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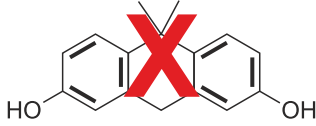
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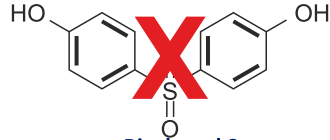
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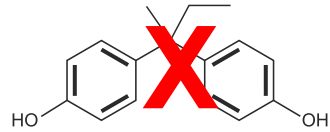
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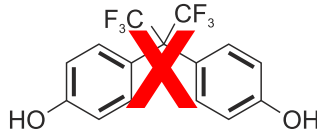
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### Fair(s) Results

Following the resounding success of the India International Leather Fair (IILLF), one could see all the leather events, held across the globe during February & March 2025, like, the MICAM, Mipel, Lineapelle, ( ITALY), APLF 2025 (Hongkong), Futurmoda (Spain), FIMEC 2025 (Brazil) and Delhi International Footwear Expo (India), concluded with good results. This reaffirmed the strength of trade fairs in generating tangible business opportunities, further enhanced by the synergistic simultaneity, facilitated crucial business partnerships. Innovation & sustainability were seen at the forefront. Detailed reports of these fair are published elsewhere in this issue.

Indian Leather industry is now well-positioned to capitalize on emerging global shifts—particularly in light of geopolitical changes and new market access opportunities, including tariff adjustments and the "China Plus One" demand, thanks to the Government's favorable policies, such as import duty exemptions on wet blue leather and enhanced credit guarantees for MSMEs, India, etc.

Shri R K Jalan, Chairman, Council for Leather Exports, has stated that, As the world recovers from the pandemic and contends with disruptions like the Russia-Ukraine conflict, Trump Tariff era and China's aggressive trade policies, India's leather industry has shown resilience, achieving consecutive months of growth. With a positive trajectory, we aim to reach the Department of Commerce's USD 7 bn export target and position, India among the top 5 global exporters by FY 2025-26.

***Indian Leather*** completing 58 years of its glorious publication, now enters in 59th year. We thank all the advertisers, subscribers and readers for their continuous support for making this possible.



## **Footwear brand Yoho to invest in manufacturing unit, seeks exports**

Yoho, a footwear company that debuted in 2021 with three SKUs, will be reportedly investing US \$ 463,000 (Rs. 4 crore) to establish a manufacturing facility in Bahadurgarh, Haryana, that can produce 2 lakh units per month, according to Yoho co-founder Prateek Singhal.

The company will start out by producing 30,000 pairs of shoes a month before progressively increasing to 2 lakh pairs.

“The upcoming unit, which will be opening early FY '26, will be supporting our R&D and focussing on producing soles and assembling trainers,” said Singhal.

India exports barely US \$ 3 billion worth of footwear, while China exports US \$ 70 billion. Vietnam exports about US \$ 17 billion worth of footwear, while even smaller nations like Bangladesh export about US \$ 9 billion. In the next five years, India’s footwear exports could increase from US \$ 3 billion to US \$ 20 billion, said Singhal. He went on to say that this manufacturing facility will provide them a competitive advantage when it comes to exporting in the future.

With 60 SKUs currently available in three categories-slippers, loafers and sneakers-the firm is known for creating Foot Pharma Foot Pad, a memory foam substitute that maintains shock absorption for up to 1.5 years.

The brand currently has 500 touchpoints throughout India through 14 distributors, and in the next two to three months, it intends to join MBOs with Reliance Footprints.

*Source : Apparel Resources*

### **Phoenix Kothari Footwear to Invest 5,000 crore in three leather units in TN in 3 years, creating employment opportunities for over 50,000 people**

In an investment of ₹5,000 crore, creating employment opportunities for 50,000 people, a Memorandum of Understanding (MoU) was signed in the presence of the Hon'ble Chief Minister of Tamil Nadu, Thiru M.K. Stalin, for the establishment of non-leather footwear manufacturing projects by Evervan Kothari Footwear Limited in Karur and Perambalur districts.

In the presence of the Hon'ble Chief Minister of Tamil Nadu, Thiru. M.K. Stalin, today (26.02.2025), at the Secretariat, during an event organized by the Department of Industries, Investment Promotion, and Commerce, a Memorandum of Understanding (MoU) was signed between the Tamil Nadu Industrial Guidance and Export Promotion Bureau, the investment promotion agency of the Government of Tamil Nadu, and Evervan Kothari Footwear Limited, a subsidiary of the Phoenix Kothari Group. This agreement facilitates the establishment of a non-leather footwear manufacturing project in Karur and Perambalur districts, with an investment of ₹5,000 crore, generating employment opportunities for 50,000 people.

The Department of Industries, Investment Promotion, and Commerce of the Government of Tamil Nadu continues to actively implement various initiatives to attract large-scale investments, create numerous job opportunities for Tamil Nadu's youth, especially women, enhance their quality of life, and ensure widespread development across the state.

Accordingly, Evervan Kothari Footwear Limited, a subsidiary of the Phoenix Kothari Group, has signed a Memorandum of Understanding (MoU) to establish a non-leather footwear

manufacturing project with an investment of ₹5,000 crore, creating employment opportunities for 50,000 people. As these industries are being set up in the industrially backward districts of Karur and Perambalur, a significant number of job opportunities will be created for the youth, especially women, in these districts and the surrounding regions.

This initiative will not only increase individual income levels but also contribute to the overall economic development of the area. The event was graced by the presence of Hon'ble Minister for Industries, Investment Promotion, and Commerce, Dr. T.R.B. Rajaa, Chief Secretary, Thiru N. Muruganandam, IAS., Secretary of the Department of Industries, Investment 2 2 Promotion, and Commerce, Thiru V. Arun Roy, IAS., Managing Director and Chief Executive Officer of Tamil Nadu Industrial Guidance and Export Promotion Bureau, Dr. Tarez Ahmed, IAS., Chairman of Evervan Shoetown Group, Thiru Ran., Chairman and Managing Director of Kothari Industrial Corporation Limited, Thiru Rafiq Ahmed, Executive Vice Chairman, Thiru P. Karthikeyan, along with other senior government officials.



*Digest of Leather News*

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## Mr. Vivek Sharma, IRS joins FDDI as 'Managing Director'

Mr. Vivek Sharma, an IRS officer of 2003 batch of the Indian Revenue Services has joined Footwear Design & Development Institute (FDDI) 10th as the 'Managing Director' from 10 February, 2025.

He has done Bachelors of Engineering with specialization in Industrial Engineering from Indian Institute of Technology (IIT) - Roorkee.



Mr. Vivek Sharma, IRS

Having wide exposure in the field of Administration and Finance, Mr. Sharma intends that FDDI must play a transformative Mr. Vivek Sharma, IRS role to promote the industry by providing skilled workforce and technology adoption to the Leather, Footwear and Allied industry which is a major constituent of India's manufacturing sector.

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### FDDI organises International conference on 'Innovations in Biomechanics and Footwear Development'

FDDI's Centre of Excellence (CoE), in collaboration with Galgotias University, Greater Noida, and the University of Cyberjaya, Malaysia, successfully hosted the international conference 2025 on '**Innovations in Biomechanics and Footwear Development**' on 21st & 22nd February 2025 at Galgotias University During the conference, Mr. Vivek Sharma, IRS, Managing Director (MD), FDDI was the 'Chief Guest' whereas Prof. Dr. Subir Kumar Saha, IIT Delhi was the 'Guest of Honor'. Dr. Shashi Bala Singh, Research Advisor to the Chancellor, Galgotias University, Dr. Madhusudan Pal, Scientist 'G' & Director, CoEs, FDDI, Dr. Avadhesh Kumar, Pro Vice Chancellor, Galgotias University, Dr. Shagun Aggarwal, Dean, School of Allied Health Sciences, Galgotias University, Dr. Rajeev



Agarwal, Senior Physiotherapist, AIIMS, New Delhi were other dignitaries who attended the conference. Prof. (Dr.) David Whitford, Vice-Chancellor, University of Cyberjaya, Malaysia participated through online mode.

The theme of the conference was 'Shaping the Future of Movement', which provided a dynamic platform for distinguished researchers, industry leaders, and academicians to discuss advancements in robotics, biomechanics, footwear technology, and health sciences.

On 21 February 2025, the morning session set the stage for insightful discussions on robotics, biomechanics, footwear design, and intellectual property rights whereas the afternoon session featured scientific presentations by Ph.D. scholars and faculty members under the thematic areas of footwear biomechanics, sports science, and disease prevention.

Under challenges & innovations in footwear technology, the second day focused on emerging AI-driven footwear design and industrial applications.

In concurrence, presentations were made by Dr. Sunil Kumar Hota from Defence Research and Development Organisation (DRDO) on Shoes for Combat Operations; by Dr. Madhusudan Pal on Challenges in Footwear Design Innovation and Manufacturing; by Dr. Gaurav Jagannath, Medical Advisory Board, Clinical AI Healthcare Technologies on AI Applications in Digital Physiotherapy and by Mr. Tushank Jain, Allure Enterprises Pvt. Ltd. on Localizing Innovations in India's Footwear Industry.

Dr. Abhirup Chatterjee, CoE - Hyderabad, Dr. M Vimudha, CoE - Chennai and Dr. Ankur Shukla, CoE - Rohtak contributed wholeheartedly by chairing the scientific sessions held both online and offline, enlightening the participants with their words of encouragement.

The conference filled with stimulating discussions, valuable learning experiences paved way for fruitful collaborations to create footwear solutions that are not only innovative but also accessible, sustainable, and beneficial to all.



## **Back-to-School Column**

**Dr. N K Chandra Babu**

### **Vein marks on Leather – Causes and Control Measures for prevention/reduction**

Next in this series is a detailed discussion on veiny leather. Veininess is a defect that refers to leathers with visible lines on the surface of the leathers due to the impression of blood vessels, which are originally present during the lifetime of the animals. Deep vein marks can downgrade the quality of leathers. Veininess is undesirable not only due to aesthetic reasons but it can also potentially affect the physical properties required for different end uses. Upper leathers with veinmarks will have poor grain 'break' and lasting properties and poor flexural endurance ultimately affecting the durability of footwear.

