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GOOD START Editorial

The **Leather Week 2026** started with positive signals for the leather industry, like announcement of the **US tariff** reductions, and the signing of the **India-EU Trade Agreement**. Following high 50% tariff (25% reciprocal + 25% penalty), which caused major disruptions for the exporters, the beginning of the year saw a move towards a reduced tariff structure of 18%. Exporters are hoping for a sustained recovery in orders from the US following the reduction of tariff. The orders from the US which got reduced in 2025 would start coming, and it is hoped that manufacturing units would run at or near full capacity. India's share of leather exports to the US could rise from about 22% to nearly 30% this year, it is hoped..

India-EU Free Trade Agreement is a great boon to the Indian footwear and leather industry, as the country's share of exports to European Union is 43% . This land-mark agreement with 0% import duty in EU for footwear and leather sector will open-up bountiful opportunities to the exporters and pave the way for more growth and expansion in the leather industry, making it a win-win for exporters and manufacturers alike, and will help in achieving the envisaged target of US$ 14 billion by 2030

The Council for Leather Exports, said, Shri R Selvam Executive Director, had organised 17 overseas export promotion events during April 2025-January 2026., in ten countries and have planned to organise ten more overseas marketing events. These events have helped in not only promoting the image of India as a reliable supplier of high quality products, but also in forging short term and long term business tie-ups.

The major event of the Leather Week, the India International Leather Fair (IILF), emphasized naturalness, innovation and sustainability with a focus on eco-friendly products and practices. This aligns with the industry's growing awareness of environmental concerns and the need for responsible production. The other concurrent events, like LERIG Conclave 2026, Fashion Show, Designer Fair, technical seminars, business talks etc. held on the sidelines of the Fair were all well attended by the people from the industry and trade.

The Leather Week 2026 will surely open up new window of opportunities for the overall growth and development of the Indian leather and footwear industry.

LEATHER WEEK - 2026

India International Leather Fair (IILF 2026)

Indian leather and footwear industry aims to maintain export growth momentum and reach export target of USD 14 billion by 2029-30

The 39th 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), and with the institutional support of CSIR-CLRI, FDDI, CIFI and trade associations, like, IFLMEA, ISF, IFCOMA, at the Chennai Trade Centre, from 1-3 February, 2026, unveiled the huge export potential of India, and also aimed to project India as an investment destination and a manufacturing hub for design and information. The mega B2B event was formally inaugurated by Amb. Shri Jawed Ashraf, IFS (Retd.) Chairman, India Trade Promotion Organisation (ITPO) in the presence of the captions of leather industry, senior government officials. The 9th Designers fair organised by the Council of Leather Exports at IILF was also inaugurated by the Chairman, ITPO.

Present on the occasion were Dr. Neeraj Kharwal IAS, Managing Director ITPO, Shri Ramesh Kumar Juneja, Chairman, CLE, Shri R. Selvam, Executive Director, CLE, Lt. Col. Harsh Kondilya OSD and General Manager, ITPO, Smt. L. Bharathi Devi, Managing Director, TNTPO, Shri Vivek Sharma, MD, FDDI, Mr. Abdul Wahab, Regional Chairman (South, CLE), Shri Sanjay Gupta, Chairman, IFCOMA, Shri Brij Lal, General Manger, ITPO, Members of Diplomatics Corps, participants from India and abroad, delegates and media representatives. The dignitaries from the overseas include Mr. Michael Hasper, Counsel General of Federal Republic of Germany in Chennai, Ms. Antonietta Baccanari, Trade Commissioner, Italy, Mr. Cameron Nobel, Dy. Consul General, Australia, Mr. Adil Australian Trade Commissioner and others.

After the opening of the fair, Amb. Mr. Jawed Ashraf Chairman, ITPO visited the stalls and complimenting all the associates, said, ITPO is committed to support and catalyse the promotional efforts in India and abroad, specially when the country is emerging as a vital destination after signing FTA's with European Union and UK. After interaction with the senior representatives of CLE and other Apex bodies he informed that ITPO is planning to hold similar leather fair in New Delhi.

While addressing the foreign media he said, specially when Europe and India are committed to shape new global order to boost economic growth in leather and its allied industries by slashing tariff on goods, enhancing service sector and fostering investment. Quality and on time delivery are imperatives to improve India's performance to strengthen its supply chain.

This year, the fair elicited participation of 368 Indian companies and 66 oversees participants. Germany & Italy have set-up their country pavilions at the fair. The other participating nations were: Australia, Argentina, China, Ethiopia, Hong Kong, Japan, Saudi Arabia, Spain, Taiwan, The Netherlands, Turkey, United Arab Emirates, United Kingdom.

Leather Fashion Show 2026

The annual concurrent event, **Leather Fashion Show**, organised by the Indian Finished Leather Manufacturers and Exporters Association (IFLMEA), was held on 1st February, 2026 at the ITC Grand Chola and a **Brand Symposium** was organised for the second time on 2nd February at the same venue. The event was aimed at connecting manufacturers and retailers across the country and exploring private-label opportunities, said Mr K R Vijayan, Convenor of Fashion Show and Brand Symposium 26. There were 14 major Indian leather goods manufacturers who presented designer leather garments, footwear and accessories made from ovine and bovine leather.

Mr Ateequr Rahman, Chairman, IFLMEA, addressing a press conference., held earlier, had said, the Fashion Show was intended to give leather goods and footwear manufacturers a strategic platform for showcasing their innovative designs and craftsmanship to the buyers from India and abroad. He said the recent India-EU free Trade Agreement (FTA) would help increase the exports. The Chairman was optimistic that the exports would witness 15-20% growth in domestic and export trade over the next three years.

The Fashion Show featured 14 showtoppers and 70 models, ably directed by Bhaskaran Chandrasekhar and choreographed by Jude Felix.

During the IILF, the Council for Leather Exports had organised the concurrent event **"Designer Fair"** at the Fair venue. The Designer Fair witnessed the participation of overseas designers from Italy, USA and Portugal. The event provided an opportunity to Indian manufacturers and exporters to meet popular designers, interact with them and explore long term tie-ups for design development.

LERIG CONCLAVE 2026

Sustainability and Circular Approaches for the Leather Economy (SCALE)

The 59th Edition of the Leather Research Industry Government (LERIG) Conclave, hosted by CSIR-Central Leather Research Institute (CSIR-CLRI) on behalf of the LERIG Trust and stakeholders of the Leather Sector, was organised on 2nd February 2026 at the Chennai Trade Centre, Nandambakkam, Chennai. The Conclave brought together policymakers, industry leaders, exporters, MSMEs, certification bodies, international experts, designers, technologists, researchers, and academicians with informative technical sessions that offered valuable insights on the theme - **Sustainability and Circular Approaches for the Leather Economy (SCALE).**

The prime objective of the Conclave was to deliberate on practical, scalable and commercially viable strategies that would strengthen sustainability, circularity, and global competitiveness of the Indian leather industry. The theme "SCALE" was conceptualized in response to growing industry concerns regarding waste management, environmental compliance, traceability requirements, carbon footprint reduction, and evolving global trade expectations.

The Inaugural session commenced with the welcome address by Dr.P.Thanikaivelan, Director, CSIR–CLRI. He highlighted the significance of 59th edition of LERIG Conclave emphasizing the indispensability of sustainability and circularity in the leather and leather chemicals & products industries, He stressed that sustainability in the leather sector must move beyond compliance-driven approaches and evolve into innovation-driven transformation. He highlighted CSIR–CLRI's continued efforts in developing technologies for converting solid wastes into value-added products,

promoting water-efficient processing systems, strengthening environmental management practices, and enabling circular economy models across the leather value chain.

In his presidential address Padma Shri M Rafeeque Ahmed, President, All India Skin & Hide Tanners & Merchants Association (AISHTMA) and Chairperson, Farida Group, stated that product industry market is steered by consumer preference to buy sustainable products. He emphasised that lasting and responsibility makes the leather industry to gain space in the circularity. He stressed on the need for transparency in processing methods, effluent treatment standards, carbon emissions management, and full value-chain traceability. He urged the industry to adopt the guiding philosophy: “Make it last; keep it longer; and waste less,” especially in view of expanding trade with the European Union, where sustainability documentation and proof-based claims are becoming mandatory.

Shri Aqeel Panaruna, Chairman, Florence Shoe Company Pvt Ltd in his address, emphasized that Product sustainability practices and global credibility are crucial for global acceptance. He stated that CSIR-CLRI is an asset for the leather sector, playing a pivotal role in translating laboratory research into pilot-scale and industry-ready technologies. He stressed that MSME’s role is very critical in strengthening the India’s leather economy and the support of CSIR-CLRI is required to nurture MSMEs through technology adoption and innovation-driven growth.

Shri M Addul Wahab, Regional Chairman, South - CLE and Managing Director, KH Exports India Pvt Ltd, expressed that transparency across the product value chain has been considered a defining element of product sustainability emphasizing on traceability from farm to finished product. He appreciated CSIR-CLRI’s technology on the development of blended yarns using leather waste

combined with natural and man-made fibres. He noted that the technology license was secured by M/s K H Exports India Private Limited and found it to be a significant technological advancement promoting circular economy by repurposing solid leather waste into value-added textile products. He instigated that deconstruction and reusing of the leather products will find a place in the future sustainability.

As part of the inaugural proceedings, CSIR–CLRI transferred a process technology for the manufacture of leather for musical instruments to M/s Infinite – Art to Heart, Chennai, reinforcing its commitment to translational research. The latest edition of CSIR-CLRI Technology Compendium was released by Padma Shri M Rafeeque Ahmed and the first copy was received by Shri Aqeel Panaruna. Dr P Shanmugam, Scientist G, CSIR-CLRI proposed the vote of thanks for the inaugural session.

