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Leather Week 2025- A Good Start

This year's events of **Leather Week** started on 31st January 2025 with a **Symposium of Emerging Brands**, jointly organised by the Indian Finished Leather Manufacturers Association (IFLMEA) & Indian Shoe Federation (ISF), at the Hotel ITC Grand Chola, which facilitated emerging brands to connect with leading customers in the Organised Retail Arena pan India. Over 15 emerging brands such as, Aks, Ad, Z aglot, TOH and others displayed their innovative products, such as Leather Garments, Bags, Shoes & Accessories for men and women.

The 38th edition of the **India International Leather Fair (IILF)**, the flagship event of India Trade Promotion Organisation (ITPO), organised in association with the Council for Leather Exports (CLE), from 1-3 February 2025 at the Chennai Trade Centre, occupied an all time high net area of 11,473 sq mtrs with a considerable increase of 20% over the previous edition, thanks to the newly constructed Halls in the ground floor of the newly built New Convention Centre. 392 exhibitors of whom 61 overseas participants from 19 countries, with Group Participation from Brazil, France, Germany and Italy, presented entire range of products relating to leather and footwear industry from raw materials to finished products, high lighting cutting-edge technologies, eco-friendly solutions and evolving fashion trends while providing a global stage for industry leaders, innovators and entrepreneurs.

IILF 2025 provided a comprehensive outlook on the industry's trajectory underscoring the impact of supportive government policies, sustainability-driven innovations and technological achievements.

The Council for Leather Exports had organised its annual event **Designers Fair** concurrently at the Convention Centre, where 36 Design Companies & Institutions from 9 countries namely, Australia, Brazil, Italy, India, Philippines, Turkey, Portugal, Mexico and the USA actively participated.

The IFLMEA organised its Asia's Mega Fashion Event, the **Leather Fashion Show** on 1st February 2025 at the Hotel ITC Grand Chola, where around 70 top class models including children and 10 show toppers showcased an array of aesthetic, trendy, high fashion oriented leather garments, shoes, bags from 11 brands.

The CSIR-Central Leather Research Institute (CSIR-CLRI) conducted its 58th edition of **LERIG CONCLAVE** on 2nd February 2025 at the Conference Hall in the New Convention Centre, which focused on the strategic advancements for the development of the leather and footwear sector.

With a huge and enthusiastic participation of the industry in all the above events and also the enhanced global presence, IILF 2025 is poised to set new benchmarks in the leather and footwear industry, fostering innovation, sustainability and international collaborations.

At a Press Meet held on the eve of IILF 2025, Shri R Selvam, Executive Director, CLE had said that Indian Leather & Footwear industry has huge growth potential and it is aiming to reach a turnover of US\$ 47.1 billion by 2029-30 (which includes domestic industry turnover of US\$ 33.4 billion and export turnover of US\$ 13.7 billion) from the turnover of US\$ 23.69 billion during 2023-24 (which includes domestic industry turnover of US\$ 19 billion and export turnover of US\$ 4.69 billion) The industry will be able to generate additional 2.5million jobs in the next 5 years, in addition to the 4.42 million people already working in the industry.

In the Union Budget 2025, **20% export duty on crust leather and the 10% import duty on wet blue leather were removed.** The Council for Leather Exports (CLE) has stated that it would help the leather industry by the reduction of duties and introducing a focus product scheme. **This scheme is expected to create 22 lakh jobs and generate exports of over ₹1.1 lakh crore.** These measures have been widely welcomed by industry stakeholders, particularly small and mid-sized tanneries, as they enhance global competitiveness and ease trade restrictions. **The exports will increase from Rs.3000 crore to Rs 8000 crore, according to Shri R Selvam, Executive Director, CLE.**



IILF - 2025 - A spectacular Leather Annual Event at Chennai

- Vasan Suri

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This year IILF, created lot of expectations across the Leather & Leather Products Industry from all over the Country. There was a good contingent of participants from China, Germany, UK, Italy, Spain, Brazil, Turkey and many other Countries.

The whole event was well organised at the new building and combining the New Convention Centre. To ensure smooth logistics and car parking facility during the Fair, multilevel parking facility was provided to the exhibitors and visitors, directly connecting to the fair.

Overall, it was a good show with very good footfall on all the three days. The visitors were inquisitive to know more about the new technology, in particular, the Oliven leader, Green tanning, Bio based products for tanning etc., Finishes for upgradation of leather. Improving the classic look and cost saving methods were on display.

Vast sections covering footwear and tannery machines were all fully occupied and busy. The interest among the industry people were generated with interesting articles and invitations spread over the social media highlighting the importance of leather.

Around 400 exhibitors presented wide range of products from Raw Hides & Skins up to various types of Leather Products. Raw Material, Lining, Fillers, auxiliaries, Chemicals, Machinery etc., in fact, anything and everything required by the Leather & Leather Products Industry were available at one point.

