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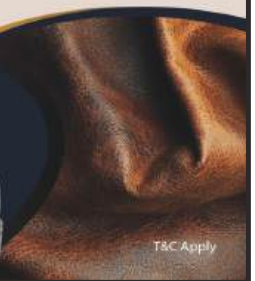
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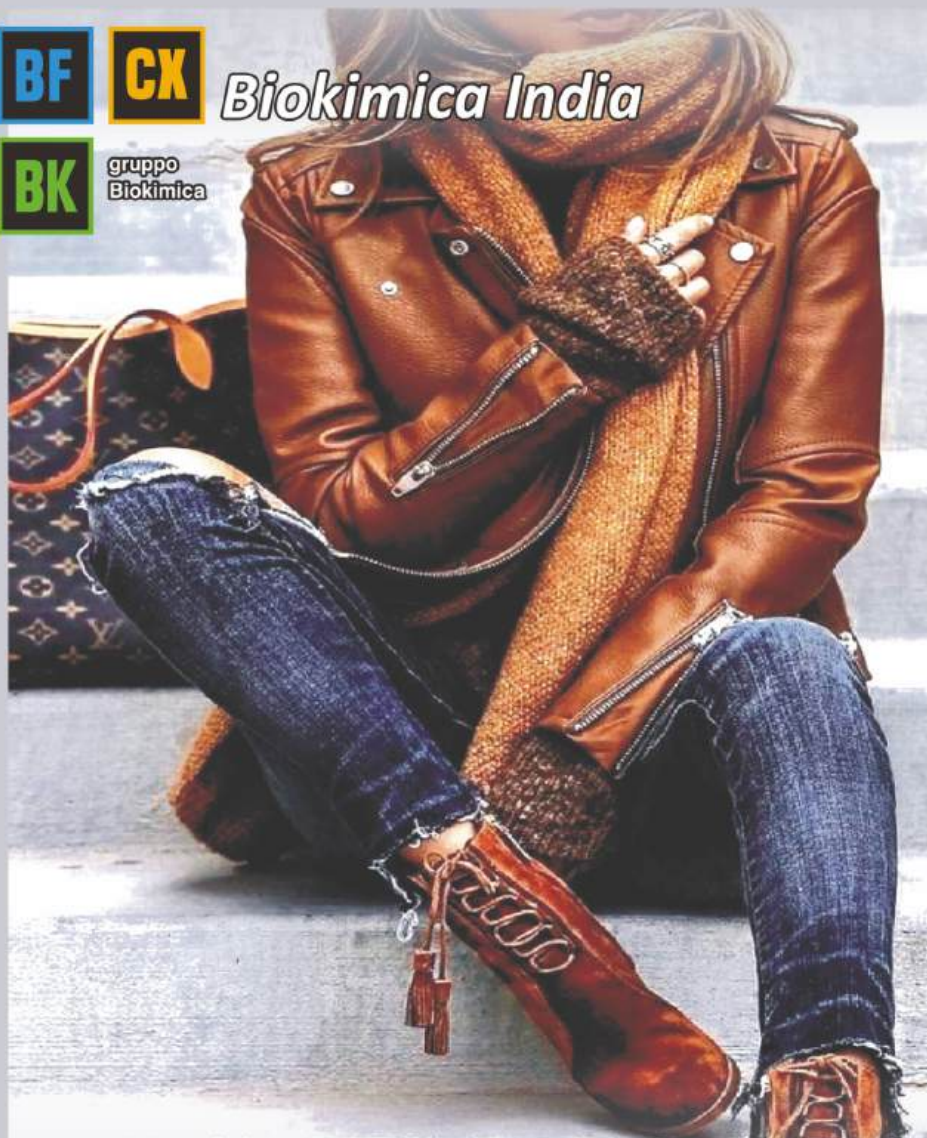
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# LEATHER: Studies for Information and Self-Training



## **Richard Daniels**

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

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

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

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

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

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

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

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

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

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

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## 13th Asian International Conference on Leather Science and Technology (AICLST 2026)

As a part of the year-long Platinum Jubilee Celebration Programme, the 13th Asian International Conference on Leather Science and Technology (AICLST 2026) was successfully organized at the Hotel The Stadel, Salt Lake City in Kolkata from 6-8 March 2026, by the Indian Leather Technologists' Association (ILTA), jointly with CSIR–Central Leather Research Institute (CLRI), with the active support from the Indian Leather Products Association (ILPA), Government College of Engineering & Leather Technology (GCELT), and Calcutta Leather Complex Tanners' Association (CLCTA), in close association with the Council for Leather Exports (CLE).

### Mission of the Conference

- Advancement of Leather Science and Technology.
- Fostering Cooperation and Collaboration among stakeholders.
- Promoting Sustainability across the Leather Value Chain.
- Facilitating Scientific Knowledge Exchange.
- Upholding the spirit that Leather Science and Technology is in our DNA.

### Vision Statement

To explore and promote innovative pathways through research, education, and skill development while simultaneously combating misinformation through a unified global voice, thereby contributing towards a sustainable future based on the principles of circular economy and Net Zero CO<sub>2</sub>e emissions.

## Aims and Objectives of the Conference

To ensure the long-term viability and sustainable growth of the broad-spectrum Leather Industry in Asia and across the globe through:

- Scientific Rigor.
- Environmental Responsibility.
- A Cleaner and Safer Industry Image.
- Enhanced and Smarter Visibility.
- Smart Management Practices.
- Strengthening Brand Equity.
- Global Collaboration and Knowledge Sharing.

The conference received an enthusiastic response from the global leather fraternity. A total of **92 technical papers** were presented, comprising **54 oral presentations** and **38 poster presentations**, reflecting a strong contribution from researchers, scientists, industry professionals, and academicians.

More than 200 delegates participated in the conference, which include from several countries including **India, China, Japan, Russia, and Romania**, highlighting its international character and reinforcing the importance of global collaboration in advancing leather science and technology.

The high percentage of full-paper submissions against accepted abstracts further demonstrated the scientific quality and research significance of the conference proceedings.

Owing to the prevailing geopolitical situation in West Asia, delegates from several countries, including China, Japan, Taiwan, Switzerland,

Italy, the United Kingdom, and the United States, were unfortunately unable to attend the conference. However, extensive correspondence was undertaken with prospective participants from China, as well as with the relevant consulates and embassies. Despite these efforts, visa-related constraints prevented their participation.

	
<p><b>Venue : Hotel “The Stadel”, Gate No. 3, Vivekananda Yuba Bharati Krirangan</b></p>	<p><b>Inauguration of the 13<sup>th</sup> AICLST ceremony by lighting the lamp.</b></p>

The AICLST conference was inaugurated on 6th March, 2026, with the welcome address delivered by Mr. Arnab Jha, President, ILTA and Chairman of the 13th AICLST Organizing Committee. This was followed by an address from Dr. S. Rajamani, Vice President, ILTA and Technical Chair of the 13th AICLST.

Padma Bhushan Dr. T. Ramasami, former Secretary, Department of Science and Technology, Government of India, and Chief Patron of the 13th AICLST, delivered the inaugural address.

In his inaugural address, Dr. Ramasami, welcoming all the participants, highlighted the truly international character of the conference, noting contributions from researchers representing China, Japan, Russia, Romania, and India. He emphasized that AICLST serves as a vital platform for leather technologists across Asia to exchange scientific knowledge, foster innovation, and

contribute to the sustainable development of the global leather sector.

Dr. Ramasami further informed the delegates that a participative and internationally coordinated peer-review process had been adopted for the evaluation of conference submissions. The review panel comprised experts from Austria, China, India, New Zealand, and Taiwan. A total of 114 abstracts were received, of which 94 full papers were submitted within the stipulated timeframe. These papers underwent a blind peer-review process to ensure objectivity and quality. Following evaluation,

54 papers were selected for oral presentation and 38 for poster presentation.

He expressed his delight that nearly 98% of the accepted papers focused on responsible innovations, including carbon capture technologies and the application of Artificial Intelligence for enhanced productivity. He described this as a highly encouraging trend in contemporary leather research across Asia.

Dr. Ramasami also noted that the limitation of oral presentations to 54 papers within a 12-hour technical schedule was intended to maintain quality discussions, while poster presentations would facilitate meaningful one-to-one interactions between presenters and interested delegates. He emphasized that all accepted papers, both oral and poster, would be included in the edited conference proceedings and that a downloadable electronic version would be hosted on the ILTA website.

He concluded his address, by congratulating all participants of the 13th AICLST and expressing his appreciation to the multinational peer-review committee, the office bearers and staff of ILTA, and the printers for their valuable contributions towards the successful organization of the conference and publication of the proceedings.



**Padma Bhushan Dr. T. Ramasami, former Secretary, Chief Patron of the 13th AICLST, delivering the inaugural address**



**The release the “13th AICLST Proceedings.”**

Following the inaugural address, the dignitaries, led by Dr. T. Ramasami, jointly released the “13th AICLST Proceedings.” The first copy of the proceedings was ceremonially presented by Mr. Arnab Jha, President, ILTA, to Dr. T. Ramasami, Chief Patron of the 13th AICLST.

### **Plenary Session – I**

#### **“Asia in Changing Leather World: Opportunities and Challenges”**

The first plenary session of the 13th Asian International Conference on Leather Science and Technology (AICLST 2026) was delivered by **Padma Bhushan Dr. T. Ramasami**, Former Secretary, Department of Science & Technology, Government of India. The session focused on the theme **“Asia in Changing Leather World: Opportunities and Challenges.”**

Dr. T. Ramasami presented an overwhelming perspective on the challenges and opportunities facing the leather industry in Asia. He discussed the evolution of the global leather sector and explained

how the centre of gravity of the leather industry gradually shifted from North America and Europe to Asia. He highlighted that in the 1920s North America was the centre of the leather world due to its strong meat and leather processing industries. During the 1950s, Europe emerged as a major hub for leather fashion and footwear production. Subsequently, from the 1970s onwards, the leather industry progressively relocated to South Korea, China, and eventually Asia as a whole, driven by economic viability and manufacturing competitiveness.

He stated that **Asia enjoys several strategic advantages in the geography of the leather world**, including abundant availability of bovine hides and ovine skins, large employment generation potential,



and a substantial share of global trade revenue. He further emphasized that Asia has emerged as the most significant knowledge generator in leather science and technology, as evidenced by scientific publications and research outputs.

According to the data presented, Asia currently contributes nearly 72% of the publications in Web of Science-indexed journals related to leather science and technology and accounts for nearly 50% of publications in Scopus-indexed journals. Asia also dominates emerging technological areas relevant to leather production, including Artificial Intelligence, Machine Learning, Nanotechnology, Sensor Technology, and Robotics.