Vein marks will get accentuated during glazing operation, and the imprints is very much visible on the grain side and hence such veiny leathers are unsuitable for glaze kid/glazed upper articles..Veininess is also undesirable in suede and nubuck leathers (due to poor nap characteristics) and upholstery leathers.They are mostly used in bag leathers and heavy corrected articles.



**Images of Leathers with heavy vein marks**

## **Factors responsible for Veininess**

The factors responsible for the veininess may be categorised into three types. The first and foremost is what happens to the animals during their lifetime, which has a considerable influence on the quality of hides and skins in general and vein marks defect in particular. Blood vessels have an important role to play during the lifetime of the animals by carrying nutrients and oxygen to the cells (arteries) and also to carry back the oxygen depleted blood back to the heart (veins), but the prominent blood vessels appear very close to the skins due to various factors. These factors include the breed, sex, age and nutritional status of the animals (even among the same species) and climatic conditions.

The females have more prominent veins compared to their male counterparts especially around shoulders and bellies. Poorly fed animals tend to have blood vessels very close to the skins, and severe cold climatic conditions can lead to more prominent blood vessels. The tanners do not have much control over these factors but can have a robust sourcing system developed for the articles and the product mix in their tanneries. Not only due to vein marks but also due to various other quality considerations, hides and skins from male animals command high price compared to those from females.

## **Factors related to slaughter and curing**

The second set of factors relate to how the animals are treated before and during slaughter and how the hides and skins are handled and treated after flaying. Poor slaughtering practices can contribute significantly to prominent vein marks in the hides and final leathers. In modern abattoirs, the animals are taken care of well prior to slaughter. They are fed well for a stipulated period of time (for example, intensive feed stock system is followed for a minimum of 30 days in export oriented slaughter houses in Botswana prior to slaughter) to improve mainly the quality and yield of meat and bring about homogenization of the animals coming from different sources

as much as possible but it can also result in improvement in skin quality as well. The stress of the animals prior to slaughter can contribute to veininess in the hides/leathers. Animals are given water and washed sometimes especially during hot climatic conditions to cool them before slaughter with both the practices having the potential to reduce prominent vein marks in hides/skins. Another important aspect is that the animals should be bled completely before flaying in order not to leave traces of blood in the veins close to the skins. Coagulated blood in the vein has the potential to promote bacterial growth leading to accentuation of vein marks in the hides/skins and consequently in tanned leathers. Chances for such occurrence especially with delayed curing beyond the staling period (which again depends on the prevailing climatic conditions) are more. The veininess is common among fallen hides as there is considerable time lag between death and flaying.

The subset of the second set of factors is related to how the hides and skins are collected, handled and cured. In some western countries and modern abattoirs (even in many developing countries like India), utmost care is taken to collect the hides and skins after flaying from the carcasses without contamination from dung, blood and other fluids in bins without much delay. But in many municipal slaughter houses in India, the butchers who bring animals for slaughter give least care and attention to hides and skins. Many times, the hides and skins are kept on the dirty floors soaked in blood, dung, soil and other contaminants for long time.

This author has witnessed in many municipal slaughter houses, even with smaller animals such as goats and sheep, the skins are kept under the hanging carcasses dripping with blood and other fluids for quite some time before they are collected and traded. Except in the case of some small butchers, the salt curing is seldom carried out in slaughter houses but mostly in mandies or primary collection centres in India. Hence, usually there is a considerable time lag between flaying and curing which results in bacterial growth especially around



more susceptible veins due to the presence of traces of blood with the possibility of the deepening of valleys.

Some authors argue in favour of use of biocides along with sea salt even with timely cure to primarily control growth of halophilic bacteria which can grow in high salt concentration. To summarize the steps to be taken during this important stage, the hides and skins should be collected free from contaminations that could accelerate the growth of bacteria, and should be salted with good quality salt formulation for curing within staling period without delay, which is less than 2 hours in climatic conditions prevailing in India. Delay in curing should be totally avoided to prevent prominent vein marks.

In some situations in India, this author has seen use of as high as 90-100% on goat skins meant for suede and glazed kid leathers especially during summer primarily to prevent vein marks. For stocks meant for long storage (>1 month), resalting is very common once the skins are received in the tanneries and the pile is often broken and repiling is done to prevent growth of bacteria (at least once in a week).

### **Factors related to Leather processing that can lead to accentuation/reduction of veinmarks.**

Except in the case of some tanners who have developed their own robust sourcing and procurement system for hides and skins, the tanners usually do not have a control over what happens during the lifetime of the animals as well as slaughtering and factors related to curing practices. They have to resort to in-process control measures to prevent the accentuation of veininess on one hand and reduce the same as much as possible through innovative process interventions on the other. Poor leather processing method can in fact lead to deepening on vein marks and third set of factors relate to what can go wrong in leather processing/in tanneries with respect to accentuation of vein marks.

Under-soaking can lead to accentuation of vein marks and many researchers have found vein marks becoming more pronounced in the case of under-soaked hides and skins. Unprotected long soaking can also result in bacterial growth leading to pronounced veininess in leathers. Thorough soaking without leaving dehydrated interstices without increase in bacterial growth is critical for prevention of veininess. In the case of hides/skins requiring long soaking process (as in the dry salted or dried stock), care should be taken to prevent bacterial growth by use of effective biocides. Excessive plumping is avoided in liming but good splitting up of fibres even in less dense area such as that surrounding vein marks is essential for reduction of vein marks problem. Hence it is crucial to achieve good fibre splitting without too much of swelling and plumping. Short and sharp liming is recommended by some authors.

This author came across one of the largest buyers of glace kid leathers who used to advocate paste liming using low percentage of high quality lime with high percentage of a mixture of sulphide and hydrosulphide (used for dehairing) to achieve good fibre splitting in the corium layers close to adipose (flesh) to reduce vein marks. Liming auxiliaries to mellow down plumping action but achieving good fibre opening are marketed by Chemical supply houses. Specialized enzyme formulations are also recommended/used by many in this regard.

Good and satisfactory removal of flesh layer with vein marks is also considered crucial for reducing veininess in the final leather. The unremoved flesh layer with vein marks/imprints will cause vein marks more visible on the grain during the subsequent operations. Some authors recommend use of salt in washing float or reuse of some spent delime liquor for washing after liming to prevent swelling of pelt. Bating is a crucial process that can have a lasting effect on this problem and hence has to be properly controlled and carefully carried out. At this stage (pH 8.5-9 and physiological temperature where bating is carried out), there is a chance for bacterial growth

and this coupled with enzyme action through synergistic effect, there is a possibility for damage to the quality of resultant leathers including vein marks accentuation. With sensitive raw materials prone for prominent vein marks, the bating should be carried out for a very short duration with very effective bating enzymes formulation without compromising on the other desirable objectives of this operation.

Some researchers recommend use of elastase-free enzymes in order not to remove elastin fibres present more around veins extensively, which will result in deepening of vein mark valleys. It is necessary to kill bating action after the completion of the process mostly done by addition of organic acids such as acetic or formic acid as carried out in many European tanneries.

Pickling is another process where the pelt may be subjected to unnecessary swelling, and if any, can lead to accentuation of vein marks apart from poor strength properties. Sufficient salt concentration (min. of 7 °Be) in the bath prior to addition of acids is the key to prevent any swelling. Here, it is emphasized that the amount of salt in terms of % on pelt weight is not crucial but the effective salt concentration in pickle bath is critical.

Salt concentration can be checked using simple devices such as Baume and Barkometers which measure the specific gravity on an expanded scale. Needless to say, there exists a direct correlation between concentration of any material in solution and specific gravity and almost all Leather Text books carry the tables for many of the most commonly used bulk chemicals in leather processing. It should be remembered that delime wash liquors cannot be completely drained as the pelt tends to carry considerable quantity of free water and hence it is another argument in favour of the need for measuring salt concentration.

Filling type of tanning can reduce vein marks to a considerable extent and hence chrome tanned leathers tend to retain vein marks

due to empty nature compared to vegetable tanned leathers. Hence, a good balanced retanning with good penetrative type of fatliquors (to achieve good fibre separation) is important to avoid vein marks in the final leather when the starting material is wet blue. Many chemical supply houses have developed retanning recipe formulations with fairly good amount of protein fillers in them for the purpose. The properties of the fillers such as molecular weight, particle size and precipitation behaviour are important for achieving best results. There are acid bating enzyme formulations available for use on wet blue leathers to bring about fibre splitting of even tanned fibres, which can also reduce the vein marks and growth marks considerably.

Splitting in the case of hides can help in removing corium layers with vein marks considerably but still the problem may persist with the leathers produced from splits if proper care was not taken during the pretanning stage. Shaving is the mechanical operation which can remove unremoved flesh layer with vein imprints if carried out to perfection. The right size of the machine with roller with right hardness and optimum operating pressure is important. Skilled buffing is crucial for leathers such as suede where vein marks can play havoc with the final quality. Tanners have devised good buffing strategies such as diagonal and round about buffing especially with the first buffing with low grit emery papers to get good quality nap with least vein marks. But good compactness of the leathers using balanced retanning system and sufficient fibre separation without oiliness is crucial for achieving best results in terms of good quality, uniformly short and fine nap free from vein marks.

Conditioning (to desirable moisture level) prior to staking is also recommended by some authors as the staking and drum milling of too dry leathers are reported to result in vein marks opening up and becoming prominent in the final leathers.

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# Indian Leather

Digest of Leather News  
ESTD: 1967



**INDIAN LEATHER** is a Digest of leather News Published on 8th of every month. Established in 1967 by Late Sri S.Sankaran, it has successfully completed 58 years of continuous publications and is in its 59<sup>th</sup> year. It has a wide readership and covers many important news in Leather, Footwear and Allied Industries. Indian Leather Publishes regularly the pre and post fair news/reports of all the major International Leather Fairs and events. It covers the burning problems of the industry.

**INDIAN LEATHER** takes part in International Leather Fairs held in India and copies are distributed to the participants and distinguished visitors of the fair, thus reaching the cream of the industry and trade.

