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Vol.60

October - 2026

No.08

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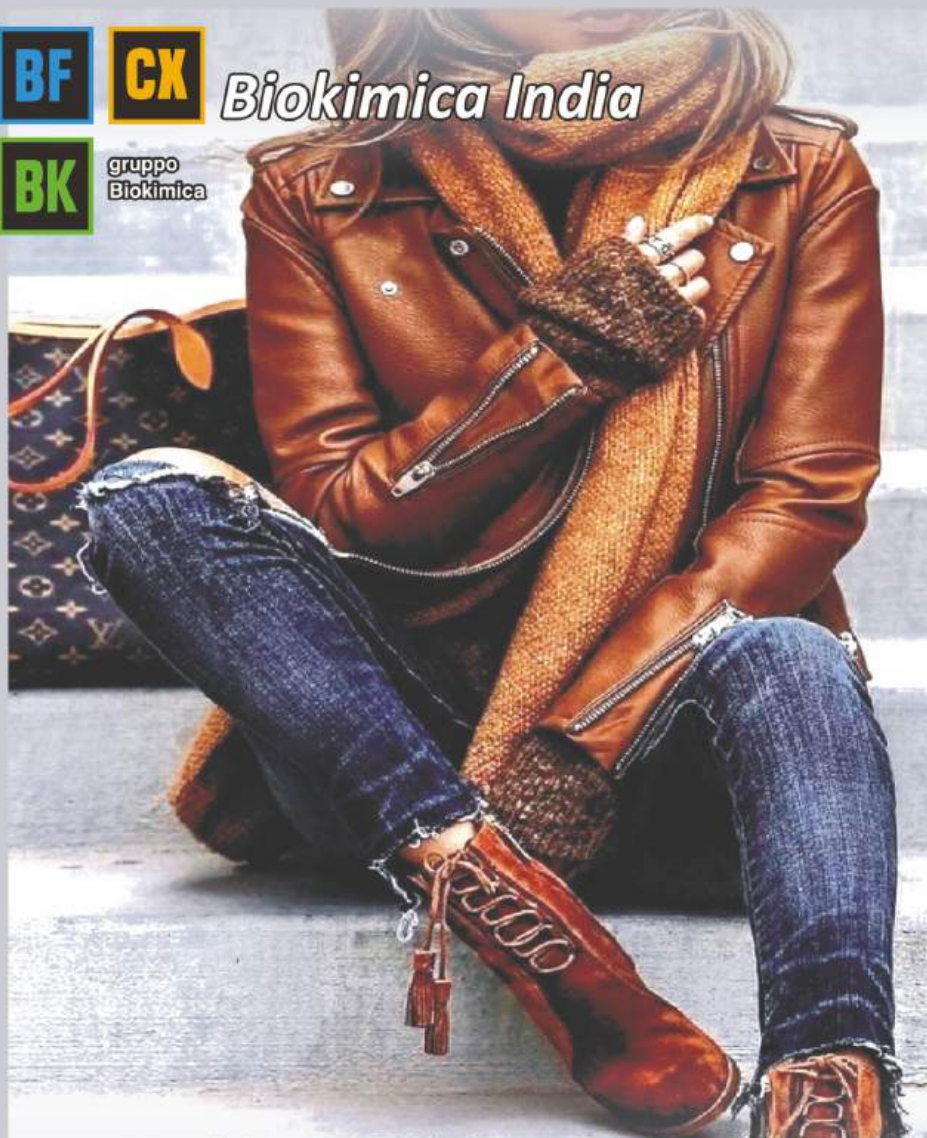
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s please contact:

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

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

Website: www.indianleathermagazine.com

Email: indianleather@yahoo.com

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Telangana government to set up CFC in Gachibowli, tanneries in Karimnagar to bolster leather industry

CFC to extend support in design, product development and branding, the tanneries in Choppadandi Mandal of Karimnagar will be eco-friendly and generate 1,000 jobs, says Minister Sridhar Babu after a review meet with TGLIPC officials

Telangana government will establish a Common Facility Centre (CFC) in Hyderabad's Gachibowli and eco-friendly tanneries in Karimnagar district to strengthen the State's leather industry and promote entrepreneurship among Scheduled Caste (SC) youth, Industries and IT Minister D. Sridhar Babu said on Saturday. 24th October 2026.

The centre will be developed on 3.5 acres in Gachibowli under a hub-and-spoke model and will provide artisans with support in design, product development and branding to help improve the value and marketability of their products, the Minister said after chairing a review meeting with Telangana Leather Industries Promotion Corporation (TGLIPC) officials.

The government was taking steps to establish eco-friendly tanneries conforming to international standards at Rukmapur in Choppadandi mandal of Karimnagar district. The proposed facilities are expected to generate employment for around 1,000 people, he said

Flatted factory complexes

Steps were being taken to establish flatted factory complexes under the Micro and Small Enterprises Cluster Development Programme (MSE-CDP), on the plug-and-play model, at Jammikunta in Huzurabad constituency and Armour, Mr. Sridhar Babu said.

He directed officials to conduct field inspections and submit a report on the lands previously allotted to LIDCAP and their present status, the Minister's office said in a release on the meeting.

Industries Department Special Secretary Krishna Aditya, Director Nikhil Chakravarthy, TGLIPC Vice-Chairman and Managing Director Prashanth Kumar and Telangana State Leather Industrial Promotion Cooperative Society president Arepalli Rajender attended the meeting. (Source : The Hindu)



CLE Highlights India–Vietnam Footwear Cooperation at Vietnam Footwear Summit

Manufacturing partnerships, investment opportunities and India's artisan heritage take centre stage in Ho Chi Minh City

Mr. Ramesh Juneja, Chairman, Council for Leather Exports (CLE) and Mr. Mukhtarul Amin, Vice Chairman, CLE, participated in the Vietnam Footwear Summit, held from 16th to 18th September 2026 at Mai House Saigon Hotel, Ho Chi Minh City, Vietnam. Representing CLE, they highlighted India's growing manufacturing capabilities and the opportunities for investment and closer cooperation between the Indian and Vietnamese footwear industries.



Mr. Ramesh Juneja, Chairman, Council for Leather Exports (left) and Mr. Mukhtarul Amin, Vice Chairman, CLE (right) making presentation

Addressing the Summit on behalf of CLE on 17th September 2026, Mr. Mukhtarul Amin presented the growth prospects and capabilities of India's footwear and leather industry and outlined opportunities for Vietnamese companies to explore investment, joint ventures and technical collaboration in India. The presentation emphasised the opportunities arising from India's large domestic market and the complementary strengths of the two countries.

India's Market Scale and Export Potential

CLE highlighted India's position as the world's second-largest producer and consumer of footwear and the fifth-largest exporter by volume. According to the industry figures presented at the Summit, in 2024, India produced 3,000 million pairs, consumed 2,858 million pairs and exported 266 million pairs. Vietnam's position as the world's second-largest footwear exporter by volume provided a strong context for exploring cooperation between two major Asian footwear manufacturing countries.

The presentation highlighted the growth in India's footwear exports, with leather footwear exports increasing from US\$1,486 million in 2020–21 to US\$1,947 million in 2025–26, while non-leather footwear exports rose from US\$194 million to US\$262 million during the same period. CLE also drew attention to the significant potential for expanding India's participation in non-leather footwear, particularly athletic and athleisure products, as well as footwear for women and children.

The industry's Vision 2030 envisages a combined footwear and leather sector turnover of US\$50 billion by 2029–30, comprising US\$36 billion in domestic business and US\$14 billion in exports. Within this vision, footwear accounts for a projected US\$27.5 billion domestic market and US\$7.6 billion in exports. Rising disposable incomes, changing fashion preferences and the expansion of e-commerce were identified as important drivers of future demand.

Opportunities for Manufacturing and Technical Cooperation

CLE presented a partnership agenda covering footwear manufacturing and the development of a stronger supply base for inputs and components in India. Opportunities identified included joint ventures in leather and non-leather footwear, along with investment in soles, uppers, moulds, adhesives, accessories and machinery. Establishing these capabilities in India would support domestic manufacturers while also creating opportunities to serve international markets.

The Council also highlighted opportunities for technical cooperation in product engineering, design development and workforce training. Technology partnerships could extend to automation, robotics, artificial intelligence and digital product development, alongside solutions aimed at improving resource efficiency and manufacturing productivity.

These areas offer considerable scope to combine Vietnam's experience and integration with global footwear supply chains with India's market scale, skilled workforce and expanding production capabilities.



Investment Support and International Market Access

The presentation showcased India's institutional ecosystem supporting the footwear and leather sector. The roles of the Central Leather Research Institute (CLRI), Footwear Design and Development Institute (FDDI), Central Footwear Training Institutes (CFTI's), National Institute of Fashion Technology (NIFT) and Leather Sector Skill Council (LSSC) were highlighted in relation to research, design education, technology and workforce development.

CLE also highlighted the support available for manufacturing and exports, including technology upgradation, trade facilitation and infrastructure development. Overseas investment projects cited during the presentation illustrated the growing interest of international manufacturers in establishing footwear and allied production capabilities in India.