Dr. Ramasami highlighted that Asia today accounts for nearly 50% of the global leather and footwear trade and provides employment to approximately 58% of the workforce engaged in the leather and footwear sector worldwide. He pointed out that while the global supply of bovine hides has remained stagnant, Asia has witnessed a positive growth trend in raw hide and skin availability, thereby strengthening its position in the global leather value chain. Furthermore, Asia possesses nearly 56% of the world's ovine skin resources, creating significant opportunities for value-added fashion and leather products.

In the technology arena, he observed that game-changing developments such as Artificial Intelligence, Machine Learning, Nanotechnology, Sensors, and Robotics are transforming the leather sector. Asian institutions and research organizations are at the forefront of embracing research and development in these advanced areas, thereby strengthening the region's position as a global innovation hub.

Dr. Ramasami also highlighted several important paradigms that merit deeper understanding within the leather and footwear sector. He stated that leather is no longer the sole material of choice for footwear, as several man-made alternatives have captured significant market share. Consequently, leather may increasingly serve niche and premium product segments rather than mass-market footwear. He emphasized that leather products must provide enhanced value propositions to justify their premium positioning in a highly competitive market environment.

He further observed that leather has the potential to evolve into a fashion statement product characterized by lower production volumes but higher value realization. To achieve this, the leather industry must firmly establish itself within the global sustainability framework by delivering on the triple bottom line of sustainability through social equity, economic viability, and environmental compliance.

## Challenges and Opportunities in the Leather and Footwear Sector

Discussing the future outlook for the industry, Dr. Ramasami outlined several key challenges and opportunities.

### Challenges:

- Rendering leather and footwear production systems compliant with emerging Net Zero carbon footprint requirements through both technological and management interventions.
- Generating robust scientific evidence and sustainability data to counter increasing market pressures from synthetic and alternative materials.

### Opportunities:

- Innovating for Net Zero carbon footprint goals through carbon capture technologies, circular economy practices, and advanced technological tools.
- Leveraging Asia's position as the world's leading knowledge producer in leather science and technology to drive sustainable growth and innovation.
- Applying the principle of “**Science for Humanity**” in leather and footwear research and development to create economic, social, and environmental benefits for society.

In conclusion, Dr. Ramasami highlighted the rising importance of Asia as a global source of raw hides and skins, a leading producer of leather and footwear products, and a dominant contributor to research and development in leather science and technology. He underscored the need for the Asian leather community to assume leadership in achieving Net Zero carbon footprint goals and to continue driving innovation for a sustainable future.

The session concluded with a strong appeal to the research and development community of Asia's leather and footwear sector. Dr. Ramasami emphasized that the responsibility of leadership rests on the shoulders of Asian leather technologists and researchers, who must work collectively to ensure that future leather and footwear manufacturing complies with global sustainability and Net Zero carbon footprint norms.

## **Plenary Session – II**

### **Theme-wise Summary of AICLST 2026**

**Speaker: Dr. Buddhadeb Chattopadhyay**



**Dr. Buddhadeb Chattopadhyay delivering Plenary Session – II**

The second plenary session of the 13th Asian International Conference on Leather Science and Technology (AICLST 2026) was delivered by **Dr. Buddhadeb Chattopadhyay, Member, ILTA, Kolkata**, on the theme “**Theme-wise Summary of AICLST 2026.**”

**He summarized the theme-wise and country-wise distribution of papers and presented an executive summary of each thematic area in his concise and insightful presentation.**



**Dr. Buddhadeb Chattopadhyay honouring Padma Bhushan Dr. T.Ramasami with a memento.**

The presentation provided a comprehensive overview of the scientific contributions, emerging research trends, and strategic directions discussed during the conference. Dr. Chattopadhyay began by reiterating the core mission of AICLST, namely the advancement of leather science and technology through scientific knowledge exchange, international cooperation, and sustainable development.

He emphasized that the leather industry must continue to pursue innovation, education, and skill development while collectively addressing misinformation and working towards a circular economy and Net Zero CO<sub>2</sub>e future.

He highlighted that the conference aimed to ensure the long-term viability of the global leather industry through scientific rigor, environmental responsibility, smart management practices, stronger brand equity, enhanced visibility, and global collaboration.

## Overview of Technical Contributions

A total of **114 abstracts** were received for the conference, out of which **94 full papers** were submitted and accepted following peer review. The conference featured **54 oral presentations** and **38 poster presentations** distributed across six thematic areas.

The largest contribution was received under **Innovative Process Technology (TI)** with 58 abstracts and 46 full papers, followed by **Carbon Capture and Utilization (TC)** with 18 abstracts and **Footwear – Future and Roadmap (TF)** with 16 abstracts. The conference also included papers on **Livestock Analysis and Quality Appropriation (TL)**, **AI and Productivity (TA)**, and **Marketing Policy and Strategy (TM)**.

The country-wise distribution of papers demonstrated strong international participation, with contributions from India, China, Japan, Russia, and Romania. India accounted for the majority of presentations, while researchers from other participating countries contributed significantly to advancing scientific discourse within the leather sector.

### Theme: Livestock Analysis and Quality Appropriation (TL)

The Livestock Analysis and Quality Appropriation session consisted of one keynote address and two oral presentations focusing on the quality and availability of bovine hides and ovine skins.

The session highlighted the significant contribution of animal husbandry to the Indian economy, accounting for approximately 28–30% of agricultural output and 4–6% of the national GDP. Presenters discussed challenges affecting hide and skin quality, including pre- and post-mortem defects, disease-related issues, and inadequate farming practices. Special emphasis was placed on DNA mapping, breed improvement through cross-breeding programmes, skill enhancement in flaying operations, and the development of organized farming systems. The discussions underscored the importance of improving raw material quality while strengthening

rural livelihoods and the circular economy associated with livestock farming.

### **Theme: AI and Productivity (TA)**

Papers presented under the AI and Productivity theme demonstrated the growing integration of Artificial Intelligence and digital technologies within the leather value chain. The studies explored the application of AI-driven tools for process optimization, productivity enhancement, data analytics, and decision-making support systems. The theme reflected the increasing importance of digital transformation in improving operational efficiency and competitiveness within the leather industry.

### **Theme: Marketing Policy and Strategy (TM)**

The Marketing Policy and Strategy session featured one keynote address and six oral presentations. The discussions revealed a significant shift in the marketplace from product-centric approaches towards value-centric and sustainability-driven business models.

Presenters emphasized the need for creating strong narratives around circular economy principles, traceability, transparency, and consumer trust. Particular attention was given to evidence-based sustainability communication rather than generic environmental claims.

The session also explored ethical marketing strategies, including Leather Working Group (LWG) accreditation, environmental labeling, life-cycle approaches, and responsible branding. Advanced technologies such as Big Data, Data Mining, Machine Learning, and Blockchain were identified as important tools for future market intelligence and consumer engagement.

### **Theme: Carbon Capture and Utilization (TC)**

Carbon Capture and Utilization emerged as one of the most significant themes of the conference, comprising one keynote address, nine oral presentations, and seven poster presentations.

The discussions focused on achieving Net Zero CO<sub>2</sub>e targets and aligning the leather industry with evolving global sustainability standards. Researchers presented innovative approaches aimed at reducing carbon footprints through cleaner production technologies, improved effluent management systems, and the replacement of carbon-intensive chemicals with environmentally preferable alternatives.

Several studies demonstrated the use of AI-driven platforms to identify carbon hotspots within manufacturing systems. Advanced scientific techniques such as EDAX, AFM, PIXI, SEM, TEM, and immuno-gold labeling were presented as powerful tools for environmental monitoring and contamination assessment. The role of wetlands and natural ecosystems in carbon sequestration was also highlighted as a promising area of future research.

### **Theme: Innovative Process Technology (TI)**

Innovative Process Technology represented the largest research segment of AICLST 2026, comprising one keynote address, twenty-four oral presentations, and twenty-two poster presentations.

The presentations covered a broad spectrum of innovations extending beyond conventional leather processing into auxiliary chemical development and advanced manufacturing technologies.

Key research areas included colour standardization, process automation, nano-technology applications for imparting super-hydrophobic and flame-retardant properties, and the utilization of multimodal NMR imaging for process monitoring and standardization.

Researchers also explored alternative tanning systems using unconventional mineral and natural tanning agents, the conversion of tannery waste streams into value-added products, the development of novel surfactants, computer-aided protein interaction studies, and the application of Deep Eutectic Solvents in leather manufacture. Collectively, these studies demonstrated the industry's

commitment to cleaner, smarter, and more sustainable processing technologies.

### **Theme: Footwear – Future and Roadmap (TF)**

The Footwear – Future and Roadmap session consisted of one keynote address, eight oral presentations, and seven poster presentations.

The presentations highlighted the growing influence of advanced technologies such as Robotics, Artificial Intelligence, Big Data, Machine Learning, Data Mining, and Blockchain within footwear design and manufacturing.

Researchers discussed innovations aimed at improving performance footwear, extending product life cycles, enhancing design capabilities, and forecasting colour and fashion trends. Considerable attention was also given to branding strategies, consumer engagement, and sustainability initiatives aligned with Net Zero CO<sub>2</sub>e objectives.

The session demonstrated that future footwear development will increasingly depend on the successful integration of technological innovation, sustainability, and consumer-centric design principles.

### **Conclusion**

In his concluding remarks, Dr. Buddhadeb Chattopadhyay observed that the overwhelming majority of research presented at AICLST 2026 reflected a strong commitment towards responsible innovation, sustainability, digital transformation, and carbon neutrality. The conference successfully showcased cutting-edge scientific developments and reinforced the role of international collaboration in shaping the future of the global leather sector.

The plenary session provided delegates with a comprehensive synthesis of the conference proceedings and highlighted the emerging research priorities that will influence the future direction of leather science, technology, and sustainability. **(to be contd....)**



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# The 26th International Shoes & Leather Exhibition - Vietnam Incorporating The 26th International Footwear & Leather Products Exhibition - Vietnam

## 8 - 10 JULY 2026

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

799 Nguyen Van Linh,  
Tan My Ward, Ho Chi Minh City, Vietnam

### Organizer:



Vietnam Leather, Footwear and  
Handbag Association (LEFASO VIETNAM)

### Local Co-organizer:

Hien Dat Exhibition & Trading Service Co., Ltd

### Supporter:

- The Leather, Footwear and Handbag Association of Ho Chi Minh City (SLA)
- Hanoi Leather and Footwear Association



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The 26<sup>th</sup> edition of Shoes & Leather - Vietnam-the International Shoes & Leather Exhibition, the premier footwear trade event in the ASEAN region, incorporating the 26<sup>th</sup> IFLE - Vietnam-the International Footwear & Leather Products Exhibition will be held on 8-10 July, 2026, at the Saigon Exhibition & Convention Center (SECC), Ho Chi Minh City in Vietnam.

