and AATCC, USA. Excellent interactions and relations with Institutions like, ICT, DKTE, MS University, LD Engineering, Textile College, Sirempur - involving Knowledge Sharing, Skill Development and Innovation.

Mr. Shah is presently involved in the business of RFD Fabrics and Yarns for testing of Dyes, Pigments and Textile Auxiliaries, Lab Instruments for the Laboratories of Colours and Textiles, Consumables – Staining Fabric, Multifibers, Detergents, International Standards and related areas, supplying to leading organizations like Huntsman, Archroma, Dystar, Atul, Colourtex, Jay Chemicals, Longshen - Kiri and others.

Assisting students doing PhD, M.Phil and research in Colours & Textiles by providing RFD Fabrics, Yarns and Consumables and Helping them in Placements in Industries. Assisted more than 300 students in Industrial Training in Industries in Vapi and surrounding areas.

Visited UK & Europe and ITME Paris & Birmingham .Actively associated with establishment of a Service Centre for Textile Machineries near Bardoli with involvement of 50 Crores investment for Developmental initiatives from Government of India. Paper Publications, Presentations in Seminar and Interaction with Industry Team for development activities.

Active collaborations with Uka Tarsadia University, Gujarat: MANTRA Surat, Vapi Industries Association, Vapi; SDC, Mumbai; ICT, Mumbai and Institutions in Silvassa, Daman & Vapi for Training, Skill Development, Placement, Education and Development Initiatives in the areas of Textiles, Colors and related fields. Interactions with Institutes in Mumbai, Surat and Ahmedabad for Textile Policy Initiatives and Development work. Running two apps in Whatsapp in Textiles for development initiatives and knowledge dissemination efforts - Texstyles Technocrate and Texstyle Academia. Members are well learned people and progressive contributors.



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2	ASSOMAC (The Italian Association for Footwear and Leather Machinery)	N3-02E
3	AUTEC AUTOMATION	N3-02B
4	BAGGIO TECNOLOGIE SRL	N2-08C
5	BARNINI S.R.L.	N3-03B
6	C.B.C. SRL	N3-04A
7	CIUCANI MOCASSINO MACHINERY	N3-01G
8	COMPEX FINISH SRL	N3-01F
9	DANESE SRL	N3-01A
10	ESSEBI SRL	N3-03-A1
11	EUROCOLOR SPA	N3-01D
12	GALLI S.P.A.	N2-08B
13	GUSBI SPA	N3-02A
14	HTF SRL	N2-08F
15	INDUSTRIAL SERVICE SRL	N3-01B
16	INDUSTRIE CHIMICHE FORESTALI S.P.A	N3-01E
17	KLF TECNOKIMICA SRL	N3-02F
18	LAMEBO SRL	N3-02G
19	MASTEK SRL	N2-08A
20	OSMO SRL	N2-08E
21	S.C.COSTRUZIONI MECCANICHE SRL	N3-01H
22	S.I.C. INTERNATIONAL SPA	N3-02C
23	SAGITTA OFFICINA MECCANICA SRL	N3-02D
24	SOMMER S.P.A. con socio unico	N3-04B
25	SPRAYTECH SRL	N2-08D
26	TEKNOLEATHER SRL	N3-01C
27	WEGA S.R.L.	N3-03A



## **TFL Highlights Sustainable Leather Solutions at IILF 2026**

The global supplier of leather chemicals is strengthening its position as a partner for responsible innovation and high performance in the leather industry.

TFL will present its high-quality leather chemical solutions, at its booth H1A-05-A in Hall 1 at the IILF. TFL will not only showcase its latest collection of leather articles for garments, accessories, and footwear in the forecasted Spring–Summer 2027 colors, but also demonstrate its commitment to sustainability and efficiency combined with technical excellence.

A particular highlight this year will be TFL's "local for local" range of ultra-low bisphenol syntans, developed to support ecological production without compromising performance. These ultra-low bisphenol solutions remain a key focus, as TFL continues to offer a versatile portfolio enabling the manufacture of all types of leather articles while staying below the detection level for bisphenols.

In addition to the ultra-low bisphenol range, the exhibition will demonstrate how TFL delivers solutions that best meet tanners' and market demands, including:

- A new era of biobased products with a high share of biogenic carbon.
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- An extended waterproofing portfolio enhancing protection and durability.



## Challenges before the Footwear Components industry

- SHARAD KANT VERMA, Ex-ED, IFCOMA

### Introduction

The Indian footwear components industry is a powerhouse for the country's footwear sector, driving employment and exports. Being highly critical and vital part of the country's footwear sector, contributing significantly to employment and exports, it is time that we need to focus and give prominence to the Component Sector in India. With the growing demand for footwear, the components industry faces both opportunities and challenges. As footwear demand surges, the components industry must navigate opportunities and challenges to seize its growth potential.

With initiatives like 'Make in India' promoting local manufacturing, the industry is poised for growth. However, it faces hurdles like raw material costs, competition from imports, and outdated technology. Addressing these challenges will be key to unlocking the industry's full potential.

- 1. Raw material availability and cost:** Fluctuating prices and availability of raw materials like leather, rubber, and synthetic materials affect production costs and supply chains.
- 2. Competition from imports:** Cheap imports, especially from countries like China, Vietnam, and Bangladesh, pose a significant threat to local manufacturers.
- 3. Technological upgradation:** Outdated technology and lack of investment in modern machinery hinder quality and productivity. This

is one of the most critical aspects which the Indian Component sector has to build upon.

**4. Joint venture and transfer of technology:** Joint ventures (JVs) and technology transfer are crucial for India's footwear components sector. Here's why:

- Tech upgrade: JVs with global majors can bring in advanced tech, improving quality and competitiveness.
- Skill development: Collaboration can upskill local workforce, bridging the expertise gap.
- Market access: JVs can help Indian companies tap global markets and supply chains.
- Innovation boost: Tech transfer can spur innovation, helping India become a hub for quality components.

**4. \*Skilled labor issues\*:** Shortage of skilled workers and high labour costs impact production efficiency.

**5. \*Regulatory challenges\*:** Compliance with environmental and labor regulations increases costs and complexity.

## **Boosting India's Footwear Components Industry: Challenges and Opportunities**

The Indian footwear components industry is a vital part of the country's footwear sector, contributing significantly to employment and exports. With the growing demand for footwear, the components industry faces both opportunities and challenges.

### **Challenges Galore**

The industry grapples with fluctuating raw material prices, competition from cheap imports, outdated technology, skilled labor

shortages, and regulatory complexities. These hurdles impact production costs, quality, and competitiveness<sup>1 2 3</sup>.

### **Demand for indigenous components**

1. Growing demand due to 'Make in India': Initiatives like 'Make in India' promote local manufacturing, boosting demand for indigenous components.
2. Opportunities for domestic manufacturers: Local manufacturers can capitalize on the growing demand, improving self-sufficiency.
3. Challenges in meeting local demand: Ensuring quality, quantity, and timely delivery are key challenges.

### **Quality Upgrade Needed**

High-quality components are crucial for global competitiveness. Adopting advanced tech, upskilling workers, and R&D investments can enhance quality. Government support through incentives or partnerships can facilitate this upgradation.

### **The Way Forward**

The footwear components industry has growth potential. Collaboration among stakeholders, government backing, and tech advancements can drive it forward. Addressing challenges and upgrading quality are key to unlocking this potential.

### **Government Initiatives and Support**

The government has set an ambitious target of reaching a \$30 billion valuation for the leather sector by 2030. Initiatives like the Production Linked Incentive (PLI) scheme aim to boost manufacturing investments and enhance competitiveness.

## **Sustainability and Innovation**

Globally, the industry is shifting towards sustainable and eco-friendly materials, with growing demand for vegan leather alternatives. Innovations in materials and product design are crucial for success.

## **Skilled labour, Employment &Technology**

- Strengthen **skill development programs** (through FDDI, CFTI and other institutions) focusing on digital design, automation, and sustainable manufacturing. The industry requires skilled workers, with Tamil Nadu alone expecting a demand for 1,35,000 skilled workers in FY 2025-26. Institutions like CFTI Chennai provide training and skill development programs.
- Provide **low-cost financing and interest subvention schemes** to MSMEs to ensure job creation and sectoral stability.
- Incentivise **green and sustainable practices**-such as recycling, biodegradable materials, and energy-efficient processes-to reduce environmental footprint.