The Technology Talks session that followed focused on translating sustainability into operational reality. Shri Rafiq, CEO and Managing Director of KKSK International, presented an industry perspective on clean technology pathways. He traced the transformation of the Tamil Nadu leather sector from pollution-intensive operations to globally recognized environmental compliance, particularly through early adoption of Zero Liquid Discharge (ZLD) systems. He shared practical data demonstrating significant reductions in water consumption—down to nearly two litres per square foot of leather processed-thereby countering common misconceptions about excessive water usage in leather production. He also elaborated on the long-standing implementation of the “Lysotec” lime-liquor recycling system, which has been operational for nearly three decades, contributing to pollution load reduction and process efficiency. Emphasizing worker safety, he urged strict adherence to sulfide oxidation protocols to prevent hazardous hydrogen sulfide emissions.

LERIG Conclave 2026

Inaugural Session

Technology Talks:

S S Dutta Memorial Lecture

Design Workshop

Panel Discussion

Dr. T. Shakila Shobana, Scientist E, CSIR–CLRI, presented a comprehensive overview of solid waste utilization technologies under “Waste to Wealth”. She categorized tannery waste streams and detailed viable technological pathways for converting raw trimmings into collagen hydrolysate, hair waste into keratin-based biofertilizers, chrome shavings into regenerated biomaterials with chromium recovery, and buffing dust into reconstituted leather composites. Her techno-economic analysis demonstrated attractive payback periods, underscoring that environmental sustainability and economic profitability can coexist. The session highlighted that waste must be reframed as a resource opportunity rather than a disposal burden.

The 7th Prof. S S Dutta Memorial Lecture, organized by the Sothern Regional Committee of the Indian Leather Technologists Association (ILTA) was delivered by Shri Aqeel Panaruna, Chairman, Florence Shoe Company Pvt. Ltd. In his lecture, he examined the implications of evolving United States tariff measures on Indian leather exports. The lecture analysed reciprocal tariff structures, global trade disruptions, and the need for market diversification toward Europe, the United Kingdom, Japan and Australia. Stressing resilience, he highlighted the importance of Free Trade Agreements and adaptive business strategies in navigating volatile global trade conditions. The session also recognized meritorious students from premier leather institutions with memorial medals, reaffirming the sector’s commitment to academic excellence.

In the afternoon session, a Design Workshop on “India’s Design Capabilities: Present and Future - A Vital Growth Engine” organized as part of the "Development of Design Studio for Footwear and Leather Sector" under the sub-scheme of Indian Footwear and Leather Development Program (IFLDP) funded by DPIIT, marked a significant convergence of cultural intelligence, artificial intelligence, and creative innovation. . The speakers for the workshop were Shri Md Sadiq, Scientist (Retd.), CSIR-CLRI, Dr. Kaustav Sengupta,

Associate Professor, NIFT Chennai, Mr. Walter Bettini, Designer - Footwear, Bettini & Penazzato SNC., Italy, Ms. Elissa Bloom, Designer - Goods, USA and Shri Suresh J, Head, Product Development, Calsea Footwear Pvt Ltd. This design workshop focused on enlightening the gathering on color cognition, consumer psychology, indigenous design intellectual property, and the growing importance of storytelling in product branding. The integration of creativity with manufacturing practicality, supported by AI-driven sampling and forecasting tools, was highlighted as essential for future competitiveness. The designers emphasized on market-oriented design solutions highlighting the tradition and craftsmanship.

During the workshop, the book titled **"Footwear Quality Manual"** authored by Shri Ramesh Subramaniam and co-authored by Dr. R. Mohan, Dr. Swarna V. Kanth, Shri R. Sathiyaraj, with contributions from Dr. D. Suresh Kumar, was released by Dr. P. Thanikaivelan, Director, CSIR–CLRI, providing a structured framework for strengthening quality assurance practices in footwear manufacturing. The first copy was formally received by Dr. B. Chandrasekaran, Distinguished Scientist, CSIR–CLRI. CSIR–CLRI also announced the launch of its Training Courses for the Advanced Footwear and Bags Design aimed at enhancing creative and technical competencies in footwear and bags design, thereby strengthening India's design ecosystem. The participating member industries were awarded Certificates for their valuable participation and support in promoting the Indian Leather and Products Industry through their involvement in the ModEurop and Fashion Trend Pool colour meetings for the Spring–Summer 2027 season.

The panel discussion on "Roadmap for Sustainable Development of Leather Sector" was moderated by Dr. P Saravanan, Scientist G, CSIR-CLRI. The panelists for the session were Shri P Rajasekaran, Business Head- Finished Leather, TATA International Ltd, Shri C

Anbu Malar, Vice-Chairman and Director, P A Footwear Pvt. Ltd, Ms Vanessa Podmore, Executive Director, Leather Working Group (LWG), Mr. Jon Loxston, Managing Director, LWG Assurance Services, Mr Ato Wondu Legesse Gizaw, Former National Project Coordinator, UNIDO, Ethiopia and Ms. Sonia Zapata, Head of Technology, Innovation and Product Management Leather Finishing, STAHL.

The panelists collectively emphasized that sustainability must be viewed as a strategic enabler rather than a compliance obligation. Key themes included renewable energy adoption, chrome and protein recovery, cluster-level environmental infrastructure, digital product passports, continuous monitoring systems, safer chemical formulations, and collaborative action across the value chain.

The panel reached a consensus that waste streams should be repositioned as resource streams and that circular economy implementation demands coordinated engagement among research institutions, industry stakeholders, policymakers and global partners for achieving meaningful and lasting transformation. This panel discussion instigated a clear, practical and forward-looking roadmap for the sustainable development of the leather sector.

The LERIG Conclave 2026 concluded with the Leather Ambassadors Meet organized by the AC Tech Association of Leather and Footwear Alumni (AC Tech ALFA), which served as a vital platform for alumni to reconnect, share experiences, and discuss industry advancements. ALFA Awards 2026 was conferred to the awardees for their outstanding contributions to the leather, footwear, and allied sectors.

Thus, the LERIG Conclave 2026 stood as a reaffirmation of collective commitment of academy, research, industry and government to scaling sustainability, innovation, and circularity as the defining pillars for the leather economy.

AC Tech ALFA hosts Alumni & Ambassadors' Meet 2026

The ALFA Alumni & Ambassadors' Meet 2026 reaffirmed AC Tech ALFA's commitment to global alumni engagement, recognition of excellence, and strengthening India's leather and footwear industry through leadership, innovation and collaboration.

The AC Tech Association of Leather & Footwear Alumni (ALFA) had its traditional Annual Get Together on 2 February 2026 at the Chennai Trade Centre with the theme "Ambassador's Meet" as part of the LERIG Conclave organised by the CSIR–Central Leather Research Institute, ensuring continuity between research leadership, industry dialogue, and alumni engagement.

The Meet brought together leather and footwear alumni of the Department of Leather Technology, Anna University (housed at CSIR-CLRI) industry leaders, academicians, and international delegates. With a global alumni network of more than 1,900 members across 10+ countries, AC Tech ALFA continues to play a vital role in shaping leadership, innovation, and collaboration in the leather and footwear sectors.

The key objectives of the above Meet were:

- Strengthening engagement among ALFA ambassadors and alumni
- Presenting current and planned ALFA initiatives
- Recognising distinguished alumni contributions
- Hosting the ALFA Orator Award Lecture
- Promoting sustainability, innovation, and global collaboration

The programme commenced with welcome address by Mr. D. Rajababu, President, AC Tech ALFA. This was followed by the

felicitation of Dr. P. Thanikaivelan, one of the distinguished alumni on assuming charge as Director, CSIR-CLRI recently and his address.

Mr. Joe Arun, Joint Secretary, AC Tech ALFA, presented an overview of ALFA activities and future initiatives.

Mr. Simon Neifer, Chair, IUL Committee, IULTCS, the Chief Guest, in his address, highlighted, sustainability, innovation, and international cooperation as key drivers for the future of the leather industry. Mr. Neifer emphasized leather's sustainability narrative as a natural byproduct of the meat and dairy industries and underscored the importance of durability, reparability, and efficient resource utilisation. He stressed that innovation, in chemistry, process control, energy and water management, and digitalisation is the key to the future competitiveness of the global leather sector. He also appreciated alumni organisations like, ALFA, for enabling cross border collaboration and inter-generational knowledge transfer.

The ALFA Orator Award Lecture was delivered by Mr. Suresh Kumar M.Tech (Footwear Science and Engg.), Country Manager & Director, Clarks India Services, and Global Head of Materials, C&J Clark International, UK. His Lecture title was: **"India in the Global Footwear Supply Chain: Opportunities, Expectations & the Road Ahead".**

The lecture provided insights into India's role in global footwear supply chains, materials innovation, sustainability expectations, and the importance of skilled talent and resilient sourcing ecosystems as pointed out below.

- India's emerging role in global footwear sourcing and materials leadership
- Expectations from global brands in terms of quality, compliance, and sustainability
- The importance of materials innovation, supply chain resilience, and skilled talent
- The role of Indian professionals and alumni networks in shaping future global partnerships.