The event is expected to bring together more than 800 exhibitors and welcome over 15,000 trade professionals. The 3-day exhibition will present a wide range of quality exhibit collections covering the supply chain of the footwear and leather industries. International exhibitors will present the latest shoemaking machinery, materials, hides, leathers and synthetic leathers, finished footwear, components, dyes & chemicals, automation solutions, 3D printing, innovative technologies and many more.

The 26th International Footwear & Leather Products Exhibition which will run concurrently with Shoes & Leather - Vietnam 2026, will showcase finished products, footwear and leather goods, like stylish bags, shoes, suitcase, fashion accessories and various type of leather products.

Shoes & Leather Vietnam is a good platform and provides direct access to global manufacturers, buyers and organises informative seminars on current topics and suppliers matchmaking sessions. The following seminars would be organised on the sidelines of the fair. International speakers will present their latest market technologies and fashion trends which will be extremely helpful for the business planning and decision making professionals.

1) **PFAS Global Regulations and Solutions**

- *Speaker: Mr. John YANG - CTC Project Leader (8 July 2:00 p.m.)*



2) **ZDHC Footwear Engagement 2026**

- *Moderator: Dr. Andy Chen - ZDHC Footwear Engagement Director (9 July 09:30 a.m.)*

3) **How to assess comfort of footwear?**

*Speaker: Mr. Michael Bodsworth - SATRA Chief Operating Officer (9 July 2:00 p.m.)*



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# D I D Y O U K N O W T H A T ...

IN THE LAST  
DECADE, SLOW  
FOOTWEAR  
PRODUCTION  
GROWTH  
CONTRASTS WITH  
THE GLOBAL  
POPULATION BOOM



DESPITE LOSING  
SHARE, CHINA  
STILL ACCOUNTS  
FOR 54.3% OF  
GLOBAL FOOTWEAR  
PRODUCTION



THE AVERAGE  
WORLDWIDE  
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FOR FOOTWEAR  
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STEADY GROWTH

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Indian Leather



June - 2026

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13 - 16 JUNE 2026 | RIVA DEL GARDA - ITALY

## **EXPO RIVA SCHUH AND GARDABAGS 105: COLLECTIVE INTELLIGENCE TO NAVIGATE MARKET CHANGE**

The 105<sup>th</sup> edition of Expo Riva Schuh and Gardabags, held in Riva del Garda, Italy, from 13-16 June 2026, closed under the banner of internationalisation, diversity of offer and innovation: from international delegations to new Summer 2027 collections, and the debut of AI runway shows.

With 22 events and operators from across the globe, Riva del Garda once again has confirmed its role as the hub where volume fashion does business and interprets market trends. The number of buyers attending the fair remains in line with June 2025 figures.

On one side, preserving “tradition”: offering the volume fashion sector - particularly footwear and bags - the **best international hub to do business and build relationships**. On the other, evolving the event to enable participants to **understand, interpret and address the challenges shaping different markets**.

### **BUSINESS**

The fairs proved to be the ideal environment to leverage the advantages of the many trade agreements Europe is currently finalising along key global routes. Discussions throughout the exhibition halls frequently focused on Mercosur and the new opportunities opening up from May 2026, as well as agreements with India and Australia, which are expected to deliver significant competitive advantages in the coming years.

**Giovanna Voltolini**, Group Exhibition Manager at Riva del Garda Fierecongressi, summarises one of the key strengths of the event: “Expo Riva Schuh and Gardabags are like an interactive map, enabling us to read the increasingly rapid shifts in global trade in real time, reposition partnerships strategically and find new balances within supply chains”.

Over the four days, supply and demand of truly global scale came together. **Figures remain in line with June 2025**, with approximately 8,000 attendees, 69.7% of whom from abroad. The steady attendance of buyers reflects the strength and diversity of the offering **from over 1,000 brands and exhibitors from 44 countries**. Notably, there has been growth in buyers from Poland, India and Latin America. Incoming flows from Greece and Israel have also improved, while Spain has tripled the number of operators active on online platforms. A total of **235 hosted buyers and journalists from 51 countries attended**, 26 of which were represented for the first time in the incoming programme, supported by the Italian Trade Agency (ITA).

The **diversity of products** on display also stands out: collections varying in **quality, design, materials and manufacturing techniques**. A richness that preserves tradition, explores the vast world of casualwear, investigates innovations in home, safety, performance and childrenswear, and embraces forward-looking solutions such as 3D printing and advanced manufacturing processes, including injected and high-frequency bonded uppers.

## **INNOVATION**

The AI runway shows were an absolute novelty - not only for the fair, but for the entire sector - clearly reflecting the event’s forward-looking approach. Their purpose remains to showcase products,

allowing buyers to first see them worn by virtual models and then experience them physically at the stands. For the fair, continuing to offer technological innovation experiences is essential in supporting distribution and the entire value chain in interpreting change and identifying emerging opportunities.

## **KNOWLEDGE**

With **22 events** - from AI runway shows to Trend Highlights, from Market Focus sessions to Expo Riva Nights and the Area Showcase - Expo Riva Schuh and Gardabags continue to impress visitors with an increasingly rich and engaging experience, full of insights, inspiration and networking opportunities.

Alessandra Albarelli, General Manager of Riva del Garda Fierecongressi, added: “Expo Riva Schuh and Gardabags are the expression of a collective intelligence involving exhibitors, buyers, associations, experts and professionals from all over the world. Our role as organisers is to observe the market as a whole and to have the courage, ambition and strength to evolve each edition in order to capture its changes. In this edition, we have provided a concrete demonstration of our ability to respond and remain proactive, focusing on three key directions: increasing internationalisation, innovation as a growth driver for the entire supply chain, and new ways of telling product stories.”

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## Future of Latin America's footwear industry was discussed in Riva del Garda

The event, which took place during Expo Riva Schuh and Gardabags, brought together representatives from the region's leading footwear industry associations. The focus was on cooperating whilst respecting differences in order to tackle the challenges posed by an increasingly aggressive foreign market that relies on very low prices, counterfeiting and second-hand goods. The stated aim is to stop competing in isolation and build a common agenda.



The leaders of the Latin American footwear world chose a specific spot on the map to come together around the same table for the first time: Riva del Garda. It was here, with the support of Riva del Garda Fierecongressi, that the LATAM Footwear Leaders Summit 2026 took place on **13 June 2026**, during **Expo Riva Schuh and Gardabags**. The conference was organised by ACCAL (the

Agrupación de Cámaras de Calzado y Afines de América Latina), representing 38,000 companies and almost one million workers.

The Latin American footwear industry, comprising **twelve countries** that together produce over a billion pairs of shoes a year, has chosen Italy as the place to embark on a new path of collaboration. This is a sign of just how much the Riva event has become an international benchmark for the sector.

But why now? The **Mercosur–European Union agreement** opens up concrete opportunities, but only for those who can present themselves in an organised manner. Europe is becoming a very interesting partner for Latin America, and Expo Riva Schuh and Gardabags provide an excellent gateway to joining a community that has focused on solid business relationships for years.

The table was coordinated by Daniel Risafi and included representatives from 12 countries: **Argentina** (Horacio Moschetto); **Brazil** (Haroldo Ferreira and Cristian Schlindwein); **Chile** (Félix Halcartegaray); **Colombia** (William Parrado); **Ecuador** (Jorge Pérez); **El Salvador** (Héctor Ramos); **Guatemala**

(Marcos Wong); **Mexico** (Juan Carlos Cashat and Lucía Herrera); **Nicaragua** (Alejandro Delgado); **Peru** (Ricardo Espinoza); **Uruguay** (Alejandro Biasioli); and **Venezuela** (Tony Di Benedetto).

Despite their differences in size and characteristics, the countries all highlighted the same problem: **the massive import of Asian products**, which reached record levels in 2025. A possible solution? Creating a **facilitated market within Latin America and differentiating** themselves, because low prices alone will not suffice.

Among the crucial issues facing the Latin American footwear trade were smuggling, counterfeiting and, in some cases, infrastructure shortages, starting with energy..

Some suggestions that emerged during the meeting included focusing on quality - in terms of both raw materials and design - as the only viable strategy in markets such as the United States and Europe. Some have called for an economic community modelled on the European one, while others would prefer to focus on internal free trade and common rules for labelling the origin of products.

The conclusions drawn by Daniel Risafi, the ACCAL coordinator, are concrete commitments: producing a **joint document in the form of a sectoral statement to signal unity** amongst Latin American countries that produce footwear; making **meetings between trade associations a regular occurrence**; and undertaking **coordinated promotional initiatives**. “Latin America has industry, talent and tradition. The challenge is to stop thinking individually and start building a common programme that allows us to compete as a region on the world stage”.

## **THE FOOTWEAR INDUSTRY IN THE 12 COUNTRIES**

**Argentina** (CIC) - 80.4 million pairs/year; ~700 companies (almost all SMEs); 12,004 employees. Imports 51.6 million pairs, exports 383,000; trade deficit USD 47 million.

**Brazil** (Abicalçados) - 847.5 million pairs/year; over 5,300 companies; 271,400 employees. Exports USD 958 million / 103.9 million pairs to over 160 markets (top markets: Argentina, followed by the United States and Spain).

**Chile** (FEDECCAL) - an importing country benefiting from a network of 30 free trade agreements with over 60 countries, the most extensive in Latin America.

**Colombia** (ACICAM) - 72.3 million pairs per year; 6,022 companies; 73,822 employees. Exports 2.8 million pairs (USD 37.9 million), imports 49 million (USD 598 million); trade deficit USD 560 million.