## **Need for upgrading the quality of components**

1. Importance in global competitiveness: High-quality components are crucial for exporting footwear and competing globally.
2. Ways to upgrade: Adopting advanced technologies, improving skills, and investing in R&D can enhance quality.
3. Government support: Incentives, subsidies, or partnerships can facilitate upgradation.

## **AI tech could be a game changer for the component sector..**

- Predictive maintenance: AI-powered predictive analytics can help reduce downtime and improve efficiency.

- Quality control: AI-driven computer vision can detect defects and ensure consistent quality.
- Supply chain optimization: AI can help manage inventory, forecast demand, and streamline logistics.
- Design and innovation: AI can aid in designing components, optimizing materials, and reducing waste.

## **Boosting India's Footwear Components Industry: A 7-Point Strategy**

### **1. *Attracting FDI & Investments***

- Introduce Production Linked Incentive (PLI) schemes for footwear components, targeting global brands and suppliers.
- Develop cluster-based infrastructure in hubs like Agra, Chennai, and Kanpur, with plug-and-play facilities under the ASEM (Asia-Europe Meeting) Industrial Cooperation Initiative.
- Facilitate joint ventures with global majors through Make in India's simplified approvals and single-window clearance.

### **2. *Emphasis on ease of doing Business***

- Launch a single-window digital portal for approvals, testing, and compliance, leveraging India's National Single Window System (NSWS).
- Rationalize import duties on critical raw materials and machinery under Customs Tariff Act, 1975, reducing costs by 10-15%.
- Expand accredited testing labs in footwear hubs, aligning with ISO/IEC 17025 standards.

### **3. Employment & creating conducive environment for the MSME Businesses**

- Strengthen skill development programs through FDDI & CLRI including the NSDC (National Skill Development Corporation), focusing on digital design and sustainability.
- Provide low-cost financing and interest subvention schemes to MSMEs under CGTMSE (Credit Guarantee Fund Trust for Micro and Small Enterprises).
- Incentivize green practices, promoting ESG (Environmental, Social, and Governance) compliance.

### **4. Technology, Design & Innovation**

- Promote digital design tools, CAD/CAM, and AI-driven systems for faster product development, leveraging India's Digital India initiative.
- Encourage R&D projects between CLRI (Central Leather Research Institute) and global partners for eco-friendly materials.
- Establish an Indian Design Council for Footwear & Components, fostering indigenous design identity.

### **5. Export Competitiveness**

- Develop export promotion zones with simplified documentation and faster customs clearances under SEZ (Special Economic Zones) Act, 2005.
- Support participation in global sourcing fairs, enhancing India's global brand presence.
- Launch a Brand India campaign, positioning India as a reliable sourcing hub.

## **6. Sustainability & Compliance**

- Provide incentives for ESG [environment, social & Governance] compliance certifications like REACH and LWG, meeting international buyer requirements.
- Support cluster-level effluent treatment plants and waste management facilities, aligning with India's Environmental Protection Act, 1986.

## **7. Domestic Market Growth**

- Rationalize GST slabs across footwear categories, addressing industry concerns.
- Provide targeted support for scaling domestic brands, enabling them to compete with imports.

### **Conclusion**

The footwear components industry in India has potential for growth, but addressing challenges and upgrading the quality are essential. Collaboration among industry stakeholders, government support, and technological advancements can drive the industry forward.

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## **Geoff Holmes appointed new IULTCS President for 2026–2027**



**The Director of the New Zealand Leather and Shoe Research Association has been appointed to head the international association of leather chemists (LASRA)**

The International Union of Leather Technologists and Chemists Societies (IULTCS) has appointed Geoff Holmes as its new President for the two-year period 2026–2027. Holmes has worked for over twenty years at the New Zealand Leather and Shoe Research Association (LASRA), the New Zealand leather and footwear research association, where he is currently Director.

### **Geoff Holmes**

In his inaugural message, the new President of the international body, which brings together around 3,000 chemists and leather researchers from 25 different national associations, described the role as an honor and a great responsibility, reiterating the central role of national associations in ensuring the strength and credibility of the IULTCS globally. According to Holmes, training, scientific research, publications, communication, and promotion of the tanning industry remain the pillars of the Union's activity.

Holmes thanked outgoing President Dr. Joan Carles Castell for his contribution, particularly in the field of ISO and CEN standardization, and welcomed new Vice President Dr. Giancarlo Lovato. Looking ahead, Geoff emphasized the importance of open and scientifically rigorous debate to maintain the IULTCS as an authoritative and forward-looking voice.

*Indian Leather congratulates Mr. Geoff Holmes on his appointment as the President of IULTCS.*



## IULTCS President Message | 2026–27

The International Union of Leather Technologists and Chemists Societies (IULTCS) begins a new chapter as Geoff Holmes assumes the role of President for the 2026–2027 term.

In his incoming message, Geoff reflects on both the honour and responsibility of leading a truly global union that represents the breadth of leather science, technology, and chemistry worldwide. He underlines the vital role of national member societies and supporting members in strengthening education, science, publications, communication, and the promotion of the leather industry.

### **The message also:**

- Expresses sincere thanks to outgoing President Dr. Joan Carles CASTELL for his lasting contributions, particularly his work with ISO and CEN leather standardization.
- Welcomes Dr. Giancarlo Lovato as Vice President and highlights renewed engagement with international standardisation bodies.
- Recognises the essential role of Dr. Luis A Zugno, the Executive Committee, Assembly representatives, and all IULTCS Commission Chairs in ensuring strong governance, scientific credibility, and global impact.

### **Looking ahead, Geoff sets a clear and courageous tone for his presidency:**

IULTCS must remain a place where ideas can be discussed openly—even when they challenge conventions—always grounded in rigour, respect, and scientific integrity. Progress in leather science has always come from questioning assumptions and pushing boundaries.

With sincerity, effort, and openness at its core, the new presidency aims to ensure that IULTCS continues to be a trusted, respected, and forward-looking global voice for leather science.

We look forward to the work ahead.

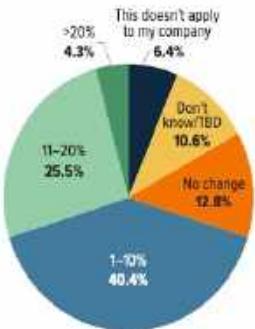
(IULTCS)

## Rising Import Costs and 2026 Uncertainty Drive Concern

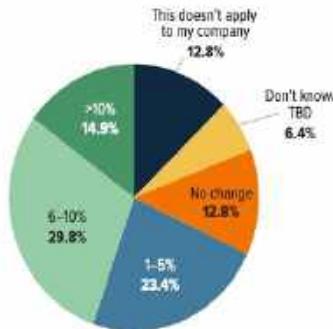
**Footwear executives warn the full impact of tariffs has yet to hit - expect higher landed costs and continued inflation pressures in 2026**

The Footwear Distributors and Retailers of America (FDRA) released the results of its Q4 2025 Shoe Executive Business Survey, offering a detailed look at how footwear leaders are assessing the economic landscape heading into 2026. The new data reveals mounting unease around import costs, tariff-related pressures, and shifting consumer dynamics as companies prepare for a potentially turbulent year.

**In anticipation of higher tariffs on footwear, how much do you expect your average landed cost will rise over the next year?**



**In anticipation of higher tariffs on footwear, how much do you expect your average retail price will rise over the next year?**



The survey shows a clear trend: executives expect the cost of imported footwear to rise materially in 2026, and many say they are only now beginning to feel the early stages of tariff-related cost

increases. While companies have continued to manage pricing and inventories strategically, concerns are growing about what the next 12 months may bring.

**FDRA President and CEO Matt Priest** noted, "Our 2025 Q4 survey reinforces what we've been hearing privately for months. The full cost of the tariff increases has not yet hit the industry, and executives are beginning to model significantly higher landed costs for 2026. With front-loading opportunities over and inflation continuing to influence consumer behavior, footwear companies are bracing for a challenging first quarter."

### **Rising Import Costs and Tariffs Create New Headwinds**

Executives reported a growing expectation that import and landed costs will climb in 2026, driven by:

- Tariff increases that have not yet fully worked through supply chains
- Higher logistics and sourcing costs
- Increased uncertainty around trade policy and global freight fluctuations

### **End of Front-Loading and Inflation Shape Business Planning**

With inflation still influencing consumer purchasing patterns, many footwear companies front-loaded product to hedge against rising costs and potential supply chain disruptions. That opportunity is over. Executives reported that this strategy, while helpful in the short term, reinforces concerns about the sustainability of pricing strategies in Q1 and Q2 of next year.