**READERSHIP :** Tanners, Leather Chemical Manufactures/Dealers, Manufacturers of Footwear, Leather Goods, Garments, Manufacturers of Machineries for Leather, Footwear and Leather Goods, Components and Accessories etc

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# LINEAPELLE

**INNOVATION, CREATIVE INPUT, MARKET: THE  
FUTURE IS HERE 24.977 PROFESSIONAL OPERATORS  
AT LINEAPELLE 105: +7% BUYERS  
(Fiera Milano Rho, February 25-27, 2025)**



An excellent attendance. A high level of creativity and innovation in product, style, and process.

LINEAPELLE concludes its 105th edition with very positive results, proving once again to be the must-attend event for the luxury, fashion, and design supply chain, even (and especially) in an economic phase that still presents significant challenges.





24.977 professional operators-including 18.833 buyers, up 7% from the September 2024 edition-joined over 1,100 exhibitors at LINEAPELLE 105, the leading trade fair for the global luxury, fashion, and design industry, held at Fiera Milano Rho from February 25 to 27, 2025.

These impressive figures confirm LINEAPELLE's absolute leadership as an unmissable international event while also demonstrating its incredible creative and innovative dynamism. This vitality offers potential reassurance despite the ongoing complexities of the current economic climate.

Tanneries, accessory manufacturers, component producers, textile suppliers, and synthetic material experts showcased a deep design vision, presenting-across all product categories, from leather to soles-top-tier innovations and novelties that sparked genuine interest among visitors. This edition highlighted a strong return to the most authentic and natural aspects of leather and materials.

Similarly, LINEAPELLE 105 engaged and inspired its community through a series of projects-hosted within a true Creativity District in Pavilion 24-that generated enthusiasm and acclaim: from the seven Lineapelle Designers Edition fashion shows to the 20 exclusive Lineapelle Interiors installations; from the In The Making artisanal workshops (organized in collaboration with Giorgio Linea) to the exhibition "Parole e Taffetà Chapter II: Animalia", dedicated to Anna Piaggi (curated by MinervaHub).

The next edition of LINEAPELLE will take place from September 23 to 25, 2025, focusing on the Autumn-Winter 2026/2027 season. Due to preparations for the Milan-Cortina 2026 Winter Olympics, the event will be relocated within the Fiera Milano Rho exhibition center: LINEAPELLE 106 will be held in Pavilions 1-3, 2-4, and 5-7.



mipel<sup>127.</sup>

LINEAPELLE

## **MICAM, MIPEL, THEONEMILANO, AND MILANO FASHION&JEWELS CLOSE WITH 40,449 TRADE VISITORS**

The Italian Fashion Accessories Trade Fairs-**MICAM Milano, MIPEL, TheOne Milano, and Milano Fashion&Jewels**-held at Fiera Milano, from 23-25 February 2025 concluded with positive results ahead of Milan Fashion Week.

With a total of **40,449 trade visitors**, **45% of whom were international**, representing **127 countries** including **Japan, China, France, Spain, Germany, Greece, and Turkey**, the four events confirmed figures in line with the previous edition. They also reaffirmed the variety of styles and trends in accessories, now recognized as an integral part of the global fashion industry.

Despite a complex economic landscape, both domestically and internationally, the four events showcased the offerings of **1,758 brands**, 46% of which came from 51 different countries. This reaffirmed the strength of trade fairs in generating tangible business opportunities, further enhanced by the synergistic simultaneity of the events.

Underlining the significance of these trade fairs and the industries they represent, **Antonio Tajani**, Deputy Prime Minister and Minister of Foreign Affairs, stated that fashion, as a whole, is a key industry for Italy's economic growth and employment. He highlighted the invaluable contribution of Made in Italy excellence, represented by both major groups and small and medium-sized enterprises, as well as artisans who combine innovation, technology, and tradition. He also confirmed that the government considers business support a priority and is actively promoting initiatives such as Fashion Days in strategic countries.

Once again, the synergy between different industries has demonstrated the unity and resilience of the accessories industry, which international buyers regard as a distinctive language and a benchmark of excellence—one that not only sets new trends but also explores the creativity of both established companies and emerging brands, including startups.

Among this year's exhibitions, a strong focus on artisanal craftsmanship was evident, with a commitment to excellence enriched by contemporary influences such as innovative materials and sustainable production techniques. Additionally, the educational sessions within the events provided professionals with insights into the latest glamorous trends while also deepening their understanding of the rich heritage that inspires the most visionary and original ideas.



## MICAM MILANO CONFIRMS ITS WINNING FORMULA

### GLOBAL BUSINESS, VISION, REFLECTION, EXPERTISE AND DISCOVERY

Innovation in production techniques and in stores, originality in style, and attention to sustainability. These were only some of the characteristics of a continuously evolving footwear industry, which showcased in this **MICAM Milano**- the international footwear trade fair.

With **853 brands-415 Italian and 438 international from 28 countries**-the event confirmed itself as a global phenomenon, presenting a powerful array of prestigious product innovations that affirm the importance of its incoming campaign.

In this edition as well, the fair featured the latest innovations from the world's top international companies along with a wide representation of all the Italian manufacturing districts that make Made in Italy

renowned worldwide, presenting buyers with their unmistakably styled proposals.

The presence of excellent companies, both Italian and foreign, that continue to choose MICAM Milano as their exclusive showcase, confirmed the confidence manufacturers have in the event's formula. There is no shortage of initiatives and both online and on-site facilities designed to welcome and support fair operators at every moment-transforming the visit into a truly exclusive, effective, engaging, and stimulating experience. This year, in fact, MICAM Milano celebrated the ability of shoemakers to renew, evolve, and continuously grow.

*“With its extensive exhibition offering and a important program of events, MICAM is the best response to a challenging period for the footwear industry,” emphasizes Giovanna Ceolini, President of MICAM and Assocalzaturifici. “2024 ended with a decline in exports (-8.4% in value) and turnover (-9.4%), along with a drop in production. However, forecasts indicate a gradual market improvement by the end of the year, with recovery prospects driven by the industry's capacity for innovation and resilience. In this context, MICAM reaffirms its status as an unmissable international event, a key reference point for brands, buyers, and professionals from around the world. The confidence of exhibiting companies in the trade show is evident in their participation, demonstrating how MICAM serves as a strategic platform for developing new business opportunities and tackling market challenges with momentum.”*

## **MICAM X: CONTRIBUTIONS AND VISIONS FROM INTERNATIONAL EXPERTS TO INSPIRE CHANGE**

Returning again in this edition was the **MICAM X** area, the innovation hub of MICAM Milano, curated by Spin360, which was once again dedicated to important aspects of product evolution. The space once again focused on four key theme areas, **Art, Fashion, Heritage and Future, Trends and Materials, Sustainability and The Future of Retail**. These themes were to be explored by industry professionals and recognized global experts.

The international voices of the upcoming edition of the Future of Retail include:







## **FUTURE OF RETAIL: THE SHOP OF THE FUTURE**

**Future of Retail**, a space focusing on innovative ideas that would shape the future of retail, hosted four companies proposing advanced solutions of interest to the footwear sector, with a focus on 3D technology. The leading companies this year were: **AQuest**, Creative Production & Technology Company; **Proke**, a precise and fast remote measurement service; **Threedium**, the world's leading 3D and AR platform for Revenue Growth; **WoV Labs**, with their proposal for a Digital Product Passport.

## **ITALIAN START-UPS: SPACE FOR THE MOST INNOVATIVE COMPANIES**

The Italian Startup area provided a stage for young Italian companies creating a series of unique, original proposals. The area was set up in collaboration with StyleIT with the support of ICE and MAECI.

## **ACADEMY AREA: THE JOY OF TRUE LEARNING**

Also present in this edition was the Academy Area, a space designed to immerse young people in the world of footwear. The Academy unfolded through a series of initiatives organized to offer the opportunity to explore the footwear industry in all its facets—from design and the techniques of shoe creation to the customisation of accessories.

## **MICAM STUDIO: THE VALUE OF STORYTELLING**

The new area hosted three exceptional publications: **ELLE, GRAZIA ITALY, FRANCE and UK and VANITY FAIR**. These media partners enlivened the space with exclusive photo shoots and meetings.

## **EMERGING DESIGNERS: AN ONSET OF INNOVATION AND STYLE**

The **Emerging Designers** area once again hosted 12 creatives from all over the world selected by a jury of fashion industry experts. Sustainability and originality were the keywords of the collections presented: recycled or recyclable materials and attention to the production chain, as well as style and personality, were just some of the features of the shoes presented on show.

# LEATHER VISION 2025

## An Exclusive Show of Latest Trends in Leather closes successfully

The 3rd edition of **Leather Vision**, organized by the Indian Leather Products Association (ILPA) in collaboration with the extraordinary team at Freya IIDF, was a resounding success. The event, held on 7 and 8 March 2025 at Freya Design Studio in ILPA Leather Goods Park in Bantala, Kolkata, attracted nearly 540 industry professionals and students from the Leather and fashion industry, making it one of the most impactful events in the leather sector this year.

### Industry Showcases and Networking

The event provided a fantastic platform for the renowned Leather Chemical Manufacturers, TFL, Smit & Zoon, Scisco, Stahl, Botico, Units Chemical, and Somme, to showcase their latest products and innovations at the Leather Vision 2025. The total display were highly praised, and the interactions between industry professionals, exporters, and tanners were particularly valuable and fruitful. These discussions facilitated helpful exchanges that would contribute to the future growth of the entire Leather sector.

### Involvement of Design Students

As part of the initiative to inspire and encourage the next generation, business entrepreneurs, designers, & students from various design institutes like NIFT, FDDI, ILEAD, CFTC Budge Budge, GCELT were invited to engage with the world of leather. A significant highlight was

the fashion show organized by the students of CFTC Budge Budge and FDDI, where they showcased their creative talents. Their innovative designs and impressive craftsmanship received widespread appreciation from the industry professionals in attendance.

## **Seminars and Lectures**

The event also featured a series of seminars and lectures over the course of two days, providing valuable insights for both students and industry professionals.