India's expanding international market access was another important part of the presentation. The country's trade agreements and economic partnerships were highlighted in the context of opportunities across Asia, the Middle East, Europe and Oceania, including engagement with the United Kingdom, EFTA and the European Union. The central message was that manufacturing partnerships in India can serve its large domestic market while also supporting wider export opportunities.

Taking Indian Artisan Skills to Global Markets



A distinctive feature of the presentation was the emphasis placed on India's rich traditional craftsmanship and the potential to connect the country's artisan clusters with global fashion and luxury markets.

The Kolhapuri chappal and its connection with Prada's Made in India sandal project was highlighted as an example of how traditional Indian footwear craftsmanship can attract recognition in international luxury markets. The example demonstrated the potential for collaborations that bring together India's traditional skills with contemporary design, global branding and international retail access.

The presentation also showcased Rajasthan's mojari, Gujarat's Bharwadi Desi Joda, Shantiniketan leather bags from West Bengal and the leather toys of Indore in Madhya Pradesh. These products demonstrated the diversity of India's handcrafted offerings and the opportunities to connect regional craft traditions and artisan communities with overseas buyers and international markets.

Invitation to BFLEX in New Delhi



Mr. Ramesh Juneja, Chairman, CLE, and Mr. Mukhtarul Amin, Vice Chairman, CLE, extended an invitation to the international footwear

industry to visit India for the Bharat Footwear and Leather Expo (BFLEX), scheduled for 15th–16th March 2027 at Bharat Mandapam, New Delhi.

Organised by CLE, the sourcing fair will bring together footwear, non-leather footwear, leather goods, leather and components, providing international buyers and industry representatives an opportunity to explore India's manufacturing and sourcing capabilities under one roof.

The invitation positioned BFLEX as an important platform for taking business discussions forward through sourcing partnerships, investment, joint ventures and technical collaboration.

CLE's participation in the Vietnam Footwear Summit reinforced the potential for closer India – Vietnam cooperation across the footwear value chain, bringing together the strengths of two important Asian footwear manufacturing countries and opening new avenues for investment, technology partnerships, sourcing and global market development.



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85th CSIR Foundation Day Celebrated at CSIR-CLRI Launches Centre of Excellence Design Studio for Footwear Sector



The CSIR-Central Leather Research Institute (CSIR-CLRI), Chennai, celebrated the 85th Foundation Day of the Council of Scientific and Industrial Research (CSIR) on October 9, 2026. The occasion marked the inauguration of the Centre of Excellence – Design Studio for the Footwear and Leather Sector at the institute's Shoe and Product Design and Development Centre (SPDDC).



Gracing the event as Chief Guest, Shri Amardeep Singh Bhatia, Secretary, Department for Promotion of Industry and Internal Trade (DPIIT), underscored the imperative of material innovation, indigenous design expertise, and global branding to enhance India's leather export competitiveness under Viksit Bharat @2047.

He recommended structured international exposure for designers and urged that the Design Studio be accessible to MSME units. Dr. N. Kalaiselvi, Director General, CSIR, commended CLRI's contributions to waste management, Zero Liquid Discharge (ZLD) systems, vegan materials, and musical instrument leather.



The event featured the release of the CSIR-CLRI Annual Report 2024–2025, the Shoe Factory Handbook, and the updated CSIR-CLRI Technology Compendium 2026.

Technology transfer agreements for musical instrument leather processing were exchanged with folklore organizations, marking a meaningful step in bringing science to traditional craftspeople.



Guests of Honour Padma Shri Dr. M. Rafeeqe Ahmed, President, AISHTMA, and Shri M. Abdul Wahab, Regional Chairman (South), Council for Leather Exports, also addressed the gathering.

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6. Synthetic Tanning Agents - Dr. Samir Dasgupta

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"If there is a will, there is the way."

AILPA Fair - Kolkata 2026

ILPA (Indian Leather Products Association) Kolkata have reshaped and redefined their exhibition standards and created a fresh look leather products exhibition under the label of AILPA.

This is the second edition and the fair have taken a big leap in just two years.

The whole ambience and environment proves it be of International standards and it is a great sight to watch and be a part of the process.

This AILPA (All India Leather Products & Accessories) Fair starts from 28th October until 30th October.

The venue is at Biswa Bangla Exhibition Centre, Kolkata.

Awaiting to witness the game changing exhibition of Leather Products from INDIA.

There is a customer Interaction session organised on the 28th for direct interaction of the exporters and the prospective buyers over a drink & dinner in the evening. On the 29th, there is the "Leather on the Ramp" Fashion show hosted by ILPA with participation and sponsors by the exporters from Kolkata.

Environment & our Industry

Environmental Norms is getting tighter day by day and it is good for the Industry, Society and the Country. This emphasised the need for Education & Knowledge as a main stream for the future students in order to stay ahead in Environmental Requirements of our Leather & Leather Products Industry.

A good team of young boys and girls with thorough knowledge on the activities of the tannery, generation of effluents and treatment of the same.

These set of young people could be employed at various locations of tanneries in India and they could really be a big support for the environmental clearances.

Tanneries in Kolkata lost their LWG status and many tanneries down South are also in the same situation and many have lost their credentials and have got degraded on their grading from Gold to Silver and up to Just Audited level and this will be a big challenge for the tanneries to export leather and for the product factories to source from these tanneries for their products and accessories exports.

It is important that we as a family from the Leather Fraternity take it as our first priority.

Air India flights get a leather make up.

Many talk about business being and the demand for Leather is going down, which spreads the negativity all around.

Instead, when we start looking around, there are enormous opportunities which exist.

The above topic is the proof. Ranvik Exports from Gurgaon have launched a Brand "Three Sixty" and serving the leather lovers towards a "leather life" for more than a decade.

Their success story is worth writing a book as that book will be an inspiration for aspiring youngsters.

Let me talk about some of the finer points which will itself be a great morale booster.

Mr. Vikash Gupta and his team have weathered all the worst times together to see the best times and still pushing to make it better and best.

Three Sixty have been a sponsor in many of the sporting events and in particular Golf competition and have been distributing prizes which is all made of Leather and really a gift which is a invaluable possession.

Another feather in the cap is the unveiling of a special leather bar made to commemorate the Indian Cricket Team First World Cup Win of One Day International in 1983.

Our Great Kapil Dev did the honors by releasing the limited World Cup Edition.

Moving on, Three Sixty recently did the complete make up all the Air India Flights Cabinets and with all Leather and Suede interiors making to truly a special experience.

I have mentioned the above information to show and prove that opportunity do exist and let us look at upgrading our Indian Railways premium Trains with such Leather Upholstery. I have written in detail in one of my earlier article and will bring it up again.

Let Leather Win, we all shall win. Jai Hind!



UITIC looks to the future of the footwear industry: the 23rd International Congress to be held in Jakarta

“Engineering the Future of the Footwear Industry” is the title of the 2027 edition, scheduled from 2 to 4 August. Advanced technologies, sustainable manufacturing and resilience will be at the heart of the Congress.

The 23rd UITIC International Congress will take place in Jakarta, Indonesia, from 2 to 4 August 2027, in collaboration with KRISTA Exhibitions and APRISINDO. The Indonesian capital, one of the country's main economic hubs, will host three days dedicated to discussion and exchange on the technological and manufacturing evolution of the international footwear industry.

The title chosen for the 2027 edition is **“Engineering the Future of the Footwear Industry”**, reflecting the Congress's aim to explore the transformations reshaping design, manufacturing and business models across the footwear sector.

The overarching theme will be **“Advanced Technologies, Sustainable Manufacturing and Resilience in a Changing Global Landscape”**, with a particular focus on the growing adoption of new technologies in design and manufacturing processes, from **Artificial Intelligence** and intelligent product design to **Physical AI** in the factory. The programme will also address the role of sustainability as a potential competitive asset, as well as the need for companies to develop greater resilience and agility in an increasingly complex and unpredictable global environment.

Three days of industry, technology and international exchange

The programme will unfold over three days, each with a different format. 2 August will focus on industry and **factory visits to footwear companies in the Jakarta area**, giving participants the opportunity to gain first-hand insight into the Indonesian footwear ecosystem.

3 August will be dedicated to the indoor conference, featuring **keynote speeches, technical sessions and expert panels**, together with opportunities for professional exchange and networking.

The final day, 4 August, will take place in conjunction with **ILF – Indo Leather & Footwear Expo and IGT – Indo Garment & Textile Expo**, with participation in the fairs' opening ceremony, a joint panel programme and an exhibition tour with Congress delegates.

The **Innovation Showcase** will also return in 2027, following the format introduced in 2023, creating additional space for new content and contributions within the Congress programme.

The programme will also include UITIC's traditional networking moments: a **welcome cocktail** on the evening of 2 August and the **Gala Dinner** on 3 August, offering further opportunities for delegates, technicians and industry professionals from around the world to connect.

With a history spanning more than **50 years**, UITIC continues its international dialogue on the evolution of the footwear industry, placing technology, innovation, sustainability and the ability to anticipate change at the centre of the 2027 Congress.

Further information and programme updates will be available on the UITIC website. www.uitic.org

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New TFL Colour Trends Spring-Summer 2028

TFL has released its new catalogue for Spring Summer 2028, presenting the latest colour trends for leather garments, footwear, accessories and for the upholstery industry.

The trends are divided into "Wearing" and "Living".