## **Executive Insights: "A Shaky 2026"**

And as the new year begins, footwear executives say they are still bracing for continued uncertainty across costs, demand, and consumer behavior:

- Consumers pulling back, limiting purchases to must-have items. Market will contract, we'll all be playing a market share game."
- "Shaky"
- "The strong manufacturers will get stronger, the weaker will get weaker. The gap between the two will get wider."
- "Economic uncertainty is having major impact on consumers, particularly the 'family channel' representing the bulk of our business."
- "We anticipate a tough first half as consumers reconcile higher expenses with fewer opportunities to increase their income (less overtime, fewer part-time jobs)."

Website : [fdra.org](http://fdra.org)

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## **COTANCE at EU TCLF Event: Ensuring Leather Is Recognised in Europe's Future Regulatory Framework**

On the 16th of January 2026, **COTANCE** took part in the EU "Shaping the Future of a Competitive Textiles Ecosystem" event in Brussels, organised by DG GROW (European Commission).

The meeting brought together TCLF stakeholders from across the EU to share industry needs and challenges with the Commission and get updates on the regulatory agenda shaping textiles, clothing, leather & footwear (TCLF) sectors.

Key topics included:

- ✓ Textile Labelling Regulation: labelling & authenticity
- ✓ Ecodesign, in particular the criteria for Recycled content and durability
- ✓ New EU waste rules, EPR and the creation of a market for the ecosystem's waste recycling and more.



There is a complex regulatory puzzle ahead, and it's crucial that our SMEs not only understand the change but are actively involved in shaping it.

From the European leather industry perspective, we emphasised the need for RECOGNITION & ASSISTANCE

"Leather is part of the Textile ecosystem, but if it is not specifically named, nobody thinks of it in policymaking," said Gustavo Gonzalez-Quijano, Secretary General of COTANCE

Overlooked in the EU Bioeconomy strategy, marginalised in the new EU Vision for Agriculture & Food, misunderstood in the ideas for the Circular Economy Act, the leather industry needs DG GROW's assistance to:

- Guarantee leather authenticity and the protection of article 5 in the revised Textile Labelling Regulation
- Ensure durability, recycled content and other Ecodesign criteria are designed also for leather, not just textiles
- Differentiate natural materials such as leather, wool and silk from their petrol-derived "fashion alternatives," and incentivise the use of the former rather than supporting more plastics.
- Open doors for our sector in R&I funding and EU policy frameworks

We do this to preserve leather made in Europe - because leather made in Europe is not just a material of superior quality; it is a material that embodies the circular bioeconomy and conveys Europe's cultural values, heritage and diversity.

**COTANCE** is committed to working with EU decision-makers and our partners across the TCLF ecosystem to ensure EU policies work for our industries, not against them

Contact : [cotance@euroleather.com](mailto:cotance@euroleather.com)

Based on the annual data reported by Member States to the European Chemicals Agency (ECHA) under the Prior Informed Consent (PIC) Regulation, the decline is mainly due to reduced volumes of exports and imports of substances containing benzene.

ECHA's annual report on exports and imports of chemicals that are banned or severely restricted in the EU shows that substances containing benzene accounted for approximately 51% (1.1 million tonnes) of total exports and 99% (30 million tonnes) of total imports of PIC chemicals in 2024. In 2023, 64 million tonnes of substances containing benzene were exported, with imports reaching 65 million tonnes. The decrease in their trade has led to a 97% reduction in overall export volumes and a 53% reduction in overall import volumes.

If substances containing benzene are excluded from the data, the report shows a slight increase in hazardous substance trade. Exports of other PIC chemicals increased by 7% from approximately 1.03 million tonnes in 2023 to 1.1 million tonnes in 2024. Imports of other PIC chemicals rose by 2% from approximately 378 000 tonnes in 2023 to 387 000 tonnes in 2024.

The top traded chemicals were largely similar to previous years, with substances containing benzene, benzene itself and ethylene dichloride (1,2-dichloroethane) dominating both exports and imports.

In 2024, pesticide exports increased by 34% (from approximately 173 000 to 232 000 tonnes), after two consecutive years of decline. The main contributor to this increase was chlorate, which accounted for 24% of the overall rise.

## Background

**Exports** - 553 companies from 24 EU countries provided data to ECHA on the exports of PIC chemicals from the EU in 2024. Three EU countries (Cyprus, Luxembourg and Malta) and the United Kingdom (Northern Ireland) declared that they had not exported PIC chemicals.

**Imports** - 226 companies from 23 EU countries submitted data on imports of PIC chemicals into the EU in 2024. Four EU countries (Cyprus, Lithuania, Luxembourg and Malta) and the United Kingdom (Northern Ireland) declared that they had not imported PIC chemicals.

Article 10 of the PIC Regulation requires importers and exporters to give information about the annual trade of chemicals listed in Annex I to the regulation to their designated national authorities by 31 March of the following year. Each EU country must then provide the aggregated information to ECHA so that it can be summarised at EU level and non-confidential information can be made publicly available.

★ ★ ★

## **ECHA takes on additional tasks to strengthen chemical safety in Europe**

The European Chemicals Agency (ECHA) takes on new responsibilities under the EU's One Substance, One Assessment (OSOA) Package.

Working closely with other EU agencies and authorities, ECHA will lead efforts to build a common data platform on chemicals, streamline assessments, and strengthen collaboration to better protect human health and the environment.

The Agency is committed to driving this initiative forward and will deliver its new responsibilities with transparency and efficiency.

**Dr Sharon McGuinness**, ECHA's Executive Director said:

"The OSOA package represents a significant step towards a more efficient chemical safety system in Europe. By joining forces with our partner agencies and authorities, we will create a system that anticipates risks, and brings together existing knowledge, and supports innovation.

Our shared goal is clear: a safer, more sustainable Europe through collaboration and science-based action."

Under this legislation, ECHA is entrusted with significant new tasks, reinforcing its role in delivering coherent, predictable, and transparent chemical assessments. These changes will enhance efficiency and improve consistency across EU chemical legislation.

### **Building a common data platform on chemicals**

The OSOA package also introduces the Regulation on common data platform and monitoring and outlook framework for chemicals.

ECHA will manage this platform in close collaboration with other EU bodies – including the European Environment Agency (EEA), European Food Safety Authority (EFSA), European Medicines Agency (EMA), and the European Agency for Safety and Health at Work (EU-OSHA) under the governance scheme and implementation plan adopted by the European Commission.

The platform will integrate information from multiple sources and provide services such as:

- Information Platform for Chemical Monitoring;
- Repository of reference values;
- Study notifications database; and

- Databases on standard formats and controlled vocabularies, regulatory processes, legal obligations, chemicals in articles or products, alternatives to substances of concern, and environmental sustainability-related data.

This will create a **one-stop-shop for chemicals data**, improving transparency and accessibility for regulators, industry, and the public.

### New tasks for ECHA

Beyond the data platform, ECHA will:

- Develop a monitoring and outlook framework;
- Support early warning and risk identification;
- Generate new data when needed; and
- Promote the use of scientific research to strengthen chemical safety.

ECHA will also take on **scientific and regulatory responsibilities** previously managed by other bodies, including:

- Preparing restriction proposals under the RoHS Directive (hazardous substances in electrical and electronic equipment), and processing exemption requests;
- Setting and reviewing limit values for persistent organic pollutants in waste under the POPs Regulation; and
- Updating guidelines on how to perform the benefit-risk assessment of the presence of certain hazardous substances in medical devices under the Medical Devices Regulation.

*(ECHA is the EU's chemicals agency responsible for implementing EU chemical regulations. We protect health and the environment through our work for chemical safety.)*

<https://echa.europa.eu/>



## TFL India's range of ultra-low Bisphenol products

TFL is a leading global manufacturer and supplier of high-quality syntans, recognized worldwide under the famous brand names of **SELLATAN®** and **TANIGAN®**.

To maintain this leading position, TFL continually invest in pioneering research and development, as well as providing extensive application support, to keep you at the cutting edge of the very latest technological advances.