Ambassadors Meet
2026


The EC


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The following awards were presented on the occasion

I. **ALFA Orator Award**

- Mr. J. Suresh Kumar B.Tech (1997 Batch), M.Tech

II. **Lifetime Achievement Awards**:

- Mr. A Muthupalaniappan B.Tech (1966 Batch), M.Tech
- Mr. M.S.A. Khader B.Tech (1967 Batch)

III. **Entrepreneur Awards**

- Mr. N. Venkataramana B.Tech (1982 Batch)
- Mr. R. Kandeepan B.Tech (1984 Batch), M.Tech
- Mr. P. Thirumaran B.Tech (1980 Batch), M.Tech

IV. **Inspiring Teacher Awards:**

- Dr. N.K. Chandra Babu B.Tech (1980 Batch), M.Tech, Ph.D
- Dr. D. Rajasekar B.Tech (1988 Batch), M.B.A., Ph.D

V. **Technocracy Awards**

- Mr. V. Prasanna B.Tech (1974 Batch), M. Tech
- Mr. K. Subba Rao B.Tech (1975 Batch) M. Tech

VI. **Women Excellence Awards**

- Mrs. P. Anuradha B.Tech (1985 Batch)
- Dr. Swarna V. Kanth B.Tech (1992 Batch), M.S, Ph.D

VII. **Exceptional Societal Influence Award**

- Mr. A. Abdul Huq B.Tech (1977 Batch), M.Tech

VIII. **Very Early Stage Startup Awards**

- Mr. Joe Arun J B.Tech (2021 Batch)
- Mr. Mohammed Arshad Khan B.Tech (2021 Batch)

The programme concluded with a vote of thanks delivered by Mr. R. Jayaraman, Vice President, AC Tech ALFA, followed by high tea and networking.

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Back to School Column

Dr N K Chandra Babu

babunkc@yahoo.com

Vegetable Tanning – Part I – Vegetable tanning materials

Vegetable tanning is probably older than civilization itself and many historians believe that skins of the animals hunted for food treated with certain plant materials were the first attire worn by humans to protect themselves against vagaries of weather conditions. Vegetable tanning as an industrial activity for the production of leathers has been recognized as having undergone evolutionary changes for many centuries. It is generally believed that initially the vegetable tanning was carried out with plant materials containing low tanning efficiency and low concentration of tannins, and the tanning used to take many months to complete. As the knowledge about vegetable tanning materials improved, higher concentration of tan liquors was possible which considerably reduced the duration of tanning. The historical background of vegetable tanning will be described later in this article after we become familiar with vegetable tanning materials, their chemistry and the terminologies associated with them.

Vegetable tannins are naturally occurring polyphenolic products found concentrated in various parts of plants such as leaves, fruits, nuts, bark, heart wood and roots. The tannins are extracted from these plant parts by leaching with water, and this will also be described later.

The tannins are polyphenolic compounds with complex structure with molecular weights ranging from approximately 500 to 3,000. The tanning action of a polyphenol (i.e. affinity for the fiber structure) is dependent on the molecular weight (particle size) and on the number

of phenolic –OH groups. A minimum molecular weight of approximately 500 together with sufficient phenolic –OH groups to form crosslinks with the fiber structure is considered essential. Small-sized tannin particles, at the lower end of the molecular weight range, have a relatively low affinity for the fiber structure, and are referred to as either “fringe level tannins” or “semi-tannins”. The affinity of tannin for the fiber structure increases as the size and number of phenolic –OH groups on the particle increase. At molecular weights above 3,000, diffusion of tannin into the fiber structure is hindered by the size of the large particles. For a good tanning material, the molecular weight has to lie in the range of 500-2000 Daltons.

Polyphenols with molecular weights less than 500 and containing insufficient phenolic –OH groups are called non-tannins, which also include sugars, acids and their salts, hemicelluloses, pectin and lignin. Even though, non-tannins have no tanning action, they are believed to play important roles in producing good quality vegetable tanned leathers. The vegetable tanning materials are often characterized in terms of ratio of tannins to non tannin components (T/NT ratio) present in them.

Vegetable tannins are classified into two groups based on their chemistry and behavior in aqueous solutions and tanning action as follows:

1. Hydrolysable tannins (pyrogallol and gallo tannins)
2. Condensed (catechol tannins)

Pyrogallol or hydrolysable tannins

Hydrolysable tannins are large ester molecules (polyesters) having a central core of sugar molecules like glucose linked to phenol carboxylic acid molecules for example Gallic acid and its derivatives. Ester links are formed by the reaction of alcoholic -OH groups on

sugar molecules with –COOH groups on phenol carboxylic acid molecules. The number of ester links in a tannin molecule is dependent on the number of sugar molecules in the central core.

The ester links are readily hydrolyzed by acids and enzymes to release sugar and phenol carboxylic acid molecules. Based on the type of phenolic compounds released during hydrolysis, the hydrolysable tannins are further subdivided into gallo tannins (Gallic acid and meta dialect acid) and elllagitannins (hexahydroxydiphenic acid, a derivative of Gallic acid). This acid reacts with itself to form an internal ester, ellagic acid, and hence the name ellagitannins. This is water insoluble and forms a bloom on the leather. The old traditional pit tannages used large amounts of ellagitannins to deposit bloom in situ inside the fiber structure.

Sumac, tara and gall nuts belong to gallo tannins and they do not form bloom and their use is limited to use as ancillary tannins in the processing of light leathers. Oak bark, valonea, chestnut and myrabolan are examples of ellagitannins.

Fermentation of weak ellagitannin solution (<6%) on aging occurs with the sugar being converted by yeast into ethyl alcohol which is then converted into weak organics by certain bacterial strains to the presence of sugars. Yeasts convert glucose into ethyl alcohol, which is then converted by specific bacteria into weak organic acids, *e.g.,* lactic acid, acetic acid. This leads to considerable loss in tannins which increases with time aided by higher temperatures. The loss can be reduced by using biocides which have the efficacy to control both fermentation and growth of microorganisms.

The amount of bloom produced and its chemical composition varies from tanning material to tanning material. Valonea and myrabolan produce more bloom than chestnut. Ellagic acid is the main constituent in valonea, whereas ellagic and chebulinic acids are the main constituents in myrabolan.

In general, solutions of hydrolysable tannins have an approximate pH range of 2.8 to 3.6 but some tanning materials like chestnut may have a very low pH and hence many times, the acidity is neutralized and this process is called sweetening. Sweetened chestnuts are used in tanning process as a self tanning material like condensed tannins. The hydrolysable tannins have very slow rate of penetration during tanning.

Color of the tanned leather is yellowish-brown to dark brown, and is faster to light than condensed tannins. Sumac (a Gallo tannin), myrabolan, and to a lesser extent valonea, contain buffer salts (salts of weak organic acids) which give considerable protection to leather against acid rot.

Catechol or Condensed Tannins

Catechols are classified as flavonoid compounds, and have a rather complex chemical structure. The basic structure (the monomer) consists of a skeleton of 15 carbon atoms and the oxygen atom. Two benzene rings containing phenolic –OH groups are linked together by an heterocyclic ring comprising one oxygen and three carbon atoms.

Two examples of flavonoid monomers are:

Flavon-3-ol ; Flavon – 3,4 diol (Structure for these monomers may be accessed from Standard book on Vegetable Tanning)

These monomers have an approximate molecular weight of 250. As tannins cover a range of molecular weights from 500 to 2,000, the particles vary in size from 2 (for a semi-tannin) to 10 (possibly 12) monomers polymerized together. A characteristic feature of condensed tannins is the polymerized structure. The heterocyclic ring opens up through the action of heat, acids or oxygen, releasing an active site for polymerization (crosslinking) to a second monomer.

Quebracho, mimosa (wattle), mangrove and gambier are important condensed tannins. In India, traditional El tanning used to be carried out with avaram bark and myrobalan nuts. Konnam is another tanning material indigenous to India. Babul bark is still used in combination with wattle (barks and twigs) and myrobalan in bag tanned leathers used in the famous Kolhapuri footwear. Ordinary (unsulfited) quebracho has the highest level of polymerization. 50% of the tannin particles have a molecular weight less than 1,100 and the rest in the range 1,100 to 15,000 with high level of astringency and difficulty in diffusion during tanning. Color of the tanned leather is also dark with reddish brown color.

In comparison, gambier has a low level of polymerization, and consequently its tanning action is described as mellow and hence, mostly used in the retanning of light leathers such as nappa upholstery leather.

All tannin particles, hydrolysable and condensed, have a tendency to hydrogen bond to each other to form aggregates, i.e. increase in particle size. Condensed tannins form aggregates more readily than hydrolysable tannins. Aggregation is catalyzed by increasing tannin concentration and low pH.

The combination of a high degree of polymerization and aggregation causes a deposition of a reddish-brown colored, viscous sludge called phlobophenes, known to the tanners as reds. Ordinary quebracho deposits a high percentage of reds due to high molecular weight/particle size. The excessive red formation in the case of quebracho may be prevented by sulfitation or by dispersing with syntans and lignin sulfonates.

Quebracho is solubilized by reacting with either sodium bisulfite or a mixture of sodium bisulfite and sodium sulfite at 90-95^{0}C. The introduction of a sulfonic acid group, -SO_3H, into the tannin molecule reduces the levels of polymerization and aggregation as well as improving water dispersibility. High molecular weight aggregates are

converted into low molecular weight particles containing solubilizing sulfonic acid groups. The sulfited quebracho is lighter in color compared to its native form.

As condensed tannins do not contain ester links and sugar molecules, they are more resistant to hydrolysis and microorganisms. Hence there is neither fermentation nor production of weak organic acids when the liquors are stored for long.

In general, solutions of catechol tannins have an approximate pH range of 4.1-5.2. In tanning, unlike hydrolysable tannins, condensed tannins penetrate faster above their natural pH conditions. Color of the tanned leather is biscuit brown to reddish brown. The color is not fast to light like hydrolysable tannins and hence tends to darken/redder on aging/exposure to light. Unlike hydrolysable tannins, they do not have buffer salt, as a result of which they do not impart effective protection against acid rot.

History of Vegetable tanning in Europe

While tracing the history of E I tanning for the purpose of reviewing document (as requested by Patent office) for the application of Geographical Indication (G I), this author found to his dismay that there are no proper documented reference to vegetable tanning in India. Available information begins only with the changes made by a French expert. The details regarding the same will be dealt with later in this article.

Well documented information available about the history of vegetable tanning in Europe would be outlined chronologically as follows.