<p><b>Ecuador</b> (CALTU) - 16.7 million pairs/year; 15,874 employees. Exports 5.3 million / imports 35.4 million.</p>
<p><b>El Salvador</b> (ASPCA) - 40 million pairs/year; 50,000 employees; 452 companies. Exports USD 36.5 million.</p>
<p><b>Guatemala</b> (GRECALZA) - 18 million pairs/year; 35,000 employees; 800 companies (mostly medium-sized). Exports 2.3 million pairs (USD 40 million); 80% of the domestic market covered by imports.</p>
<p><b>Mexico</b> (CICEG) - 221.5 million pairs/year; 97,521 employees; exports over USD 920 million. Imports 171.8 million pairs; trade deficit USD 1,315 million.</p>
<p><b>Nicaragua</b> (CAMCUNIC) - 10 million pairs/year; 30,000 employees. 60% of domestic consumption is imported.</p>
<p><b>Peru</b> (CEIMD) - 30 million pairs/year; over 8,500 companies. Exports 1.5 million pairs (USD 20.8 million); imports 41 million (57.75% of consumption).</p>
<p><b>Uruguay</b> (CICU) - 500,000 pairs/year; 453 employees. It does not compete on volume but on the quality of the leather; only 7% of domestic consumption is domestically produced.</p>
<p><b>Venezuela</b> (CAVECAL) - 7.5 million pairs/year; 10,000 employees. Domestic consumption 75 million pairs, 90% imported.</p>

## ABOUT ACCAL

The Association of Chambers of Commerce for the Footwear and Related Sectors of Latin America unites the leading institutions in the sector from 12 different countries. Its mission is to promote integration, industrial development and cooperation among its member countries.

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## **ITALIAN LEATHER FOOTWEAR AND LEATHER GOODS TECHNOLOGY SECTOR CLOSED 2025 DOWN 11%**

- **PRESIDENT MAURO BERGOZZA: “WITH A PERMANENT SUPPLY CHAIN WORKING GROUP, TARGETED INVESTMENTS AND A SYSTEMIC VISION, MADE IN ITALY CAN RETURN TO BEING A LEADING PLAYER IN GLOBAL MARKETS”**
- **ITALY CONFIRMS ITS LEADERSHIP IN HIGHER-VALUE SEGMENTS, MAINTAINING A 27% SHARE OF GLOBAL EXPORTS, SECOND ONLY TO CHINA, DESPITE THE CURRENT DIFFICULTIES**
- **THE SECTOR HIGHLIGHTS THE URGENCY OF A EUROPEAN AND NATIONAL INDUSTRIAL POLICY TO PRESERVE STRATEGIC MANUFACTURING SUPPLY CHAINS AND AVOID LOSING MADE IN ITALY SKILLS, EMPLOYMENT AND TECHNOLOGIES**

The Italian technology sector for footwear, leather goods and tanning continues to experience the downturn that began in 2023, but it can rely on solid foundations for recovery: world-leading technological expertise, strong corporate financial structures and the second-largest export share worldwide in the sector. However, launching a new growth cycle requires a systemic strategic vision, an industrial policy capable of creating a favourable investment climate, and stronger integration among companies throughout the supply chain. This was the message delivered during the **Assomac General Assembly**, held today at the Fondazione Cariplo Congress Centre in Milan, which brought together the supply chain associations, confirming the shared commitment to advancing initiatives that support the competitiveness of the Italian manufacturing system.



During the meeting, data presented by the Association's Research Centre highlighted a challenging environment. Following the -12% recorded in 2024, **2025 closed at -11%, with production estimated at €512 million**. Exports remain the sector's primary growth driver. The data show greater competitive pressure for tanning machinery (-24.49%), a segment experiencing a sharper slowdown after the resilience shown in previous years, while leather goods machinery declined by -9.80% and footwear machinery by -4.08%. Spare parts and maintenance activities remained substantially stable.

**In 2025, Italy accounted for 27% of global trade in the sector**, compared with 42% in 2005, according to Assomac's twenty-year industry report. China, supported by public incentives up to eight times higher than the OECD average, increased its share to 49% in 2025. Thanks to its price competitiveness and ability to serve high-volume markets linked to large-scale manufacturing, Beijing is now the world's leading exporter. Italy follows, confirming its role as China's primary competitor in the global industry. It has maintained leadership in tanning machinery, leather goods machinery and spare

parts, reducing production volumes in favour of quality and focusing on higher-value segments, particularly luxury and premium markets.

In the current environment, competitive positioning can no longer be considered an acquired advantage; it requires adaptability, strategic vision and strong links among all stakeholders in the value chain. With this in mind, Assomac proposes the establishment of a permanent **value chain working group** bringing together representatives of technology, materials and finished products – footwear, leather goods and tanning – as a stable forum for dialogue, the development of shared strategies and unified representation before national and European institutions.

To build a stronger industrial ecosystem, it is essential to look beyond the boundaries of individual sectors. The case of the Vigevano district, where the ratio between machinery manufacturers and footwear producers now stands at eight to one, represents one of the clearest examples of what happens when supply chain links weaken and highlights the need to act before the process becomes irreversible.

Among the strategic priorities identified during the Assembly to support the sector's competitiveness are **the strengthening of international market presence through continuous engagement initiatives, the development of new industrial partnerships, generational continuity within companies, promotion through trade fairs and support for organisational and digital transformation processes.**

The discussion highlighted a shared awareness that **none of these challenges can be effectively addressed by individual companies acting alone.** Competitiveness, innovation and internationalisation require stronger collaboration across the entire supply chain, deeper integration between technology, materials and

manufacturing, and development plans capable of generating growth for the Italian manufacturing system.

**Mauro Bergozza**, President of Assomac, stated: *“Made in Italy does not begin when a product is sold, but much earlier: in capital goods, expertise, manufacturing and entrepreneurial capability. This strategic heritage fuels the strength of our supply chains and the competitiveness of the Italian industrial system. For this reason, the real risk today is not only growing international competition, but the progressive weakening of the production ecosystems that generate value, innovation and employment. Fashion is the meeting point between creativity, style and enterprise. The industrial dimension is what allows the sector to continue generating value, exports, jobs and growth. The proposal for a permanent supply chain working group stems from the desire to strengthen dialogue between technology, materials and finished products and to represent more effectively the needs of Italian manufacturing supply chains. There is no Made in Italy without a supply chain, no supply chain without manufacturing, and no manufacturing without technology.”*

The Assembly featured contributions from representatives of institutions, trade associations, the exhibition industry and sector research centres: **Roberto Luongo**, Advisor to Minister Urso for Internationalisation and the Promotion of Made in Italy – **Ministry of Enterprises and Made in Italy**; **Alessandra Pastorelli**, Counsellor at the Directorate General for Growth and Export Promotion – **Ministry of Foreign Affairs and International Cooperation**; **Lorenzo Galanti**, General Director of the **Italian Trade Agency (ITA)**; **Giovanna Ceolini**, President of **Assocalzaturifici**; **Alessandro Iliprandi**, President of **UNIC – Italian Tanneries**; **Claudia Sequi**, President of **Assopellettieri**; **Luca Baraldi**, Head of the **Federmacchine** Research Centre; **Luca Ariazzi**, Head of the **Confindustria Accessori Moda** Research Centre; and **Enrica Baccini**, Head of Research and Development at **Fondazione Fiera Milano**.

## **THE ANNUAL GENERAL MEETING OF UNIC – ITALIAN TANNERIES : 80 YEARS BETWEEN MEMORY, TANNING AND THE FUTURE**

**ALESSANDRO ILIPRANDI (BONAUDO) ELECTED PRESIDENT;  
“RADICI” PRESENTED, THE VOLUME THAT RECOUNTS  
EIGHT DECADES OF HISTORY, INNOVATION AND  
REPRESENTATION FOR THE SECTOR**

Eighty years of associative, industrial and cultural history. With its gaze set firmly on the future. The 80th Annual General Meeting of UNIC – Italian Tanneries was held on 12th June, in Santa Croce sull’Arno, at Po.Te.Co., celebrating a symbolic milestone for the association, which was founded on 9 April 1946 and represents one of the most significant sectors of Made in Italy, with a value of approximately €4 billion and internationally recognised leadership in quality, innovation and environmental commitment.

During the Meeting, Alessandro Iliprandi, CEO of Bonaudo Spa, was elected President of UNIC. Bonaudo Spa is a historic Italian company specialising in the production of high-quality leather for the luxury segment. Alessandro Iliprandi is the association’s 19th President and will be supported by Vice Presidents Matteo Mastrotto of Rino Mastrotto Group, Fabrizio Nuti of Nuti Ivo Group and Gianni Russo of Russo di Casandrino.

“This is a particularly difficult time for the sector,” says Alessandro Iliprandi. “There are many challenges ahead of us, but we have vision, courage and a constant determination to improve on our side. Among the priorities of my mandate will be strengthening collaboration with our customers throughout the supply chain,

achieving an even more incisive European representation, and supporting a culture of training and leather, with particular attention to younger generations and the dissemination of skills.”

The Meeting also provided an opportunity to look back over the association’s eighty years of activity through the presentation of RADICI, the historical volume produced by UNIC that recounts the evolution of Italian tanning from the post-war period to the present day. Through documents, images and testimonies, the book conveys the value of an industrial, cultural and manufacturing heritage that has accompanied, and continues to accompany, the international growth of Italian leather and has helped build the identity of the sector.

A heritage which, as outgoing President Fabrizio Nuti recalled in his end-of-mandate address, represents a strategic resource for the future: “UNIC is not only a representative body. It is also a place for discussion and growth for the sector, helping our companies to defend and enhance their production model.”

The celebration of the 80th anniversary comes at a particularly complex time for the tanning sector. In 2025, Italian tanning production recorded a decline of almost 6% in value and 4% in volume, while exports fell by 5%. The number of companies and employees also contracted, confirming that the current economic environment remains difficult.

Between memory and innovation, culture and industry, UNIC’s 80th anniversary confirms the association’s central role in representing, protecting and promoting Italian leather worldwide, while supporting companies as they face the challenges awaiting the sector in the years ahead.

## FDRA: New CPI Data Shows Tariffs Driving Footwear Price Increases, Pressuring American Families

The **Footwear Distributors and Retailers of America (FDRA)** responded to the latest Consumer Price Index (CPI) data on 10th June 2026, highlighting continued increases in footwear prices and the growing role tariffs are playing in driving inflation across the industry.

New analysis from FDRA shows overall inflation rose 4.2% year-over-year in May, marking the fastest pace in three years, while footwear prices jumped 5.2%, the fastest increase in nearly four years. Price increases were seen across categories, including men's (5.4%), women's (6.2%), and children's footwear (2.3%).

### KEY FOOTWEAR INFLATION TRENDS AT A GLANCE



FDRA leaders emphasized that these rising costs are not just the result of broader economic trends but are increasingly tied to tariff policies affecting the footwear supply chain.

“Families are feeling the squeeze, and the footwear industry is seeing it play out in real time,” said **Matt Priest, President and CEO of FDRA**. “While there are many factors contributing to inflation, tariffs are playing an outsized role in driving up the cost of everyday essentials like shoes. These are not discretionary items-they’re a necessity-and the longer these policies remain in place, the more pressure they put on American households.”