"Wearing" comprises inspirations and colour trends for garments, footwear and accessories.

Here leather embraces a vibrant palette of brilliant yellows and greens, floral and coral hues, and warm shades inspired by sunsets and terracotta. These expressive colours bring fresh energy to garments, footwear and accessories. Splits, soft nubuck, lightweight lambskin and calfskin meet natural vegetable-tanned leather, combining tactile appeal with performance and versatility.

"Living" features all colours that will decorate the season's interior designs.

In this section, butter tones and warm neutrals create a soft, reassuring atmosphere, enriched by emerald blues inspired by the ocean depths. The palette brings warmth, elegance and a sense of immersive calm to contemporary interiors. Brushed calfskin, full grain cowhide, tumbled nubuck and soft nappa interact with travertine, light woods and metallic surfaces to create refined, welcoming spaces.

TFL Colour Trends Spring Summer 2028 invite designers to explore a season in which colour, tactility and technical performance come together, balancing authentic materials with contemporary lifestyles and a renewed desire for comfort, versatility and self-expression.

We wish our customers an inspiring read of the TFL Trend Catalogue and a valuable source of ideas for their future colour decisions.

For more details, please visit www.tfl.com.

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Co-Chair: Dr. S.
Rajamani, Vice
President, ILTA &
Technical Chair, 13th
AICLST *(in the
absence of Mr. Md.
Azhar, Chairman,
ILPA, due to prior commitments)*



**Right: Mr. N. R. Jagannathan
Left: Dr. S. Rajamani
Chair and Co-Chair of Technical session-VII**

The final technical session of the 13th Asian International Conference on Leather Science and Technology (AICLST 2026) was held on the theme “**Marketing Policy & Strategy (TM)**”. The session was chaired by **Mr. N. R. Jagannathan, President, ILTA Southern Region**, and co-chaired by **Dr. S. Rajamani, Vice President, ILTA and Technical Chair of the 13th AICLST**.

Prior to the commencement of the session, both dignitaries were welcomed to the dais and presented with mementoes by **Dr. Buddhadeb Chattopadhyay, Former Principal, Government**

**College of Engineering & Leather Technology (GCELT), Kolkata,
and Member, AICLST Scientific Committee.**

The session focused on the strategic dimensions of marketing and branding within the leather sector, addressing topics such as marketing environment analysis, product innovation and development, market research and consumer understanding, digital content marketing, sustainability-driven branding, and policy advocacy for country-specific marketing initiatives.

In his opening address, **Mr. N. R. Jagannathan** warmly welcomed the distinguished guests, industry leaders, delegates, researchers, and participants to the session. He emphasized



Keynote Address by Mr. G. M. Kapur

that while the conference had extensively deliberated on leather science, technology, processing methodologies, and sustainability, the ultimate success of all such efforts depends on the ability of the industry to effectively connect with the end consumer.

He observed that regardless of technological advancement or manufacturing excellence, the true value of any product is realized only when it successfully reaches the market and creates value for consumers. Therefore, marketing strategy occupies a central position in determining the future growth and competitiveness of the leather sector.

Reflecting on the historical evolution of the Indian leather industry, Mr. Jagannathan noted that India has long served as a crucial component of the global leather supply chain. The country has

consistently delivered world-class craftsmanship, manufacturing expertise, and large-scale production capabilities. However, despite these strengths, India has often remained invisible to the final consumer, while brand ownership, design leadership, and market intelligence largely remained concentrated in overseas markets.

He remarked that for many decades, Indian manufacturers contributed significantly to global brands but received only a limited share of the overall value generated across the supply chain. According to him, this situation must change, and the time has arrived for India - as well as other Asian nations-to move beyond the role of suppliers and contract manufacturers and emerge as brand creators, market leaders, and market makers.

Mr. Jagannathan stressed that the industry must invest significantly in consumer research, market intelligence, design development, and brand building. He advocated for the creation of globally recognized brands that proudly reflect the identity, craftsmanship, and heritage of India and Asia.



Paper presentation by Mr. Chandan Panda

He further observed that marketing today extends far beyond conventional advertising. Modern marketing encompasses strategic planning, policy advocacy, innovation management, sustainability communication, storytelling, customer engagement, and long-term brand development. Success in contemporary markets depends upon the ability to effectively communicate authenticity, sustainability, transparency, and value to increasingly conscious consumers.

Highlighting successful examples from within the industry, he referred to leading brands such as **Bata, Liberty, Mochi, Mirza, Superhouse, Tata, and iDesign**, which have demonstrated that strong market presence, consumer trust, and brand loyalty can be successfully developed. These organizations have established significant recognition in domestic markets and provide valuable models for future global expansion.

Mr. Jagannathan emphasized that today's global consumers are increasingly concerned about sustainability, ethical sourcing, traceability, environmental responsibility, and product authenticity. Consumers are often willing to pay premium prices for products that align with their values and provide transparency regarding their origin and manufacturing processes.



Paper presentation by Mr. Sudipta Banerjee

He noted that India possesses unique strengths in this regard. The country's leather craftsmanship is rooted in centuries-old traditions, its artisans possess highly specialized skills, and its tanning heritage represents a valuable cultural and industrial asset. These strengths, he remarked, should not merely be viewed as production capabilities but as powerful brand assets capable of generating significant global market value.

He further stressed that the challenge lies in translating these assets into strong global brand equity through effective marketing strategies. Key questions that the industry must address include how Indian leather products should be positioned internationally, how

awareness of Indian leather can be enhanced globally, and how evolving consumer expectations regarding lifestyle, aesthetics, sustainability, ethics, and quality can be effectively understood and addressed.

He concluded by encouraging delegates to actively engage with the presentations, challenge assumptions, ask critical questions, and consider how their own organizations, factories, brands, and partnerships can contribute towards building a stronger and more globally recognized leather industry.

The session featured the following presentations:

1. **Keynote Address by Mr. G. M. Kapur** – *Marketing Policy and Strategy for Leather 2050: Challenges and Opportunities*
2. **Mr. Chandan Panda** – *Leather Aesthetics of Bengal: Bridging Indigenous Craft with Contemporary Style*
3. **Mr. Sudipta Banerjee** – *India's Smart Leather Future: Building Lean, Agile, Resilient and Responsible Value Chains through Industry 4.0–5.0 Transitions*
4. **Mr. Soumak Banerjee** – *Consumers' Willingness to Pay for Sustainable Leather: A Quantitative Analysis of Eco-Attributes, Traceability, and Ethical Orientation*

The keynote address delivered by **Mr. G. M. Kapur** on “**Marketing Policy and Strategy for Leather 2050: Challenges and Opportunities**” provided a forward-looking perspective on the future of the leather sector. The presentation examined long-term market trends, evolving consumer expectations, sustainability-driven purchasing behaviour, digital transformation, and the strategic initiatives required to position leather as a preferred material in future global markets.

The subsequent presentations addressed a broad spectrum of issues ranging from innovation-driven growth strategies and circular economy models to regional design identity, sustainability, Industry 4.0–5.0 transitions, and consumer behaviour analysis. Together, these presentations provided a comprehensive overview of the strategic, technological, and marketing interventions necessary for strengthening the global competitiveness of the leather sector.

Particular attention was given to the growing importance of sustainability, traceability, consumer awareness, responsible value chains, and circular economy principles.

The discussions highlighted that future success in the leather industry will depend not only on technological excellence but also on the ability to effectively communicate value, authenticity, responsibility, and innovation to consumers worldwide.



The session served as a fitting conclusion to the technical deliberations of AICLST 2026 by emphasizing that scientific innovation, technological advancement, sustainability, and marketing strategy must work together to ensure the long-term growth and global relevance of the leather industry.

Following the technical presentations, **Mr. G. M. Kapur** was presented with a **Memento and Citation** in recognition of his keynote address and valuable contribution to the conference. All other paper presenters were also presented with **Citations** by **Mr. N. R. Jagannathan** and **Dr. S. Rajamani** in appreciation of their scientific and professional contributions to the session.

Thereafter, both the Chair and Co-Chair were felicitated with **plants and citations** by **Dr. Buddhadeb Chattopadhyay** as a token of appreciation for their guidance, leadership, and successful conduct of the session.

It was also noted that a total of **38 poster presentations** were



The Chair and Co-Chair were felicitated with **plants and citations** by **Dr. Buddhadeb Chattopadhyay**

exhibited across the various technical themes of the conference. The poster presentations attracted considerable interest from delegates and provided an excellent platform for one-to-one scientific interaction, discussion, and exchange of ideas. **Certificates were presented to all**

poster presenters in recognition of their valuable contributions to the scientific programme of AICLST 2026.

Valedictory Session

The **Valedictory Session** marked the formal conclusion of the **13th Asian International Conference on Leather Science and Technology (AICLST 2026)**.

The session was chaired by a distinguished panel comprising **Dr. Buddhadeb Chattopadhyay, Member, AICLST Scientific Committee and Former Principal, GCELT, Kolkata; Dr. J. Raghava Rao, Member, AICLST Scientific Committee and Vice President, ILTA Southern Region; Dr. B. Chandrasekaran, Former Director, CSIR-Central Leather Research Institute (CLRI), Chennai; Mr. N. R. Jagannathan, President, ILTA Southern Region; and Mr. Asit Baran Kanungo, Vice President,**



ILTA and Coordinator, AICLST Working Committee.