The restriction draft of ECHA on Bisphenol A and other bisphenols of similar concern (BoSC) has changed. Initially, it foresaw a limit of 500 mg/kg BPS/BPF for leather by 2025, with a further reduction to 10 mg/kg by 2030. The Federal Office for Chemicals (BfC), the German REACH authority, has temporarily withdrawn the dossier without providing further information, so it is unclear whether the conditions will remain the same. However, based on all the facts published by ECHA in this context, there is currently no reason to believe that the conditions for leather applications will significantly improve.

It is also important to note that brands are independently implementing their own Restricted Substance Lists (RSLs) in advance of legislation and the values can be even more stringent. This forces tanneries to comply with the low bisphenol limit in the leather they supply. As a global leader in chemicals for leather production, TFL immediately started developing products to address this new challenge once it became public.

Genuine replacement syntans with their 'tanning power' remain essential in leathermaking to convert wet blue and wet white intermediates into real leather. Syntans possess many advantages as they are designed specifically for certain applications and

performance requirements. They facilitate the steering of tightness, softness and fullness and contribute to the achievement of properties such as lightfastness and heat resistance.

**Building on the global success of the leading SELLATAN® and TANIGAN® syntans, TFL is launching the next generation of ultra-low or zero BPS/BPF syntans.**

TFL's range of retanning resins, polymers along with dyestuffs, fatliquors and softening polymers are, of course, all free of bisphenols, making them ideal for use with the ultra-low and zero bisphenol genuine replacement syntan range. TFL has also developed a simulation tool to show to customers that their leather should comply with the relevant regulations.



**Apart from the ultra-low BPS/BPF products in the global range, local production of selected products has already started at the TFL plants in Hyderabad (India) and Changzhou (China) to make ultra-low bisphenol products more readily available in the APAC region.**

**TFL's comprehensive and expanding range of locally produced Indian ultra-low to zero Bisphenol syntans comprises TANIGAN®s MBO-I, RLO-I and DSO-I in liquid form, as well as TANIGAN®s OSO-IN, MBO-I, NAO and SELLATAN® RS-N in powder form. These syntans ensure that most types of leather can be easily produced.**

In addition, TFL India has also optimised the bisphenol content of its local range of pre-tanning agents, **TANIGAN® PTO**; rechroming syntans, **TANNESCO®s HN** and **CH**, which are available in powder form; neutralising syntan, **SELLASOL® NG-I Liq**; vegetable syntan, **MIROSAN® EMO**; and speciality auxiliary syntans for low-salt pickling and dye exhaustion, **SELLATAN® PA-I Liq**.

This now comprehensive local range of ultra-low bisphenol-optimised syntans ensure the right products can be easily selected from it to achieve all required leather article types.



**The BPS content of the local Indian range of the above products is given below.**

**TANIGAN® MBO-I Liq : <20 ppm**

**TANIGAN® MBO-I powder:< 40 ppm**

**TANIGAN® OSO-IN powder: <10 ppm**

**TANIGAN®NAO :<10 ppm**

**TANIGAN®PTO :<10 ppm**

**TANIGAN® RLO-I Liq : <15ppm**

**TANIGAN® DSO-I Liq :<100 ppm**

**SELLASOL® NG-I Liq :n.d**

**SELLATAN® RS-N powder:<10 ppm**

**SELLATAN® PA-I Liq :<10 ppm**

**MIROSAN® EMO :<10 ppm**

**TANNESCO® HN powder:<5 ppm**

**TANNESCO® CH powder:<5 ppm**

Note: in all the above products BPF content is either not detectable or zero.

n.d. = not detectable.

**By working with the new range of TFL syntans, both local and global, you will stay ahead of any current or expected legislative restrictions. These next-generation products are an essential new range of genuine replacement syntans that enable the production of leather with bisphenol levels below the detection threshold (less than 10 ppm).**

**Author:** Christopher Sydney Tysoe/ Product Management

## Industrial Symbiosis: Turning Waste Into Opportunity

Leather has always been more than a material. It is a story of transformation - of turning what would otherwise be discarded into something beautiful, durable and highly valuable from both circular economy and fashion perspectives. Yet today, much of leather's potential remains untapped. That is where **industrial symbiosis** comes in.

### Leather: circular by nature, innovative by choice

Leather itself begins its life as a by-product of the meat and dairy industries. Without leather, millions of hides and skins would become waste, left to decompose and emit significant greenhouse gases over time. Through craftsmanship and technology, tanneries transform this residue into a beautiful - and, most importantly, natural and durable - material that supports jobs, cultural heritage, and bioeconomy. Leather-making is a fascinating blend of craftsmanship, sciences and art considering the myriad of colours, textures and designs that you can obtain.

But circularity does not stop at leather alone. Along the way, the process generates other valuable by-products - hair, fleshings, fats, collagen-rich materials, shavings, and trimmings - many of which already find second lives in fertilisers, cosmetics, gelatine, collagen, pet food, and technical applications. **The challenge is not technology: the sector has been innovating for centuries. The challenge lies in coordination and information sharing.**

### Why cooperation matters - starting upstream

As part of the SYMBIOS project, we brought the leather community around the table - twice. Two dedicated focus groups gathered experienced voices from across the global leather value chain, from the livestock and meat sector to tanneries and downstream users. Together, they shared real-life practices, challenges, and ideas on how the leather-making process can become more circular and more

closely interconnected with the agri-food sector and/or other industries, such as chemicals, pharmaceuticals, construction or paper.

One of the strongest findings of the SYMBIOS focus groups is clear: **the greatest opportunity for circularity lies upstream, at the interface between slaughterhouses and tanneries.**

How hides are removed, cleaned, trimmed and classified in the very first stages determines:

- the quality of the leather,
- how much usable material is recovered,
- and whether by-products can be valorised - or become waste.

**Better cooperation at this stage means:**

- higher usable hide yields,
- fewer chemicals used later,
- better-quality inputs for leather, collagen and fertilisers, etc.
- and more value generated by every animal - economically and environmentally.

Industrial symbiosis, in other words, is not an add-on. It is a multiplier.

**What holds symbiosis back?**

Despite its potential, industrial symbiosis is not yet fully realised. The focus groups identified recurring barriers:

- **Economic:** markets often fail to reward higher-quality hides or upstream pre-processing.
- **Regulatory:** complex waste rules and unequal treatment of natural vs synthetic materials discourage circular solutions.
- **Logistical:** high dispersion and low quantities of secondary feedstock generation and long transport distances make collection, recycling and processing harder.
- **Skills & knowledge:** traditional expertise in hide handling is disappearing, directly affecting quality and yields.

- **Narrative:** leather is too often labelled as “unethical” or “problematic,” rather than recognised as a biogenic, circular resource.

## Industrial symbiosis is already happening

The good news? The industrial symbiosis is already taking shape.

From bio-based tanning agents made from agrifood residues (grape pomace, olive leaves, avocado pits) to new uses for chromium-containing residues, the leather industry is proving that leather can go even further in the circular bioeconomy. **What is needed now is scale, alignment and trust across sectors.**

## How SYMBIOS makes the difference

The SYMBIOS project was created precisely to unlock this potential. By bringing together tanneries, slaughterhouses, agrifood actors, researchers and policymakers, SYMBIOS aims to:

- map real industrial symbiosis practices and identify new ones,
- rebuild cooperation between key actors,
- develop replicable models that work for SMEs,
- support skills, data-sharing and better policy alignment,
- and ensure that **nothing is wasted** - neither materials, nor opportunities.

## From fragmented practices to a shared system

Industrial symbiosis already exists in leather. The challenge now is to move from isolated solutions to a **coordinated system** - one that rewards cooperation, values natural materials fairly, and strengthens Europe’s circular bioeconomy.

Leather shows us that waste is often just **untapped value**. SYMBIOS is about turning that value into opportunity - for people, for industry, and for the planet.

*Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union. Neither the European Union nor the Granting authority can be held responsible for them.*



ASSOCALZATURIFICI

## ITALIAN FOOTWEAR INDUSTRY

- **TURNOVER EXPECTED IN 2025 AT €12.8 BILLION (-3.1% VS 2024).**
- **EXPORTS RECORDED AT €7.7 BILLION IN THE FIRST 8 MONTHS OF 2026**

**A clear improvement in the third quarter (-0.9% turnover) compared to the first part of the year according to a survey report.**

**Domestic consumption remained stable in the first nine months**

**Export volumes increased (+4.3%), driven by performances in the Middle East-posting double-digit growth in value-and in the EU.**

The Italian footwear sector is showing signs of gradual stabilisation within a global macroeconomic context that remains uncertain. According to the business survey carried out by the Confindustria Accessori Moda Study Centre for Assocalzaturifici, the first nine months of 2025 depict a sector that, while still in negative territory (-4.1% revenues in the sample of member companies compared to January–September 2024), is experiencing a significant easing of the downturn. In fact, the third quarter recorded a year-on-year decline in turnover of -0.9%, a markedly better result than the sharp contractions seen in the first half of the year.

“The current overall picture remains complex and does not spare even the top end of the market, but third-quarter data indicate a slowdown in the decline and the first glimmer of light at the end of the recessionary tunnel,” said Giovanna Ceolini, President of Assocalzaturifici.

“Despite the lack of significant improvements in geopolitical scenarios, the ability of our companies to maintain a strong presence in European markets and to capture demand in more dynamic areas, such as the Middle East, will be key to facing 2026. While company performances remain uneven, with several businesses still under pressure, the limited decline expected in year-end turnover (estimated at €12.8 billion) confirms the resilience of Made in Italy.”

Full-year projections for 2025 indicate sector turnover down by around €409 million compared to the previous year, corresponding to a contraction of -3.1%-a far less severe outcome than that recorded at the close of 2024.

On the foreign trade front, in the first eight months of 2025 exports reached a value of €7.72 billion (-1.3%).

The most significant figure concerns quantities: 131.8 million pairs were sold abroad, up by +4.3%. This recovery in volumes was accompanied by a repositioning of average prices (€58.58 per pair, -5.3%), reflecting a correction after the double-digit increases seen in 2022/2023.

The EU area (which absorbs 7 out of every 10 pairs of footwear exported) grew both in value (+2.2%) and in volume (+7.6%). Germany stood out with a solid +6% in value and +10% in pairs, while positive performances were also recorded in Spain, Poland, Belgium and Austria. Outside the EU, the Middle East confirmed itself as the most dynamic area, with overall value growth of +13%, driven by the surge in the United Arab Emirates (+20%). Turkey and Mexico also performed well.

By contrast, the Far East remains under pressure, suffering a contraction of more than -20% in both volume and value, reflecting the sharp slowdown in China (-24.6% in value) as well as in other major Asian markets (Hong Kong, Japan and South Korea), in addition to the CIS area (-9.2%, with Russia at -17.8%), still penalised by the conflict.

The US market remains under close observation, closing the eight-month period with a +2.9% increase in value against a decline in quantities (-4.2%). The sector is cautiously assessing the impact of tariffs set by the US-EU agreement: while August recorded a discouraging -17.8% in value, preliminary September data show a responsiveness that was, in some respects, unexpected.

At present, 55% of member operators exporting to the US consider the effects of the tariffs to be significant, with strong critical impacts for one company in five. At the same time, imports increased by +12.8% in quantity (reaching 271.6 million pairs); this trend is not linked to domestic consumption-which remained flat-but rather to strengthened logistics flows for re-export, especially in sportswear.

On the domestic front, purchases by Italian households in the first nine months recovered the gap with 2024, matching last year's levels only thanks to a positive third quarter (+2% in quantity); however, they remain well below pre-Covid levels (-7.7%). Industrial production continues to reflect the difficulties of the first part of the year, with the ISTAT index down by -8.5% in the first nine months. The prolonged period of unfavourable economic conditions has taken a toll on business demographics, with a decline at the end of September of -3.4% in the number of active footwear manufacturers and -2.3% in employment compared to the 2024 figures, across both industry and craftsmanship.

However, signs of normalisation are emerging from short-time work schemes (Cassa Integrazione): after the spike in the first quarter (+66%), authorised hours in the leather supply chain fell by -20% in the following two quarters, resulting in an overall +2.5% increase over the nine-month period. Tuscany remains the district with the highest recourse to wage support measures (9.1 million hours, +56.8%), followed by Campania (-14.2%) and Marche (+10.8%), within a framework of prudent workforce management in anticipation of a recovery.

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## Diversifying while staying true to core values

Expo Riva Schuh and Gardabags confirm their role as strategic global hubs, focusing on market and product diversification in response to the new balances of *Affinity Globalisation*. The trade fairs are evolving towards an integrated platform model for the global volume fashion industry.

Over just four days, during the January 2026 edition of Expo Riva Schuh and Gardabags, a series of events unfolded set to reshape geopolitical and commercial balances. These are the signs of a **world changing at great speed**, where global assets move faster than maps can be redrawn.

In a landscape that is constantly redefining its shape, direction and priorities, it is essential to rely on established industry benchmarks capable of interpreting change and turning emerging opportunities into competitive advantage.

At Riva del Garda, the spotlight was on **Affinity Globalisation** – a form of globalisation that is far from disappearing, but is instead transforming. It is becoming increasingly complex, with **significant implications for supply chains** that are now spreading across a growing number of production countries, creating redundancy. A scenario essentially defined by **diversification**.

Within this context, **Expo Riva Schuh and Gardabags** – as always opening the **Autumn/Winter 2026–27 season** – once again demonstrated their strength as international hubs for industry networking, commercial exchange, and for interpreting and shaping future scenarios.

## JANUARY EDITION: KEY FIGURES

The Riva del Garda event has embodied diversification for decades – a fact clearly confirmed by the figures from the January 2026 edition.

**Alessandra Albarelli**, General Manager of Riva del Garda Fierecongressi, commented: Attendance reached almost **8,000 visitors**, with a contraction in mature markets such as Italy, Germany and France. We recorded significant growth from countries including Poland, Belgium, Slovenia, Georgia and North Macedonia, as well as emerging markets such as Chile, Colombia and Kenya. Particularly noteworthy was the participation of Korean buyers, confirming the fair's role as a gateway for the development of new markets. We also saw an increase in operators from the e-commerce segment.

Some have described the Riva event as the '*United Colors of Shoes and Bags*'. "In a world that is increasingly divided, Expo Riva Schuh

and Gardabags bring together the footwear, bags and travel goods sectors in a truly international setting."

This shift in visitor composition clearly reflects the ongoing political, economic and digital transformations.

**Scott Sinclair**, Canadian buyer at East Lake Limited, underlined: "Being able to find such a wide range of designs, materials, suppliers and price points will allow me to differentiate myself from competitors." The theme of diversification once again takes centre stage.

**Marta Artigas**, designer at Spain's BCN Design Studio, highlighted the value of the **Gardabags** project: "I am confident that the new format and the variety of the offer on display will establish the fair as the key reference point for leather goods and luggage. It is an unmissable event."

## EVENTS

For Riva del Garda Fierecongressi, 'diversification' has become a guiding principle when it comes to events, too. Providing not only an excellent opportunity to close deals and forge partnerships, but also **insight into trends and markets** while strengthening professional **networking**, has now become a firmly established objective.

The footwear, sneaker and bag consumer trends presented in the **Highlights Area**, developed in collaboration with Arsutoria, have enjoyed growing success. All sessions held over the four days of the fair were consistently sold out.

Strong attendance was also recorded at the **Market Focus** sessions, which explored market outlooks across the Americas, Asia, Africa, the Middle East and Europe.

To assess the success of the **Innovation Village Retail**, we turn to the words of Kenyan entrepreneur **Grace Mbugua** of Jeilo Leather Collections, who attended the fair both as a manufacturer and as a

buyer: "Understanding the opportunities offered by the many technological innovations presented by the startups at the fair is essential for all companies wanting to grow and overcome the ongoing frictions and challenges of today's market."

Among the most groundbreaking solutions was that of **Solaya**, winner of the **Startup Competition**, recognised for its ability to deliver practical, scalable and high-impact solutions to support the evolution of the market. Thanks to this award, the French startup will have the opportunity to exhibit at the next edition of Expo Riva Schuh and Gardabags, strengthening its international visibility and opening up new business opportunities. Solaya enables e-commerce brands – and beyond – to create **professional visual content** using iPhone technology and advanced 3D modelling.

The app instantly generates accurate product photos and videos, lifestyle imagery and advertising creativity, fully aligned with brand identity, reducing costs and accelerating omnichannel content production.