**FDRA Chief Economist Gary Raines** added that the latest numbers reinforce a clear and measurable trend in the data.

“Retail footwear prices rose again year-over-year in May-up in nine of the last ten months and now at their fastest pace in nearly four years,” said **Raines**. “What stands out is that footwear prices are rising faster than overall inflation, which is unusual and points to structural cost pressures beyond typical economic trends-particularly tariffs. At this trajectory, 2026 is on pace to see one of the fastest increases in footwear prices in more than three decades. These pressures have been building across the supply chain and are now clearly reaching store shelves and increasingly price-sensitive consumers.”

FDRA has consistently warned that tariffs are a direct tax on consumers, particularly affecting families purchasing essential goods like footwear. With import costs already rising and limited ability for companies to absorb additional expenses, industry leaders caution that continued tariff pressure will likely sustain upward pricing trends.

“Reducing footwear tariffs remains the most immediate step policymakers can take to provide relief,” **Priest** added. “Without action, these costs will continue to compound, and American families will continue to pay the price.”



## **Brazilian Footwear Industry U.S. and Latin America drive export growth in April**

**Over 8.2 million pairs worth US\$73.5 million were shipped in April, increase of 9% compared to the same month last year**

The fourth month of the year brought positive news for the Brazilian footwear industry. According to data prepared by the Brazilian Footwear Industries Association (Abicalçados), based on figures from the Secretariat of Foreign Trade (Secex), 8.2 million pairs worth US\$73.5 million were shipped in April, increases of 9% in volume and a decrease of 7.3% in revenue compared to the same month last year.

In the four-month period, exports totaled 34.5 million pairs and US\$284.44 million, declines of 11.7% and 18.5%, respectively, compared to the same period in 2025.

Abicalçados' Executive President, Haroldo Ferreira, highlights that April brought signs of a recovery in footwear exports to strategic markets, especially the United States and Latin American countries. "The increase in shipments to the United States indicates not only a recovery, but also an anticipation of exports to the destination following the tariff relief, since the additional 50% tariff is no longer being applied and Brazilian footwear is now competing under an equal 10% tariff rate," he says.

According to the executive, the year-to-date figures still reflect the impacts of the first quarter, marked by the U.S. tariff shock, weaker momentum in traditional markets, and lower average prices associated with changes in the export mix by product and destination.

Another factor that boosted April's export performance was shipments to Latin American countries. Excluding Argentina, exports to Latin American markets increased by 24.6% in value and 53% in volume compared to the same month last year. In April, exports to the United States totaled 842.9 thousand pairs and generated US\$14.72 million, increases of 16.5% and 40.5%, respectively, compared to the fourth month of last year.

## **Lindex and BASF partner to bring textile-to-textile recycled polyamide to lingerie sector**

**Lindex has partnered with BASF's loopamid<sup>®</sup> to accelerate textile-to-textile recycling and advance the shift towards more circular material solutions in the fashion industry. Together they introduce loopamid to the lingerie sector.**

For Lindex, the use of loopamid builds on its long-term work to increase the use of recycled materials and reduce dependency on virgin raw materials. Building on progress in textile-to-textile recycled cellulosic fibres, Lindex is now driving innovation in polyamide within lingerie.

*“As a major lingerie player, we have a clear responsibility and opportunity to drive change in this category. Polyamide is an important material category for Lindex, where our scale allows us to drive real impact. With loopamid, we are moving from ambition to action, advancing more circular solutions while supporting long-term, sustainable growth and reducing the use of virgin material. Progress at this level requires new technologies and close partnerships across the value chain, and BASF plays a key role in enabling this development,”* said Anna-Karin Dahlberg, Chief Sustainability Officer at Lindex.

Developed by BASF, loopamid is a recycled polyamide 6 made entirely from textile waste such as post-industrial waste and post-consumer waste. The technology enables the recycling of polyamide materials that are otherwise difficult to process, including blended textiles, while maintaining material quality comparable to virgin polyamide 6 and enabling multiple recycling cycles.

*“With loopamid, our goal is to fully close the loop for polyamide textiles. Working with Lindex allows us to actively shape the transformation towards a more circular fashion industry,”* said Dag Wiebelhaus, head of innovation and project lead of loopamid at BASF’s Monomers division.

First lingerie products made with loopamid are planned to be introduced in selected Lindex lingerie styles at the beginning of 2027. The collaboration and use of loopamid support Lindex’s overall material ambition that by the end of 2026, 100 per cent of materials used will be recycled or sustainably sourced.

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## **A. Fayaz Ahmad, Deputy Director, CLE retires after 39 years of distinguished service**

Shri A Fayaz Ahmad has joined the Council for Leather Exports (CLE) on 07th April, 1987, at entry level position, and from there onwards, he progressed in his career. Shri A Fayaz Ahmad has been primarily handling the formulation & implementation of Central Sector Scheme of Govt of India for leather & footwear industry namely 'Indian Footwear & Leather Development Programme (IFLDP)' right from inception Ninth Five Year Plan period 1997-2002 onward to the present period 2021-2026 (29 years of IFLDP).



Shri A Fayaz Ahmad, Deputy Director, CLE has handled many diverse subjects during his tenure in CLE, and headed for many cells established in CLE, which include: as head of the Department of IFLDP, Domestic Industry Cell, Logistics Cell, MSME Support Department, Indian Standard Cell, to name a few. He was actively involved in many of the CLE's initiatives, such as IDLS Scheme, Establishment of Greenfield Mega Leather, Footwear & Accessories Clusters, Upgradation Projects of Common Effluent Treatment Plants in tannery clusters etc

Shri A Fayaz Ahmad had sectoral in-depth knowledge on leather & footwear industry, extensively worked on the SWOT of the industry and suggestive measures for overcoming the challenges, its conception and presentation to the authorities concerned from time to time, under the guidance of Executive Director and Chairman of the Council. He was also involved in the preparation of Vision Document 2030 for the Leather & Footwear industry. He has extensively travelled to industry clusters in the country for interactions and also to overseas countries for market promotion activities.

He had excellent industry and institutions connect and has successfully organized 75<sup>th</sup> Diamond Jubilee edition of the 'CLE Industry outreach events / webinars' on Indian Footwear & Leather Development Programme (IFLDP) 2021-26.

Shri A Fayaz Ahmad, has retired from CLE on 31st May 2026, upon attaining superannuation after 39 years of distinguished service towards development and growth of the leather and footwear industry in the country.

*Indian Leather* wishes a very happy post-retirement life and congratulates him for his commendable services rendered in CLE for the leather and footwear industry. His contacts : Shri A Fayaz Ahmad - 99400 39045 | Email: afayazahmad@yahoo.com)



## *Vasan's Voice*

- Vasan Suri, A Passionate Leather Lover &  
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### **Love for performance should overtake fear of performance**

With all the geo-political events, adding pressure everywhere, there is a fear of failure. This fear of failure creates a negativity and that spreads more faster than positivity. It is high time, we all should practice more meditation to keep our mind calm, in these tough and turbulent times.

Love for performance should overtake the fear of performance. Let us develop the patience to understand each other problems and share positive vibes to kindle the inside fire to perform. The past one year or so, have created a sense of failure and negativity around, with all these war, natural calamities, economy situation etc.,

Designers' decide their style and the brand owners and marketing team confirms their type of leather, colors, lining, accessories etc., The order gets placed with the factories for leather products and they in turn place their orders for Leather and other ingredients. Suddenly, the marketing team gets shaky with their decisions and decides to withdraw a particular collection. As the ball has started rolling, they have no option except to find fault with the supplier and reject the consignment.

Leather colour matching have become like synthetics. The natural beauty of the leather is compromised with the effort to match the colour right. This is just a case in point and many such cases are

happening around the world and the fear of failure have become dominant.

It is a tough situation and time not to pass on the blame or issues and try to get at the bottom of it taking everyone in to confidence.

As stated earlier in one of the earlier articles, smart phones have affected the eye sight and there is red tone that floats.

It is high time we all involved in the industry come closer to support each other and spread love and understanding which will be helpful in boosting the confidence at every level.

Efforts should be made and good news about Leather being an “imperfect, perfect product” should be spread around the market and the final consumers.

No two men are the same and the same happens with the animal skin. With the advanced technology and engineering leather industry at large is giving their best efforts to get the best product in to the market.

***Bhagavat Gita says***  
***“Yogah Karmasu Kaushalam”***  
***Excellence comes through balanced action***  
***Burnout is not a badge of honour anymore***  
***Protect your peace and stay calm***  
***Prioritise your action and take right decision***  
***Happiness is in living and let others live***

Love for performance should overtake love for failure and let us all stay together and prosper together in these tough times.

Calm mind is like a clear water surface and let us develop calmness and spread love and positive vibes all around.



## Back to School Column

**Dr N K Chandra Babu**

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### SYSTEM DEVELOPMENT IN TANNERIES

(contd. from May issue)

#### ***DYE HOUSE***

Retanning / dyeing drums

- Load capacity /drum -- shaved / sammed weight in kg / pieces or sq. Ft

- Process duration of retanning / dyeing - hours ( cycle time )

- Number of loads/drum /shift

- Number of loads possible / drum / per day ( 2 overlapping shifts )

- Crusting & dyeing capacity / day

- Sammying

- Splitting

- Shaving

- Setting out

- Vacuum drying

- Drying capacity /day based on the number of overhead drying hangers available

- Time required for complete drying - in summer and in rainy season

- ***Crust yard and finishing yard***

- Staking – vibratory, rotary

- Toggling

- Buffing

- Spraying
- Roller coating
- Ironing
- Plating
- Embossing
- Measuring

### ***PRODUCT / ARTICLE MIX PLANNING***

The main objectives of the tanneries are

(1) Complete utilisation of the raw hides & skins purchased by conversion into suitable finished leathers (products / articles) to avoid the piling up of semi-processed materials – pickled pelts / wet blues / undyed crust / dyed crusts – in order to achieve maximum number of capital turn over cycles and to reduce the time for capital turn over cycle.

(2) Maximum possible quantity of production for every year / month / week / day

(3) Full utilisation of the output capacity of all the equipment and machinery

(4) Full utilisation of the man power and technical skills

(5) Maximisation of the profitability and returns on investment (R.O.I)

(6) Minimisation of the production cycle time for each product / article

### ***CAPACITY BALANCING / CHOICE OF PRODUCT MIX***

Different articles require different machine operations and different process sequences

Different articles have different process cycle times

Different articles require different mix of raw material selections / grades / sizes

If only a few articles are produced some machines / operators will be underutilised and the available output capacity of some machines / operators will not be enough.