From my perspective, it is a great opportunity & the largest platform for all the members of the Industry across the Country and Globe to

meet each other and promote business relationship and friendship. What I felt missing was the enthusiasm with which this event should have been posted, shared in the print media and social media. When we are against all sorts of negative news and wrong information spread around by the PETA and other Organisations, about our Industry, these events provide a beautiful platform to raise our voice in solidarity.

Unfortunately, CLE, ILPA, AISHTMA, TALTEA, ISF, AFMEC, Agra Footwear Association have not actively campaigned for the event.

It was a huge fair with participants from all over the Universe, joining hands to make the exhibition absorbing, interesting and a connecting platform. The timely announcement of the Union Budget allowing the crust exports duty free and import of wet blue duty free opened up lot of debates and discussions. As usual, some were happy and some were unhappy with such a decision and only the time will prove the results. In any case, the immediate boost required for the industry was provided at the right time.

Good point to note was that, every Stall offered something new for the Industry and it was complete action all the three days with enquiries and interest.

The **Designers' fair** was well organised this time compared to the last exhibition and it was good to see Designers from Italy, Brazil, India and other Countries showing their skill and knowledge.

Well done ITPO and the fraternity members from all over India made it a point to visit.

Personally, it was a great moment to connect with people across the Globe and some of my mentors, friends, colleagues and young blood (future force) from the Industry on all the three days.

The LERIG conference was also well organised with many forums and lectures by eminent industry leaders and scientists. The AC Tech Association of Leather & Footwear Alumni (ALFA) had organised an event for felicitating Dr. K.J. Sreeram, Director, CSIR-CLRI, for his contribution to the industry, and the report is as under:

ALFA Ambassadors' meet 2025

Good job done by the young team of members of the Alfa team, by bringing the leather leaders and ALFA members and Alumni. "An R&D leather growth for the sustainable development of the Leather Sector" - this topic was presented by our Director of CSIR-CLRI Dr. K.J. Sreeram. Incidentally, the prestigious award for Orator was also presented to Dr. K.J. Sreeram. Thanks to Dr. K.J. Sreeram for his excellent speech and presentation. Some of the salient features of his presentation which needs immediate attention:

1. Call for a consortium uniting all the stake holders from the raw material supplier, tannery, chemical manufacturers and environmental control and maintenance team to come together to create a futuristic sustainable leather sector.
2. Important is to record and provide Data and comparison data month by month about the development made in the leather sector. This has to be highlighted with all facts and figures.
3. Google search engines and other search engines does not throw much light about the Leather Industry in India. Personally, I have been highlighting this subject that, when you check on Google about the Indian Leather Industry, it gives a very bad image with pictures of the 70's & 80's, which really hurts the industry.
4. It was pointed out that, the Director tried using Gamma for the presentation and the AI could not offer much support about Leather Industry. Interestingly, the AI could provide interesting data from the Agricultural industry.

5. Dr. K.J. Sreeram insisted upon providing more information and data about the leather industry on web pages for the AI to pick the right content about Leather.

6. Dr. K.J. Sreeram mentioned about bringing the school students to CLRI for education and awareness about Leather.

7. The Director also highlighted that, synthetics, vegan and leather likes will have a place in the huge requirement of leather for footwear in the Universe which he puts it up at 38 Billion sqft against the leather availability of 22 Billion sqft.

My Observations & Suggestions:

a) While sharing the slide, there was a picture which was dated 2013. This should be avoided.

b) AI could never write about Leather, the emotions, feel and touch of leather. Though, it can pick up the data and other information available on the web.

c) Presentations should be HI (Human Intelligence) based with support of AI. But, in leather industry HI will only win as we always talk about the feel, touch and emotions connected with Leather.

d) About the Leather Industry on the search engines right from 2020, I have been writing to the CLE (including ILPA, ISF, AISHTMA, TALTEA etc.,) and the Chairman of that period for no reply or positive action.

This has to be taken up immediately by the CSIR-CLRI & CLE for the benefit of the Leather Industry.

e) Important to stress upon Consortium which I have been talking about right from the time of COVID-19 online discussions for a better tomorrow.

f) Last but not the least, the word sustainability with all its real meaning and purpose should start from the workers level at a tannery. The more they get involved and feel committed; we will be able to reach our targets faster on sustainability.

Unfortunately, we don't make them a stakeholder in our progress. No tannery worker or product sector operators/workers are brought down to the fairs and such events.

In fact, a good day visit with a stomach full lunch for them once in a year during such events will mark a better tomorrow. Celebrating our workers during such events will boost their morale and help to reach our sustainable goal.

g) The Director spoke about bringing school students to CSIR-CLRI, which is a great step forward.

It is also essential that everyone from the Industry should make it a point to visit schools and colleges to share the beauty of Leather, the comfort, durability and longevity, the sustainability, Decomposable nature of leather.

h) On the total leather available for consumption annually, it was mentioned as 22 Billion sqft against 38 Billion sqft. for just the footwear.

This does not cover the other leather products requirements. This gives a very positive approach that, we still have enough market share to live on and not to waste our time complaining about our competitors.

I) Last but not the least, such meetings should involve more and more people from the industry to take the real purpose and meaning of sustainability of the Leather Sector to the entire World.