Prior to 1840, the range of vegetable tanning materials in use was limited to indigenous barks of a low tannin concentration (approximately 8% to 10%). Oak and to a lesser extent, pine, yellow and birch are the materials used.

The tanning process involved leaving hides (pelts) in contact with bark and water. Tanning dissolved slowly to form a liquor of low tannin concentration; the strongest liquor was approximately 30-35^0 Barkometer. Tanning was a slow and time-consuming process as it takes a long time for the tannins to dissolve, diffuse and fix in required amount (yield) to achieve effective tanning. In England during the middle ages, it was considered necessary to leave the hides in tan liquor for “a year and a day” to obtain good quality tanned leathers as a rule.

During the middle and later half of the nineteenth century, other vegetable tanning materials, e.g., mimosa bark, mangrove bark, valonea cup/beard, myrabolan nuts, were introduced into the traditional bark tannage. As these materials were richer in tannins (approximately 34-39%), it was possible to obtain a stronger tan liquor of up to 50^0 Barkometer (7^{0}Baumé), and so reduce the time of tannage.

Highly concentrated vegetable tanning extracts were produced during the period from 1870 to 1900. Liquid chestnut extract (200^0 Barkometer) and solid quebracho were among the first commercial extracts to be produced. The strength of the strongest tan liquor in use in the larger and more progressive tanneries had by now risen to 100-110^0 Barkometer and the time of tannage reduced to approximately three to four months.

The tanning in the case of heavy leathers, especially sole leather was completed with a process called hot-pitting which involved treatment a higher concentration of tannins (>110 ^{0} Bk) at low pH and higher temperature (~35^0 C) to obtain high yield and improved solidity..

During the time of World War II, the strength of the strongest tan liquor has risen to 120-140^0 Barkometer which enabled the reduction of process time to six to eight weeks. These tannages used a countercurrent system, i.e. pelt moved in the opposite direction to the

flow of tan liquor in a series of pits (with increasing tannin concentration and acidity), and time spent was also increased with increasing tannin concentration.

Blends of catechols (mimosa and/or cold soluble quebracho) and pyrogallols (myrobalan/valonea/chestnut) were used. Catechols, on account of their high pH values and rapid penetration, were suitable for the coloring/penetrating stage of tanning. Pyrogallols, because of their lower pH values (in particular chestnut), and the gradual development of acidity through fermentation, were used to fix the tannin and increase the firmness. The deposition of bloom by valonea and myrabolan also contributed to the fullness and firmness of the leather. The tannage produced full and firm sole leather with a light color. The light color was obtained by bleaching in a hot liquor made from highly sulfited mimosa – a process typically followed in U.K. tanneries.

The tanning mainly involved treating the pelts in series of pit systems called suspenders, handlers, layers, dusters, circulators and hot pits.

Suspenders – A set of 6-12 pits used in the initial stages of tanning to color and set the grain. The pelt was suspended from a wooden pole in the tan liquor and gently agitated by means of a rocker frame.

Handlers - A set of 6-12 pits used in the intermediate stages of tanning, in which leather was laid flat (i.e. piled) and covered with tan liquor.

Dusters and Layers – Used in the final stages of tanning, in which leather was laid flat (piled) and sandwiched by layers of chopped bark, crushed myrabolam nuts, and Valona beard. This was covered with tan liquor, prepared from either tan liquor or liquor blended with extract. The leather remained approximately one month in the pit.

Dusters and layers were old traditional pit systems which were uneconomical in terms of time and material. Progressive tanners replaced them with circulator sets.

Circulators – A set of 6-8 pits used in the final stages of tanning, in which leather was suspended. The pits were interconnected to allow the diffusion of tan liquor (by means of a small pump) through the set, so that the liquors have similar strengths, i.e. pH, Barkometer. The strength of the liquor is maintained over a period of 7-10 days through the addition of a stronger tan liquor or extract. The temperature could also be increased by a heating coil, e.g. hot-pitting.

The period 1945-1985 has seen a considerable contraction in the European sole leather industry, as a result of cheap imports and synthetic substitutes. Tanners were forced to rationalize to reduce cost, and use of rapid tanning systems came into practice. In the initial post-war years, rapid tannages consisted of complete deliming, usually a synthetic tannin (syntan) pre-tannage and vegetable tanning in pits (up to three weeks' duration). After 1985 most European tanners used either a rapid pit-drum tannage or a rapid drum tannage.

History of E I Tanning in India

E.I. Leathers are produced in Tamil Nadu predominantly today in Truchi, Dindigul, Ranipet, Melvisharam and Ambur. While tracing the history of vegetable tanning in general and EI tanning in particular, a writeup was reviewed and updated by this author as mentioned earlier. This formed the basis for the award of GI for EI to South Tamil Nadu tannery clusters ultimately. The summary of the writeup is included as follows.

The extensive report on Marco Polo travels in India in the 13th Century mentions about the use of dressed tanned leather in India that time. The tanning technology was reported to have undergone many changes during Mogul period. Evidences and records available indicate that leathers were used for many applications including production of coins during that period. When British East India Company assumed administrative functions in India, leathers

and leather products (mainly army related) based on vegetable tanned leathers were traded by them. During that time, tanneries were set up based on European method of vegetable tanning. The first large sized tannery was set up in Santhom, then Madras followed by three more in Hosur, Bangalore and Madras.

Another significant development took place in 1804 when a French Eurasian in Pondicherry, Charles De Sousa introduced techniques of leather tanning that he picked up in Mauritius using myrobalan to prevent the darkening of color on oxidation of locally produced avaram bark tanned vegetable leather. With some modification in process which involved wattle tanning followed by myrobing, the famous East India (E.I.) Tanning Technology was created that has endured till today. After the first war of Independence in 1857, the British realized that as supplies from England to the British Army in India were severely impeded by distance and other factors, they set up additional tanneries in India particularly in Madras presidency and more tanneries came up in Truchi, Dindigul and then North Arcot. Thereafter E.I. leather export picked up and exported to European countries namely England, France, Spain, Italy, Germany and also to Japan. E.I. Leathers from Indian is listed in leather markets in the World even today.

References to the writeup on history of E I Tanning

1. The LEATHER INDUSTRY IN INDIA - a book published for Council for Leather Export by Mr Placodo P D Souza Indian Diplomat served as High Commissioner and Council General for Government of India
2. “Platinum Jubilee Souvenir” by All India Skin and Hide Tanners & Merchants Association, Chennai (Article ‘Closing in on century’ by S Raja, Editor, Leather Ware)
3. December 1963 issue of Leather Science Journal, CLRI

For any queries/comments, Pl contact by mail at babunkc@yahoo.com

IILF 2026 - the Leather Carnival
Revolve, Evolve, Involve

- Vasan Suri
A Passionate Leather Lover & Professional
Hi-Tech Consultancy
Tel: +91-9871504980/9999735293

The 39th India International Leather Fair (IILF) 2026 was formally opened with ribbon cutting, with all the legends and veterans of the Industry taking the front stage along with Government Dignitaries.

I have always believed and impressed upon that, Fairs are the best meeting place to get connected with new customers & suppliers, renew old contacts, get connected on lost connections etc.,

The sheer warmth and pleasantries shared during such fairs holds all of us together for the next one year.

Though, a Sunday, the footfall was good. We could see less number of people from Chennai but, many from Delhi, NCR, Kolkata, Jalandhar, were present.

Usually, I would like to cover as much stalls as possible on the day one to understand the market and mood and go on with details on the 2nd & 3rd Day.

A caption came in to my mind.

For the growth of our Industry, we need to do this. Are we doing this? Revolve, Evolve, Involve.

REVOLVE

We need to stay rooted to our culture, tradition and good practices and respect the doyens, legends and stalwarts of our Industry.

Their experience and knowledge will be the guiding force and no two things about it.

EVOLVE

Are we evolving with newness and fresh look at every level? Yes, we are evolving. Is the speed enough is the question mark. We should evolve in a speed to be prepared 3 seasons ahead. For this, young minds need to be motivated and should not be that, they are brought out to the front and the limelight. By getting exposed on the frontline with backing of our experienced elders, they could bring some fresh breath, if they are pushed to the front.

This is not a wild thought and this is the practical way to move forward. We see the same seniors occupying the front stage and the youngsters go missing.

Let us evolve.

INVOLVE

The Indian Industry is full of talents. It should not be that, only the top layer get all the exposure and people down the line get lost. Their ideas need to be promoted and brought out. This can be achieved only by involving new faces and talents on such International events bringing them to the center stage and making them to be more proactive and productive.

Otherwise, the creativity gets nibbed in the initial stages.

Not necessary the owners of big organisations take the front stage. What about the master and craftsman who is responsible for all the Marvel products created. What about those technical wizards who have worked hard to create new articles, what about the labs who support us or what do we actually want from them.

I mean this sort of involvement and commitment.

There should be a system to check on whether what is spoken on stage is being followed up and converted as performance rather than just, prepared PPT or speech only for that occasion.

I keep talking about involving young workers and staffs to understand more about eco friendly tanning and LWG and the environmental norms and requirements for our Leather Industry.

Let us REVOLVE, EVOLVE & INVOLVE for a better and futuristic Industry of Leather & Leather Products.

Why not make the Government turn their heads towards our Industry by uplifting our performance in reality rather than lacing up meetings with sweet talks. Luckily, the Present Union Government is proactive for the trade and Industry and in particular exports. But, we need to make the Leather Fraternity flag flying higher.

Day 2 at IILF

All traffic was leading unto the leather fair 2026. Inside the exhibition centre, car parking had gone full up to the 6th floor. It was a Leather carnival.

There was a fresh breath of optimism and could see happy faces discussing new opportunities and possibilities rather than tired faces after so much of walking from New Hall to Old Hall & vice-versa.