Article wise machine operation requirements have to be documented and taken into consideration while deciding on the product / article mix.

The production planning department must balance the product / article mix to ensure that the machine hour requirements for each operation / machine do not exceed the maximum possible quantities per day including overtime work.

If this rule is not followed, then a backlog will certainly build up leading to delayed production and deliveries and consequent customer dissatisfaction.

### ***MONTHLY PRODUCTION PLAN***

Based on the above documented data and the orders on hand the top management and the production manager must plan and document a detailed monthly “production plan”.

This plan will specify the following details

- (1) Types of raw materials / sizes / grades / quantities to be issued date wise against the orders on hand and orders under negotiation.
- (2) The target delivery dates and schedules required to meet the despatch schedules and dates committed to the customers.
- (3) The critical requirements of the orders – size range, thickness, article and colour.

The “monthly” production plan can be broken down into “weekly” production plans for easy implementation of the plan and follow up.

### ***PRODUCTION SCHEDULING***

Based on the monthly production plan which has been finalised, specifying the details of article wise quantities to be produced during

the month and the delivery dates to be met a detailed schedule of production plan has to be drawn up.

Production scheduling becomes more important as the number and types of finished leather articles increases as compared to the production of a limited number of basic articles like crust leathers - undyed or dyed.

When the tannery has to produce different types of finished leathers with different types of finish and article characters in different colours for different buyers with a very wide range of order sizes with the necessity to deliver the orders on the dates committed to the customers the situation becomes more complicated and requires detailed planning and scheduling.

### ***DELIVERY DATES / PROCESS CYCLE TIMES***

Based on the committed delivery dates and the process cycle times required for the different articles, a plan has to be drawn up for the date wise issue of raw materials.

The raw materials for articles with the longest process cycle times must be issued first, followed by raw materials for articles with shorter process cycle times and the raw materials for articles with the shortest process cycle times to be issued last.

The last date for raw material issue deadline must be arrived at by deducting the process cycle time - number of days from the target delivery date.

### ***OPTIMIZATION OF MACHINERY OUT-PUT CAPACITY UTILISATION &***

#### ***AVOIDANCE OF BOTTLE -NECKS***

Raw materials must be issued in such a manner to optimize the utilisation of available machinery out-put capacity in each shift.

In the case of machines specific to the processing of only one type of leather – either sides or skins - ie splitting / shaving / setting out machines – the required optimum quantity of suitable raw material

type has to be issued for production every day to ensure that the machines and the machine operators are fully utilised without any idle time due to the non availability of the required type of raw material for work.

If the optimum required quantity of cow sides is not issued for production every day, then the machines specific to cow sides production -splitting / side shaving / side setting out machines – and their machine operators will be forced to idle effectively reducing the overall productivity.

If the in-put raw material issued is in excess of the maximum machine out-put capacity, including the possible out-put in overtime work, during one day then a back-log will build up leading to production delays

Matching the optimum machinery out-put capacity of each individual machine by the issue of correct quantities of suitable raw materials is a critical requirement to optimize the machinery out-put capacity utilisation.

With regard to the machines and equipment which are not raw-material specific, i.e., through feed sammying, sammying, vacuum drying, over head hangers, through feed buffing, dedusting, vibratory staking, toggling, spraying, roller coating, plating, embossing, rotary ironing, measuring machines, there is the flexibility to process either cow sides or goat / sheep skins.

### ***ELIMINATION OF BOTTLE-NECKS***

If bottle-necks in some machinery operations persist even after a detailed production planning due to a shortfall in machinery out-put capacity, the tannery management must initiate immediate steps to install new machinery / equipment to fill up the shortfalls and augment the out-put capacities.

Suedes and nubucks require repeated number of buffing operations and efficient dedusting operations.

One of the other possible areas where a bottle-neck could build up during the rainy season is the overhead drying hangers. Cow leathers and unshaved goat and sheep crust leathers take a longer time to dry – 18 to 24 hours compared to the drying time for thin leathers like gloving leathers – 6 hours. The tanneries must study this aspect in detail and initiate necessary steps to enhance the drying capacity in order to avoid a bottleneck.

### ***FINISHING DEPARTMENT***

The finishing department has to produce a wide range of colours, ranging from white, off-white, pastel colours through light browns, medium browns, dark browns - to black. If pastel colour leather is sprayed in the spraying machine immediately after the spraying of black leather, then there is a very good possibility of contamination of the pastel colour finishing spray mixture by the remnants of black colour finishing spray mixture from the spraying lines and guns leading to either a change in the colour or the formation of dark spots on the pastel coloured leathers.

This could be avoided largely by starting with the finishing of pastel colours / light colours in the beginning of the week, and changing over to medium colours, dark colours and black in that order.

The spraying machine can be cleaned thoroughly over the weekend, to be ready to spray pastel colours in the beginning of the coming week.

### ***PRODUCTION MANAGEMENT***

Based on the monthly production plan finalized, the lots to be issued date wise are planned and confirmed.

All the different production departments are to be given a copy of the monthly production plan with the date wise plan for issue of lots to enable them to make the necessary work arrangements and to plan the shift-wise and date-wise allocation of machines and operators.

The raw material stores will prepare the lots - pickled pelt/wet blue/crust as per the size / selection / order quantity and issue them to the production department along with the job card / route card.

### ***JOB CARD / ROUTE CARD***

The job / route card is the identification document for the lot and must accompany the lot in its movement through the different machine / process operations.

The raw material store, based on the communication received from the general manager, will fill up all the details of issue and order specification and the target dates for internal delivery from dyehouse to crust yard, crust yard to finishing yard and from finishing yard to the finished leather warehouse and the target date for despatch to the customer.

At each process/operation stage, the supervisor / operator must confirm the respective work completion by signing the card and entering their remarks.

The job/ route cards facilitate the compilation of the daily work in progress (W.I.P.) Report which is a very important document for tracking the progress of the lots and for managing the production.

The job/ route cards duly filled in by the various departments through which the lots have progressed will be delivered to the finished leather warehouse along with the finished leathers.

A study of the job / route cards help to identify the bottle-neck areas in production and other information which will be very useful for planning better production management procedures.

The reverse side of the job / route cards may be used as the quality assurance parameters check and recording document

### ***WORK IN PROGRESS REPORT (W. I. P.)***

The daily work in progress report is a document which identifies the actual work positions of all the lots under work giving all the relevant details relating to the customer orders or internal orders.

W.I.P report is to be compiled every day in the morning, one or two hours after the start of the work shift by one of the staff walking around the production shop floor and verifying the actual work position of each lot.

W.I.P report is to be submitted to the production manager as soon as it is compiled.

The production manager will study this document in detail and identify the lots which are not progressing and are behind schedule.

He will discuss the details with the department heads and initiate the necessary actions – like arranging for the necessary overtime work, deploying additional workers, allocating additional machine time etc.

In case the lot is held up due to some technical problem he will arrange to provide the necessary technical problem solving support and speed up the progress of the lot.

The details of the number of days – specific to the article - required to deliver the finished leather from the work position the lot is in during the compilation of the W.I.P report are included in the w. I. P report format against the process / operation stage, facilitating the quick estimation of the expected date for the delivery of finished leather to the finished leather warehouse.

The W.I.P report doubles up as the progress tracking document used to track the progress of the lots.

This will enable the production manager to work out the best possible delivery date and inform the marketing / sales departments who will inform the customers as early as possible about the expected delay in the delivery of their orders.

### ***TOTAL QUANTITY OF LEATHERS UNDER WORK***

The WIP report will confirm the details of the total quantity of leathers at different stages of work on a daily basis.

The top management will try to keep the total quantity of leather under work as low as possible and initiate the necessary actions to support this objective.

The production manager and the production department heads can use the w. I. P report as the base document in their time productivity improvement objectives.

### ***P. D. C. A METHOD ( PLAN – DO – CHECK – ACT )***

The monthly production plan and the daily work in progress reports are the basic documents for the implementation of the p.d.c.a continuous improvement cycle in production management.

In case a lot is delayed in production, the reasons for the delay must be analysed and the basic causes for the delay or bottle-neck must be identified and documented Necessary corrective actions have to be implemented a.s.a.p.

These may involve one or more of the following.

1. Training of additional machine operators
2. Carrying out repairs and maintenance work on machines which have become non-functional temporarily.
3. Introduction of additional work shifts.
4. Modifying the article-wise daily production synchronized with the current machine output levels
5. Installation of additional machinery in the required sections
6. Modifying the process sequences
7. Trouble shooting to solve technical problems faced.

### ***PROCESS COSTING DATA RECORDS***

The costing department must calculate the lot-wise costs of chemicals used for each lot - based on the actual chemical consumptions for (1) beam house & tan yard (2) dye house (3) finishing yard – as cost / sq. ft. and compile the total process

chemical cost for each lot and document the data – colour-wise / article-wise /size-wise.

In order to enable the costing department to calculate the costing data the production manager must furnish the section-wise “standard authorised bills of materials “ - for the different articles.

## **BILLS OF MATERIALS**

### ***BILLS OF MATERIALS ARE “A MUST” DOCUMENT.***

The costs have to be broken up into sub-groups as given below for analysis.

Beam house & tan yard – (1) beam house (2) tanning

Dye house – (1) syntans, vegetable tannin extracts (2) fatliquors (3) dyestuffs (4) auxiliary chemicals (6) basic chemicals such as sodium formate and bicarbonate, formic acid etc.

Finishing yard – (1) pigments (2) dye solutions (3) binders (4) auxiliary products (5) top coats (6) waxes & oils (7) solvents.

Based on the analysis of actual consumption, taking into account the unavoidable wastages during weighing and mixing and the amount of unused coloured season / finish mixtures, the bills of materials have to be topped up with an estimated quantity enhancement, for calculating the actual costs.

Based on the data a “ready reckoner of process chemical costing” for the various articles can be compiled for reference.

These data can be used to study the possibilities of cost reductions in the different areas and to initiate suitable actions to reduce the process chemical costs.

“Cost reduction” and “cost optimisation” are critical requirements in improving the “cost efficiency” of production.