It was a great evening to see my Guru Dr. Sadullah, Dr. T.Ramaswamy, Future of our young team in the leather sector Mr. Abdul Wahab, and Mr. Raja Babu, President of ALFA.

The young team of ALFA is doing a commendable job and all good wishes to them.

See you all at the IILF 2026, Chennai.



CSIR - CLRI PARTICIPATES IN IILF-2025

At its pavilion in the IILF 2025 CSIR-CLRI showcased its latest technologies aimed at enhancing the sustainability of the leather sector. These innovations covered various areas, including leather processing, leather chemicals, leather products, and waste management solutions, with a strong emphasis on waste-to-wealth initiatives.

The institute presented its design sequence, “Magic Moments Unite with Progressive Modernity to Create Tomorrow’s Vibes,” which highlighted a fusion of traditional leather craftsmanship with contemporary design elements such as asymmetric cuts, metallic zippers, and laser-cut patterns inspired by digital aesthetics. Additionally, CSIR-CLRI participated in the Designer Fair, unveiling its Spring-Summer 2026 collections

As part of IILF 2025, CSIR-CLRI also organized the Leather Research Industry Government (LERIG) Conclave, focusing on the dissemination of specialty chemicals, sustainability practices, and carbon footprint assessment. Smt. Supriya Sahu, IAS, Additional Chief Secretary to Government Health & Family Welfare Department, Government of Tamil Nadu, Shri. Vimal Anand, IRS, Joint Secretary, Department of Commerce Ministry of Commerce & Industry, Government of India and other leather industry stakeholders visited CSIR-CLRI Pavilion on 1.2.2025.

Shri E Srinivas, Joint secretary, DPIIT, Ms Sabiha Rizvi Director, Leather Section, DPIIT and Shri R Selvam IAS, ED CLE had been to CSIR-CLRI Stall, Dr. K.J Sreeram, Director CSIR-CLRI interacted with the delegation explained various research activities, services and technologies of the Institute.

This year too, the CSIR-CLRI stall witnessed a high footfall, reflecting strong interest and engagement from industry stakeholders.

CSIR-CLRI remains committed to being your trusted technology platform and education hub, continually driving innovation and excellence in the leather sector.



FDDI's Pavilion in IILF 2025

The Footwear Design & Development Institute participated in the IILF 2025 which provided a prime platform to demonstrate its commitment to innovation, sustainability and cutting-edge design. The stall featured a diverse range of student-designed products, including footwear, leather goods, garments, and accessories. Many of these designs had been recognized at prestigious national awards, further highlighting the exceptional creativity and skill of FDDI's students. The products on display showcased innovative and High fashion designs, with a notable emphasis on eco-friendly materials and processes that are becoming increasingly important in the global marketplace.

The services of FDDI's International Testing Centres (ITC) for supporting the footwear and leather industry were also provided to the perspective visitors. Information about the academic programmes of the FDDI which is having the status of 'Institute of National Importance' as per FDDI Act, 2017 was also provided to the aspiring students.



A view of the inauguration session of 38th IILF

Networking played a significant role at the fair, and FDDI capitalized on this by engaging with a wide range of industry leaders. Representatives from major brands like Bata, Reliance Footprint, Hindustan HFL, and Cotecna as well as leading institutions like CLE, Central Leather Research Institute (CLRI) and Central Footwear Training Institute (CFTI), interacted with FDDI's team.

These interactions facilitated valuable knowledge exchanges, provided market insights, and opened the door for future collaborations. A key feature of FDDI's stall was its Start-up's alumni brand showcase, a tribute to the success of former students who have ventured into entrepreneurship. FDDI highlighted several alumni brands including Ms. Nidhi - Insilito 22), Ms. Bhavana Marjana (Brand Name Bhavana) and Mr. Biplab Bhattacharya (Brand Name: - Ravvani), which have gained recognition in the leather goods and footwear industries. This initiative not only celebrated the entrepreneurial spirit nurtured by FDDI, but also provided alumni with a platform to showcase their businesses, gain exposure, and explore collaboration opportunities with other industry stakeholders.



Seen in the picture are : 3rd from Left Colonel Pankaj Kumar Sinha, Secretary FDDI, Ms. Manju Maan, Executive Director (ED) - FDDI, Noida campus and Mr. M. Sundaresan, ED - FDDI, Chennai campus along with the staff at the stall of FDDI

During the IILF, on 2nd February 2025, a seminar on 'Productivity Improvement for the Footwear Sector' was conducted by Mr. Dinesh Kumar, Head of the Department, School of Footwear Design and Production (FDP) & IDLS Awareness Session was conducted by Mr. D. Ramesh, Senior Faculty (Gr-II), FDP, FDDI Chennai campus.

The seminar focused on industry-driven mechanisms, emphasizing the significance of different driving wheels in enhancing productivity. It highlighted the importance of studying a factory's workflow before recommending tailored productivity improvement training programs. IDLS Awareness.