Interest and curiosity from the Leather Fraternity were all pointed towards Chemical suppliers, who have brought in amazing technological advancements.

From Sodium Sulphide free tanning, efficient chrome tanning, reduced water inputs and lesser inventory of chemicals with upgradation technology, single compound tanning technology, green finishing technology, bio based dye stuffs and vegetable & fruits based dyes were all on display. These basic information should raise the curiosity of the leather fraternity to go and check on the 3rd day by themselves and keep up the liveliness.

Leather Goods machinery section was totally crowded with many innovative technology and machines on show. Lot of participants with non-leather products displayed, had busy time with visitors

enquiring about Leather Alternatives and Vegan Leathers, Bio degradable non-leather products etc.,

The Leather Industry has the biggest chest and heart to allow every other alternative to come and be a part of the Leather Carnival and yet over shines all the products as the "ever crowned king" of the fashion industry.

The CSIR-CLRI, FDDI, CFTI have put up their pavilions to share the knowledge with young students and the upcoming entrepreneurs. The trade and industry associations, IFLMEA, ISF and IFCOMA also had their own booths

Everything went on well and on every good event there will always be room for improvement and betterment and that is a part of the process.

Takeaways from the fair (Make in India - Leather Chemicals)

1. Indian Leather Chemicals Industry have brought in some excellent products.

2. Bio Sure & Vegetable dyes from **Atlas**.

3. Green Finishing with release paper technology from **C&E**.

4. Portofino suitable for tamp nation and one product for top finish is an excellent product from **C&E**

5. One single compound to make from wet blue to crust is a great product from **C&E** is a revelation

6. **Balmer & Lawrie** is also working on the same lines and are in the initial stages.

Takeaways (European Chemicals made in India)

Stahl - Have some fantastic feel modifiers.

TFL - The theme of Light Iris Blue shirt of all the team was interesting in the fair lights. Attractive.

ATC - The Split Suedes top feed to enhance the sheen and nap was very good.

Smit & Zoon - Never falls short to amaze. The white Natural milled in Cow developed as a multi purpose crust with light weight lingers in the thought, always. 1923 an amazing product and my all time favorite.

Takeaways (Imported)

Monu - Wow! What a pastel range of Suedes with absolute sheen and nap. So attractive.

Fenice - The water stain 4000 & 2000 series will be a blessing for the leather finishing.

4401 **-** The instant softener on any thickness. A magical product.

4634/B **-** A wonderful product for suedes and Nubuck to revive the sheen and nap.

Sommer - Upgradation systems were very nice and good.

There are many more companies and products and the future looks bright with **"make in India"** products coming up.

Day 3 at IILF

The 3rd and final day of IILF witnessed less number of footfalls which may be due to the starting of the week and every one might have decided to stay at their offices. This was evident from the free flow of traffic on the road to the Fair venue, and also the car parking did not get filled up beyond the third floor. The enthusiasm with which all started not found on the last day, was not encouraging..

The good news about the American Tariff being brought down to 18% from 50% should have made many people come in looking for opportunities.

The exhibitors literally voiced their concern about the days of the exhibition

I request the organizers, ITPO to address these following issues along with the exhibitors and industry leaders

- The exhibitors prefer the days to be Wednesday/Thursday/Friday. This allows them a full one week schedule. By keeping it on Sun/Mon/Tue, affects both the week working. After all the week working, they are forced to travel on a Friday to be fair ready on Sunday.
- Mobile net-work connections were not good. None of the service providers were working inside. The exhibitors had wifi but what about the visitors and others.
- The red carpets spread on the halls were not properly fixed and many people had to slip and fall down.
- The food providers need to be screened. The quality was not good and should be improved.
- The bifurcation of the product wise allocation will be required. Leather, Non-leather, Chemicals, Shoe Components, Machinery others etc., for the visitors and customers to spend their time in a planned way. There is someone at the New Building and another at the CC building, of the same product line. This could be avoided

  Stalls should be numbered in such a way, that it could be easily located at the halls by the visitors without wasting time and if necessary volunteers could be employed to guide the visitors..

Detailed analysis report about the fair will follow.

* * *

39th India International Leather Fair
(February 1-3, 2026)


Atlas


BELGIAN INTERNATIONAL


CSIR-Central Leather Research Institute
CSIR-CLRI


CSIR-CLRI


CMI


GG Organics


GG Organics


ITA


FENIA


KELVIN


LANXESS


HARMAN
smac
priya impex


smac


SGS INDIA PRIVATE LIMITED


SHUBOND


Stahl
Performance Coatings


VISHNU
CHEMICALS LTD
Since 1990

LANXESS presents its advanced fungicides portfolio for the leather industry at IILF 2026

- **Solutions designed for long term preservation across leather processing stages**

- **Introduction of new product Preventol® CT 40**

Specialty chemicals company LANXESS, has showcased its exclusive fungicides portfolio at its booth in the India International Leather Fair (IILF) 2026

LANXESS has introduced its latest product of the Preventol® range. The new preservative Preventol® CT 40 for leather intermediates is powered by a unique combination of electrophilic and membrane-active profile. Its broad-spectrum efficacy and strong contribution to storage stability makes Preventol® CT 40 an ideal choice for safeguarding leather intermediates and ensuring high-quality leather products consistently.

With Preventol® LANXESS offers effective and economical long-term preservation of leather intermediates. It provides protection against mold & fungi in leather manufacturing process. While fighting mold, the membrane active biocides are not degraded but released unchanged, so they can repeat their defense work over and over again – a truly regenerative biocide ensuring long-term protection.

Unlike other systems, most Preventol® products contain more than one active substance and function ensuring that both modes of action are combined in one product. This leads to a broader spectrum of efficacy and additional safety for tanneries.

A further benefit of these active substances, unlike electrophilic active substances which protect mainly the surface, is their ability to penetrate the cross-section of a hide. That gives an extra protection even after splitting the leather intermediates: otherwise, new surfaces emerging from splitting would immediately be at risk. Membrane active biocides reduce this risk and give tanneries more security.

Speaking about the event, Anand Muthureddy, Head – Business Unit Material Protection Products, LANXESS India, said, "The Indian leather industry operates in an increasingly competitive environment, and LANXESS remains focused on delivering reliable and effective solutions to the market. Through our fungicides portfolio, we aim to support the leather industry with reliable, high-performance solutions that align with global quality standards."

ARCHROMA MAKES ITS FIRST APPEARANCE AT IILF WITH ADVANCE LEATHER SOLUTIONS

The event marks a step forward for the company as it strengthens its engagement with leather manufacturers in India and across global markets, as well as its response to the evolving environmental requirements and increasingly demanding quality standards.

At IILF, Archroma, a global leader in specialty chemicals towards sustainable solutions, participating in the India International Leather Fair (IILF) for the first time, presented its latest solutions designed to support sustainable leather production, enhanced material performance and greater process efficiency, and these solutions include LUPRINTAN® acrylic and syntan solutions, as well as DORANIL® dyes which help meet the demanding fastness standards of the leather industry.

"Our debut at IILF represents an important step in expanding Archroma's presence in the leather industry," said Vishal Grover, VP, Global Segments, Archroma. We were excited to engage directly with the manufacturers and demonstrated how our solutions could help them achieve sustainability goals while delivering the performance and efficiency their customers expect."

Archroma's team of experts who were available throughout the fair shared the insights, discussed technical challenges and explored the opportunities for possible collaboration.

About Archroma

Archroma is a global, diversified provider of specialty chemicals serving the branded and performance textiles, packaging and paper, and construction markets.

LEATHER 2050 : CHALLENGES AND OPPORTUNITIES

The XIII Asia International Conference of Leather Science & Technology, organised by the Indian Leather Technologists' Association (ILTA) in association with the CSIR-Central Leather Research Institute (CSIR-CLRI) with the support of Council for Leather Exports (CLE), Indian Leather Products Association (ILPA), Government College of Engineering and Leather Technology (GCELT) and Calcutta Leather Complex Tanners Association (CLCTA) will take place at the Hotel The Stadel, Sale Lake, Kolkata, from 6th to 8th March 2026.

This time ILTA with the support of IULTCS's Asian Country Members China, Japan, Taiwan, Turkiye, New Zealand along with UNIDO and others has again been selected as the host of 13th AICLST.

As per the Mission, Vision and Objectives of ILTA, the theme for this conference would be:

LEATHER 2050 : CHALLENGES AND OPPORTUNITIES

ABOUT THE TECHNICAL SESSIONS

Leather 2050 plans for sustained development of leather sector in its march towards 2050. The major focus for this Conference would be to address the challenges and the opportunities arising out of meeting effectively in the following areas:

(A) Live Stock Analysis & Quality Appropriation

- Livestock population dynamics through cluster creation and rural skill-based entrepreneurship;
- Genetic potential of livestock breeds and strategy for skin quality enhancement;
- Transmission of bacteria and viruses from hides/skin;
- Traceability and quality labelling of hides & skins - digital and AI initiatives;
- Animal husbandry systems and disease controlling measures,
- Quality control measures from farm to tanneries:
- Livestock slaughter and preservation strategies for hygienic & effective output;
- Role of animal husbandry in carbon footprint and livestock health interventions for quality upgradations,

(B) Marketing Policy & Strategy

- Marketing environment analysis;
- Market research and customer understanding:
- Policy advocacy for country specific marketing;
- Product innovations and development vis-a-vis marketing:
- Digital content marketing for leather and leather products;

(C) AI and Productivity

- AI in leather and product manufacturing:
- Process monitoring and control;
- AI powered ERP:
- AI for fashion and design trends,
- Inputs for machine learning. AI for quality, grading and sorting:
- Predictive maintenance,

- AI and sustainability;
- Data driven decision making at all stages,

(D) Carbon Capture & Utilization

- CCU in leather manufacturing stages;
- Innovations in CC technology for leather industry use:
- Waste treatment plants and CCU;
- Carbon footprint assessment and reduction strategies;
- Challenges and opportunities for CCU in leather sector;
- Circular economy and carbon utilization;

(E) Innovative Process Technology

- Nanotechnology applications;
- Sustainable chemistries, materials and processes;
- Leather processing from batch to continuous;
- Turning wastes to value added chemicals and products;
- Automation and robotics;
- Process intensification and green chemistry;
- Sustainable environment management practices;

(F) Footwear - Future & Roadmap

- Raw material availability and leather footwear consumption matching;
- Upcycled, recycled and environmentally friendly processes for footwear materials;
- Cost of leather processing to footwear needs matching challenges and opportunities:
- Innovations in footwear manufacturing and sustainability:
- Leather-non-leather mix of materials in footwear manufacture;
- Automation & AI in footwear production;

CONTACTS FOR REGISTRATION, SPONSORSHIP / ADVERTISEMENT

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Internationalisation: Assomac launches the 2026 programme for Leather-footwear Technologies

With “Assomac Around the World”, the Association supports companies in international markets. First stops: Chennai and Hong Kong

Assomac launches the 2026 “Assomac Around the World” programme, aimed at supporting the internationalisation pathways of Italian manufacturers of machinery and technologies for the tanning, footwear and leather goods industries. This strategy translates into a targeted presence in markets where investments, production supply chains and industrial growth dynamics are concentrated.