One of the standout moments was the lecture by renowned industrialist Mr. Tapan Nandi, who shared his vast experience and journey in the leather industry. His speech inspired and educated the attendees, shedding light on the challenges and opportunities in the industry.

Another key speaker was Professor Chatrapati Dutta, the Principal of the Government College of Art & Craft, Kolkata. He shared his extensive knowledge and creative experiences with the students, specifically focusing on the intersection of Fashion and Artificial Intelligence (AI).

The seminar, organized by SGS, titled "SGS Sustainability Services for Leather and Leather Product Industries", was a major highlight of the event. The seminar was highly informative and successfully addressed key issues surrounding sustainability in the leather industry.

The seminar organized by Worldwide Responsible Accredited Production (RAP) was an excellent session that provided crucial insights into the WRAP certification program and its benefits. As a

global leader in promoting ethical and sustainable practices in the manufacturing sector by adopting the WRAP certification..









### **International Women's Day Celebration at Leather Vision 2025**

As part of the 3rd edition of Leather Vision 2025, ILPA took the opportunity to celebrate International Women's Day on 8th March by recognizing the contributions of the prominent women entrepreneurs in the leather industry. The event served as a platform to honor the achievements of these trailblazing women who have made significant strides in the industry.

ILPA felicitated Ms. Samira Azhar, the founder of Crescent Expo Syndicate Pvt. Ltd., and Ms. Bhavna Belani, the founder of Gaurav Lederwaren, for their outstanding contributions to the leather sector. Both women have been instrumental in driving innovation and setting high standards in the industry.

### **Looking Ahead**

With the tremendous success of the 3rd edition, there is great anticipation for the next edition of **Leather Vision**. The event has proven to be an excellent platform for education, networking, and innovation in the leather and fashion industries. ILPA wishes everyone involved in the event with continued success and look forward to a bigger and even more successful event next year.

\* \* \*

***Delhi International Leather Expo (DILEX)  
6<sup>th</sup> edition 2025: Empowering Global Trade  
Through Indian Leather & Footwear Excellence***



*Lighting of the Lamp of Delhi International Leather Expo (DILEX) 2025 by Chief Guest Shri Vimal Anand, JS, DOC, HE Mr. Mariano Agustin Caucino Ambassador of Argentina, Shri RK Jalan, Chairman CLE and Shri Puran Dawar, Northern Regional Chairman, CLE*

The Council for Leather Exports (CLE) organized the 6th Edition of the Delhi International Leather Expo (DILEX) – Reverse Buyer Seller Meet (RBSM) during 20th and 21st February 2025 at the India International Convention & Expo Centre (IICC), Yashobhoomi, Dwarka, New Delhi, with funding support from the Government of India under the Market Access Initiative (MAI) Scheme. This landmark event is poised to strengthen India’s position in the global leather and footwear industry.

This premier B2B event provided a vital platform for Indian leather and footwear manufacturers and exporters to showcase their latest collections and innovative products while offering international

buyers alternative sourcing options. The expo was marked by robust participation from over 220 exhibitors and around 250 foreign buyers from 52 countries.

The event, inaugurated by Shri Vimal Anand, Joint Secretary, Department of Commerce, as the Chief Guest, and graced by HE Mr. Mariano Agustin Caucino, Ambassador of Argentina, witnessed extensive engagement from industry stakeholders. In addition to international participation, over 1500 representatives from Indian buying houses, retailers, and trade buyers attended, ensuring ample networking opportunities. Diverse product categories on display included leather and non-leather footwear, leather garments, accessories, gloves, and specialized items such as safety products and handcrafted leather toys.

DILEX 2025 is strategically significant for India's leather and footwear sector, which is increasingly recognized as a "China Plus One" sourcing destination. The expo underscores India's commitment to innovation, sustainable growth, and global excellence, fostering one-on-one business meetings and long-term collaborations. Industry insiders remain optimistic that this event will further enhance export opportunities and strengthen India's position among the world's top leather and footwear exporting nations.

Shri Vimal Anand, Joint Secretary of the Department of Commerce, inaugurating the DILEX 2025, remarked that the event marked a significant milestone in India's global trade journey. He noted that in the post-COVID recovery phase, India's leather and footwear industry had demonstrated exceptional resilience by expanding exports and positioning the country to achieve its ambitious targets, including a goal of USD 7 billion for FY 2025-26.

JS, DOC, Shri Anand, also shared that with favorable policies, such as import duty exemptions on wet blue leather and enhanced credit guarantees for MSMEs, India is well-positioned to capitalize on emerging global shifts-particularly in light of geopolitical changes and new market access opportunities, including tariff adjustments and the "China Plus One" demand.

He further emphasized that, supported by cutting-edge automation, AI technology, and a well-crafted policy response, India can effectively overcome traditional logistics and productivity challenges, paving the way for sustainable growth in the leather and footwear sector. He stated, “The 6th edition of DILEX presents an opportunity to showcase India’s growing potential as a global leader in the industry, facilitating enhanced participation from both domestic and international stakeholders to define actionable solutions for the future.

Shri RK Jalan, Chairman, Council for Leather Exports, in his address said, “The 6<sup>th</sup> Edition of the Delhi International Leather Expo (DILEX) 2025 opens doors for the global leather and footwear sector amidst an evolving geopolitical landscape. As the world recovers from the pandemic and contends with disruptions like the Russia-Ukraine conflict, Trump Tariff era and China’s aggressive trade policies, India’s footwear and leather industry has shown resilience, achieving consecutive months of growth. With a positive trajectory, we aim to reach the Department of Commerce’s USD 7bn export target and position India among the top 5 global exporters by FY 2025-26.



*Shri RK Jalan, Chairman, Council for Leather Exports addressing the panel discussion of 6th edition DILEX, 2025 at Yashobhoomi, IIC Dwarka, New Delhi*



Shri Jalan further added that this edition marks an important step as we assess the role of geopolitical shifts, tariff policies, technological advancements, and India's strategy to capture emerging market opportunities. India's demographic advantage and manufacturing capabilities make us a reliable player in labor-intensive sectors like leather and footwear, especially as China pivots towards high-tech industries. He applauded the govt support for this event under MAI and informed with the support of policy announcements during budget by Hon'ble Prime Minister of India and Finance Minister like the Focus Product Scheme (FPS), tariff exemptions, and Bharat Net, the Indian leather and footwear industry is primed for expansion. This platform will solidify our position as a competitive exporter in this ever- evolving global trade environment." He further conveyed that this premier event highlights India's innovative leather and footwear industry. Despite global challenges, our exports have grown steadily, positioning India as a key "China Plus One" sourcing destination.



*Shri R Selvam, Executive Director, CLE addressing the panel discussion organised during 6th edition of Delhi International Leather Expo (DILEX) at Yashobhoomi, IICC Dwarka, New Delhi*

Shri R. Selvam, Executive Director, Council for Leather Exports said "India's leather and footwear industry, valued at over \$23 billion, is experiencing robust growth, driven by sustainability, innovation, and

rising consumer demand. DILEX 2025, organized by the Council for Leather Exports, showcases India's pivotal role in this dynamic market. As a leading producer and exporter of high-quality leather goods and footwear, India is at the forefront of eco-friendly practices and cutting-edge technology. This premier event brings together industry leaders, designers, and buyers to explore new opportunities, foster partnerships, and highlight India's commitment to shaping the future of the global leather industry. With the government's unwavering support, we are dedicated to expanding India's global presence and strengthening its position in the international trade landscape for the leather and footwear sector."

### **Panel Discussion**

During 6th DILEX, CLE organised a Panel Discussion today on "Bharat - the Destination for Footwear and Leather Products Sourcing ". Shri Aqeel Panaruna, Former Chairman, CLE moderated the discussions. Eminent industry members spoke on growth prospects of the sector.



*Shri A. Panaruna, former Chairman, CLE moderating the panel discussion organised during 6th edition of Delhi International Leather Expo (DILEX), 2025 at Yashobhoomi, IICC Dwarka, New Delhi*



The Delhi International Leather Expo (DILEX) 2025 successfully concluded on 21st February 2025, marking a significant milestone in the global leather and footwear industry. Mr. Puran Dawar, President-AFMEC was the Convener of the 6th DILEX. The event facilitated around 4092 one to one B2B meetings and generated business worth Rs. 1122.97 crores (both firm orders and future expected business), thereby providing the exhibitors to explore new business opportunities and market avenues. With participation from 50+ countries, DILEX 2025 served as a dynamic platform for trade, innovation, and collaboration. During the closing ceremony, the expo was officially rebranded as the “Bharat Footwear and Leather Expo (BFLEX)”, reflecting India’s vision to strengthen its global presence in the leather and footwear sector.

Source : Council for Leather Exports

***Please visit our website:  
[www.indianleathermagazine.com](http://www.indianleathermagazine.com)***



## Leather Vision 2025

- Vasan Suri

**A Passionate Leather Lover & Professional  
Hi-Tech Consultancy**

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***(Shri Vasan Suri shares his views on the recently concluded Leather events)***

The Indian Leather Products Association (ILPA) had organised the 3rd edition of the event **Leather Vision**, with the support of the Chemical Manufacturers and Suppliers on 7 & 8 March, 2025, in Kolkata. As I walked in, the first sight of the young boys and girls from FDDI, NIFT actively getting involved in the proceedings suggested that we are moving towards “**Unlimited Opportunities**”. The seniors, legends and leaders are holding the hands of the next generation and together, they back up these young boys and girls for “Unlimited Opportunities”. The down trend in the fashion industry has already hit the bottom and it is time to bounce back. Such events like “**Leather Vision**” brings the industry together and motivates the industry and fraternity as well as the young people to get committed to the Leather Industry. It was a Friday and period of fasting (Ramadan month), and still, the turnaround of people was amazing

The event started with a Welcome address by Ms Arpita, followed by an inspiring address by Mr Tapan Nandi. There were moments of felicitation of Mr Nandi for his contribution and Mr Luthra, editor of the magazine “Leather Age”. It was a great moment for myself when called upon stage for my involvement with ILPA and the industry and presented with a lived plant, inspiring to grow as a tree.