Colonel Pankaj Kumar Sinha, Secretary FDDI shared his views on 'Future-Ready Skills for the Footwear Industry'. His insights on skill development, emerging trends, and the role of institutions like FDDI in preparing the workforce for the evolving footwear sector was highly valuable for industry stakeholders.

* * *



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Overcoming the Bisphenol Challenge in Leather: **BENITAN's Low & Zero-Bisphenol Syntans**

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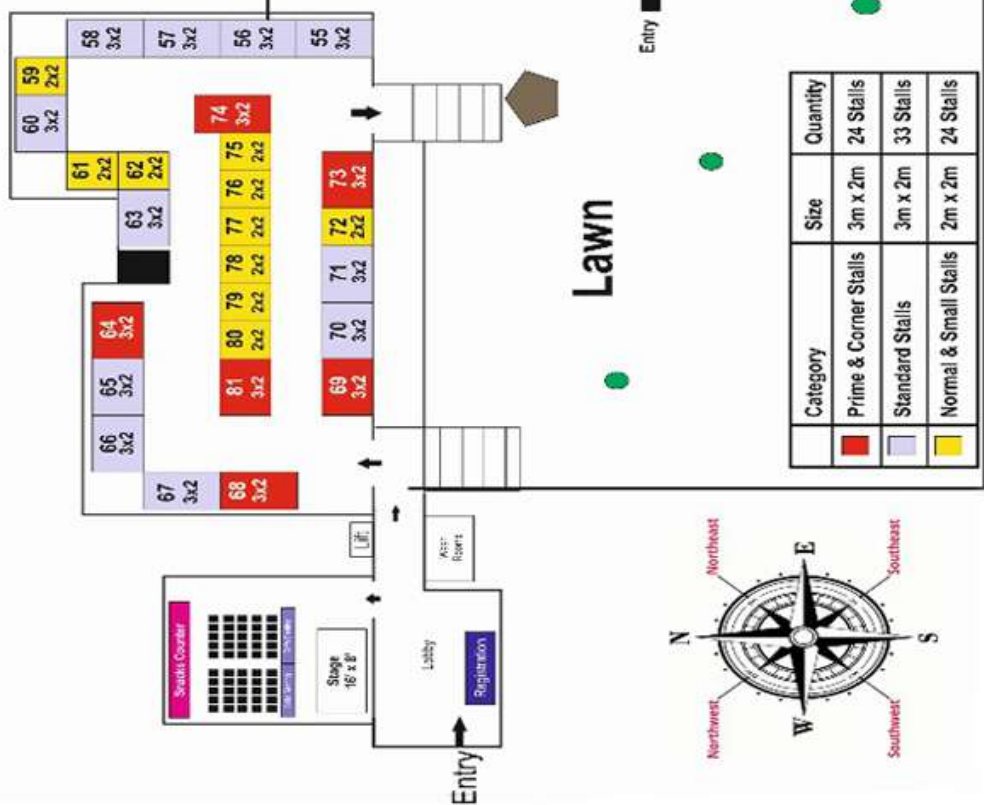
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Indian Leather

Digest of Leather News
ESTD: 1967



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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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Back-to-School Column

Dr. N K Chandra Babu

Dr N K Chandra Babu, PhD in Leather Technology, was the Retd. Chief Scientist & Head of Tannery Division in CSIR-Central Leather Research Institute for more than 15 years and also served as the Honorary Faculty, Department of Leather Technology, Anna University for 25 years. He is now a Consultant to Solidaridad Regional Expertise Centre (Trust). (Editor)

Quality Standards for Curing Salt - Explained

First in the series of articles proposed under this Back to School column is on quality requirement of curing salt used for the temporary preservation of hides and skins. If the tanneries are close to (or an integral part of) the slaughter houses/abattoirs, green hide processing (without any curing) is possible as it is prevalent in many developed countries. But countries like India where, slaughtering of animals and raw hide collection and supply chain is very complex and too decentralized, curing becomes necessary to preserve the material temporarily before they are traded and transported to tanneries before leather processing can commence.

The way curing is carried out can have a considerable influence on the final quality of leathers. Though research endeavours are on to replace salt-based curing due to pollution related problems, it remains still the most popular method due to its simplicity and economic consideration apart from easy availability of common salt almost all over the world. It is a common knowledge that common salt, sodium chloride, brings about temporary preservation of hides and skins due to its dehydration ability to bring down the moisture content in the stock to a level where bacteria are unable to act on it

to cause putrefaction. The bacteriostatic ability of the salt is also another advantage. This article does not deal with aspects related to salt curing practices in detail but would rather concentrate on the quality requirements of the common salt used in curing which are commonly ignored in practice. This is primarily due to the fact that the supply chain remains very unorganised and the curing is carried out mostly in primary raw material collection centres/mandies in countries like India.