Exports represent an essential lever for the resilience of the Italian technology system and for the enhancement of its excellence, particularly in light of geopolitical instability and increasing competitive pressure in global markets.

“Italy maintains a significant presence among the world’s leading exporters, despite a context marked by international tensions and dynamics that have affected value chains”, states **Cristiano Paccagnella**, Vice President of Assomac. “The 12.2% contraction in Italian exports (January– October 2025 compared to the previous year) reflects the difficulties of the current phase. At the same time, companies continue to demonstrate a strong international orientation, investing in market presence and participating in promotional

initiatives in major global contexts. In this scenario, the support of ITA - Italian Trade Agency is a central element in strengthening the visibility and international positioning of Made in Italy technologies. For these efforts to be sustainable over time, it is equally important to rely on actions and resources that can encourage exports and investments in machinery, supporting the competitiveness of companies in global markets. Recent developments in the free trade agreement between the European Union and India represent a step in this direction".

India, with the 39th edition of IILF – India International Leather Fair, scheduled in Chennai from 1 to 3 February, opens the 2026 "Assomac Around the World" programme and aligns with the broader process of strengthening bilateral economic relations. The event brings together operators and companies from all over the world, including Argentina, Australia, China, Hong Kong, Japan, Saudi Arabia, Spain, Taiwan, the Netherlands, Turkey, the United Arab Emirates, Germany and the United Kingdom, confirming its role as one of the main meeting points for production supply chains in the Asian region.

In the period January–October 2025, Italy ranked second after China among suppliers of leather processing machinery to India, with export values of €12.48 million and a market share of 17.2%, despite a decrease of 14.7% compared to the same period of the previous year. Maintaining a presence in this market is an essential condition for preserving positions in the country, the world's second-largest footwear producer, with a rapidly expanding leather industry and dynamic commercial interests.

The growth of India's leather-footwear segment is a structural trend, supported by export performance and by trade agreements that encourage market internationalisation.

The overall value of the leather sector is estimated at approximately €19.6 billion in 2025, with a base of 2,100 companies (92% of which are concentrated in the main districts located in the states of West Bengal, Tamil Nadu, Uttar Pradesh and Punjab), and is expected to expand to reach €43.5 billion by 2030.

At the Italian National Pavilion in Chennai, promoted by ITA - Italian Trade Agency, covering an area of 280 square metres, Italian participation has recorded encouraging feedback. Twenty-five Italian companies manufacturing technologies and machinery for the leather–footwear supply chain are present, 15 of which are Assomac members. Overall, Italian technology is represented at the fair by more than 60 companies active in the country. “Expectations are positive. The flow of qualified visitors, both from the tanning sector and from the footwear and leather goods segments, confirms the importance of continuing to maintain a presence in the Indian market”, comments **Agostino Apolito**, General Director of Assomac. “To compete with international players, a collective, coordinated and forward-looking vision is essential. Our business system cannot limit itself to isolated actions: this is the time to build alliances, shared commercial plans, investments in innovation and international networks”.

During 2026, the Association’s action in support of the internationalisation of Italian manufacturers in the sector will continue in further target markets, starting in March with APLF Leather in Hong Kong, followed by subsequent stages in Asia, Southeast Asia and Latin America.

LINEAPELLE

107th LINEAPELLE demonstrates Great Energy, Awareness, Interest despite challenges

The event showcased the leather industry's resilience and innovation

The Best Expression of the Global Fashion Community

It was an energetic, aware and highly interested community that, from 11 to 13 February 2026 – in the spaces of Fiera Milano Rho – animated the 107th edition of LINEAPELLE-the International Fair for the Leather Industry demonstrating an incredible determination to build new horizons and respond to the complexities of a market that for over two years has been experiencing a condition of repeated criticality, but is beginning to show some signs of a possible trend reversal.

A place of relationships, inspiration and synergies, a true laboratory of stylistic and commercial future, LINEAPELLE 107 strengthened the meaning of its global leadership by offering the supply chain the opportunity to respond to current market challenges and to prove itself stronger than many adverse factors.

ENERGY AND AWARENESS

The fashion, luxury and design system, together with the creative manufacturing supply chain, met at LINEAPELLE 107 to engage both commercially and stylistically, working on the collections for the Summer 2027 season presented by 848 exhibitors (436 tanneries, 290 accessories manufacturers, 95 synthetics, 27 others) from 33 countries.

The forced anticipation of the exhibition dates, due to the presence within the Fiera Milano Rho spaces of some competition venues of the Milan Cortina 2026 Winter Olympic

Games, caused a foreseen and conscious reduction in attendance by professional operators (around 16,000) arriving from 99 countries. By adapting their trade fair flow models, they expressed – as underlined by the majority of exhibitors – reassuring energy and a vision strongly focused on product, quality and, above all, service.

INTEREST

The innovation front and a determined search for materials and solutions capable of expressing a very high degree of naturalness will be the most important turning keys of the near future for the entire supply chain. These represent the factors on which buyers' and visitors' interest focused, both inside exhibitors' stands and in the spaces dedicated by LINEAPELLE 107 to several projects promoting the highest supply chain craftsmanship engineering.

This is the case of the 22 installations in the LINEAPELLE INTERIORS area, a creative platform now in its third edition that activates links between design companies and leather and materials manufacturers. Or LINEAPELLE Après-Ski, an exhibition project inspired by the alpine atmospheres of the Winter Olympics, which presented innovative materials and products dedicated to the mountains alongside the performance of some humanoid robots. All talks scheduled at the Fashion & Science Theatre were sold out: from sector-focused ones (for example, in-depth analyses of regulatory and technical topics related to the leather supply chain) to more fashion-oriented ones, such as the very well-attended conversation between journalist Mariella Milani and designer Antonio Marras.

SYNERGIES

The debut of a new exhibition synergy was very positive, allowing LINEAPELLE visitors to gain an even broader overview of the product offering, in this case related to textile materials. This

is the synergy with FILO – the leading exhibition for yarns and fibers – hosted for the first time within LINEAPELLE as evidence of an increasingly concrete activity aimed at enhancing Made in Italy.

INSTITUTIONAL VISITS AND INTERNATIONALIZATION

The protection and promotion of Made in Italy are also a priority from an institutional perspective, as explained by Gilberto Pichetto Fratin, Minister for the Environment and Energy Security, and Francesco Lollobrigida, Minister of Agriculture, during their visit to LINEAPELLE.

Also present at the fair was Matteo Zoppas, President of ICE Agency who – in collaboration with the Ministry of Foreign Affairs and International Cooperation (MAECI) – organized at LINEAPELLE 107 an incoming program of foreign operators from five strategic markets: the United States, Japan, China, Belgium and Germany.

The next edition of **LINEAPELLE** will take place from 15 to 17 September 2026, again at Fiera Milano Rho.

ILM Edition #163: Positive feedback from exhibitors and visitors

From fashion trends to AI: Focus on expert discussions, order business and networking

WELL BEYOND EXPECTATIONS.

The 163rd edition of ILM- the International Leather Goods Trade Fair, held from 7 to 9 February 2026, in Offenbach, was about more than just placing orders. Besides the new collections for the Autumn/Winter 2026/27 season, discussions focused on several strategic subjects. Hot topics of conversation at the fair were innovative tools, the use of AI, and tried-and-tested methods of how changes can be implemented and have a lasting effect. As well as first-rate panels of experts “on stage”, the emphasis was on direct, face-to-face exchange. “The community feels very much at ease at ILM. You can sense it in the mood of togetherness and the positive vibes,” says a delighted Arnd Hinrich Kappe, CEO of Messe Offenbach. And an aura of glamour entered the exhibition halls with the appearance of TV and fashion icon Frauke Ludowig.

“WAIT AND SEE” IS NOT A STRATEGY.

Of this, exhibitors and visitors to ILM were in full agreement. In view of the many challenges, there is a need for joint solutions based on partnership. Players from trade and industry met up in Offenbach, the “living room of the leather industry”, to work together on innovative concepts – in an atmosphere that was thoroughly positive. Matthias Herr, Head of Urban Sales from Deuter, sums it up well: “In fact, I have the impression the morale is even better than last year. Everyone who headed for Offenbach wants to make a difference. Sticking your head in the sand? – No use to anyone!”

MORE FASHION FANTASY!