The next event was a Fashion Walk by the students of FDDI who showcased the latest footwear designs developed by them. This was followed by a presentation by SGS on the evolution of Leather Industry, the process and various types of tanning etc The speaker went on to talk about Sustainability and Traceability of Leather from the farm to the stores and also on Carbon emissions and reach a stage of Carbon neutral.

It was an absorbing session and I only wished that students present from FDDI & NIFT could have stayed back to listen to this informative speech.

*(to be contd..)*



## **48<sup>th</sup> Fimec comes to an end, reinforcing Brazil's position as one of the world's main footwear hubs**

**With more than 23,000 visitors from 36 countries, the fair moved the sector forward over the last three days, projecting growth for the year**



The 48th edition of **Fimec (International Fair of Leather, Chemicals, Components, Machinery and Equipment for Footwear and Tanneries)** has once again established itself as the main focal point for the leather-footwear sector. The 3-day event organized by Fenac Experiências Conectam, presented by Sicredi Pioneira and sponsored by Transduarte, BADESUL, Brastema and Henkel and also supported by various Brazilian Leather & Footwear Trade Associations, like, Abicalçados, Abqtic, Abrameq, ACI-NH/CB/EV/DI, Aicsul, Assintecal, CICB, IBTeC and Sebrae/RS.



Fimec 2025 took place from March 18th to 20th at Fenac, in Novo Hamburgo/RS (Brazil).

FIMEC 2025 recoded the attendance of more than 23,000 people in search of innovation, technology and new trends. Considered the largest fair in Latin America and one of the most important in the world, it brought together visitors from 36 countries and several Brazilian states, who were able to see first-hand the innovations that promise to transform the future of the industry.

For Fenac's CEO, Márcio Jung, this year's edition reinforced the strength of the sector and its potential for growth. "We had a brilliant Fimec, with a qualified audience and a significant presence of professionals and companies from Brazil and abroad. This is a reflection of the work we do, focusing on attracting international visitors," he said.

In addition to the high number of visitors, once again the number of exhibitors was significant, driven by the business opportunities offered by the fair. "Large companies participate as an institutional positioning for brand strengthening. But what we've noticed is that small and medium-sized exhibitors find here a chance to get new customers, which is essential for the market," Jung added.

As an example, Comelz Cutting Machines has already guaranteed its participation in the 2026 edition, celebrating this year's good results. "Fimec was excellent, because all the people who came were really interested, they didn't come to waste time. The fair is an opportunity to present our products to potential customers who don't know us yet," said sales executive Giuseppe Seija.

With intense activities over the three days, the 48th Fimec reaffirmed its relevance to the leather-footwear industry, strengthening Brazil as one of the main centers in the sector and projecting promising business for the following months. The event was attended by a total

of 400 exhibitors, with the largest volume of space sold since 2017, with a total of 10,600 m<sup>2</sup>.

### **Concept Factory completes 15th edition with success**

This year, the traditional Concept Factory was the most complete edition in the project's history. With five production lines, for the first time the action included the development of children's shoes, as well as women's shoes, sports shoes, safety shoes and bags. As well as demonstrating the production of shoes and bags in real time, inside the fair's pavilions, the event showcased the latest technological innovations and sustainable practices in the market. In an area of 1,600m<sup>2</sup>, during the three days of Fimec, 2,750 pairs of shoes from the leading brands produced, and also 120 bags.

The project was carried out by Coelho Assessoria Empresarial and the Brazilian Institute of Leather, Footwear and Artifact Technology (Instituto Brasileiro de Tecnologia do Couro, Calçado e Artefatos - IBTeC), in partnership with Fenac. especially Latin America,” he said..

### **Fair discusses relevant issues in the sector**

As well as bringing news to visitors, Fimec was the occasion for important debates between professionals in the cluster. One of them was the CICB Sustainability Forum, which took place alongside the trade fair program on the second day of the event (19th). In this edition, the Forum debated “Life Cycle Analysis (LCA)” with relevant names from the market. A trend in Brazil, the tool measures the environmental impact of a product or process, from the time raw materials are obtained to their reuse. The event was organized by the Brazilian Leather project, in partnership with the Brazilian Tanning Industry Center (Centro das Indústrias de Curtumes do Brasil - CICB) and the Brazilian Trade and Investment Promotion Agency (ApexBrasil).

On the last day of the fair (20th), the sector gathered for a panel on trade opportunities between Mercosul and the European Union, promoted by the German-Brazilian Chamber and the Commercial, Industrial and Services Association of Novo Hamburgo, Campo Bom, Estância Velha and Dois Irmãos (ACI-NH/CB/EV/DI). With a focus on the Partnership Agreement between Mercosul and the European Union, the meeting brought together experts and representatives from the business sector to discuss how Brazilian companies can benefit from the opening up of markets, with emphasis on easier access to exports, international financing lines and expanding their presence in the European market.

**The 2026 edition** - The 49th edition of Fimec (International Fair of Leather, Chemicals, Components, Machinery and Equipment for Footwear and Tanneries) will take place from 3-5 March 2026 in the Fenac pavilions, in Novo Hamburgo/RS.

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## **53<sup>rd</sup> Futurmoda concludes on a positive note**

Technology takes center stage at Futurmoda

- **Innovation, Sustainability & Technology**
- **Over 5000 visitors from the trade & industry**
- **New arrivals for Spring-Summer 2025-2026 season**

The 53rd edition of Futurmoda-the popular Spanish Fair for Leather, Textiles, components, Machinery for Footwear and Leather goods, held at the IFA-Fira Alacantg Exhibition Center in Elache, Spain, on 12 & 13 March 2025, ended with good results.

Over 300 exhibitors, occupying 12,500 sq mtrs exhibition space, showcased a wide variety of products, materials and technologies for the footwear, leather goods and fashion industry and also recycled materials, eco-efficient processes and new alternatives for the industry were on display. The event exceeded the expectations with 5003 professional visitors which include from overseas countries, such as Italy, Portugal, France, Germany, Poland, the Netherlands, China, and India.

Álvaro Sánchez, General Director of the Spanish Association of Footwear Component Companies (AEC), highlighted the fair's growth in both exhibitors and visitors, stating that these results

confirm that "the industry continues to bet on technological transformation and the development of more sustainable materials." He also emphasized that "the sector is evolving rapidly, and FUTURMODA reflects this evolution, consolidating itself as the leading platform for footwear and leather goods manufacturers.

One of the main highlights of this edition was the machinery sector, which occupied 15% of the exhibition area. Automation, process optimization, and digitalization showcased the industrial transformation the sector is undergoing.

More than 20 companies presented advanced and sustainable equipment for footwear and leather goods manufacturing. The machinery area also hosted live demonstrations, allowing attendees to experience firsthand the functionality of various technological solutions and their impact on production.

Innovations included specialized machines for eco-friendly footwear manufacturing, introducing the production of anatomical insoles, innovative soles, and components made from biodegradable and recycled materials.

Another technology showcased was 3D printing, featuring equipment capable of creating high-precision final parts and prototypes, which are essential for the manufacturing of customized and exclusively designed products.

On the other hand, automated systems for cutting and assembling materials were exhibited, meeting the sustainability requirements imposed by international regulations and the growing demand for environmentally responsible products. The next edition of Futurmoda will take place from October 15 - 16, 2025 which would focus on Trends and Sustainability.





## **TFL Group Appoints André Lanning as Group CEO**

TFL Group, a leading global provider of specialty chemicals for the leather industry, is pleased to announce the appointment of André Lanning as Group CEO, effective March 1, 2025. He succeeds Russ Taylor, who is stepping down for personal reasons.



André joins TFL from Trinseo, where he most recently served as Chief Commercial Officer. With a distinguished career spanning executive leadership roles-including CEO, SVP, and VP positions at Kemira, Yara International, Nuon, Advanced Refining Technologies (ART) and W.R. Grace-he brings a wealth of global experience, deep market expertise, and strategic vision to his new role.

Under André's leadership, TFL will continue its focus on sustainable growth, market leadership, and innovation in an evolving industry landscape. His strategic priorities include driving commercial excellence, expanding market share, optimizing operational synergies, and pursuing organic growth opportunities. Additionally, he will explore strategic M&A initiatives to further strengthen TFL's competitive position.

We are excited to welcome André to TFL Group and look forward to his leadership in guiding the company's next phase of growth and success.

**The 56th edition of *Texworld Apparel Sourcing Paris* took place in a particularly dynamic atmosphere. More than 8,500 international visitors discovered and made business connection with the 1,250 exhibitors from 32 countries over three days at the Paris-Le Bourget Exhibition Centre.**

*Texworld Apparel Sourcing Paris*, Europe's biggest marketplace for fashion textiles and clothing, has confirmed its position as the leading global fashion platform for mid-range segment buyers and suppliers. Held from 10 to 12 February 2025 at the Paris - Le Bourget Exhibition Centre, the new edition attracted more than 8,500 visitors, a 10% increase comparing to the February 2024 edition.

**Paris as an unmissable global sourcing destination for fashion buyers** This Parisian event has established itself as an unmissable contact point for designers, buyers and suppliers of fabrics and finished products. It also confirms the importance of Europe for the global fashion industry, with the Top 5 visitors coming from France, the UK, Italy, Spain and Germany. After a few years of adjustment, many international buyers returned to Paris, with international participation on the rise. The grand return of international buyers to Paris, while French buyers remains stable, shows the resilience of Paris in an increasingly volatile fashion market.

### **Meeting market expectations**

*“The global market, beyond the general geo-politico-commercial situation, is still undergoing a major metamorphosis, with a gradual shift from the entry-level segments of the past towards a more qualitative offering, which now accounts for the bulk of global clothing consumption, points out Julien Schmoll, Marketing and Communications Director at Messe Frankfurt France. We've redesigned our trade fairs to meet the needs of buyers in these mid-range markets, by focusing our selection on a diversified, enriched,*

*qualitative and cutting-edge offer, with a very wide choice at competitive prices, presented in a functional setting conducive to exchanges”.*

### **Focus on African sourcing**

This year saw the spotlight shine on African sourcing, now seen as an attractive alternative by many buyers. The nine Ethiopian companies present in Paris made promising commitments with European brands

### **Exhibitors-visitors: three days of active exchanges**

On the buyers' side, the feedback also points to active exchanges. This innovation was highlighted during the *Econogy Tour*, which was organised for visitors interested in identifying companies that respect the ecological and social standards of the textile industry.