The session provided an opportunity to reflect upon the successful completion of three days of intensive scientific deliberations, knowledge sharing, networking, and collaboration among researchers, academicians, industry leaders, technologists, and students from different parts of the world. During their addresses, the dignitaries highlighted the significance of the conference in advancing leather science and technology and appreciated the high quality of research papers, technical discussions, keynote lectures, poster presentations, and industry interactions that had taken place throughout the event. They noted that the conference had successfully addressed several contemporary issues confronting the leather sector, including sustainability, carbon footprint reduction, circular economy approaches, Artificial Intelligence, innovative process technologies, footwear development, and strategic marketing initiatives.

The speakers also acknowledged the active participation and valuable contributions of delegates, researchers, industry professionals, sponsors, exhibitors, and supporting organizations, all

of whom played an important role in making the conference a grand success. The deliberations conducted during the conference were recognized as meaningful contributions towards shaping the future direction of the global leather and footwear industry.



As a special gesture of appreciation, the dignitaries jointly felicitated **Dr. Piku Sen**, Oral Paper Presenter and **Master of Ceremony** of the conference, with a **Memento and Plant** in recognition of her valuable contribution towards the successful conduct of the scientific sessions and overall coordination of the conference proceedings.

The valedictory session concluded with an address by **Mr. Asit Baran Kanungo**, Vice President, ILTA and Coordinator, AICLST Working Committee. On behalf of the **Indian Leather Technologists' Association (ILTA)**, he expressed sincere gratitude to all stakeholders who contributed to the success of the conference. He conveyed his heartfelt appreciation to the **Sponsors, Advertisers, Delegates, Speakers, Poster Presenters, Session Chairs, Scientific**

Committee Members, Organizing Committee Members, Supporting Organizations, and Volunteers for their enthusiastic participation, cooperation, and unwavering support throughout the event.

Mr. Kanungo also acknowledged the efforts of the conference secretariat and organizing team for their dedication and meticulous planning, which ensured the smooth execution of all technical, scientific, cultural, and networking activities associated with the conference. With the completion of the valedictory proceedings, the **third day as well as the 13th AICLST 2026 officially came to a close**. Delegates and participants then assembled in the dining hall for **high tea**, providing one final opportunity for interaction, networking, and exchange of ideas before departure.

Based on the feedback received from delegates, speakers, sponsors, exhibitors, and participants, the conference was widely regarded as a resounding success. The event successfully fulfilled its objectives of promoting scientific excellence, fostering international collaboration, encouraging innovation, and facilitating meaningful discussions on the future of the leather and footwear sector. The positive response from participants reaffirmed the relevance and importance of AICLST as one of the premier international platforms for advancing leather science, technology, sustainability, and industry development.

Thus, the **13th Asian International Conference on Leather Science and Technology (AICLST 2026)** concluded on a highly successful note, leaving participants with valuable insights, new collaborations, and a shared commitment towards building a more innovative, sustainable, and globally competitive leather industry.

[Acknowledgement of Organizing Structure and Committees](#)

The Organizing Committee of the **13th Asian International Conference on Leather Science and Technology (AICLST 2026)** records its sincere appreciation to all office bearers, committee members, reviewers, coordinators, volunteers, sponsors, speakers, delegates, and supporting organizations whose collective efforts contributed to the successful organization of the conference.

Vote of Appreciation

The Organizing Committee expresses its heartfelt gratitude to all committee members, coordinators, volunteers, sponsors, advertisers, speakers, poster presenters, delegates, supporting institutions, and industry partners for their invaluable



Dr. Piku Sen

contributions. Their dedication, professionalism, and teamwork were instrumental in making the **13th AICLST 2026** a highly successful international conference and a significant platform for advancing leather science, technology, sustainability, and global collaboration.

Special Recognition

Oral Paper Presenter & Master of Ceremony

The Organizing Committee extends its special appreciation to **Dr. Piku Sen** for her outstanding contribution as the **Master of Ceremony** throughout the conference.

Dr. Sen successfully anchored and conducted the proceedings of all three days of the conference with remarkable professionalism, confidence, and efficiency. Her ability to coordinate the various technical sessions, plenary lectures, inaugural and valedictory programmes ensured smooth transitions between events and significantly contributed to the overall success of the conference.

In addition to her role as an Oral Paper Presenter, Dr. Sen provided valuable coordination support to the Organizing Committee and played an instrumental role in maintaining the schedule and flow of

the conference proceedings. In recognition of her dedicated service and contribution, Dr. Piku Sen was felicitated during the Valedictory Session.

Concluding Remarks

The **13th AICLST 2026** successfully fulfilled its objective of creating a premier platform for scientific exchange, technological innovation, sustainability dialogue, and international collaboration within the leather and footwear sector. The conference demonstrated that the future of the industry lies in the integration of science, sustainability, digital technologies, responsible manufacturing, and strategic market development.

The outcomes and recommendations emerging from the conference provide a valuable roadmap for researchers, industry stakeholders, policymakers, and institutions committed to building a more innovative, sustainable, resilient, and globally competitive leather industry.

(We thank ILTA for their kind permission to publish this comprehensive report on the proceedings of the 13th AICLST 2026, prepared by Shri Susanta Mallick, General Secretary, ILTA) - Editor



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Back to School Column

Dr N K Chandra Babu

babunkc@yahoo.com

SYSTEM DEVELOPMENT IN TANNERIES

(Contd. from September issue)

Despatch Consistency Records

- For every lot / batch of finished leather despatched a reference sample of a4 size has to be retained with all the relevant details recorded for future reference
- For bulk orders of one article in one colour , a4 swatches from each lot with suitable numbering of the lots, have to be maintained in one folder to facilitate the verification of consistency of the article especially with regard to the colour and shine levels
- Periodic joint review of these consistency records will highlight any variations or drifts which have not been noticed earlier and help the team to focus on correcting the variations.
- This is a very important requirement and the finished leather warehouse must be entrusted with the responsibility of compiling and maintaining these records.
- It will be very helpful for the chief executive to check these despatch reference swatches on a daily basis , and play the role of the customer and detect variations and drifts from the target sample and initiate corrective actions immediately

Quality of Machine Operations

- Machine operations play a major role in the quality assurance of the leathers produced. "Operating instructions" for each machine operation must be explained to the

machine operators in detail and documented in "Amharic" for reference by the machine operators.

- The operating instructions must be displayed near the location of the machine in a visible form - either on a board or in the form of instruction sheet.
- A model operating instructions is presented here for reference

Buffing, Snuffing Section

1. Ensure that the safety guards are in place
2. Check the job / route card for process instruction / specifications of the buffing / snuffing work to be carried out
3. Check the flatness of the skins and proper trimming of the edges to avoid during buffing
4. Check the moisture content of the skins
5. Check the alignment of the buffing roller and the feed roller
6. Check the grit of the buffing paper
7. Check the correct fitting of the buffing paper
8. Buff 3 or 4 skins first, check the correctness of the buffing level
9. Show the skins to the supervisor, get his / her approval confirmed.
10. Check the dust extractor efficiency
11. Start the buffing / snuffing work

The tannery must ensure that similar operating instructions are prepared for each machine type and displayed visibly near the respective locations of machines.

Q. A. System Implementation

- The tannery must implement the quality assurance system explicitly by recording the details of the achieved parameters against the required Q.A. parameters in the Q.A. Check list for each and every lot processed.
- The production team members must meet once a week to discuss in detail about the Q.A. check lists for the lots processed during the last week and initiate the necessary actions to improve the conformance to the quality assurance norms agreed upon.
- The quality assurance system must be internalized by the team members.
- The implementation of the quality assurance system will result in the reduction of (1) rejections (2) delays in production (3) complaints from customers (4) process cycle time (5) cost of production
- The implementation of the quality assurance system will result in the increase of (1) profitability and profits (2) productivity (3) efficiency.

Testing Equipment

- It is important that the tannery makes the investment to install the basic, inexpensive testing equipments to facilitate the effective implementation of “quality assurance parameters-checks”
- Equipments to test (1) rub-fastness (2) flexing endurance (3) grain bursting strength (4) pH (5) boil test (6) shrinkage temperature have to be installed ASAP.
- For the other tests requiring the use of expensive, special test equipments like -tensile strength testing equipment, xeno -test equipment, finish adhesion testing equipment, the testing

facilities at “Accredited Labs/reputed Institutions.” to be used on a “pay-for-use” basis.

- Simple “quick-check” test procedures have been suggested for use till the testing equipments are installed in the tannery. These simple checks/tests can be carried out by the technical personnel at the shop floor to carry out the in-process quality assurance checks without delaying the progress of the work.

Customer Relationship

The customer is the most important person in our premises. He is doing us a favour by giving us the opportunity to serve him - MAHATMA GANDHI

A customer is never lost; Someone else has found him - ANON

The Customer is The One Who Pays Our Bills - ANON



Customer Relationship

- In the highly competitive international leather and leather products trade, quality is the only basis on which success is possible.