Retailers were in a confident mood. Apart from classic formats, demand was strong for fake fur bags, sophisticated styles in crocodile patterns, suede, and imaginative accessories such as charms and foulards. Brown is the colour of this season, whereby fashion experts recommend the importance of combining the many natural tones with fresh, contrasting colours.

MORE INNOVATION!

Numerous innovative solutions in suitcases and luggage at ILM demonstrated how travel is being transformed by modern technologies. The new models combine design, material and electronics in well-thought-through integrated systems. Travelers can use a smart phone app to locate their luggage via GPS or Bluetooth tracking systems. Digital locks can be opened using an app or a fingerprint sensor

MORE LEARNING!

A special focus in Offenbach was placed on the luggage and school articles segments. Product developers from selected brands presented innovative, functional aspects of their highlights in entertaining talk rounds. Besides which, a variety of talks and lectures on trends proved fascinating and inspirational. “We favour know-how with a practical bent,” explains Arnd Hinrich Kappe. “In Offenbach, retailers not only gain exclusive information at first hand, but they also pick up valuable ideas on how to create enthusiasm and shopping experience in their stores.”

MORE CREATIVITY!

Using ultra-modern event technology to arouse emotions and leave a lasting impression – that too was part of what ILM Edition #163 was about. “Think BIG!” was the motto in the entrance area where an oversized bag proved a definite eye-catcher. Another major audience attraction was the 360-degree video camera with which visitors and exhibitors were able to create their personal 360-degree videos and share them on their social networks.

The interplay of innovation and inspiration accounts for the success of ILM. Josefine Jost of JOST puts it in a nutshell: “Everyone enjoys seeing each other here, ordering, and exchanging experiences.”

Following the close of the 163rd ILM, exhibitors and visitors alike voiced their satisfaction with how the event had gone. The high degree of internationality is a particularly pleasing aspect: Some 30 per cent of visitors had come from abroad, a fact that emphasises the international importance of ILM.

The next edition will take place in Offenbach, from 29 to 31 August 2026.

The 163rd edition of ILM - the International Leather Goods Trade Fair

(Source @ Laura Brichta/Messe Offenbach)

FDRA's Matt Priest Statement on Supreme Court Overturning IEEPA

WASHINGTON, D.C.

Today, Matt Priest, President and CEO of Footwear Distributors and Retailers of America (FDRA), released the following statement: "Today's Supreme Court decision marks an important step toward creating a more predictable and competitive environment for American businesses and consumers. By removing these widespread tariffs, the footwear industry can redirect billions of dollars toward innovation, job creation, and affordability for families across the country. FDRA has consistently advocated for policies that strengthen the U.S. economy and support working families. This ruling provides relief at a time when cost pressures have been significant, and it opens the door for continued collaboration between industry leaders and policymakers to ensure trade policy reflects today's global marketplace. We look forward to working with the Trump Administration and Congress to build on this progress and create a framework that benefits consumers, retailers, and manufacturers alike." For more information about FDRA or to schedule an interview with Matt Priest on the state of the footwear industry, please email fdracomms@cgagroup.com

EU and Mercosur sign historic and ambitious partnership

The European Union and Mercosur signed a Partnership Agreement (EMPA) and an Interim Trade Agreement (iTA), on 17th January 2026, representing a historic milestone between the two regions, and an ambitious platform for strengthening their economic, diplomatic and geopolitical relations. The Mercosur bloc comprises Argentina, Brazil, Paraguay and Uruguay.

This Agreement will create one of the biggest trade zones in the world covering a market of around 700 million consumers. This will deliver substantial new commercial opportunities for companies across the EU, driving an estimated 39% increase in annual exports to Mercosur (a value of approximately €49 billion), while supporting hundreds of thousands of EU jobs. The Agreement also sends a strong geopolitical signal, demonstrating the EU and Mercosur's shared commitment to multilateralism and the rules-based international order. At a time of global uncertainty and increasing fragmentation, this agreement underlines the value of cooperation, dialogue and international partnerships. The agreement presents significant opportunities for mutual gain through strengthened economic, geopolitical, sustainability, and security cooperation.

President of the European Commission Ursula **von der Leyen**, President of the European Council Antonio Costa, and leaders from Mercosur countries witnessed the signing of the EU-Mercosur Partnership Agreement (EMPA) and the EU-Mercosur Interim Trade Agreement by EU Trade Commissioner Maroš **Šefčovič** and his Mercosur counterparts. European Commission President, Ursula **von der Leyen**, said: *"Today, two like-minded regions open a new chapter of opportunity for more than 700 million citizens. With this win-win partnership, we both stand to gain – economically, diplomatically and geopolitically. Our companies will create exports, growth and jobs. We will support each other in our clean and digital transitions. And our signal to the rest of the world is clear: the EU and Mercosur are choosing co-operation over competition and partnership over polarization".*

The European footwear confederation CEC was among the 78 business associations from the EU and Mercosur who urged their governments to swiftly conclude a free trade agreement between the two blocs.

Strategy and Leather Industry Part – I

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(Contd.. from December)

5.The Indian leather industry, Key Strategic Areas

The Indian leather industry is a significant economic driver and it generates employment and contributes to foreign exchange earnings. To enhance its competitiveness and future prospects, a strategic approach focusing on technology, quality, and sustainability is crucial.

5.1 Key Strategic Areas: Table 5 A

5.1 Key Strategic Areas: Table 5 A
• Embrace Technology and Innovation:
Investing in modern machinery and digital manufacturing processes can improve efficiency, reduce costs, and enhance product quality, allowing Indian leather producers to compete on a global scale.
• Focus on Quality and Craftsmanship:
Differentiating products through superior quality, attention to detail, and high-end craftsmanship can create a unique selling proposition and attract discerning customers in international markets.
• Sustainability and Eco-friendliness:
Adopting sustainable practices, from raw material sourcing to waste management, can address growing consumer demand for eco-friendly products and enhance the industry's image.
• Customization and Personalization:
Offering tailored products and personalized services can cater to specific customer needs and increase value perception, leading to higher sales.
• Clustering and Networking:
Establishing industrial clusters and fostering collaboration between businesses can lead to better resource sharing, knowledge exchange, and increased competitiveness, particularly for SMEs.

5.1.1 Key Strategic Areas: Table 5 B

5.1.1 Key Strategic Areas: Table 5 B
• Strategic Marketing and Branding:
Developing strong brand identities and effectively marketing products to target markets can increase brand awareness and attract more customers, both domestically and internationally. •Government Support and Policy Initiatives:
The government plays a vital role in supporting the industry through policies that promote technological advancement, skill development, and export promotion.
• Training and Upskilling:
Investing in training and upskilling the workforce, especially traditional artisans, can improve their skills and enhance productivity, making the industry more resilient and competitive.
• Focus on Luxury and High-End Products:
The demand for high-quality, luxury leather goods is expected to continue growing, offering a significant opportunity for Indian leather producers to cater to this market segment.
• Leveraging Import-Export Data:
Utilizing import-export data to understand market trends and consumer preferences can help businesses tailor their strategies and enhance their competitive advantage.

Source : 5 & Table – 5 A The Indian leather industry, Key Strategic Areas

6.Sustainability of the tanning industry

- The issue of sustainability has gained considerable attention among leather industry customers, consumers and the community at large and the industry has been addressing the subject for some time.
- Each national tanning industry has been developing its own strategy and implementing its own activities, based on the different target they want to reach. The following represent the key common elements relevant to the whole industry.
- First and foremost, it must be stressed that the leather industry is based on processing and recycling a by-product of the meat, dairy and wool industries – over 99% of global leather production is

made from the hides or skins of cattle, sheep, goats and pigs. Therefore, the sustainability of the leather industry depends on the raising of animals for food and for wool.

- Other important aspects for the leather producing industry are environmental sustainability, ethical & social sustainability and economic sustainability.

6.1 Environmental sustainability Table - 6A

6.1 Environmental sustainability Table - 6A
– Full compliance to environmental regulation (water, air emission, solid waste)
– Commitment to energy efficiency
– Definition of Life Cycle Assessment (LCA) and Environmental Footprint of leather (incl. participation to international projects)
– Commitment to work towards best practice in processing – to anticipate ever increasing environmental controls and carbon reduction targets and in order to exercise due diligence.

6.2 Ethical & social sustainability Table – 6B

6.2 Ethical & social sustainability Table – 6B
– Full compliance to product safety regulation (mainly on chemical side, e.g. Reach for EU)
– Full compliance to health & safety and employment regulation (no child labour, respect of workers' rights…)
– Commitment to animal welfare principles/practices (see separate ICT statement on animal welfare).