However, there are National and International quality standards well laid out for the curing salt including how the curing salt should be packed and labelled as well. The Indian standard prescribes using a denaturant like kerosene in the salt formulation (min of 0.2% on the total mass) and the packing is labelled as 'Poisonous, Handle with care' so that it is never used for human/animal consumption. The purity of salt in terms of sodium chloride content (min of 97% on dry weight basis; moisture content should be <6.0% as per BIS standards; some other standards talk about minimum of 94%) and this is necessary for achieving consistently good results.

The salt should be free from gritty materials and other water insolubles (< 1%). The water soluble materials other than sodium chloride should be less than 2% as per Indian standard but it is silent about the type of impurities. Some International standards talk about salts of calcium and magnesium should be < 2% as this parameter is critical for quality of curing. Calcium and magnesium salts can cause a star shaped defect called salt stain/salt stippen in the cured stock with grain being damaged mostly along the backbone (more visible in the final leather).

To avoid this problem from occurring, sodium carbonate (soda ash) is used as an additive in curing salt but this amount should not exceed 0.5% (this is specified in BIS standard) on the total mass of the salt or otherwise, it can lead to hair immunization. In some countries, sodium fluoride is used to prevent salt stippen. Basically,

these additives work by precipitating Ca and Mg. Another critical parameter is iron contamination, which should be less than 100 ppm as Fe by mass. Iron can lead to patches in the cured stock and in the case of greasy skins, can give rise to red patches on the flesh side (should be differentiated from red stain due to 'Red heat' caused by halophilic bacteria which thrive in common salt from marine source). Excess iron, to some extent, can be taken care of by formulation with soda ash, which makes iron insoluble. As is evident, soda ash is a common remedy both for salt stippen and iron contamination.

Halophilic bacteria can thrive even in high concentration of sodium chloride and cause red stains on stock stored for long duration. To prevent growth of halophilic bacteria, bactericides are recommended as a part of curing salt formulation (min of 0.5%). The common preservatives used earlier were chlorophenates before they were phased out due to toxicological consideration. Zinc chloride is also recommended by some standards including BIS. In countries like Australia, boric acid along with sodium fluoride is used in curing salt formulation to an extent of 1% on the weight of the salt and labelled as Hide Cure.

Another important quality requirement is with respect to particle size of the salt. Ideally, the size should be between 2-3 mm. Larger than this size, will take more time to act and can also cause grain damage due to rubbing. Lower particles will lead to caking with the salt being unavailable for effecting uniform dehydration of the material and hence there is a chance of spoilage.

It is important to adhere to the above discussed quality standards to avoid any damage occurring to the raw hides and skins. Any damage caused at this stage cannot be reversed or rectified during leather processing and hence carried on to the final leather downgrading it.

For any feedback, please mail to babunkc@yahoo.com



LERIG Conclave 2025 (2nd February 2025)

The 58th edition of Leather Research-Industry-Government Conclave (LERIG) was organised by the CSIKR-Central Leather Research Institute (CSIR-CLRI) on 2nd February, 2025 at the Conference Hall in the New Convention Centre in Chennai Trade Centre, on the side lines of the India International Leather Fair. The significant gathering focused on strategic advancements for the development of the leather and footwear sector in India.

The day-long program, spread over to Four Sessions, namely, **CSIR-CLRI Technology Talks, Technical Session by ILTA, Industry Interaction and Stakeholders'**.

Connect on Specialty Chemicals and Leather Ambassadors' Meet, held informative discussions on the subjects, like, Specialty Chemicals from CSIR-CLRI, Sustainability with a focus on Carbon Footprint Assessment Software and SS Dutta Memorial Lecture.

Highlighting the importance of sustainability in today's consumer-driven market, Dr B. Madhan, Chief Scientist, introduced a groundbreaking carbon footprint assessment tool designed to help industrial units quantify their carbon emissions and work towards achieving carbon neutrality. The tool aims to enhance industry transparency and enable consumers to make environmentally conscious choices.

Dr. R Aravindhan, Senior Principal Scientist, announced exciting developments during the event, including the introduction of protein fillers derived from chrome shaving waste and innovative specialty chemicals for upholstery leathers. "We believe these advancements will significantly empower our tanning community," said Dr.Aravindhan.

Dr. K J Sreeram, Director of CSIR-CLRI, highlighted the critical need for collaboration between research institutions and industry stakeholders. Shri Rajendra Kumar Jalan, Chairman of the Council for Leather Exports (CLE) and CEO of M/s AFPL Global Pvt. Ltd., emphasized the global market dynamics and the potential for sustainable practices, including water recycling and lean manufacturing.

The Technology Compendium of CSIR-CLRI was officially launched during the conclave, with the first copy presented to Shri M Abdul Wahab, Regional Chairman (South), CLE. Distinguished guests, including Shri N Shafeeq Ahmed, President of the South Indian Shoe Manufacturers Association (SISMA), and Shri V Noushad, President of the Confederation of Indian Footwear Industries (CIFI), also shared insights on the importance of aligning with global trends.

In a keynote address delivered during the 6th Professor S S Dutta Memorial Lecture, Dr. N Mohan, Director, and CEO of Kothari Industrial Corporation Ltd., praised the remarkable growth in the Indian leather and footwear sectors, driven by rising demand for sustainable products. He reinforced the necessity for innovation and efficient supply chains to maintain competitiveness in the industry.