- Quality products, quality information, quality communication and quality service are the requirements for an organization to gain customers and retain by fulfilling their demand for quality products and services and to build a profitable long term relationship.
- The marketing and sales specialists of the organization initiate the relationship with the customer.
- The challenging mandate for the organization is to build on the initiative of the marketing department and grow the business by on - time delivery of quality products and services.
- It must fully meet the expectations of the customers and constantly strive to improve the customer satisfaction levels and build an excellent relationship with them by delivering value to them.
- Real time information about the progress of the customer's orders is an important element in the confidence building information support from the tannery .
- Quite a number of customers would appreciate receiving weekly updates from the tannery about the status of their orders in production and the expected delivery dates.
- In case of any unexpected delay the customer should be informed immediately in advance about the delay and the reasons for the delay and the revised delivery date.
- This advance warning about the expected delay enables the customer to reschedule their production and costly production delays are avoided
- If the customer is informed about the delay only in the eleventh hour, they will be forced to suffer delays and consequent losses, leading to the loss of confidence.

- Likewise, if there is a variation in the colour of the leather the tannery should courier a few representative pieces alongwith the approved target sample to illustrate the variation and seek their opinion whether they will accept the lot with colour variation. in many cases they will accept the lot as a special case
- In some cases if the customer perceives the colour variation to be unacceptable they will ask the tannery to make a fresh lot urgently in order to help them to avoid the payment of compensation to their customers on account of gross delay in delivery
- If the tannery does not inform the customer about the problem it will lead to a straining of the relationship with the customer as the customer will refuse to accept the lot with colour variation and will claim for compensation from the tannery for the losses incurred by them on account of the non delivery of their order
- Timely communication to the customer about delays and variations in subjective quality assurance parameters like colour, softness will help to avoid the straining of the relationship with the customer and to retain the confidence of the customer.
- Sometimes the customer may request for advancing the delivery date by a few days in order to meet some unexpected demand
- If the tannery fulfills this special request of the customer it will enhance the relationship with the customer.

Delivery Schedule Management

- The customers for finished leather—shoe, garment, leather goods, gloves, bags - manufacturers are required to deliver their products to their customers in a very short period.

- As finished leathers are the main raw material in put for their production facilities and they cannot afford to hold large inventory of finished leathers the product manufacturers insist on very short supply lead times from the tanneries.
- Many large international brands outsource their product manufacturing to - China, Vietnam, India and East European countries. They select the tanneries after a detailed study about the product quality, service quality and their capabilities and commitment to deliver on time.
- They "specify" the articles and the tanneries selected by them, to their product suppliers overseas and instruct them to place their orders with these tanneries.
- They prefer to place their orders with the tanneries who are able to deliver the products ordered on time consistently within the specified delivery lead time.
- They require the supplier tanneries to deliver the order to reach the destination airports in 3 weeks from the order date.
- This is a very critical requirement as any delay in the delivery of leather from the tanneries "specified" by them are viewed by their outsourcing product manufacturing units who will charge the air freight cost of the shoes, leather goods to their account. this is a substantial cost to them and they claim back the amounts from the tanneries.
- This requirement with regard to the necessity for the tannery to accept the cost of air freight of the shoes from China or Vietnam to U.S.A or U.K or Europe in case of delayed supply of leathers by them is incorporated in the purchase contract.

- The delays may take place either on account of delays in the supply of raw material to the tanneries or due to delays in production.
- The tanneries must cover the purchase of raw materials well in advance for the full order quantity for the season. When the order quantities in some colours are substantial, some tanneries prepare additional quantities of dyed crust and keep them as rolling stock which can be finished and despatched in a very short time.
- The required chemicals must also be made available on time to avoid any production delays due to the non availability of chemicals.
- Some big tanneries from South America, India and Pakistan hold stocks of their standard articles in Hong Kong or China to meet the urgent requirements of the customers.

The customers do not accept any shortage in the quantities delivered and the tannery must issue a reasonable quantity of additional raw material for production to compensate for the area shortages in production and the rejection due to poor selections.

Export Marketing

The marketing of finished leathers for export has evolved into a very specialised knowledge based activity. The export marketing channels may vary depending on the specific markets and customers.

Marketing Channels

1. Direct marketing to the shoe and leather product brands and their supplier factories

2. Marketing through buying agents of the customers
 3. Marketing to the stockists and wholesalers
 4. Marketing through selling agents of the tanneries
- The choice of the marketing channels is also influenced by the nature of the products and the levels of product differentiation.
 - With well differentiated product lines with specific performance characteristics, direct marketing to the brands and their factories becomes predominant.
 - With product lines of minimum product differentiation, marketing through stockists and wholesalers or the selling agents of the tanneries prevail.
 - Nowadays the marketing department has to do more of “marketing” and less of “selling”.
 - “Marketing” is a “customer driven” activity which starts with the identification of the evolving needs of the customers and ends with the “on-time” delivery of their orders for the specific products required by them.
 - “Selling” is an “organisation driven ” activity which focuses on offering the standard products manufactured by the organisation to the customers and taking orders.
 - The marketing department has the responsibility to translate the specific requirements of the customers -relating to the product characteristics, end use articles, performance tests, aesthetic properties, price levels, delivery lead times etc –to the production department.
 - Effectively the marketing department has to play the role of the customer when interfacing with the production department.

- The leather purchase requirements of the leather products manufacturers abroad are driven by the requirements of their design and product development teams.
- The marketing department of the tannery has to develop an interface with the design and product development teams of the customers through their purchase departments.
- The changing requirements of fashions lead to a constant demand for new types of finished leathers with different colours and textures.
- The marketing department must document the specific requirements of the customers with regard to the characteristics and properties and attributes , in a very detailed manner and communicate these requirements to the production department and explain the details clearly.
- It will be necessary for the marketing and production teams of the tannery to meet once a month and exchange information.
- Most of the tanneries worldwide focus on the “Marketing” approach and they bring out their “Season specific” product folders for the (1) spring / summer and (2) autumn / winter seasons and distribute them to their customers and prospective customers during the (1) Asia Pacific leather fair, Hong Kong and (2) Lineapelle, Bologna.
- These new products folders present (1) one large leather swatch for each article – approximately 4”x6”- and 5 or 6 small swatches in different colours with a brief description of the following article specifications / characteristics.

1 – Article Name

2 –Size Range

3 – Thickness Range

4 – Type of Finish

5 – Grain Character

6 – Shine level / Optic

7 – Suitability for End Use Articles

8 – Cutting Coefficients

- These new product folders are very important “marketing tools” as they play the role of the “silent salesperson” in the customer’s article reference library.
- These folders are quite expensive to make but play an effective role in the order generation process.
- These costs have to be factored into the product costing calculations.
- The international customers expect the tanneries , who want to sell their leathers to them or their out-sourcing manufacturers to be very professional in their working and approach.
- They expect their prospective supplier tanneries to be fully aware of the well known international basic requirements with regard to article characteristics based on the end use and the R.S.L. compliance requirements.
- They will expect the customer to ensure that all the shoe lining leathers and specifically the leathers for “sock linings” to have excellent - (1) dry rub fastness (2) wet rub fastness (3) sweat resistance (4) free formaldehyde content below the stipulated requirements etc, without them having to tell the suppliers about their specific requirements.
- They will expect the tanneries to ensure that white leathers supplied by them have a “collodion – free” finish.
- They also expect the supplier to inform them clearly about the limitations with regard to the performance properties of their leathers clearly in writing so that they can make a well informed , qualified decision as to the purchase of the leathers.
- Some big tanneries avail of the services of renowned international fashion and design consultants to make

prototypes of shoes / leather articles in the right colours and the right textures , for presentation to the purchase and design teams of the “brands”.

- By taking this initiative they steal a march over the regular tanneries who focus on selling the basic undifferentiated articles in basic colours and textures in securing orders from the big brands at a good price.
- The tanneries must do their home work properly and present themselves as “pro – active potential suppliers” rather than as “run of the mill suppliers”.
- The tanneries must adapt their approaches to different markets and market segments suitably and present themselves as “potential future suppliers”.

Customer’s Priorities



- The customers assess the product and service quality of the supplier tanneries first and if their requirements with regard to these criteria are fulfilled they proceed further and assess the supply lead times .
- If the supply lead times fall within the accepted limits , then they assess the quantity the tannery can supply.
- The tanneries have to realise these priorities of the customers and take the necessary steps and actions to “win” orders from the identified customers.

New Product Development

- Global trade in leather products is strongly influenced by the changes in fashions and is highly competitive
- The end customers expect new articles every season and the international manufacturers of leather products and articles – shoes, garments, hand bags, wallets, belts, travel goods, gloves in turn demand new types of leathers every season.
- The expectations of the international customers are thus translated into a demand for newer types of leather articles
- Hence it has become necessary for the tanneries to meet this constant demand for new types of leather articles
- The customers may give samples of the finished leathers which they are sourcing from another tannery and ask the tannery to develop counter samples
- The tannery may decide to develop its own range of new types of finished leather articles and offer them to the customers

Developing A New Article to Match the Sample given by the Customer

The new product development / research & development department must study the swatch received from the customer in detail and identify and record the critical requirements and performance parameters to be achieved

- find out / identify the final end use product to be made
- identify suitable raw/ materials /sizes/thickness /grades to be used for the initial samples

- assess all the critical assessment points considered important by the customer
- record the critical assessment points and the assessment parameters in the form of a check list.