Finally, a detail that may appear minor but in fact highlights the attention to detail that distinguishes Expo Riva Schuh and Gardabags: the trophy awarded to the Startup Competition winner was produced by **Belemi's Hub**, a Trentino-based startup. 3D-printed using plant-based PLA, the award is designed to be sustainable: bio-based materials, low-temperature printing, reduced energy consumption and ease of recycling. It is a contribution that strengthens the link between the trade fair and its local area, showcasing local expertise in dialogue with international innovation.

Expo Riva Schuh and Gardabags went further, building on this well-established initiative. They also introduced the **Showcase Area**, where visitors were able to admire the most representative models from Gardabags exhibitors, and the **Garda Trentino Lounge**, created to welcome the press while simultaneously promoting the Garda Trentino area.



The return and success of **Expo Riva Nights** further confirmed the desire of the Expo Riva Schuh and Gardabags community to build strong and lasting relationships even in relaxed and informal settings.

## A VISION FOR THE FUTURE

The term 'diversification' also featured in the address by **Roberto Pellegrini**, Chairman of Riva del Garda Fierecongressi: "Our future is already mapped out: the event **will no longer be just a footwear and bags trade fair**, but will evolve into the **global hub for volume fashion**. This transformation will be driven by product diversification, offering buyers and manufacturers practical answers to industry needs."



This forward-looking approach to both the industry and the event speaks more powerfully than any figures in highlighting Expo Riva Schuh and Gardabags' continued role as the international benchmark for the world of accessories and fashion.

The next edition of Expo Riva Schuh and Gardabags, featuring the latest industry innovations, will take place from **13 to 16 June 2026**.

\* \* \*



## **LeatherTech Bangladesh 2025 concluded with positive results.**

**“LeatherTech is not merely a “Showcase”; it is a remarkable initiative to propel the sector towards its potential” BIDA chief**

The 11th edition of LEATHERTECH BANGLADESH—the International Technology Trade Show on Leather, Footwear Machinery, Shoe Materials, Chemical & Accessories for Footwear & Leather goods Sector, organised by ASK Trade & Exhibitions Pvt. Ltd, with the support of Leather goods and Footwear Manufacturers & Exporters Association of Bangladesh (LFMEAB) concluded successfully. The fair was held between 4th & 6th December 2025, at the International Convention City Bashundhara (ICCB), Dhaka, Bangladesh, occupying over 15000 square metres of space, hosting more than 200 exhibitors from local and overseas, who welcomed 4424 business visitors over three days of run.

In the midst of not so encouraging order position due to geo political situation and turbulence due to tariff across the world, LEATHERTECH Bangladesh still managed to attract cross section of visitors from sector thus reiterating its position as a “The Networking Platform of the Leather Sector” There good interaction between the members of Pakistan Tanners Association and Leather goods and Footwear Manufacturers & Exporters Association of Bangladesh who also met the members of the Guangdong Show-Making Machinery

Association (GSMA) from China at the business meeting held in sidelines during the tradeshow. Many first time participants reported good enquiries besides some orders. Overall, all exhibitors felt that the event helped to interact with the industry and the expectation is that coming quarters could see higher exports.

Mr. Chowdhury Ashik Mahmud Bin Harun, Executive Chairman, Bangladesh Investment Development Authority (BIDA) was the Chief Guest and inaugurated the show. Mr. Syed Nasim Manzur, President, Leathergoods and Footwear Manufacturers & Exporters Association of Bangladesh (LFMEAB) was the special guest. Leaders of Industry associations from Bangladesh, China, India and Pakistan were present on the occasion.



The Chief guest, in his inaugural address, has said, 'Bangladesh's leather industry now stands on the threshold of realizing its full potential. An exhibition like 'Leathertech' is not merely a showcase; it is a remarkable initiative to propel the sector toward that ultimate potential. Such events signal that the leather industry is ready to enter a new chapter. I firmly believe that with coordinated efforts between the public and private sectors, Bangladesh's leather industry will advance much further.'

Syed Nasim Manzur, President, Leather goods and Footwear Manufacturers and Exporters Association (LFMEAB) said, 'The leather industry of Bangladesh is now at a crossroads to accelerate export-oriented manufacturing. To move to the next level, policy liberalization is essential. If we can strengthen the right connections between our country and neighboring economies, technological development within the leather sector will progress even faster.'

The Council for Leather Exports (CLE) India, Pakistan Tanners Association (PTA), India Footwear Components Manufacturers Association (IFCOMA) and Guangdong Shoe-Making Machinery Association (GSMA) from China, participated in the event in Group Pavilions.

Most of the leading industry associations supported the event with LFMEAB, providing the Lead Support. Nearly 200 exhibitors from 8 countries including Bangladesh participated in this largest technology tradeshow for the Leather Sector in the country" informed Tipu Sultan Bhuiyan, MD of ASK Trade & Exhibitions Pvt Ltd, the organisers of the show.

LEATHERTECH Bangladesh began its journey eleven years ago as a technology platform created to bring technology related to manufacturing footwear, travelgoods and allied products from across the world closer to the doorsteps of end users. Over the years, it has become the most preferred platform to penetrate and explore the Bangladesh Leather, Footwear and Travel goods sector. In the last 10 years it has grown to become the "Networking Platform of the Leather Sector" in the country.

The leather and footwear industry is Bangladesh's second-largest export sector after ready-made garments, contributing to approximately 3% of the global leather goods market and meeting nearly 10% of global leather demand. Designated as a priority sector for export diversification under the Industry Policy 2022, the industry

is positioning itself as a global sourcing hub, backed by a cost-competitive workforce, abundant raw materials, and targeted policy incentives.

Bangladesh's leather and footwear exports continued their recovery in October FY25–26, posting a 9.7% year-on-year growth, reaching US\$591.5 million compared to US\$539.4 million last year, according to data from the Export Promotion Bureau (EPB). Overall, the leather and leather products segments remain the key growth engines, while footwear performance shows early signs of stabilization after months of fluctuation. Bangladesh's export base continues to diversify - strengthening its position as a resilient and evolving global sourcing hub.

In this context the technology, materials and accessories showcased at LEATHERTECH Bangladesh 2025 will prove to be extremely beneficial to those factories who are looking to expand capacities as well as those wanting to diversify into product lines and those planning to enter the sector. Over the years this show has helped budding entrepreneurs to access the global technology and help in manufacturing footwear for the domestic market also.

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The 34th International Exhibition on Shoes and Leather Industry - Guangzhou (Shoes & Leather - Guangzhou 2026) will incorporate the IFLE - Guangzhou 2026. It is one of the most important and leading events for the shoes and leather industry. Shoes and Leather - Guangzhou will be held from 20-22 May, 2026, at the Hall 17.1-20.1, Area D, China Import and Export Fair Complex, Guangzhou, China (also called Canton Fair Complex)

In 2025, the exhibition recorded exhibitors from **17 countries & regions** and professional visitors from **78 countries & regions**. The Shoes & Leather - Guangzhou 2026 is expected to have 800+ exhibitors and 20000+ visitors. It will showcase a variety of products which include, advanced shoe-making machines, cutting solution, leather, synthetic leather, materials, sewing technology, automation, chemical, garment, 3D printing, components and many more.

The International Footwear Exhibition (IFLE) - Guangzhou will run concurrently with Shoes & Leather - Guangzhou 2026. 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.

### **Footwear Machinery Expo**

### **Be Ready for the Future**

The Shoes & Leather - Guangzhou 2026 will mainly consist of shoe machinery show and leather & material trade fair. Facing this world-

wide economical challenges, 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 2026 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 organised during the Shoes & Leather - Guangzhou 2026. International speakers will present their latest market technologies and fashion trends, which will be extremely helpful for the business planning and decision making. In 2025, our professional speakers presented topics included how worldwide respond to U.S. reciprocal tariff policy, ZDHC footwear engagement strategy & work plan 2025, how to make your footwear more comfortable and fit, how to create blockbuster products in an over competitive age as well as e-commerce sharing. More seminars details will be posted in early 2026.

### ***Inspire and Create***

One of the concurrent event in the Shoes & Leather - Guangzhou 2026 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 14th 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 2025, a total of 109 entries were received from 9 countries and regions, including China, India, Indonesia, Malaysia, Philippines, Taiwan (China), Hong Kong (China), Vietnam and Thailand.