The conclave fostered engaging discussions aimed at strengthening partnerships among research institutions and industry stakeholders. These insights are anticipated to propel the leather industry toward a more sustainable and innovative future.

In recognition of excellence, the AC Tech Leather & Footwear Alumni Association presented its Orator Award to Dr. K J Sreeram, underscoring the vital role of technologists in enhancing leather's appeal in the market.

CSIR-CLRI remains dedicated to forging paths for sustainable practices in the leather sector and is committed to transforming research into impactful industry solutions.

2024 will not significantly change the landscape of the world's top footwear exporters



We have looked back at the data available so far on the performance of some of the world's top footwear exporters in 2024. Unsurprisingly, Asian countries continue to dominate, but China has slowed. In Europe, we highlight the performance of Spain with consistent growth in value and volume of exports

According to the available data, **China remains the world's leading exporter of footwear, but its performance in 2024 was modest at best.** From January to December 2024, China shipped 9.2 billion pairs of shoes valued at 46.9 billion US dollars, an increase of 2% in volume and a decrease of 7% in value, as compared to 2023, with an average price of 5.1 US dollars per pair.

On the contrary, **Vietnam and Indonesia**, the world's second and third-largest footwear exporters in 2023, according to the World Footwear 2024 Yearbook, **are on track to finish 2024 in a strong position**. From January to November, footwear exports increased by 13% to 20.7 billion US dollars and by 9% to 6.4 billion US dollars, respectively, as compared to the same period of the previous year.

Still in Asia, we highlight that preliminary figures show that **India**, the sixth-largest footwear exporter in 2023, recorded a 3% year-over-year increase in volume to 240 million pairs of shoes in the first eleven months of last year, but a 2% year-over-year decline in value to 2.0 billion US dollars.

In Europe, where the global share of exports is low, **Spain's performance stands out**. After entering the top ten footwear exporters in 2023, the European country increased its exports in volume and value by 9% and 10% in the first eleven months of last year to 162.6 million pairs of shoes and 3.4 billion euros, respectively, as compared to the same period of 2023.

(Source : worldfootwear.com)



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Italian leather representatives explore sustainability and innovation in Brazil's leather supply chain

A delegation officially representing Italy's leather importers and certification bodies recently visited Brazil, hosted by the Centre for the Brazilian Tanning Industry (CICB). The group arrived in the country to **explore advancements in sustainability**, best practices, and traceability within the Brazilian leather sector. Their agenda included technical visits to tanneries, slaughterhouses, and farms, as well as data and system presentation meetings.

The delegation was composed of representatives from UNIC (Italian Tanners' Association) and ICEC (Italian Institute of Quality Certification for the Leather Sector) and was accompanied throughout the schedule by Rogério Cunha (CICB's Trade Intelligence) and Ricardo Andrade (CICB's Sustainability). The group also focused on aspects related to the European Union Deforestation Regulation (EUDR).



*Technology and Tools
Presentation*



Field Visits

The initiative was supported by the Brazilian Leather project, a partnership between CICB and the Brazilian Trade and Investment Promotion Agency (ApexBrasil).

The agenda began in São Paulo with presentations by major companies from the Brazilian leather sector, showcasing technologies, continuous improvement efforts, compliance processes, and raw material control in leather production. "It was a very positive and educational moment on Brazil's sustainability practices, with tannery representatives directly involved in compliance projects presenting their progress and how we are prepared to meet international requirements for guarantees and records," highlighted Ricardo Andrade.

The delegation then moved on to a series of field visits across various locations in Brazil, which demonstrated the production processes and tools presented earlier in São Paulo. The group was hosted in Xinguara (Pará), Jales (São Paulo), and Lins (São Paulo) for on-site visits. Participating companies that opened their doors to the Italian entities included Coming, Durlí Couros, Fuga Couros, Grupo Viva, JBS Couros, and Minerva Leather.

For Rogério Cunha, the visit from UNIC and ICEC representatives to Brazil helped strengthen commercial partnerships and offered a practical demonstration of the unique aspects of Brazilian leather production and its high-quality standards. "It was an important moment to experience firsthand what we do and the high level of expertise and technology in our industry. Italy is a major and excellent leather partner, which is now even closer to our work through this visit," he said.

Cunha added that in 2024 alone, Italian importers accounted for 11.4% of Brazilian leather exports, ranking third among the country's top buyers, with a 5.7% growth in value compared to 2023. Nearly 45% of the leather purchased by Italy from Brazil is finished or semi-finished, meaning it has higher added value. Italy is the largest leather importer in Europe.

* * *

Leather and footwear sector presents new products and seeks strategic partnerships at Fimec 2025

The event takes place from March 18th to 20th, at Fenac, in Novo Hamburgo/RS



48th Fimec (International Fair of Leather, Chemical Products, Components, Machinery and Equipment for Footwear and Tanneries) will welcome thousands of visitors to the Fenac pavilions in Novo Hamburgo/RS. The professional fair will take place from March 18 to 20, from 1 pm to 8 pm, and will offer more than 10 thousand m² of exhibition space, bringing together companies of leather, chemical products, components, machinery, equipment and technologies for footwear and tanneries.