Model Check List

Material type	Size	End use
Thickness	Construction of article	Softness/ firmness
Heat resistance	Tensile strength	Tear strength
Grain crack resistance	Flexing endurance	Crocking fastness (flesh side)
Tannage character	Light fastness	Heat resistance
Dry rub fastness	Wet rub fastness	Adhesion of finish
Tape test	Resistance to solvents	Repolishability
Burnishability	Grain to flesh colour match	Weight per sq ft
Washability	Fastness to washing	
Resistance to migration into pvc	Resistance to migration into pu	
Collodion / nitro free finish	Absence of offensive smell	
Resistance to fungus attack	Embossability	Cheese cut edge
Elastic stretch	Touch	Surface feel
Perspiration resistance	Resistance to dry cleaning	Shine level & optic
Retention of shine after wetting & drying cycle		Intensity of colour

(To be continued)

A safe garment starts with a safe factory: tackling chemical exposure in textile production



During textile dyeing, finishing and coating, workers may encounter hazardous substances that can create serious health risks if exposure is not properly controlled.

Testing a finished garment reveals little about the chemicals workers may have been exposed to while making it, bluesign advises. During textile dyeing, finishing and coating, workers may encounter hazardous substances that can create serious health risks if exposure is not properly controlled.

Worker health is an essential part of textile sustainability, yet attention often focuses more heavily on product attributes and environmental impacts such as carbon emissions, water use and waste. Chemical exposure during production can be less visible, even though it may

have consequences for workers' health and wellbeing. bluesign, an SGS company, supports a systems-based approach to chemical management and facility performance. Through the bluesign System, facilities can assess chemical risks alongside worker safety, environmental performance, resource productivity, emergency preparedness and social responsibility.

Drawing on recurring issues identified during facility assessments, bluesign highlights five areas that deserve particular attention: inadequate ventilation and air-quality monitoring; unsafe handling of solvents, adhesives and other chemicals; gaps in hazard assessments and occupational health monitoring; insufficient training; and inappropriate chemical storage, including inadequate labelling, segregation or secondary containment.

Effective management requires more than written procedures. Facilities need to establish whether controls are implemented consistently and are working in practice. The widely used S.T.O.P. hierarchy prioritizes substitution of hazardous substances, followed by technical controls such as enclosed systems and local exhaust ventilation, organizational measures such as procedures and training, and personal protective equipment as a final layer of protection.

Although manufacturers are responsible for providing safe working conditions, brands also need meaningful visibility into occupational health and safety risks across their supply chains. International frameworks, including the UN Guiding Principles on Business and Human Rights and the OECD Guidelines, provide an important reference for identifying and addressing adverse impacts. Legal requirements vary and continue to evolve, but effective risk assessment and remediation remain important elements of responsible supply-chain management.

bluesign solutions

bluesign supports apparel brands and manufacturers with solutions designed to help identify, manage and reduce occupational health risks through comprehensive chemical management and facility performance assessment. By evaluating worker safety alongside environmental performance, resource productivity, emergency preparedness and social responsibility, bluesign helps organizations strengthen responsible manufacturing practices across the textile value chain.

Through initiatives such as the bluesign CMR Solvent Phaseout Program, manufacturers can reduce reliance on higher-risk substances while supporting safer workplaces and more responsible chemical management practices. bluesign also helps organizations gain greater visibility into how chemical risks are managed in practice, supporting worker health, regulatory compliance and supply-chain transparency.

Discover more about bluesign solutions.

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56th FUTURMODA closes with satisfactory results

The 56th edition of Futurmoda - the International Trade Fair for Components, tanning & textiles, machinery and solutions for the footwear and leather goods industry held on 14th & 15th October, 2026 at IFA-Fire Alicante in Elche, Spain, concluded with satisfactory results.

The fair featured 171 exhibitors who presented the latest collections & fashion trends for Autumn/Winter 2027-2028 seasons, which emphasised eco-friendly organic and tech-balanced designs, merging traditional leather and tanning craftsmanship with next generation sustainable materials.

The two-day event recorded the attendance of nearly 4000 visitors who mainly came from Europe, North Africa, the USA and Asian countries. **Álvaro Sánchez Concellón, CEO of the Spanish Footwear Components Companies** highlighted the high level participation of international visitors. He explained that they were interested in seeing the collections of the participating Spanish companies, and concluded that “the data is very positive, and we are satisfied with the results achieved by the companies.”

Over the two days, the Experts Forum addressed design protection and intellectual property, industry competitiveness, and the application of artificial intelligence in business, while the Trend Forum, part of FUTURMODA Green Planet, showcased companies' latest trends. Additionally, on Wednesday afternoon, the **final of the Footwear Design JAM 2026**, organized by 3DSOUL in collaboration with the FICIA Foundation, took place with eight finalists.

Álvaro Sánchez announced that work on the next edition is already underway: “We hope to maintain the same level of participation and even surpass it,” he stated, confident that it will be “a very positive edition,” to be held in March of next year.



BASF India, along with Green Worms and IPUA, Inaugurates a Polyurethane Waste Mechanical Recycling Facility in Keralam

BASF India, in collaboration with Green Worms (Serve Rural) and Indian Polyurethane Association (IPUA), inaugurated a CSR funded polyurethane (PU) waste recycling facility in Manjeri, Malappuram district, Keralam on 13th October 2026, marking a significant milestone in advancing circular economy practices for polyurethane waste in India.

The CSR initiative, led by BASF India, implemented by Green Worms, and supported by IPUA, aims to establish a structured ecosystem for the collection, segregation, recycling, and repurposing of post-industrial polyurethane waste from the footwear industry, addressing a waste stream that has traditionally been challenging to manage.

The project will establish a responsible collection and mechanical recycling network for post-industrial polyurethane waste from the footwear industry, diverting it from landfills and transforming it into useful products such as indoor floor mats for rural schools in Keralam. In its first phase alone, the initiative is expected to benefit around **4,000 school children from underprivileged background** while creating livelihood opportunities for waste collectors and recycling workers.

The inauguration ceremony was attended by representatives from Government, BASF India, the Indian Polyurethane Association, Green Worms and prominent stakeholders from the footwear industry.

Speaking on the occasion, **Alexander Gerding, Managing Director, BASF India Limited and Head, BASF Group companies**, said, *"At BASF, we believe that sustainability creates the greatest value when it delivers benefits for both people and the environment. The inauguration of this polyurethane recycling facility marks an important milestone in advancing the collection, mechanical recycling, and repurposing of footwear polyurethane waste in India. Through our*

collaboration with Green Worms and the Indian Polyurethane Association, waste that would otherwise end up in landfills is transformed into valuable products that support community development. This initiative advances circularity, creates livelihood opportunities, and demonstrates how industry and communities can work together to deliver environmental and social impact.”

Jabir Karat, CEO & co-founder of Green Worms, *“At Green Worms, we believe that waste is not merely a challenge to be managed, but a resource that can create value when the right infrastructure, technology, and partnerships are in place. This polyurethane recycling facility represents an important step towards addressing the growing challenge of industrial polyurethane waste in the footwear sector through a practical, scalable, and circular approach. Our collaboration with BASF India and the Indian Polyurethane Association demonstrates how industry partnerships can turn complex waste streams into valuable secondary resources while creating opportunities for sustainable livelihoods.*

Harneet Kochar, Chairman- Indian Polyurethane Association (IPUA), *said, “This initiative demonstrates how industry collaboration and technical expertise can help create practical and scalable solutions for polyurethane mechanical waste management. By bringing together stakeholders across the value chain, we can contribute to more sustainable manufacturing practices while advancing circular economy principles within the footwear industry.”*

Polyurethane is a versatile material widely used across industries including furniture, bedding, automotive, footwear, appliances, construction, and packaging. As polyurethane consumption grows, effective end-of-life waste management solutions become increasingly important.

The facility is expected to strengthen local waste management systems and demonstrate how collaboration across stakeholders can create scalable solutions for complex waste streams. The project will also promote responsible disposal practices while delivering long-term environmental and community benefits.



Henkel successfully closes acquisition of specialty coatings company Stahl

Adhesive Technologies expanding portfolio into attractive specialty coatings business

Henkel has successfully completed the acquisition of the Netherlands-based Stahl Group ("Stahl"), a global player in high-performance specialty coatings for flexible materials. Following the fulfillment of all closing conditions, including the required regulatory approvals, the company is now fully part of Henkel as of 1st October, 2026.

Stahl serves leading brands across mobility, fashion & lifestyle, luxury and packaging markets around the world. The portfolio comprises leather finishing solutions, performance coatings and packaging coatings for unique performance attributes and superior consumer experience.

"The successful closing of the Stahl acquisition marks another important milestone in executing our purposeful growth agenda and in strengthening Henkel's Adhesive Technologies business. By entering into the highly attractive adjacent category of specialty coatings, we are unlocking new growth opportunities and broadening our technology portfolio with product offerings in core as well as in new end markets. Together with ATP Adhesive Systems and Wetherby Laroc, we have successfully closed three transactions in our Adhesive Technologies business unit this year – adding around one billion euros in combined sales and laying the foundation to further drive profitable growth," said Henkel CEO Carsten Knobel.