***(to be continued)***

# Strategy and Leather Industry Part – III

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<b>Strategy and Leather Industry Part – I, II, III, IV &amp; V</b>	
<b>I</b>	<b>II</b>
<b>Introduction, Strategy &amp; Definition, Strategy basics- Key Elements, Planning Process, Levels &amp; Key Considerations</b>	<b>Key Strategies for a Sustainable Leather Industry, THE UK LEATHER INDUSTRY - AN OVERVIEW AND FUTURE STRATEGY,</b>
<b>A brief list of words that are often confused with strategy, Strategy – Status Quo to Desired State,</b>	<b>STRATEGIC ISSUES FOR THE UK LEATHER INDUSTRY, Creating A Pricing Strategy For Leather Products,</b>
<b>Three key elements of a good strategy -Diagnosis, Guiding policy, Coherent actions, Good Strategy and Poor Strategy</b>	<b>Three major pricing strategies - Cost-Based, Value-Based &amp; Competition-Based, Leather Pricing and Profitability Strategies - Meaning &amp; Significance,</b>
<b>The Indian leather industry, Key Strategic Areas, Sustainability of the tanning industry-Environmental, Ethical &amp; social and Economic sustainability,</b>	<b>Factors Affecting Leather Pricing, Common Pricing Strategies for Leather Products, Profitability Strategies for Leather Businesses- Cost Reduction Techniques, Diversification of Product Lines, Investment in Technology and Innovation,</b>
<b>A business strategy and how to develop one - key components, Why it is</b>	<b>Targeting Niche Markets, Effective Marketing and Branding, Challenges</b>

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<p><b>important, building and measuring the success of business strategy,</b></p>	<p><b>in Leather Pricing and Profitability,</b></p>
<p><b>Strategic Planning Basics: A Roadmap to Success, Strategic Management, Strategy Execution, What is a Strategy Map? - Financial, Customer, Internal Process &amp; Organisational Capability,</b></p>	<p><b>How to Stay Competitive in the Leather Industry? – Continuous Improvement and Adaptation for Manufacturers and Suppliers, Some strategies for staying competitive in the leather industry,</b></p> <p><b>Life cycle assessment and leather production, Production Chain Sustainability, System boundaries of an LCA study of leather “from cradle to gate”,</b></p>
<p><b>The Rise of Sustainable Leather in India: Practices, Challenges, and Future Trends - Practices, Challenges Key Players and Initiatives, Market Trends, Technological Innovations,</b></p>	<p><b>Framework to evaluate sustainable value chain (VC) practices, The Rise of Sustainable Leather in India: Practices, Challenges, and Future Trends, The future of leather sustainability, Pros-Environmental Benefits, Ethical Considerations,</b></p>
<p><b>Consumer Demand and Market Dynamics, Regulatory and Industry Support, Global Collaborations and Partnerships, Social and Ethical Considerations, Sustainability as a Brand Value, References.</b></p>	<p><b>Innovation and Durability, Cons - Cost, Availability and Variety, Perception and Performance, ESG, Carbon Credit and Product Life Cycle in Leather Industry, Global leather industry highlights, The global leather industry – Opportunities &amp; Challenges, The future of the global leather industry is promising,</b></p> <p><b>Reference.</b></p>

**Strategy and Leather Industry Part – I, II, III, IV & V**

III	IV
<p><b>Strategies Followed in Leather Industry for Growth &amp; Development, Strategies for Enhancing the Competitiveness of Leather Industry in India, 3 Government initiatives for the leather industry - Indian Footwear and Leather Development Programme (IFLDP),</b></p>	<p><b>Advancements in Sustainable Leather Manufacturing, What is Sustainable Leather Manufacturing Importance, Advancements benefit the environment- Reduced water consumption</b></p>
<p><b>Strategies for Reducing Waste and Maximizing Efficiency in Leather Production, How to Boost Leather Exports from India, Expert Tips Best tips to export leather products from India,</b></p>	<p><b>Reduced chemical use, Waste reduction and recycling, Reduced carbon footprint, Sustainable leather manufacturing practices have any economic or social benefits - Create new business opportunities</b></p>
<p><b>Market Size of the Leather Industry, Global Perspective, Indian Leather Industry, Leather Export Data, Leather Market Size - Global Industry, Share, Analysis, Trends and Forecast 2022 – 2030, Global Leather Market Dynamics,</b></p>	<p><b>Reduce costs, Improve marketability, Improve working conditions, Support local communities, Promote animal welfare, Can Leather Be Truly Eco-Friendly Or Sustainable, A New Chapter of Sustainable Leather,</b></p>
<p><b>Trends in the Leather Market, Global Leather Market Dynamics, Trends in the Leather Market, Growth Hampering Factors in the Leather Market, Indian</b></p>	<p><b>The Definition of Sustainable Leather and Why It Matters, Are Animals Killed to Make Leather, Are Leather Alternatives the Solution or the Problem,</b></p>

<b>Strategy and Leather Industry Part – I, II, III, IV &amp; V</b>	
<b>III</b>	<b>IV</b>
<b>Economy and Leather Industry, Futuristic Vision of Leather Industry,</b>	
<b>The Characteristic of A Healthy and Progressive Futuristic Vision of Leather, A Futuristic View – Leather in a Nutshell , Factors Influencing the Futuristic Vision of Leather, Challenges encountered,</b>	<b>The Future of Sustainable and Ethical Leather &amp; The Benefits, Embracing Eco-Friendly Tanning Processes, Championing Resource Efficiency, Advancing Waste Reduction and Management,</b>
<b>WHAT WILL THE TANNERY IN 2030 BE LIKE, The future imagined, Sustainability no longer a problem,</b>	<b>The Importance Of Traceability and Transparency in the Leather Supply Chain, The Role of Certification in Sustainability, Circular Economy and The Life Cycle of Leather, Upcycling and Recycling,</b>
<b>Cleaner chemistry, Even safer places to work, Predictions about key issues and likely developments in the leather sector,</b>	<b>Extended Producer Responsibility, Sourcing with Integrity, Collaborative Consumption, The Role of Consumers in Driving Sustainable Leather, Conscious Consumption, Slow Fashion Movement, Educating Consumers, Compliance and Best Practices for Sustainable Leather</b>
<b>Changing Use of Leather, HISTORY LESSONS, THE FUTURE OF LEATHER, Vision Document-2030 for the leather and footwear industry, Information on Harmonious Coexistence, References.</b>	<b>Bio fabrication, Green Chemistry, Digitalization and Automation, Final Thoughts, Purpose-led strategy - Clariant’s purpose: “Greater chemistry –between people, ESG, Select ESG Factors , ESG commitments,. ESG Landscape -</b>

<b>Strategy and Leather Industry Part – I, II, III, IV &amp; V</b>	
<b>III</b>	<b>IV</b>
	<b>Environment, social &amp; governance report, Advances and trends in leather science and technology, References.</b>
<b>Strategy and Leather Industry Part – I, II, III, IV &amp; V</b>	
<b>V</b>	
<b>Responsible Leather from Textile Exchange, Responsible Leather Assessment Tool (RLA) Goals, Issues to Address- Responsible Leather Initiative &amp; Stakeholder Meeting</b>	
<b>Environmental - Tanneries, Social, Existing Standard &amp; Protocols, Responsible Leather Assessment Tool, Global Roundtable for Sustainable Beef (GRSB), GRSB Principles and Criteria for Defining Global Sustainable Beef,</b>	
<b>Global Roundtable for Sustainable Beef (GRSB) and Responsible Leather,</b> <b>Leather Impact Accelerator (LIA) – Textile Exchange, LIA Components, Textile Exchange Launches the Leather Impact Accelerator (LIA),</b>	
<b>Leather Industry Association and Trade Groups, Leather Panel- Links, leatherpanel.org, WHEN IS LEATHER NOT LEATHER? DIFFERENT MATERIALS HAVE DIFFERENT BENEFITS, BUT LABELS CAN BE CONFUSING. GET THE FACTS,</b>	
<b>Leather and the Meat Industry, What is the Connection, A general consensus in the industry not to use the word ‘leather’ for synthetic, polyurethane or polyvinyl chloride sheets or any sheets not originating from animal skins or hides,</b>	
<b>Identifying Overseas Markets for Leather Products, Market Research Strategies,</b>	

<b>Strategy and Leather Industry Part – I, II, III, IV &amp; V</b>	
<b>III</b>	<b>IV</b>
<b>Going forward- the leather industry, A trend toward - versatile and sustainable manufacturing, leather and synthetic materials coexisting, Future trends in the leather industry</b>	
<b>Going Forward - The Indian leather industry- Key Strategic Areas, Sustainable Leather &amp; Footwear Manufacturing Practices, Circular Economy in the Leather &amp; Footwear Industry, Three key elements of a good strategy,</b>	
<b>Strategies Followed in Leather Industry for Growth &amp; Development, Futuristic Vision of Leather Industry, Vision Document-2030 for the leather and footwear industry, Information on Harmonious Coexistence, References.</b>	

## **1.Strategy for Growth and Development**

Leading players in the Global Leather industry have adopted various strategies to achieve additional market share. Key strategies adopted by these players include product launch, joint venture, acquisition, partnership, expansion, and investment. Industry Growth Strategies have the potential to remove challenges and accelerate economic development in the prioritized areas.

### **1.1 Strategies Followed in Leather Industry for Growth & Development**

<b>1.1 Strategies Followed in Leather Industry for Growth &amp; Development Table - 1</b>
<b>1.Merger &amp; Acquisition Strategies. 2.New Product Launch. 3.Cooperation and Support for Effective &amp; Customer Oriented Marketing by suitable Sourcing and Product Modification &amp; Formulation Strategies. 4.Forward &amp; Backward integration in manufacturing for Market Share, Environmental Advantage &amp; Cost Advantage. Also having activities in allied industries for better survival,</b>

## 1.1 Strategies Followed in Leather Industry for Growth & Development

Table - 1

**growth development and sustainability.**

**5.Intelligently connecting production plants and technologies to efficiently use resources and leverage expertise. Production plants, energy and material flows, logistics, and site infrastructure are all integrated 6.Product modification and formulation for the Customized Requirements of Customers.**

Competitive Strategy is taking offensive or defensive action to create a defend-able position in an industry to cope successfully with five competitive forces such as Potential entrants (threats of new entrants), Industry competitors (rivalry among existing firms), Buyers (Bargaining power of buyers), Suppliers (Bargaining power of suppliers), Substitutes (threat of substitute products/service) and thereby yield a superior return on investment for the firm. In coping with five competitive forces there are three potentially successful strategies- Overall Cost Leadership, Differentiation & Focus.