### **From mainstream brands to haute couture**

The materials manager and the buyer for a major French general clothing brand have also set themselves the goal of monitoring the market. *"We come to the show to meet our Indian, Turkish and Chinese suppliers, they explain, and then we do a lot of monitoring for future collections... Not forgetting the shopping list given to us by the designers, which we supplement with requests for samples”.*

The same approach applies to haute couture. Livia Stoianova and Yassen Samouilov, founders of *On Aura Tout Vu*, came to meet Chinese and Indian suppliers: *"We wanted to identify materials and suppliers for a show production company that we support and advise, explain the two designers.*

### **15-17 September 2025: Rendez-vous at Le Bourget**

Save the date now: The next edition of *Texworld Apparel Sourcing Paris*, which will include the key sectors Avantex and Leatherworld, will be held at the Paris- Le-Bourget exhibition centre in a similar layout to the February edition, with a service offering designed for buyers and visitor areas set up to create synergies between raw materials and finished products.

Website: <https://texworld-paris.fr.messefrankfurt.com/paris/en.html>



## **ASSOMAC Around the World:**

### **Italian technological excellence goes round the world**

- The 'Assomac Around the World' programme to support Italian companies in the leather, footwear and leather goods sector, also implemented through promotional activities managed in conjunction with the ITA Agency, is back on track.
- Through its collaboration with the Agency, Assomac supports companies in the sector, facilitating their participation in the most important international fairs, from the IILF in India to the APLF in Hong Kong and the Mega Leather Show in Pakistan.
- India emerges as a strategic market, with a 17 billion euros leather sector and Italian machinery exports growing by 42.15%, while in Hong Kong, Italy confirms its leadership in the supply of components for tanning machinery and in Pakistan the Mega Leather Show offers new opportunities in a rapidly evolving \$874 million market.

Assomac renews its commitment to promoting Italian leather, footwear and leather goods processing technology on international markets through the 'Assomac Around the World' programme. The initiative, dedicated to strengthening the internationalisation process of companies in the sector, joins the promotional strategy and activities implemented by the ITA Agency, communicating the value of the Italian sector in the main world markets.

In the first half of 2025, the Confindustria association will be present at the most important trade fairs, offering member companies the opportunity to present their technologies and develop new collaborations.

After the first appointment at the India International Leather Fair (IILF) in Chennai, held from 1 to 3 February, the tour continues today in Milan, where Lineapelle, a reference event for the global leather and fashion industry, is being held until 27 February. In March it will then be the turn of the APLF in Hong Kong (12-14 March), followed by the Mega Leather Show in Pakistan (11-13 April).

### India: a growing strategic market

The presence in Chennai represented an important opportunity for Italian companies in the sector to present their technological solutions to a rapidly expanding market. India is now one of the main players in the global leather industry, with a GDP expected to increase by 6.5% in 2025.

India's leather and finished goods sector was worth 17 billion euros in 2024, with forecasts of growth to 45 billion euros by 2030. The country is among the world's leading producers, with an annual output of around 1 billion square metres of leather, which accounts for 10% of global production. India is also the world's second largest producer of footwear and leather goods, as well as the fifth largest exporter of leather goods and the third largest exporter of saddle goods.

On the machinery export front, Italy remains a strategic partner for India. In the first ten months of 2024, our country was the second supplier after China of leather processing technology, with an export value of 14.62 million euros and a market share of 20.8% (2023 figure). This figure marks a significant growth of 42.15% over the same period last year, confirming the central role of Italian technology in the modernisation process of Indian industry.

### **Hong Kong: a strategic business hub for the industry**

After Lineapelle, the tour will continue to APLF Hong Kong (12-14 March), one of the most important trade fairs for the footwear and



leather goods industry in Asia. Hong Kong, which has always been a crossroads of international trade, represents a privileged gateway to Asian markets, particularly for mainland China and South-East Asia. As the 2024 data show, here Italy confirms its leadership in the sector, supplying alone about 80% of the machinery components (excluding sewing machines) imported for the tanning of leather, hide and fur or for the production and repair of articles in these materials, for a total value of USD 1,828,000.

Italy also dominates in the segment of machinery for the preparation or processing of leather, hide or fur, or for the manufacture or repair of leather goods, with exports on this market rising from 42.19% in 2022 to 77.46% in 2024. Footwear manufacturing or repair machinery also performed well (38.32% market share), although slightly down on the previous year. Italy therefore remains among the main exporters of machinery for the sector, making the participation of Italian companies at APLF Hong Kong a strategic opportunity to consolidate their presence in the Asian market.

### **Pakistan: a potential yet to be explored**

In April, Assomac and the ICE Agency will be present at the Mega Leather Show in Pakistan, a landmark event for the local leather industry, which represents the country's second largest export sector after textiles, with an annual value of USD 874 million. The sector is mainly divided into four segments: leather clothing, gloves, footwear and leather goods, with exports of leather gloves accounting for a significant share of the total.

The Pakistani leather industry currently has about 800 companies, with 213 tanneries registered with the industry's umbrella association. The industry contributes around 4% to the national GDP, and is considered a key sector for the country's economic growth.

Despite Pakistan's well-established role in the global leather market, the sector still has wide margins for development, especially in terms of technological innovation and sustainability. Currently, Pakistani tanning technology is considered among the most advanced in South-East Asia, with quality standards second only to those in Italy. However, the need to modernise production facilities and improve process efficiency makes the local market particularly interesting for Italian machinery suppliers.

### **A look into the future: focus on Africa and major international events**

In addition to the trade fairs in the first six months of the year, Assomac continues its work on an institutional and international level. The association is actively involved in the UITIC International Congress of Footwear Technicians, which will be held in Shanghai from 31 August to 3 September, in collaboration with its Chinese colleagues from the CLIA association. The event, entitled '*Footwear Industry Competitiveness and Sustainability in the Era of Artificial Intelligence*', will be an opportunity to discuss the challenges and opportunities of the sector in the era of artificial intelligence.

At the same time, Assomac has multiplied its **commitment to the African market**, a rapidly expanding market which, if harnessed, will soon become strategic for the growth of Italian companies. The aim is to develop new business opportunities, consolidate the presence of Italian technology in North Africa, and contribute to the development of the sector through projects and technological support in the centre and south of the continent.

'*Assomac around the world*' is not only a tool to promote Made in Italy technology, but a digital and trade fair platform to announce at the most important international trade fairs '*Be Smart! From Skills to Factory*', the new edition of Simac Tanning Tech, from 23 to 25 September at Fiera Milano Rho.

## **11M2024: Decline In Italian Tanning Sector**

The Italian tanning industry, based on the latest ISTAT data available (11 months of the year), is estimated to end 2024 with an overall annual decline of 4.3% in turnover and 7.6% in production volumes. If the evidence of these changes were confirmed in the final analysis, this would be the second consecutive year of overall declines for the sector, reflecting persistent generalized suffering in the fashion, furniture and automotive supply chains.

The ongoing international political tensions that have been a feature of the last few years, and their severe consequences at the economic level, have intensified an economic slowdown that affects consumer products in the aforementioned supply chains most strongly, upon which the need to rethink development strategies at the global level is clear.

While on the global political level there have recently been signs of possible relaxation of existing conflicts, the prospects for trade still appear difficult and uncertain, with the risk of further exacerbation and effects unfortunately difficult to fully discern at the global level.

The performance of Italian leather exports also shows overall negative fluctuations in the period January-November 2024, with a total decline of 3 % in value compared to the previous year's figure. Despite the negative sign of total exports, the analysis of individual shipments by main destination country shows, once again, varied trends, even of remarkable intensity. Among our top 20 export countries, Spain (+11 %), Vietnam (+23 %), Germany (+6 %) and India (+2 %) are growing, against substantially unchanged flows to France (first foreign destination of Italian leathers), China (including Hong Kong) and South Korea. Shipments to the U.S. (-4%), Serbia (-3%) and the U.K. (-4%) declined slightly, while more intense declines were seen in Romania (-11%), Tunisia (-10%), Portugal (- 6%), Albania (-11%), Poland (-12%), Slovakia (-15%),

Mexico (-10%), Turkey (as much as -30%) Czech Republic (-20%) and Hungary (-7%).

The analysis of the sector-specific performance of the individual segments and production districts of the Italian tannery unfortunately shows no exceptions to the adverse landscape mentioned above. In the detail of production by animal origin, bovine leathers show, on average, less negative variations than sheep and goat leathers, both in production and in turnover, while, in terms of destination sector, difficulties appear widespread across all client segments. Turnover in all major national manufacturing districts is declining.

*Source : Leatherinsiders*

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## Portugal has provided shoes for 67 million people around the world

***Portuguese footwear industry exported 67 million pairs of shoes worldwide in 2024***

The Portuguese footwear industry exported 67 million pairs of shoes worldwide in 2024. In practical terms, the sector exported more than 90% of its production to 170 countries on all continents.



Compared to the previous year, APICCAPS estimates, based on preliminary data from the National Statistics Institute (INE), indicate a 3.3% growth in sales in volume and a 6.5% reduction in value, to 1,702 million euros. “This is a reflection of the market dynamics. The year that has just ended was very difficult on the external front. On the one hand, there was a noticeable slowdown in the main international markets, namely Germany, France and the Netherlands, which affected the main players in the sector, and our companies in particular. “The sector’s strategy of diversifying its product offering is beginning to become noticeable, even if it often involves subcontracting abroad, as our main international competitors already do,” highlighted the President of APICCAPS, Luís Onofre.

In fact, exports of leather footwear will have fallen by 7% in 2024 to 39 million pairs, while exports of footwear made of other materials (waterproof, plastic or textile) will have increased by 22.6% to 28 million pairs. “Although we believe that leather footwear is the best solution on the market, which is why it represents more than 80% of our sales in terms of value, because it is a natural product, technically more robust and considerably more sustainable, as it has a longer lifespan, we have made a considerable effort to invest in a new generation of products, particularly within the scope of the Bioshoes4all project.” “This is a path that we should explore further,” said Luís Onofre.