6.3 Economic sustainability Table – 6C

6.3 Economic sustainability Table – 6C
– Commitment to fair trade practices
– Traceability of raw hides and skins (common position proposed: the origin of the raw hide/skin is that of the slaughtering facilities; consequently, no info should be generally requested on the upstream

6.3 Economic sustainability Table – 6C
part of the supplying chain) **– Commitment to transparency on the origin of leather production** **(background: customs regulations, UNI 11239, prEN 16484 CEN/TC 289)** **– Commitment to observe and promote the correct labelling of leather and leather products, according to the agreed ICT definitions and international standards and laws.**

Source : 6 & Tables – 6A, 6 B & 6 C Sustainability of the tanning industry, International Council of Tanners 2025, The Global Resource for the Leather Industry

7. What is a business strategy and how to develop one? Table- 7 A

7. What is a business strategy and how to develop one? Table- 7 A
• A business strategy in its simplest form is a tool for helping you achieve your business goals **• A business strategy provides the guiding principles for many organizational decisions, such as hiring new employees, or developing new products. And helps you to define the methods and tactics you need to take within your company.** **• Creating a business strategy that's in line with the vision you have for your organization is a time-consuming exercise. In this article, we'll discuss what a business strategy is and why it's important, the different components of a business strategy and explore some examples of business strategies to help you generate ideas for your own company.** **• Whilst a business strategy is simple to understand in theory, developing a good business strategy, and then actually implementing it, is no easy task.** **• The key elements of a business strategy : What is a business strategy? How is strategy different from tactics? What are the key components of a business strategy? reimporting? How to measure the success of a business strategy?**

7.1 What is a business strategy?

- In essence, a business strategy is an organizational master plan. This plan is what the management of a company develops and implements to achieve their strategic goals. Essentially, a business plan is a long-term sketch of the desired strategic destination for a company.
- This long-term sketch will contain an outline of the strategic, as well as tactical decisions a company must take to reach its overall objectives. This business strategy will then act as a central framework for management.
- Once this framework is defined, management must live and breathe it. It helps the different departments within a business work together, ensuring that all departmental decisions support the overall direction of the organization. This helps to avoid working in silos, or different teams pulling in opposite directions. "However beautiful the strategy, you should occasionally look at the results." – Winston Churchill

7.2 How is strategy different from tactics? Table – 7B

2 How is strategy different from tactics? Table – 7B
• Before we get into the details of how to build a business strategy, it is important to understand how strategy differs from tactics. Both of these contribute to each other, yet are entirely different things.
• Strategy as we've identified refers to the long-term goal or roadmap for an organization, and how it plans to reach them. Or, the path the organization will take towards its goals.
• Conversely, tactics refer to the specific set of actions taken to reach the organizational goals, or strategy. Good tactics can save even the worst strategy. Bad tactics will destroy even the best strategy." – General George S. Patton Jr.

7.3 What are the key components of a business strategy? Table – 7C

7.3 What are the key components of a business strategy? Table – 7C
• Business strategies come in all shapes and sizes (see some examples/resources below) and can vary significantly in their depth. Most business strategy documents will however contain the following:
• Vision and objectives 2. Core values 3. SWOT (strengths, weaknesses, opportunities and threats) 4. Tactics and operational delivery 5. Resources and resource allocation 6. Measurement and analysis

7.4 Why is a business strategy important? Table – 7D

7.4 Why is a business strategy important? Table – 7D
• Virtually every business leader has some form of vision for their organization. Generally, in the early days, such as a start-up environment, this can be very fluid. However, as time goes by and business grow, or get busier the “business strategy” may become less defined.
• When a strategy is not well defined, a business may start to struggle, with personnel change the core of a business and its values can often become less defined. This can, in some cases lead organizations to become victims of their own success, they may be achieving short-term results, but this could be at the expense of their long-term viability.

7.5 How to build a business strategy Table – 7E

7.5 How to build a business strategy Table – 7E
• The above gives us a practical definition of strategy and why it is important. Now, we need to look at how to successfully build one.
• This can be broken down into a few key steps -1. Defining your vision 2. Setting your objectives 3. Analyzing your business and your marketplace 4. Defining your competitive advantage 5. Building a framework

7.6 How to measure the success of a business strategy Table – 7F

7.6 How to measure the success of a business strategy Table – 7F
• We may consider a business strategy to be successful when it is directly responsible for organizational growth and sales.
• However, to really understand whether a strategy is successful we must develop a more granular measurement. It is here that you need to define Key Performance Indicators (KPIs).
• KPIs are typically defined by department, with each of these contributing to the overall performance of the business. Some examples are:

7.6 How to measure the success of a business strategy Table – 7F
• Financial performance – Revenue, Gross profit, Net profit, Operating profit EBITDA (earnings before interest, taxes, depreciation, and amortization), Free cash flow.
• Competitive advantage - Market share %, , Brand recognition Media coverage, Growth vs competition

Source : 7 & Tables – 7 A, 7B, 7C, 7D, 7 E & 7 F. What is a business strategy and how to develop one? IMD - International Institute for Management Development

8.Strategic Planning Basics: A Roadmap to Success

Strategic planning is the process of defining an organization's **direction, priorities, and actions** to achieve long-term success. It helps leaders **set goals, allocate resources efficiently, and measure progress** to ensure alignment with their mission and vision.

8.1 What is Strategic Planning? Table – 8A

8.1 What is Strategic Planning?
Strategic planning provides a structured approach for organizations to:
• Clarify their mission and vision – Define what they stand for and where they want to go.
• Identify key priorities – Focus on what matters most for success.
• Develop measurable goals – Create clear, actionable objectives.
• Align teams and resources – Ensure efforts support strategic outcomes.
• Track performance and adjust – Use data to refine strategies over time.
When done correctly, strategic planning turns vision into action, ensuring that daily operations contribute to long-term success.

8.2 Why is Strategic Planning Important? Table – 8B

8.2 Why is Strategic Planning Important? Table – 8B
Without a solid plan, organizations risk:
• Lack of Direction – Teams may not know what to focus on.
• Inefficient Resource Allocation – Time and money may be spent on

8.2 Why is Strategic Planning Important? Table – 8B
low-impact activities. **• Poor Decision-Making – Leaders may react to challenges instead of proactively addressing them.** **• Missed Opportunities – Growth potential may go untapped.** **A well-executed strategic plan provides clarity, accountability, and a roadmap for achieving organizational goals.**

8.3 What is a Strategic Plan?

A strategic plan is a document used to communicate with the organization the organizations goals, the actions needed to achieve those goals and all of the other critical elements developed during the planning exercise.

8.4 What is Strategic Management? What is Strategy Execution?

Strategic management is the comprehensive collection of ongoing activities and processes that organizations use to systematically coordinate and align resources and actions with mission, vision and strategy. Strategic management activities transform the static plan into a system that provides strategic performance feedback to decision making and enables the plan to evolve and grow as requirements and other circumstances change. **Strategy Execution** is basically synonymous with Strategy Management and amounts to t**he systematic implementation of a strategy**.

8.5 What Are the Steps in Strategic Planning & Management?

There are many different frameworks and methodologies for strategic planning and management. Most employ some variation on these five key steps:

8.5.1. Define Mission & Vision Table – 8C

8.5.1. Define Mission & Vision Table – 8C
Start by establishing: **◆ Mission – Why does your organization exist?** **◆ Vision – Where do you want to be in the future?** **◆ Core Values – What principles guide your decisions?**

8.5.2. Conduct a Situational Analysis Table – 8D

8.5.2. Conduct a Situational Analysis Table – 8D
Analyze internal and external factors that impact success. This may include any number of analytical exercises, such as:
SWOT Analysis – Identifying Strengths, Weaknesses, Opportunities, and Threats.
Market & Competitor Analysis – Understanding trends and industry positioning.

8.5.3 .Set Strategic Goals & Objectives Table – 8E

5.5.3 .Set Strategic Goals & Objectives Table – 8E
Define clear, measurable goals that align with your vision. Objectives should be defined and mapped to the goals. Taken as a strategy, the goals / objectives should be:
✓ Specific – Clearly defined.
✓ Measurable – Quantifiable progress indicators.
✓ Achievable – Realistic given resources.
✓ Relevant – Connected to the organization's purpose.
✓ Time-Bound – Have clear deadlines.

8.5.4. Develop & Implement Action Plans

Break down goals into specific initiatives and projects, assigning responsibilities, timelines, and resources to ensure execution.

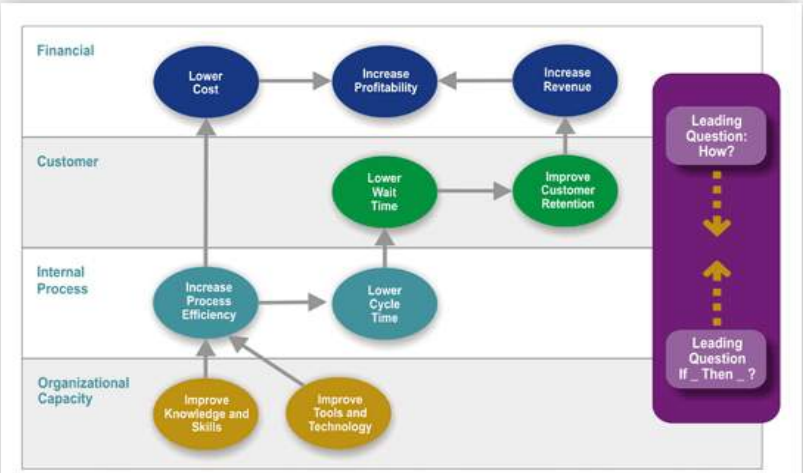
8.5.5. Monitor, Measure, and Adapt

Success requires ongoing performance tracking. Organizations should use Key Performance Indicators (KPIs) to track progress and Adjust strategies based on data and evolving priorities.

8.6 Strategic Planning & the Balanced Scorecard

The Balanced Scorecard (BSC) is a powerful framework that links strategy to execution. It helps organizations - Align daily operations with strategic goals, Track progress across financial, customer, internal process, and learning & growth perspectives and Improve decision-making with real-time performance insights.

8.7 What is a Strategy Map? Figure – 8 F



Reference: The Institute Way: Simplify Strategic Planning & Management with the Balanced Scorecard.

- A strategy map is a simple graphic that shows a logical, cause-and-effect connection between strategic objectives (shown as ovals on the map). It is one of the most powerful elements associated with the balanced scorecard methodology, as it is used to quickly communicate how value is created by the organization.

- Strategy mapping can vastly improve any strategy communication effort. Most people are visual learners and so a picture of your strategy will be understood by many more employees than a written narrative.

- Plus, the process of developing a strategy map forces the team to agree on what they are trying to accomplish in simple, easy-to-understand terms. With a well-designed strategy map, every employee can see how they contribute to the achievement of the organization's objectives.

Source : 8 & Tables – 8A, 8B, 8C, 8D & 8 E and Figure-8F Strategic Planning Basics: A Roadmap to Success, The Balanced Scorecard Institute

(to be Contd.)

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