## 1.2 Strategies for Enhancing the Competitiveness of Leather Industry in India <sup>1A</sup>

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

1. Overcome the disadvantages of economies of scale 2. Access skilled & educated labour 3. Have better cost effectiveness due to sharing of common costs 4. Have quicker dissemination of information leading to better responsiveness to market challenges 5. Increase competitiveness by sharing best practices in the areas of organizational capabilities,

technological innovations, flexible structure and faster decision-making process. 6. Have better negotiating power

### **1.3 Government initiatives for the leather industry - Indian Footwear and Leather Development Programme (IFLDP) <sup>1B</sup>**

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

- Sustainable Technology and Environmental Protection (STEP) – The STEP initiative is aimed at sustainable and environment-friendly industrial and tanning activities which are particularly linked to environmental concerns. Considering these issues, zero liquid and wastewater discharge is made mandatory in some states. Assistance for the upgradation of Common Effluent Treatment Plants (CETPs) and vision document preparation is provided under the scheme.
- Integrated Development of Leather Sector (IDLS) – The main objective of this scheme is to encourage entrepreneurs to diversify and set up new units leading to better productivity.
- Establishment of Institutional Facilities – The scheme aims to provide infrastructure upgradation of campuses of the Footwear Design and Development Institute (FDDI)
- Mega Leather Footwear and Accessories Cluster Development (MLFACD) – The scheme is launched to assist entrepreneurs by providing modern infrastructure, technology, training and skill development, and human resource development inputs.
- Brand Promotion of Indian Brands in Leather – The scheme aims to provide Indian footwear and leather manufacturers international branding support to provide better product visibility.
- Footwear Sector and Development of Design Studios – This scheme will provide design support, technical assistance, and opportunities for employment and business.

## 1.4 Strategies for Reducing Waste and Maximizing Efficiency in Leather Production <sup>1C</sup>

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

## 1.5 Investing in Technology and Innovation

Technology and innovation can help companies improve their processes, reduce waste, and enhance their environmental performance. Some examples of technology and innovation in leather production include:

### Investing in Technology and Innovation Table – 1 C

**1.Digitalization:** Digitalization can help companies improve their supply chain management, reduce waste, and enhance their production processes. For example, digital tools can be used to optimize production planning, reduce energy consumption, and track material usage.

**2. Automation:** Automation can help companies reduce the labor required for leather production, increase productivity, and reduce waste. For example, automated cutting machines can help reduce material waste, while automated dyeing processes can help reduce water usage.

**3.Chemical innovations:** New chemicals and treatments can help companies reduce the environmental impact of leather production. For example, eco-friendly tanning methods can reduce the use of hazardous chemicals, while water-based finishes can reduce the use of solvents.

**4.Sustainable materials:** Developing new sustainable materials, such as leather made from plant-based materials, can help companies

## Investing in Technology and Innovation Table – 1 C

**reduce their environmental impact and meet the growing demand for sustainable products from consumers.**

By investing in technology and innovation, companies in the leather industry can enhance their environmental performance, reduce waste, and meet the growing demand for sustainable and eco-friendly products. Additionally, investing in technology and innovation can help companies stay competitive in a rapidly evolving market and enhance their reputation as innovative businesses.

Source : 1 & Table – 1 & 1 A - Strategies for Enhancing the Competitiveness of Leather Industry in India, Mrs. Anamika Singh, Lecturer-Marketing, Bharati Vidyapeeth Institute of Management Studies and Research, Conference on Global Competition & Competitiveness of Indian Corporate.

1 B- Leather Industry in India LAST UPDATED ON OCTOBER 11, 2023 BY CLEARIAS TEAM.

1 C & Table – 1 C. Reducing Waste and Maximizing Efficiency in Leather Production.Deskera.

## **2. How to Boost Leather Exports from India, Expert Tips Best tips to export leather products from India <sup>2</sup>**

India's tradition of leather craftsmanship uniquely positioned it to dominate the global export market. However, in order to fully realize this potential, innovation and adaptability are required. Here are some expert recommendations for Indian leather goods exporters, as well as essential research and data resources:

### **2.1. Best tips to export leather products from India Table – 2 A**

## **7. Best tips to export leather products from India Table – 2 A**

### **1. Do extensive market research**

**Before getting into the leather export business, do extensive research**

## **7. Best tips to export leather products from India Table – 2 A**

**on your target markets. Identify potential clients, learn their preferences, and understand market trends. Analyze the competition and create efficient pricing plans to strategically position your products.**

### **2. Efficient Shipping Logistics**

**Select dependable shipping solutions that are specific to your product type and target markets. Collaborate with skilled goods forwarders or shipping brokers who specialize in managing leather goods. To avoid delays or issues, ensure that shipping schedules, documentation, and customs clearance processes are all coordinated in an efficient manner.**

### **3. Discover Reliable Suppliers**

**Establish relationships with reliable tanneries, leather manufacturers, and suppliers in India. Determine their credibility, quality standards, production capacity, and ability to meet your export requirements. Consider visiting data-driven platforms like [ExportImportData.in](https://www.ExportImportData.in).**

### **4. Reliable leather exporters data**

**Reliable leather exporters data can help traders analyze the global market. One of the best market research platforms is [ExportImportData.in](https://www.ExportImportData.in), where you can obtain updated leather buyer details, supplier details, leather HS codes, product descriptions, and much more.**

### **5. Being Informed and Innovative**

**Stay current on industry developments, developing technology, and altering client preferences. Continuously improve your leather product offerings to meet changing worldwide market demands. Adopt sustainable processes and ethical sourcing to align with rising customer awareness in these areas.**

Source : 2. & Figure – 2 A. How to Boost Leather Exports from India: Expert Tips India Export Data 10-May-2024.

### 3. Market Size of the Leather Industry<sup>3</sup>

#### 3.1 Global Perspective

In 2023–2024, the global leather and leather goods market was valued at USD 469.49 billion. By 2030, it is projected to reach USD 738.61 billion, growing at a compound annual growth rate (CAGR) of 6.7%. This growth is driven by the increasing demand for leather products worldwide, with developing countries like India and China leading the export due to the availability of labor, raw materials, and other resources at low costs.

#### 3.2 Indian Leather Industry

India's leather industry was valued at USD 17 billion in 2023 and is estimated to reach USD 32.4 billion by 2029, with a CAGR of 2.95% expected from 2023 to 2029. Prime leather-producing states in India include Uttar Pradesh, Tamil Nadu, West Bengal, Punjab, Maharashtra, and Karnataka. The industry provides direct employment to over 4.4 million people and contributes 30% of the world's total leather production. With over 3 billion square feet of leather produced annually, India has a robust, eco-friendly tanning base and manufacturing units.

#### 3.3 Leather Export Data 2023-24

Total leather export from India: USD 19 billion. Number of Indian exporters: 31,379.

Number of buyers: 229,674. The top three leather exporters are China with 11,661,750 shipments, Brazil with 4,149,390, and India with 2,088,555 shipments.

Top leather HS codes: 42023120, 42022190, and 42023120.

#### 3.4 Required Documents for Leather Export from India

GST Certificate, Registration cum membership certificate (RCMC), Import Export Code (IEC), Export License, Proforma Invoice, Certificate of Free Sales, Certificates of Origin, Inland Bill of Lading.

These documents are mandatory for the export of leather goods from India

Source : 3. India's Leather Export Industry: Insights, Trends and Top Exporters, Seair Exim Solutions

## 4. Leather Market Size - Global Industry, Share, Analysis, Trends and Forecast 2022 – 2030 <sup>4</sup>

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

### 4.1 Global Leather Market Dynamics <sup>4.1</sup>

#### 9.1 Global Leather Market Dynamics Table – 4 A

**9.1.1 Market Drivers. Increasing demand from the footwear industry.**

**Rise in disposable income among consumers. Changing fashion trends among millennials. Rising domestic and international tourism.**

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

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

Source : 4 & 4.1 & Table – 4 A Leather Market Size - Global Industry, Share, Analysis, Trends and Forecast, 2022 – 2030. Acumen Research and Consulting

## 5. Trends in the Leather Market, Leather Market Dynamics, and Growth Hampering Factors in the Leather Market Tables – 5 A & 5 B & 5 C.

### 5.1 Trends in the Leather Market Table -5 A

#### 5.1 Trends in the Leather Market Table -5 A

- **Sustainability: There is a growing demand for eco-friendly leather products, with consumers becoming more conscious of the**

## 5.1 Trends in the Leather Market Table -5 A

environmental impact of their purchases.

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

## 5.2 Leather Market Dynamics Table - 5 B

### 5.2 Leather Market Dynamics Table - 5 B

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

## 5.2 Leather Market Dynamics Table - 5 B

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

## 5.3 Growth Hampering Factors in the Leather Market Table - 5 C

### 5.3 Growth Hampering Factors in the Leather Market Table -5 C

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

Source : Tables 5 A & 5 B & 5 C. Leather Market Size Growing at 6.2% CAGR, Set to Reach USD 708.7 Billion By 2030. Acumen Research and Consulting

## 6. Indian Economy and Leather Industry <sup>6</sup>

### 6.1 Indian Economy

#### 6.1.1 India is the fifth largest economy poised to become the world's third-largest economy by 2030

Rating agency S&P Global Ratings on Tuesday forecast that India is poised to become the world's third-largest economy by 2030, with an estimated 7% GDP growth in the fiscal year 2026-27. Currently, India is the fifth largest, lagging US, China, Germany and Japan.

"A paramount test will be whether India can become the next big global manufacturing hub, an immense opportunity. Developing a strong logistics framework will be key in transforming India from a services-dominated economy into a manufacturing-dominant one," it said.

Realizing the full potential of India's labour market will primarily hinge on the upskilling of workers and a rise in the engagement of women in the workforce, it said. "Success in these two areas will enable India to realize its demographic dividend," it said. S&P said that the robust growth of India's domestic digital market has the potential to drive the expansion of its thriving startup ecosystem, particularly in the realms of financial and consumer technology, over the next decade. <sup>6A</sup>

The United States of America, China, Japan, Germany, and India are the largest economies in the world in 2023, as per their GDP data. GDP serves as a key metric for assessing the magnitude of a nation's economy. <sup>6B</sup>

#### 6.1.2 India poised to become a \$30 trillion economy by 2047

India is poised to become a \$30 trillion economy by 2047 with the collective efforts of the government and industry pushing towards an exponential growth rate to achieve a fully developed India. The Indian economy has been a bright spot with strong growth amid a significant slowdown and even distress in other countries. This has increased the country's respect among nations and given the large size of its market other countries are eager to sign free trade agreements with India. <sup>6C</sup>

Leather Industry has an immense potential by taking advantage of these proposed scenarios for growth and development leading to reaching new heights both in National and International scenarios.

*(to be contd...)*

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