By market, according to APICCAPS estimates, Europe continues to be the natural market for Portuguese footwear, especially Germany (14 million pairs, worth 383 million euros), France (15 million pairs, worth 348 million euros) and the Netherlands (5 million pairs, worth 195 million euros). The United Kingdom also continues to be an excellent market for Portuguese footwear (3 million pairs, worth 113 million euros), as does the USA, where sales have increased by 25% in the last three years to 2 million pairs, worth 94 million euros.

## **Consumption is expected to grow in 2025**

Global footwear consumption is expected to grow by 8.4% in 2025, according to the World Footwear Survey. Even so, if the forecasts are confirmed, consumption should grow significantly in Oceania (+25%), Africa (+13.3%), Asia (+9.2%) and North America (+8.3%), while Europe (+0.5%), the reference market for Portuguese footwear, should stagnate.

Predictably, according to the same report, the footwear industry will continue to face difficulties, particularly with the cost of raw materials and goods and with competition in domestic markets.

“All indicators point to 2025 being a very challenging year, as the world’s main economies continue to show signs of strong stagnation. There are many signs of uncertainty”, laments Luís Onofre. “On our side”, he continued, “we must continue our efforts to seek new markets, as only with a proactive attitude in developing new products and winning new customers will we be able to mitigate a particularly complex economic situation”.

## **Leather goods**

### **With historic results**

Also according to APICCAPS estimates based on preliminary data from INE, the leather goods sector reached a new historical high in 2024. In the entire year, Portugal exported 351 million euros in leather goods and leather goods. This represents an increase of 8.5% compared to the previous year.

The “Suitcases and Bags” segment stood out, registering growth of 10.6% to 175 million euros.

## Global Leather Industry PART – IV

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*(contd. from Feb issue)*

### 16. Going Forward - Leather Colouration

#### Going Forward - Leather Colouration

1. Leather and Circular Economy is gaining more importance in the changing scenario. In the 2020s and beyond, the way we make and use products is going to have to shift from a linear model to a circular one. Recycling of Leather is a part of fuller and effective utilization of precious high strength product from animal kingdom. Getting value products from Splits, Hair and wool, green and limed fleshings etc enhance the sustainability of Leather.

2. Need to change the Leather Industry image from Polluting Industry to Positive Scenario. The role of Best Available Technology, Cleaner Operations & Green Chemistry has to play a great role for things to make happen. More contributions have to come from Brands, Leather Chemical Suppliers including Colourant manufacturers, Research Institutions & Eco Standards for enhancing the performance of Leather Industry

3. Innovation is a key requirement for survival, growth, development and continual sustainability. When innovative ideas become scarce in the Leather Area itself, there is a great need to get ideas and innovative approaches and initiatives from allied industry like Textile, Paper, Synthetic Polymer, and Coating & Constructions to continue the efforts of offering 'new' to Leather Industry. Few examples are – Inkjet Printing, Production of Novel Eco Synthetic Leather from Leather waste and more environmentally friendly Polymers, a Total Relook and revisiting the Conventional Leather Making.

4, Encouraging Organizations to become member and associate in Sustainable Standards and .Organizations as well as Industry Associations for enhancing the visibility and acquiring organizational and strategic skills. While the Colourant Industry is more located in Asia Pacific, the Leather Industry has a Global spread.

## Going Forward - Leather Colouration

5. Strategic thinking involving Market Penetration, Process and Product Modification for meeting the challenging Customer Requirements, Having strong QA and Customer Support Areas. Key strategies adopted by leading players include product launch, joint venture, acquisition, partnership, expansion, and investment.

6. Merger & Acquisition have become an important strategy for survival, growth and development with leading players in Colourant & Leather Chemicals Industry- Stahl completing acquisition of BASF Leather Chemicals, TFL buying LANXESS Organic Leather Chemicals business. Customer base expansion, Fuller & effective utilization of Manufacturing, Research & Development and Marketing Skills, Utilization of Realized financial values for still better value-added businesses and other similar initiatives have become results in this strategic merger and acquisitions happening in Colourant Industry.

7. Key Growth Drivers are - Demand Drivers- Rising disposable incomes, Growing fashion consciousness among the youth in rural India. Supply Drivers- Very good Raw material Availability of Raw material, & Skilled Manpower, Good Manufacturing & Marketing experience, Positive Educational & Research Support. Policy Drivers - Receiving favourable tax treatment, 100 percent FDI in the sector and 100 percent repatriation of profits and dividends, thereby incentivizing foreign players to invest in the sector.

### 16.1 Leather Sustainability – Going Forward

#### Leather Sustainability – Going Forward

1. Leather and the Meat Industry. Leather from cattle, sheep, goat and pig are a by-product of the meat industry. 98% of the leathers are made from these four animals. Farmers do not raise cattle for their hides to turn into leather as the value of a steer/cow hide is generally only approximately 4% of the total animal's value. Farmers raise cattle for their meat or milk with the hide as a by-product that must be turned into another value-added product or eaten. Leather is currently the best way to up-cycle hides and skins from

## Leather Sustainability – Going Forward

the meat industry; every year it not only saves around 7.3 million tonnes from global landfill, but is versatile enough to be used in a range of products from soft gloves to comfortable footwear, to hard wearing furniture and contemporary clothing. **15**

2. The Numbers - LCA calculations- 95% of the economic value is allocated to food. (Icafood2014.org) and Leather is < 5% of the economic value of a cow. LCA – Life Cycle Assessment. **16**

3. In 2011 Pete Lankford, design director for Earthkeepers and Timberland Boot company, was quoted: “Leather wins hands down over anything you can think of.” He continued, “If you can buy a pair of boots that last twice as long as a synthetic alternative, you’ll end up with half the environmental impact in the long run”. Timberland and other major retailers, meanwhile, partnered to create the Leather Working Group in 2005 to introduce a rating system for leather manufacturers based on their efforts to reduce their environmental impact. **17**

4. An incredible journey of Leather- Leather is the result of the recycling of a slaughterhouse leftover - Hides & Skins. Tanneries tend to maximize the use of valuable matter by converting them into Leather. While doing so, the by-products obtained are recycled for fuller utilization and value addition and environmental protection. Leather & Leather Products are also recycled and up cycled .Leather is natural, biodegradable & durable. Leather is substantially a circular economy product leading to a product of enhanced sustainability.

5. Changing self and changing self-leading to Global Change are small steps taken to attain Sustainability. This directs that the Sustainability is the responsibility of everyone. All the stake holders in the value chain - Leather manufacturers, Traders, Brands, Retailers, Suppliers (including chemical companies, machinery manufacturers, etc.) Associations, Technical experts and Research Institutions including CSIR-CLRI contribute for the successful existence of Leather on an ongoing manner. Organisations like Leather Working Group (LWG), Leather Naturally, Sustainable Leather Foundation, Textile Exchange - Responsible Leather Round Table (RLRT), Global Roundtable for Sustainable Beef (GRSB), Leather Impact Accelerator(LIA)

## Leather Sustainability – Going Forward

support the global leather industry to learn, to improve and to protect for future generations.

6. Auditing the Leather Supply Chain - Environmental Compliance, Wastewater and Other Waste, Chemicals, Social & Labour, Energy Usage, Water Usage and Hide Traceability form important subject matters. The key focus areas are - Environmental Compliance, Social Compliance and Governance Compliance. Certification and Audit bodies like Leather Working Group, ICEC - Institute of Quality Certification for the Leather Sector, Brazilian Leather Certification of Sustainability (CSCB), ZDHC, LEATHER STANDARD by OEKO-TEX, ECO<sub>2</sub>L Energy Controlled Leather and related organisations play a very crucial role for making the Leather Industry more responsible and for solutions in the Leather value Chain.

7. Responsible chemistry and Life Cycle Assessment ( LCA), Cleaner production, Green Chemistry Principles, Best Available Techniques & BAT reference documents (BREF), Eco Labels, RSL & MRSL, Sustainable Leather Management (SLM) The Sustainability Footprint – An Integral Approach and related subject matters contribute for Responsible Leather.

8. Implementing Across Value Chain the United Nations Sustainable Development Goals (SDGs) is a need of the hour requirement to end poverty, protect the planet and ensure prosperity for all by 2030.

## 16.2 Going Forward - Circular Economy – Leather

### Going Forward - Circular Economy – Leather

1. An incredible journey of Leather- Leather is the result of the recycling of a slaughterhouse leftover - Hides & Skins. Tanneries tend to maximize the use of valuable matter by converting them into Leather. While doing so, the by-products obtained are recycled for fuller utilization and value addition and environmental protection. Leather & Leather Products are also recycled and up cycled .Leather is natural, biodegradable & durable. Leather is substantially a circular economy product.

## Going Forward - Circular Economy – Leather

2. Environmental challenges; Sustainable Leather Management; Certifications to International Standards on Quality, Traceability, Environmental protection, Chemical management ;Modernization, Innovation and related areas are being addressed on an ongoing basis by Leather Industry, Government, Research Organizations, Leather Industry Association and Trade Groups and Organizations and institutions connected with Leather & Leather Related Activities. Result is the enhanced sustainability of Leather & Leather Products Industry on an ongoing basis.

- 3 Leather; Recycled Leather; Leather Alternatives – Synthetic PU & PVC based, Bio Leather and Composites from Leather, Recycled Leather & Leather Alternatives would co - exist continuously. Parameters like
- i. The rise of environmental and societal concerns, as well as animal welfare;
  - ii. Growing demand from rising population & Spending Potential and
  - iii. Catering the needs of various economic sections favour the co – existence of Leather, Recycled Leather & Leather Alternatives.

4. Indian Leather Industry has a long tradition. In the past few decades, Indian leather industry has undergone a drastic change from being an exporter of raw materials in the 60's and 70's to exporter of various finished and fashionable leather goods, Besides having a very good National Market, it is a one the foreign exchange earner for India. Currently it has witnessed little slow down in the export earnings.