By combining Stahl's leading specialty coatings capabilities with Henkel's global adhesives expertise, we are creating a more comprehensive solutions platform that will help customers innovate faster and advance their sustainability ambitions. We are very excited to welcome our new colleagues to our Adhesive Technologies team to jointly drive further business opportunities," said Mark Dorn, Executive Vice President and responsible for Henkel's Adhesive Technologies business unit.

ITALIAN FOOTWEAR INDUSTRY

FOOTWEAR SECTOR: EXPORTS DOWN 2.4% IN THE FIRST PART OF THE YEAR, BUT TRADE SURPLUS RISES TO €2.16 BILLION (+9.6%)

Domestic consumption returns to growth (+2%), while Europe confirms its position as the main market for Made in Italy footwear

According to figures compiled by the Centro Studi Confindustria Accessori Moda for Assocalzaturifici, Italian footwear exports totalled €4.77 billion in the first five months of 2026, down 2.4% in value and 5.8% in volume compared with the same period last year.

The global scenario remains marked by significant instability, while the Italian footwear industry continues to demonstrate its ability to adapt and maintain a strong presence in international markets.

The first half of the year closed with turnover down 2.3%, while exports fell by 2.4% in the first five months. At the same time, the sector's trade surplus increased by 9.6%. *"The Italian footwear industry continues to operate in a challenging economic environment, in continuity with the trends seen in 2025. Nevertheless, the sector is maintaining its position within the manufacturing landscape and continues to demonstrate a strong ability to adapt and a clear international orientation," said Giovanna Ceolini, President of Assocalzaturifici. "Our companies are responding with determination to a complex environment shaped by geopolitical tensions, weaker demand and rising costs. Between January and May, the sector's trade surplus increased by 9.6%, reaching €2.16 billion. This result reflects the competitiveness of our*

companies and the ability of Made in Italy to continue creating value even in an exceptionally challenging environment. The resilience of the EU market and the first signs of a recovery in domestic consumption point to improving conditions for our sector. More than ever, companies need to be supported through measures aimed at strengthening competitiveness, investment and employment, so that the industry can continue to represent a leading pillar of Italy's manufacturing system."

The export performance has been particularly affected by markets most exposed to geopolitical tensions.

Exports to countries such as Russia, Middle East and Far Eastern Countries and the USA, declined sharply

The European Union moved in the opposite direction, recording overall growth of 2% in value. France led this performance, with exports up 4.3%. It remains the leading destination market for Italian footwear, accounting for more than one fifth of the sector's total exports.

The domestic market, meanwhile, is showing some encouraging signs. After three years of progressive contraction, household purchases of footwear in Italy increased by around 2% in both volume and value in the first half of 2026, bringing a prolonged period of declining consumption to an end.

Women's footwear recorded the strongest performance in the domestic market, with both volumes and consumer spending up 4%. Sports footwear and sneakers also grew by 1.5%, accounting for more than 42% of total consumer spending on footwear.

The challenging economic environment is also weighing on production, with the Istat production index down 6.7%, as well as on the structure of the supply chain.

Italian Leather Goods Industry

The first half of the year is still weak: according to data processed by the Research Centre of Confindustria Accessori Moda for Assopellettieri, turnover is down (-2.5% among the associated companies surveyed) and so is industrial production (-4.6% according to the Istat index). The ongoing international conflicts, the unrewarding macroeconomic scenario and the widespread reduction in consumers' purchasing power, together with new consumption paradigms and the crisis in aspirational purchases that has hit the luxury sector, are preventing the industry from leaving behind the recessionary phase that began three years ago, after the end of the post-Covid rebound, and which is still ongoing.

Italian leather goods exports reached Euro 3.93 billion in the first five months of the year, which is down 3.4% in value and 11.1% in volume, while the trade surplus remained stable at Euro 2.56 billion. On the exports front, Italian exports to EU recorded 1.9% increase. Exports to France and Germany registered growth rate of 2.8% and 1.4% respectively, and also the exports to the US increased by 3.3% despite trade and tariff uncertainty. In the Far East, exports declined 4.4%, although shipments to China fell just 1.8%, an improvement from the sharper declines seen in previous years.

The sector continued to maintain value in international markets, with average export prices rising 8.7% to €161.33/kg. Bags remained the leading product category, accounting for nearly 72% of exports. Meanwhile, domestic retail sales were broadly stable, down just 0.5%, while spending by foreign tourists in Italy increased approximately 4.3% in January-May.

The results underline the sector's ability to maintain its international positioning and value despite weaker volumes, with EU and US markets providing important sources of resilience in the first half of 2026.

Strategy and Leather Industry Part – IV

NSK SRINIVASAN¹ & HASMUKH SHAH²

UMTA Management & Textstyles Academy, Vapi, Gujarat, India ^{1&2}

nsk_sriya@yahoo.com¹textiles.vapi@gmail.com²

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2. Can Leather Be Truly Eco-Friendly Or Sustainable? ²

- Recent advancements in leather manufacturing have significantly improved its environmental credentials, supported by key performance indicators like reduced carbon footprint and enhanced waste management.
- Imagine a world where leather, once seen as a symbol of environmental problems, now leads in ethical labor practices and sustainability. This transformation isn't a distant dream-it's happening now in the global leather industry.
- Real animal leather, derived from natural hides, is proving to be more sustainable than commonly recognized. It surpasses synthetic alternatives, with 65% sourced from cows, 15% from sheep, 9% from goats, and 11% from pigs.
- Despite claims of sustainability, synthetic leathers like faux leather and vegan leather, made from plastic materials such as PU (polyurethane) and PVC (polyvinyl chloride), face significant environmental challenges. These materials can take up to 500 years to decompose, leaching harmful microplastics and toxic chemicals into landfills.
- Isn't it time we reassess our biases and choices and embrace the advancements in the leather supply and manufacturing chain? After all, leather is the ultimate biodegradable and sustainable material humanity has utilized since the dawn of time.

2.1 A New Chapter of Sustainable Leather



- Today, leather production is writing a new chapter-one focused on sustainable practices, innovations in natural alternatives, and transformative change. It's a story of an industry not just responding to the demand for sustainable fashion but actively embracing it through sustainable manufacturing.
- And the results are promising. The industry is gradually shifting towards more sustainable leather production methods, including the use of eco-friendly materials, advanced tanning processes, and comprehensive waste reduction and management.
- According to the Sustainable Leather Foundation, modern technological and scientific innovations have significantly reduced the impact of real leather on the environment, especially when compared to petroleum-based alternatives.
- In fact, modern leather manufacturing recycles over 270 million animal skins and hides annually, saving more than 7.5 million tons of waste from landfills each year!
- It is a versatile testament to an industry's commitment to sustainable manufacturing. Real leather comes from a tradition of craftsmanship and innovation that supports sustainable fashion.

2.2 The Definition of Sustainable Leather and Why It Matters



- Much like the shift to organic cotton, the leather industry is charting a new course toward sustainability. As global awareness of environmental and ethical issues grows, leather processing is adopting more eco-friendly methods.
- Sustainable leather, also known as ethically sourced leather, is produced using environmentally friendly tanning processes, resource-efficient techniques, and effective waste management. This approach not only reduces environmental impact but also conserves resources, supports animal welfare, and meets consumer demand for responsible and ethical products.
- The potential to lessen the environmental impact of leather production, conserve resources, improve animal welfare, and deliver sustainable products to consumers underscores the importance of sustainability in the leather industry. As the industry evolves, these practices are becoming increasingly crucial in shaping the future of leather production.

2.3 Are Animals Killed to Make Leather?

- Contrary to widespread perception, animals are not killed specifically to produce leather. In fact, 99% of the world's leather comes from animals raised for food, making leather a by-product of the meat industry. The hide accounts for only about 1% of the animal's total value, making it economically impractical to raise animals solely for leather production.
- Modern leather manufacturing recycles more than 270 million cow hides per year, saving landfills from over 7.5 million tons of waste annually.

This process not only utilizes leftover hides that would otherwise be wasted and thrown into a landfill, but also honours the life of the animal by ensuring nothing goes to waste.

2.4 Are Leather Alternatives the Solution or the Problem?

- When you consider leather alternatives, you might wonder if they are truly the solution or just another problem. These alternatives, such as Piñatex made from pineapple leaf fibers, Mylo derived from mushroom mycelium, and Desserto from cactus, offer innovative, animal-free options that aim to reduce the environmental impact compared to traditional leather.
- However, while these materials present promising benefits, such as lower reliance on animal hides and potentially reduced environmental harm, they are not without their challenges. For instance, some plant-based leathers might have higher greenhouse gas emissions due to land use requirements. Furthermore, comprehensive life cycle analyses (LCA) comparing their overall sustainability to traditional leather are still underway.
- So, are these alternatives the solution or the problem? They offer exciting possibilities but need more thorough evaluation to determine their true impact. As research continues, the picture will become clearer of whether they genuinely provide a sustainable alternative or if further improvements are needed.