Fenac CEO Márcio Jung explains that Fimec will bring together brands that will showcase the latest innovations and technologies, in addition to fostering business and promoting networking and knowledge capable of transforming the industry. “We are the largest fair in the sector in Latin America and the only one in the world that presents the entire sector’s operations in a single location, acting as

a strong business driver for the cluster and promoting economic development that transcends the region and the state, generating impacts throughout Brazil and Latin America,” he emphasizes.

With around 400 exhibitors, Fimec 2025 will bring together industries from different Brazilian states, as well as foreign companies from Colombia, China, the United Arab Emirates, Italy, Peru, Turkey and Uruguay.

Fimec and CICB Sustainability Forum renew partnership for 2025

For the third consecutive year, the Forum will be held during the largest leather and footwear fair in Latin America, which will take place from 18-20 March 2025.

With two successful editions already held and the approval of its influential audiences, the partnership between the **CICB Sustainability Forum** and the **48th Fimec** is renewed for 2025. The Forum – which is the key event in the sector for learning about the main topics in the leather chain – will once again take place during and in the physical space of Fimec, the largest fair in the leather and footwear sector in Latin America. The CICB event will be on the second day of the fair, the 19th, in the afternoon.

The convergence of objectives and audiences of the two events was highlighted as one of the main reasons for the success of the partnership.



Please visit our website
www.indianleathermagazine.com



FUTURMODA MARCH 2025 is not just a trade fair, it is the reference meeting point for the footwear and leather goods industry.

It will be held in IFA - Fira Alacant, Elche, Spain on 12th & 13th March, 2025.

At each edition, more than **4,000 professionals** from different countries attend to discover the latest innovations, establish strategic contacts and strengthen their businesses.

Why should you attend FUTURMODA?

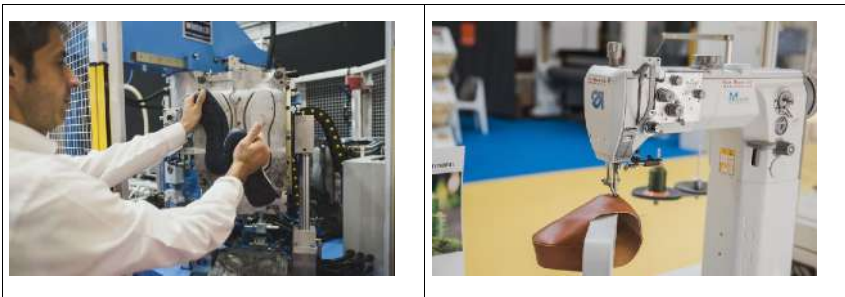
- **Exclusive access to innovative trends and materials.** In the March 2025 edition, the **spring-summer 2026 trends** will be presented in advance, allowing you to discover new materials, components, fabrics and advances in technology and machinery for the manufacture of footwear and leather goods.
- **More than 300 leading international exhibitors** Companies from Spain, Italy, Portugal and France will exhibit their latest innovations in components, tanning, fabrics, chemical products and technology. It is a unique opportunity to meet suppliers and establish strategic business relationships.
- **Networking with over 4,000 professional visitors** Manufacturers, designers, model makers and experts in sectors such as footwear, leather goods, textiles and fashion meet at FUTURMODA, offering an ideal environment for collaboration and the generation of new business opportunities.
- **Futurmoda Green Planet: sustainability and eco-friendly materials**
If you are interested in sustainable fashion, this space will allow you to discover environmentally responsible materials, such as

recycled leather, eco-friendly textiles and energy-efficient production technologies.

- **Strategic location at IFA-Fira Alacant** Held in **Elche (Alicante, Spain)** , in the heart of one of the largest footwear industries in Europe, the fair offers easy access from different points in Spain and Europe, guaranteeing a highly specialized and high-level event

In this edition of Futurmoda-2025, **TECHNOLOGY and INNOVATION** meet again in a unique event that will make a difference in the footwear and leather goods industry.

This edition will feature the exclusive participation of **leading companies in machinery and technology**, which will present revolutionary solutions to optimize production and improve product quality.



What will you find in our technology and machinery area?

- **State-of-the-art machines** designed to improve efficiency at every stage of production.
- **Innovative technological solutions** that optimize processes and reduce environmental impact.
- **Live demonstrations** to discover the future of manufacturing first-hand.
- **Automation and robotics** applied to the footwear and leather goods sector.

ILM Industry backs ILM - buoyant order business and stimuli for the future

ILM Edition #161, held from 15 to 17 February in Offenbach, once again demonstrated: The trade fair is not only the most important order platform for fashionable bags, luggage, school satchels, and accessories, but is also a unique international platform for personal interaction. ILM is where the whole international industry gets together. Arnd Hinrich Kappe, Managing Director of Messe Offenbach, explained the concept, which is continuously being developed further: "There has been a massive change in exhibitor and visitor expectations in recent years.