The winning entries were announced and awarded during the Opening Dinner Banquet and displayed during the exhibition. The juror committee consisted of 10 renowned professionals, including international designers, trend experts, footwear consultants, lecturers, and representatives of global footwear associations. More info on the 15th Edition of IFDC will be posted here in early 2026. If you would like to find out more, please contact us.

For details:

Email: [toprepute@toprepute.com.cn](mailto:toprepute@toprepute.com.cn), [www.toprepute.com.hk/](http://www.toprepute.com.hk/)



## **FIMEC 2026 (3-5 March, 2026, Novo Hamburgo/RS Brazil)**

**FIMEC 2026 will be a stage for trends and innovation for the leather and footwear industry**

**The 49th edition of Fimec**—the International Fair of Leather, Chemical Products, Components, Machinery and Equipment for Footwear and Tanneries, organised by Fenac with the support of Brazilian Leather & Footwear Trade Associations, like Abicalçados, Abqtic, Abrameq, ACI-NH/CB/EV/DI, Aicsul, Assintecal, CICB, IBTeC and Sebrae/RS, will take place between 3 & 5 March 2026 at the pavilions of Fenac, in Novo Hamburgo/RS, Brazil.

FIMEC, considered as the largest and the main trade fair in the sector in Latin America, is expected to host around 400 exhibitors who would be welcoming more than 20,000 visitors over the three days of the Fair. Fimec is regarded as the only event in the world to encompass the entire production chain in one place.

Bringing together around 400 exhibitors in over 10,000 m<sup>2</sup> of exhibition space, Fimec is an international benchmark in business, innovation, and networking. Over three days, thousands of professionals will have access to solutions in leather and hides, chemical products, components, machinery, equipment, and new technologies. “We are preparing a very special edition. The demand for exhibition space is already above average, and if we maintain this pace, we will surpass the size of Fimec 2025,” projects Diogo Leuck, CEO of Fenac.

The organization expects to receive 20,000 visitors from 20 Brazilian states and approximately 40 countries. Among the new features already confirmed for 2026, is the return of the **Fimec Studio**, a

space that brings together content on trends and innovation. Lecuk anticipates that the program will also include new business areas, "silent lectures," collective spaces for Latin American countries, as well as tourist routes and technical visits to factories in the sector outside of the fair's regular hours. "These new features will further strengthen Fimec's role as the main showcase for the sector," he assesses.

Registration for the 2026 edition is free and will soon be available through the official website: [www.fimec.com.br](http://www.fimec.com.br).

The fair is for professionals; access is prohibited for those under 14 years of age.

### **CICB Sustainability Forum**

CICB Sustainability Forum 2026 will take place during FIMEC

The CICB Sustainability Forum 2026, organised by the Brazilian Leather Project, a partnership between the Centre for the Brazilian Tanning Industry (CICB) and the Brazilian Trade and Investment Promotion Agency (Apex Brasil), will take place on 4th March, 2026, the second day of the FIMEC trade fair, in Novo Hamburgo (RS), Brazil.

The central theme of this edition would be Industry and Transformation with Artificial Intelligence. This forum is recognised as the leading debate and knowledge event for the Brazil's leather industry

The Forum's program will present practical examples of artificial intelligence applications across the leather supply chain, as well as content exploring how different technologies are shaping the transformation of operations and business management.

The keynote address will be delivered by Rafael Martins, entitled Artificial Intelligence Taking Over the World. Rafael is an innovation and technology columnist for Grupo RBS and MIT Sloan Review Brasil, CEO of Share, and a guest professor at institutions such as the University of Coimbra (Lisbon), Mackenzie and ESPM.

Providing an update on the evolution of sustainability through new technologies and monitoring tools, Ricardo Andrade, advisor at CICB, will deliver the opening presentation of the Forum.

From a specialized tannery-industry perspective, representatives of leading companies will share real-world cases of AI already applied in practice.

### **Topics to be discussed at the Forum**

Development and Evolution of Sustainability in Brazil's Leather Supply Chain - Ricardo Andrade – CICB

Artificial Intelligence Taking Over the World - Rafael Martins – Share

AI-Based Digital Solutions for the Leather Industry - Jo Gilet – Hidexe

Impact of Technology Use on Durlicouros' ESG Advancements - Ivens Teixeira Domingos – Durlicouros

Automation and Efficiency in Tannery Operations - Cesare Dal Monte – GER

The Forum will conclude with a final panel discussion addressing the use of artificial intelligence and the future of leather production.

Registration will be limited and announced through CICB's communication channels.

Participation in the Forum also requires registration for the Fimec trade fair, available at [www.fimec.com.br](http://www.fimec.com.br).

## **A more integrated platform for the global leather supply chain**

APLF 2026 will take place from March 12 to 14, 2026, at the Hong Kong Convention and Exhibition Centre. The event will once again bring the global leather and fashion supply chain together in Hong Kong for three intensive days of sourcing, exchange, and business development.

With more than 600 exhibitors and an expected attendance of 9,000 professional visitors, APLF is recognized as a key access point to the Chinese and Southeast Asian markets. Participants include tanneries, material and chemical suppliers, component specialists, brands, buyers, and manufacturers of fashion goods and accessories.

One of the central features of the 2026 edition is its simplified layout. APLF Leather, Materials+ and Fashion Access will all be located entirely on Level 1 of the venue. This creates a single continuous space rather than separate zones across different levels.

The objective is practical: shorter distances improve circulation. Categories connect more naturally. Raw materials, chemicals, components, and finished products coexist within the same visitor route. For visitors, this means time savings and easier comparisons across the supply chain. For exhibitors, it translates into greater visibility and a more consistent flow of visitors, encouraging deeper conversations and better commercial outcomes.

### **Industry dialogue beyond the exhibition space**

The context in which APLF 2026 will take place remains complex. Much of 2025 was marked by uncertainty following changes in U.S.

import tariff policies. Trade flows were disrupted, and confidence weakened across several manufacturing sectors.

In recent weeks, however, signs of stabilization have begun to appear. Reports from Italy indicate that some companies in the leather sector have started rehiring and training staff. This reflects cautious optimism and expectations of firmer demand in 2026.

China also announced a reduction in the import tax on wet blue leather, lowering the rate from 6 percent to 3 percent. The measure aims to encourage imports and support local production. This is particularly relevant for the Leather and Hide Council of America, whose working relationship with the China Leather Industry Association remains strategic for both sides. In this context, LHCA and CLIA will jointly organize a two-hour seminar during the fair.

Beyond the commercial exhibition, APLF 2026 reinforces its role as a knowledge-sharing forum. Sustainability, regulatory compliance, transparency, and performance continue to have a decisive influence on strategic decisions across the sector.

On March 11, 2026, prior to the opening of the exhibition, the Leather Supply Chain Conference will take place. The conference will address current pressures and priorities across the entire value chain, from production and chemistry to brand expectations and market readiness.

During the fair, the Next Gen Materials Tech Talk will focus on emerging material technologies. These sessions respond to growing demand for scalable, performance-driven solutions aligned with responsible sourcing frameworks.

An educational program on the final day will support skills development and provide practical context on trends shaping the current market environment.

Taken together, the single-level layout, the mix of exhibitors, and the program of activities position APLF 2026 as a more connected and efficient platform for the industry. The emphasis is on the quality of exchange and measurable commercial value.

Broad geographic representation of the industry

(National pavilions as of January 15, 2026)

Italy – ICE, Italy – UNIC, Germany, Brazil – CICB, Japan – JLIA, Spain, Turkey, United States, France – FFCP, France – FFTM, Pakistan – PTA, Mexico & Australia

### **Growing importance of certification and standards**

During a press conference at APLF 2026, the Japan Leather and Leather Goods Industries Association will announce a new initiative: a sustainability certification recognized by JLIA for companies in the leather supply chain that demonstrate a concrete commitment to environmental, social, and economic sustainability. The framework is aligned with the Sustainable Development Goals and international ESG principles.

Evaluation criteria include governance, labor conditions and human rights, environmental management, and product safety. The certification aims to establish clearer benchmarks and encourage responsible practices throughout the sector. JLIA will present further details at APLF, stand 1BE02JP.

It is clear that APLF continues to be the major meeting point for the leather industry, its supplier companies, and manufacturers of leather, related materials, and components. For this reason, its ability to positively influence the industry will be the key factor shaping what happens in 2026.