2.5 The Future of Sustainable and Ethical Leather & The Benefits



- The future of sustainable leather hinges on its impact on the environment, economy, and society, with consumers driving the change. Growing awareness of traditional leather's drawbacks is pushing the industry toward eco-friendly methods like sustainable materials, green tanning, and waste management.
- This shift creates new revenue opportunities. Ethical practices allow manufacturers to charge premiums and gain a competitive edge, with initial investments expected to boost profit margins.
- Balancing economic viability with environmental and ethical concerns is key. As the industry evolves, sustainability these advances will shape leather production and consumer consumption.

2.6 Embracing Eco-Friendly Tanning Processes

- Eco-friendly tanning processes, like vegetable tanning and enzyme-based methods, may provide a greener sustainable tanning alternative to traditional chrome tanning (chromium tanning). These processes minimize the use of hazardous chemicals, curtail water pollution and carbon emissions, and address the environmental concerns associated with traditional natural leather production.
- Chromium tanning has eco-friendly benefits too. It is so efficient at transforming raw hides into leather that it uses less chemicals, water, and energy throughout the entire leather process. Chromium also has the benefit of being recycled and utilized multiple times before disposal.

2.7 Championing Resource Efficiency

- Championing resource efficiency in the leather industry involves the optimal use of raw materials, energy, and water during the production of leather. This strategy aims to reduce waste and greenhouse gases and repurpose waste as a resource.
- By prioritizing resource efficiency, sustainable leather production can help lessen the industry's environmental footprint and promote circular economy principles.

2.8 Advancing Waste Reduction and Management

- The production of sustainable leather benefits the environment by decreasing the use of water, energy, and chemicals, marking a significant step toward greater sustainability. By implementing cleaner methods and optimizing resource use, the industry can reduce waste and improve efficiency, thereby minimizing its environmental impact. These advancements not only help decrease the amount of waste generated but also protect animal welfare.
- Focusing on these sustainable practices enables the leather industry to significantly lessen its ecological footprint and positively impact the journey toward a more sustainable future.

2.9 The Importance Of Traceability and Transparency in the Leather Supply Chain



- Traceability and transparency are essential for sustainable supply chains. They illuminate the journey of materials, from origin to final product, enabling companies to source responsibly and minimize environmental impact. Effective traceability systems help businesses track materials, conduct audits, and maintain ethical practices.
- Collaborating with suppliers and industry partners to establish clear sustainability standards is crucial. By prioritizing traceability and transparency, businesses can meet regulations, build trust, and drive meaningful change.

Key aspects include - Ensuring ethical sourcing, Adhering to certifications and standards, Raising consumer awareness.

These efforts contribute to greater transparency and traceability throughout the supply chain. These efforts contribute to greater transparency and traceability throughout the supply chain, such as the EU's Due Diligence legislation for deforestation and New York's fashion industry regulations. Additionally, the EU's green claims legislation may impact global organizations if enacted.

2.10 The Role of Certification in Sustainability

- Certification and standards are pivotal in ensuring the sustainability of leather manufacturing. By adhering to these standards, manufacturers demonstrate their commitment to environmental and social responsibility, offering customers confidence in their products.
- Standards ensure that leather production is conducted responsibly and sustainably, meeting environmental compliance and safety requirements. They also guarantee product quality and durability. Leading certifications, such as those from the Leather Working Group (LWG), Sustainable Leather Foundation, ISO Standards, IEC, and OEKO-TEX, play a significant role in promoting environmental, social, and governance best practices across the industry.

2.11 Circular Economy and The Life Cycle of Leather



The circular economy focuses on reducing waste and promoting the continual use of resources through effective waste management. In the leather industry, this approach involves practices such as recycling, upcycling, and cleaner production methods to minimize waste and enhance efficiency.

2.12 Upcycling and Recycling

Upcycling and recycling transform discarded leather offcuts and scraps into new, valuable products. By repurposing these materials into furniture, footwear, and garments, the industry not only reduces waste but also promotes resource efficiency and sustainability.

2.13 Extended Producer Responsibility

Extended Producer Responsibility (EPR) requires manufacturers to manage the environmental impact of their products throughout their life cycle. This includes design, production, use, and disposal. EPR incentivizes producers to create products that are easier to recycle and responsibly handle waste, thus fostering sustainability and reducing environmental impact.

2.14 Sourcing with Integrity

Ethical sourcing is fundamental to sustainable leather production. It involves tracking the leather's journey from farm to factory, supporting local communities, and utilizing by-products. This practice promotes social sustainability, animal welfare, and environmental stewardship.

2.15 Collaborative Consumption

Although less common, collaborative consumption within the leather industry can further support circular economy goals. By encouraging collaboration among producers, consumers, and policymakers, the industry can foster transparency, promote sustainable practices, and reduce its environmental footprint. Initiatives might include encouraging the reuse or upcycling of leather products and promoting sustainable material use.

2.16 The Role of Consumers in Driving Sustainable Leather



- As a more informed and socially responsible consumer, you are driving the leather industry towards sustainable practices. Concerned about the environmental and ethical implications of your purchases, you demand greater transparency and responsibility in the materials made.
- Your awareness of responsible manufacturing is a powerful force for change, pushing the industry to adopt more sustainable practices. By prioritizing eco-friendly and ethical products, including better alternatives to leather, you motivate companies to align with these values.
- This shift towards sustainable leather is part of a broader trend across the fashion industry. As you seek out brands that reflect your commitment to environmental and ethical standards, you're contributing to a more eco-friendly and ethical leather industry.

2.17 Conscious Consumption

- Conscious consumption in the leather industry involves being aware of the environmental and social implications of the leather products we purchase, including leather goods that align with our values and are produced in a socially responsible manner.
- By practicing conscious consumption, consumers can help drive the demand for sustainable leather and encourage companies to adopt more sustainable and ethical practices in their production processes.

2.18 Slow Fashion Movement

- The slow fashion movement in the leather industry emphasizes the importance of sustainable and ethical practices in producing and consuming leather goods, including leather products that are made with care and have a lesser environmental impact.
- By advocating for the reduction of overproduction and pollution, the slow fashion movement aims to address the environmental and social issues related to the leather industry, ultimately leading to a more sustainable and ethical industry.

2.19 Educating Consumers

- Educating consumers about sustainable leather, including the environmental and ethical implications related to sustainable practices, is essential to enable them to make informed decisions when purchasing leather products.
- Additionally, increasing consumer awareness of sustainable leather can encourage companies to invest in sustainable practices by creating a market for sustainable leather products.
- For learning more about how consumers can drive sustainable leather production, the Leather Hub for Consumers on the Sustainable Leather Foundation website can be visited.

2.20 Compliance and Best Practices for Sustainable Leather



- The leather industry is evolving to embrace eco-conscious practices, with innovations in bio fabrication, green chemistry, digitalization, and

automation leading the way. These advancements are crucial for minimizing the industry's environmental footprint and fostering long-term sustainability.

- Government regulations and policies play a pivotal role in advancing these efforts. For instance, the EU's upcoming Deforestation Due Diligence law will require supply chain traceability to prevent deforestation. Regulations like REACH and the ZDHC's Roadmap to Zero restrict harmful substances in leather production, while California's Safer Consumer Products Regulations target high-risk chemicals.
- Complementing these regulations, certification programs such as the Leather Working Group and the Sustainable Leather Foundation set standards for environmental and social performance, including fair labor practices.
- These combined efforts are shaping a more sustainable future for the leather industry:

2.21 Bio fabrication

- Bio fabrication in the leather industry involves creating leather from biological materials, like lab-grown collagen from yeast, instead of traditional animal hides. This sustainable, animal-free method is emerging as a promising future for leather production.
- Ongoing research and development are enhancing the quality and cost-effectiveness of bio fabrication, making it an increasingly viable option for the industry.

2.22 Green Chemistry

- Green chemistry in leather production focuses on eco-friendly tanning methods, such as chrome-free and renewable chemicals. While some new techniques, like d-AA-assisted tanning, still use aldehydes, they represent progress toward more sustainable practices.
- By embracing green chemistry, the leather industry aims to minimize hazardous chemicals and reduce its environmental impact.

2.23 Digitalization and Automation

- Digitalization and automation in leather production involve using technology to streamline processes. This includes software, sensors, and robots to monitor and control production stages.
- The goal is to produce high-quality leather efficiently while enhancing traceability, transparency, and productivity.

2.24 Final Thoughts

- The leather industry stands at a pivotal moment in its journey toward sustainability. By supporting brands that use eco-friendly tanning methods, prioritize resource efficiency, and focus on waste reduction, you contribute to a more ethical and sustainable future. Technological advancements and responsible practices are crucial for driving this change across the sector.
- As a consumer, your role is vital. By making informed choices and backing brands that enforce ethical and sustainable practices, you can influence the direction of the industry. Your wallet is a powerful tool in this process. Supporting responsible leather manufacturers helps shape a leather industry that benefits both the environment and society.
- Stay informed and continue making choices that support this important shift toward a more eco-friendly and responsible industry.

Source : 2. Can Leather Be Truly Eco-Friendly Or Sustainable? Brad Jackson

(to be continued)

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TEX BIOSCIENCES (P) LIMITED

"Guru Krupa" Building- 2nd and 3rd Floor
No. 101/56, 4th Avenue Ashok Nagar,
Chennai - 600 083, Tamil Nadu, India.
Tel : +91-44-4298 8700

E-mail : aravindha@texbiosciences.com

Website: www.texbiosciences.com

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