5. Circular economy is relevant as it offers companies the opportunity to turn inefficiencies in linear value chains into business value. These inefficiencies look beyond production waste, focusing on underutilized capacities, premature product lives, unsustainable materials, wasted end-of-life value and unexploited customer engagements. Three drivers underpin the shift towards circular: the trend of increased customer-centricity, sustainability and enabling technologies.

6. Waste to Wealth: A Model needed for the Leather Industry for The waste generated - Tannery Waste. Manufacturing/production waste, from the production of leather-based goods and Post-consumer waste. Awareness Creation, Use of Technology, Innovation, Government Support, Research and Development Efforts, Industry Support, Out of box thinking etc. are the



## Going Forward - Circular Economy – Leather

need of the hour. Types of Wastes - Current Utilization-Further Value Addition is to be seen from a totally innovative way for solutions

### 16.3 Going Forward - Synthetic, Recycled and Bio Leathers

#### Going Forward - Synthetic, Recycled and Bio Leathers

- None of the alternative materials achieved the properties of leather according to the applied reference values, although many of them are offered as a leather alternative. The question of why it is difficult to achieve these properties by alternative natural materials is answered with the different biological functions of the used materials. **18**
- The Sustainability Club has mapped out all the bio-based leather alternatives that are available or in development.
- In Leather and Leather Alternatives club, Leather( Very High Volume ) is a leading member. Synthetic Leather (High Volume ) comes next with an established presence in the value chain. Both Bonded Leather & Bicast Leather utilise Leather Waste. They have small Volume. Both Bio Leather and Bio Fabricated Leather strongly belong to Eco friendly leathers. They have a very small volume. They are promoted by Fashion and Environmental Enthusiasts.
- The most talked about alternative in the leather industry-synthetic leather-lies among the pool of technical textiles. Classified as a coated fabric, synthetic leather is commonly of two types: polyurethane (PU)- based and polyvinyl chloride (PVC)-based. It is manufactured by coating a base fabric, which can be woven, knitted or nonwoven; with any of the two mentioned polymers. Coating has a vast application area in almost every field of technical textiles. Innovations and developments in the Textile Coating area benefits the Synthetic Leather Industry substantially.
- Vegetable tanned leather is a sustainable product and Eco -Friendly - Chrome Free. Breathable. Antibacterial. Recyclable. Many Tanning Industry Leaders like BOXMARK, Austria promotes Vegetable Tanned Leather as far

## Going Forward - Synthetic, Recycled and Bio Leathers

as ecology is concerned – replacing the traditional chromium III tanning procedure with a vegetable synthetic production process, converting the leather dyeing process to using heavy-metal free pigments and the finishing of leather articles with solvent-free varnish. FAULHABER PRODUCTS, Germany produces high-quality vegetable tanned leather with a natural finish. studio tolsta and other leading fashion houses use Vegetable Tanned Eco Leather for marketing their leather products

- The future of bio-based leather -There are more exciting innovations happening in this field. Bio-fabricated leather is a promising new material group that is cultured in a lab or brewery. Most of these materials are so new that they are not yet commercially available. Bioengineering is also being practiced by Modern Meadows, a well-known start-up within the field. The strong cases to present are - APPLE SKIN Vegan leather from apple pomace, HEMP BIO LEATHER, Malai is a biobased material grown on Coconut water, Vegea uses grape marc(Wine Leather), Cactus leather, marketed as Desserto.

- Bonded Leather & Bicast Leather are known as recycled leather which have a good potential. They assist leather in the recycling activity. Use of natural resins instead of synthetic resin during their manufacture, take to Eco Friendly club.

- Leather Composite with Regenerated Leather (RGL) and Bio Leather & Bio fabricated leather for innovative applications is an innovative avenue for fashion and high-end products.

- Upscaled functional leather (UFL) inherits all the natural properties of leather and combines it with other cross-domain functions, due to which it has gained considerable attention as advanced functional bio-based materials. Further emphasis is on UFL, which includes electromagnetic (EM) wave absorbing leather, infrared absorbing leather, X-ray shielding leather, flexible conductive leather, flame-retardant leather, antibacterial leather, self-cleaning leather as well as water-, oil-, and soil-repellent leather. 24 Use of Leather and Leather Alternatives for Upscaled functional leather (UFL) is an innovative area like Smart Textiles in Textiles which is an innovative and value-added area.

## Going Forward - Synthetic, Recycled and Bio Leathers

- Standards, Standardisation and Labelling are some of the key factors for the success of Bio Leathers and Bio Fabricated Leathers.

### 16.4 Going Forward - Certifications in Leather Industry – A Review

#### Going Forward - Certifications in Leather Industry

1. Organisations are seeking certifications and accreditations of Standards for Growth, Development and Sustainability. The major contributing factors are.

- Brands at the end of Leather or Textile value chains increasingly demand that the products they buy display their social or environmental credentials, in the form of certifications or audits. Operational transparency and environmental impact are an important part of purchasing decisions.
- In a global and competitive market, having Certifications and Accreditations have become a crucial element for competitiveness, leadership and continuous improvement of organizations.
  - Certification is an effective tool that contributes to improving efficiency in business management and building confidence among all economic agents.
  - Certification promotes and recognizes the best tannery practices regarding economic results, reduction of environmental impact, and relationships with employees and surrounding communities.

2. The global leather and allied products market are expected to grow from \$291.11 billion in 2020 to \$336.21 billion in 2021 at a compound annual growth rate (CAGR) of 15.5%. The market is expected to grow to \$ 447 billion by 2022. **19**

The Leather industry in India stands at USD 17.85 billion of which Exports are USD 5.85 billion and Domestic market consumption is USD 12 billion as of January 2019. India's total leather exports in FY2018-2019 amounted to a total of USD 5.7 billion. **20**

As per officially notified DGCI&S monthly export data, the export of Leather and Leather products for the period April 2020 – March 2021 touched US \$

## Going Forward - Certifications in Leather Industry

3681.58 Mn as against the performance of US \$ 5070.55 Mn in April 2019 – March 2020, recording a decline of 27.39%. The root cause analysis of this declining performance and strategy for remedial measures including innovations and action plans in the value chain are the need of the hour for growth and development. **21**

With the above scenarios, Certifications and accreditations would be one of the key factors for success and going ahead.

3. The major dimensions in Leather Certifications are: Economic, Environmental, Social and Sustainability. Awareness, Knowledge Creation and successful practice play an important role for the sustainability of Leather Industry.

Need to change the Leather Industry image from Polluting Industry to Positive Scenario. The role of Best Available Technology, Cleaner Operations & Green Chemistry has to play a great role for things to make happen. More contributions have to come from Brands, Leather Chemical Suppliers including Colourant manufacturers, Research Institutions & Eco Standards for enhancing the performance of Leather Industry.

Encouraging Organizations to become member and associate in Sustainable Standards and Organizations as well as Industry Associations for enhancing the visibility and acquiring organizational and strategic skills.

4. Changing self and changing self-leading to Global Change are small steps taken to attain Sustainability. This directs that the Sustainability is the responsibility of everyone. All the stake holders in the value chain - Leather manufacturers, Traders, Brands, Retailers, Suppliers (including chemical companies, machinery manufacturers, etc.) Associations, Technical experts and Research Institutions including CSIR-CLRI contribute for the successful existence of Leather on an ongoing manner. Organisations like Leather Working Group (LWG), Leather Naturally, Sustainable Leather Foundation, Textile Exchange - Responsible Leather Round Table (RLRT), Global Roundtable for Sustainable Beef (GRSB) & Leather Impact Accelerator(LIA) support the global leather industry to learn, to improve and to protect for future generations.

## 16.5 Going Forward - Leather Auxiliaries – A Review

### Going Forward - Leather Auxiliaries

Leather Chemicals and Auxiliary Manufacturers play a great role in the development, growth and sustainability of Leather Industry. It is an ongoing activity.

Besides Leather Chemicals & Auxiliaries, this industry has portfolios like Textile & Paper Auxiliaries, Performance Coatings, Polymers, Shoe Finish & Aftercare etc for catering the needs of allied industry.

Quality Assurance and Customer Support, having Center of Excellence and Application & Fashion Centres, Product stewardship, Products Launch, Sustainable Sourcing, Consumer Product Safety, Solutions & Services are key support areas for successful business activity.

Quality Assurance and Customer Support, having Center of Excellence and Application & Fashion Centres, Product stewardship, Products Launch, Sustainable Sourcing, Consumer Product Safety, Solutions & Services are key support areas for successful business activity.

Responsible Manufacturing, Clean Technologies Concept, Practising Green Chemistry & Sustainable Chemistry & Best Available Techniques, Getting Certifications to Standards, Having associations in Industry Organisations & Business Associations are gaining momentum for survival and growth and sustainability.

Innovations, Solutions to challenges faced by the Leather Industry and Extrapolating novel technology from allied industry would definitely help Leather Industry for successfully facing the competition from Synthetics and other non-leathers products. The Leather Chemicals and Auxiliary Manufacturers would do a major contribution in this regard.

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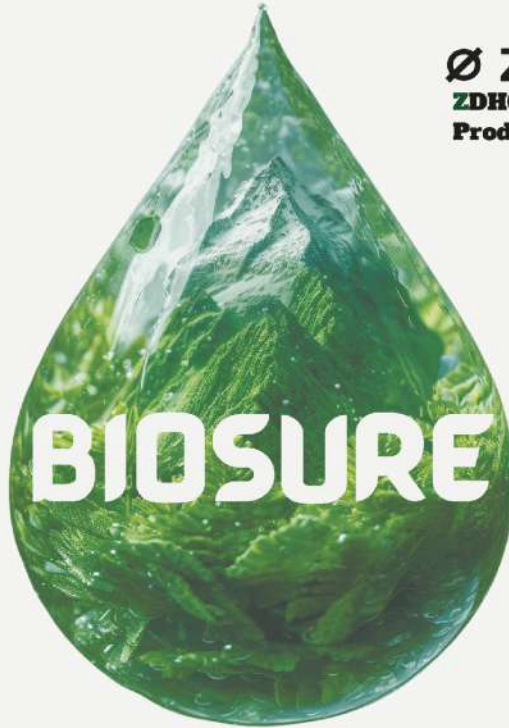
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