*(Source: Cueroamerica)*

# **ILM 163<sup>rd</sup> ILM-the International Leather Goods Fair (7-9 February, 2026, Offenbach, Germany)**

## **Autumn/Winter 2026/27 Collections will be presented**

The 163rd edition of ILM, organised by Messe Offenbach, will take place between 7 & 9 February, 2026, in Offenbach, Germany, which will once again be the hotspot for fashion handbags, luggage, school articles, accessories etc.

Over 300 brands from 25 countries will be presenting their latest collections for the Autumn/Winter 2026/27 season at this edition. ILM is the world's only specialist fair in this segment with international appeal, and so it attracts the industry's leading players. It is where prestigious labels and major purchasers of more than 60 nationalities meet. "We are unique. This constellation is to be found only in Offenbach. That's the secret of our success," says Arnd Hinrich Kappe, CEO of Messe Offenbach, emphasising ILM's international pre-eminence.

The "Young Innovators" trade fair programme sponsored by Germany's Federal Ministry for Economic Affairs and Energy (BMWE) will ensure that, in future, many more young, up-and-coming enterprises will be taking part in ILM.

A project that, according to Kappe, promises to add valuable momentum to the industry. The focus at the fast-approaching ILM will zoom in on two key strong-selling product categories. Fascinating talks by product developers from the luggage and school articles segments will provide guests with valuable first-hand insights and information. Besides which, inspiring talks and lectures on trends with practical ideas for ordering and selling will be a further source of sound professional knowledge.

Innovative events, lectures on trends and round-table discussions will all be enthrallingly set in scene: Besides the popular afterwork parties, a further meeting point for invited guests promises to be the "Hidden Highlight". On Sunday evening, 20 selected exhibitors, including innovative brands and newcomers, will have the opportunity to welcome their key customers to a get-together with flying buffet. This exclusive event is being sponsored by Messe Offenbach.

**COOPERATION FOR THE FUTURE:** The recently agreed cooperation with the Travel Goods Association will be attracting not only more than 20 prestigious new brands, mainly from the outdoor segment, to Offenbach, but a good many trade visitors from the USA as well.

**HARNESSING SYNERGIES.** Parallel to ILM, the international consumer goods trade fair "Ambiente" will be taking place in Frankfurt from 6 to 10 February 2026. The two trade fairs will be linked via a free shuttle service. Moreover, a good number of hotels will be offering special rates, allowing exhibitors and visitors a reasonably priced and pleasant stay during ILM Edition #163.

Further information at: [www.ilm-offenbach.de](http://www.ilm-offenbach.de)

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# **MOMAD**

**MOMAD - International Fashion, Footwear & Accessories Trade Show (5-7 February, 2026, Madrid, Spain).**

**Newcomers and established brands will shine at the February edition of MOMAD**

From 5 to 7 February, MOMAD will showcase the fashion industry in an event focused on commercial exchange and market vision



**MOMAD** is advancing towards its next edition with a high level of participation, achieving an exhibition occupancy rate of **over 90% in Hall 10 of IFEMA MADRID**. The presence of **more than 200 brands** from **Spain, France, Germany, Portugal, and Greece**, among other European markets, reflects the sector's interest in being part of this international event, held from **5 to 7 February**, which is seen by professionals as the premier showcase for **discovering collections, detecting trends, and establishing business relationships**.

In this regard, the February edition will provide a **representative snapshot of the sector**, with an exhibition offering that combines **established brands, newcomers**, and a clear commercial focus. **MOMAD** will present proposals that reflect the **creative dynamism** of **Spanish fashion**, alongside **European brands** that prioritise design, brand identity, and increasingly align production with **quality and sustainability** criteria, key values for the professional channel.

### **An offering of brands aligned with market trends**

Among the already confirmed brands are well-known names from the national landscape such as **Alba Conde, Victoria by Vicky Martín Berrocal, Vilagallo, Surkana**, and **Escorpión**, which will provide a wide perspective on current fashion, featuring more commercial proposals as well as collections with a strong creative and design character.

Alongside these established brands, **MOMAD** is welcoming some **newcomers** to enhance the fair's attractiveness as a platform for discovering new products and generating new business opportunities. Notable new additions for this edition include **Fuchs Schmitt**, specialising in outerwear designed for the urban woman; **CIRCU**, offering ethical and designer swimwear, and **Marinette Saint-Tropez**, known for its feminine, Mediterranean-inspired style. This will ensure that the additions will expand the range of the exhibition and bring a touch of freshness to the overall display.

In the February edition, **MOMAD** is shaping an event focused on **business**, the **quality of offerings**, and the **connection between brands and the professional channel**, positioning itself as a key date within the fashion sector's trade fair calendar. It will once again coincide with **Bisutex and Intergift**, creating a high-value event for the professional channel.

Get your **professional pass** on the **MOMAD website**. [www.ifema.es](http://www.ifema.es)



## AT MICAM, THE FIRST DIGITAL SOLUTION TO CONFIDENTLY SELECT FUTURE BESTSELLERS

### IT'S NOT MAGIC, BUT A DATA-DRIVEN TREND GUIDE DEVELOPED WITH AI

Purchasing future bestseller products while reducing unsold stock and simultaneously optimizing commercial and environmental impact: it's not magic, but the exclusive service offered by MICAM, the first international trade show to present a **TREND GUIDE** and a **TREND AREA** based on data and generated by artificial intelligence. As an exclusive service provided by MICAM, this data-driven project was born from the desire to enhance the visitor experience by offering the most reliable insights into seasonal trends, helping buyers optimize their purchasing decisions. For this reason, MICAM collaborates with **Livetrend**, a cutting-edge digital platform specializing in trend and market analysis.

This innovative digital solution, powered by artificial intelligence, analyzes millions of images and data points from various web sources. Through specially developed algorithms, it identifies and processes seasonal macro-trends. Instagram, e-commerce platforms, fashion shows, and consumer interest are all leveraged to support trend forecasting.

According to the data-driven guide, **2026** will be marked by a collective search for authenticity-a **“Primordial Renaissance”**, in which footwear must respond to consumers' renewed demand for value. Within this scenario, four macro-trends define the season: **Bucolic Slumber**, rooted in a serene, natural rural world; **Lavish**

**Subversion**, inspired by the enchantment of the everyday, a luxurious and surprising theme; **Primal Futurism**, based on the ambivalence between a minimalist future and a past rich in traditions; and **Dark History**, which introduces an almost religious and historical dimension inspired by ancient rituals, asserting itself through its dramatic intensity.

**Bucolic Slumber** reflects the growing desire to slow down and reconnect with nature, expressed through footwear featuring soft shapes and an aesthetic that evokes the comforting familiarity of well-worn objects. Classic rural styles are updated with contemporary solidity: Mary Janes and riding boots take on a character suspended between nostalgia and modernity, thanks to substantial soles, rounded lines, and materials such as suede and prominently grained leathers.

**Lavish Subversion** explores a sense of rebellious maximalism through unexpected playful details that transform classic silhouettes—ballet flats, feminine pumps, and loafers—enhanced by glossy finishes, velvets, and satin surfaces that convey a theatrical sensibility.

**Primal Futurism** builds the future from fragments of the past, integrating technology and craftsmanship. The aesthetic favors matte surfaces, materials such as pony hair and distressed finishes, hardware elements like studs and mechanical fastenings, and minimalist, intellectual forms.

**Dark History** draws inspiration from the Middle Ages, Baroque influences, and the dark elegance of Gothic romanticism, featuring sculptural shapes, elongated toes, twisted or arched heels, and high shafts reminiscent of ceremonial attire. Materials intensify this atmosphere through textured combinations: embossed leathers, lace, patent finishes, velvets, and even chain mail, creating contrasts between softness and structure. Corset - style lacing, oversized buckles, and multiple straps contribute to a sense of ritual and enhance the vintage allure of the designs.

## LEATHER: Studies for Information and Self-Training



**Richard Daniels**

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

**Two studies are available for download free of any charge from the website [www.indianleathermagazine.com](http://www.indianleathermagazine.com)**

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

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

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

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

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

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

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

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

**This is about making Leather !**

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"Guru Krupa" Building- 2nd and 3rd Floor  
No. 101/56, 4th Avenue Ashok Nagar,  
Chennai - 600 083.Tamil Nadu, India.

Tel : +91-44-4298 8700

E-mail : aravindh@texbiosciences.com

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



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