ILM has always been famous as one of the top international order fairs. But that on its own is now no longer sufficient. We have progressed from being purely an order fair and have become a platform for communication and strategy. Offenbach is where the future of the industry is fashioned."



There was a strong focus at ILM #161 on the close interconnectedness of trade and industry, innovation and inspiration. As a central communication forum, the FUTURE HUB provided

exhibitors and visitors with practical insights, inspiring panel discussions, and trend talks, preparing the trade ideally to launch into the new buying season.

NEWCOMERS AND REAPPEARANCES

Around 300 brands from 25 countries presented their new collections for Autumn/Winter 2025/26, with many longstanding top-name exhibitors including newcomers and reappearances.

The curated mix of brands whisks visitors off on an inspiring journey. The concept: In "boutique character", trendy accessories such as jewellery, travel scooters, smart gadgets, and lifestyle articles were stylistically integrated in the various halls, thus ensuring many an element of surprise. "Following a concept store nation, we are offering retailers new ideas for high-margin additions to their product range that are easy and profitable for them to implement in their business," Arnd Hinrich Kappe expanded further.



A mood of optimism and a buoyant placing of orders that was the unanimous impression after the three-day fair in Offenbach. ILM is and remains the most Important marketplace for the leather goods, accessories, and luggage industries. The first two days, the fair

witnessed vigorous business especially in international terms. Besides the classic leather goods retail trade, more and more shoe and textile retailers and buyers from well-known department and concept stores now attend the fair seeking bags, luggage, and accessories to augment their range. The compact presentation of all key brands and collections in a single location has caught on well.



RED WINE AND CHOCOLATE

What trends are in demand for Autumn/Winter 2025/26? Here too, ILM's curated brand portfolio has a clear answer on offer. In terms of colour, deep shades of red and nuances of brown from camel and cognac to mocha are breathing fresh Inspiration into the collections. And the motto for the latest handbags is functionality encounters femininity. The emphasis is on shoppers and bowling bags in medium formats. The trend is towards fluffiness: In challenging times, plush and teddy along with novel decorations such as playful charms, bright bandanas, and bows aim to and will spread good cheer.

NEW TRENDS IN AUTUMN

The next ILM Edition #162 will take place from 30 August to 01 September 2025.

38th edition of the India International Leather Fair (IILF) 2025
1-3 February 2025, Chennai Trade Centre, Chennai













CSIR-CLRI TECHNOLOGY PAVILION







CSIR-Central Leather Research Institute Hosts 58th Leather Research – Industry-Government Conclave to Propel Sustainable Growth in the Leather and Footwear Sector





UITIC 2025 World Congress Announces Call for Papers

The International Union of Shoe Industry Technicians (UITIC) is pleased to announce the call for papers for its 22nd World Congress, to be held in Shanghai, China, from August 31st to September 3rd, 2025.

The UITIC World Congress is the premier global event for footwear industry professionals, bringing together experts from around the world to discuss the latest trends, technologies, and challenges facing the industry. The 2025 congress will focus on the theme of **"Competitiveness and Sustainability in the Era of Artificial Intelligence."**

We invite researchers, academics, and industry professionals to submit original papers on a wide range of topics related to footwear manufacturing, technology, and sustainability. The deadline for abstract submission is April 11th, 2025.

All abstracts must be submitted online no later than 11th April 2025, through an easy access system which has been set up to submit presentations on:

<https://uitic.org/22nd-congress-abstract-submission/>

Key Dates:

- **Abstract Submission: From 14th February to 11th April**
- **Notification of Acceptance or Rejection: Until 9th May**

- **Presentation or Poster submission: Until 1st August**
- **Congress Dates: August 31st - September 3rd**

Sergio Dulio, President of UITIC, declared: *“The future of footwear lies at the intersection of AI-driven innovation and sustainable practices. This conference will explore how companies can leverage both to thrive in a rapidly evolving market and shape a more sustainable future for the industry”*.

For more information about the UITIC 2025 International Congress, including submission guidelines and registration details, please visit the Congress website: <https://www.uitic2025.com/> and the official website: <https://uitic.org/>

UITIC <https://www.uitic.org/>

The International Union of Shoe Industry Technicians (UITIC), established in 1972, is an organization which aims at developing technical knowledge in the footwear industry, in particular by organizing international conferences on a regular basis and by taking the initiative in setting up information exchanges between its members, mainly in the field of technology. UITIC's main activity is to organize the most prestigious meeting of experts in the world, the "UITIC International Footwear Congress".

This event tackles the latest technical problems or innovation in the footwear industry. Visits of footwear factories and related industries are organized before the Congress. UITIC's members are footwear experts, research centres, private companies and technicians from footwear associations, coming from 27 countries.



Leading by Example: European Leather Industry Demonstrates Safety, Sustainability, and Social Responsibility at ILO International Workshop



From January 27–28, 2025, the ITC-ILO Turin Campus became the focal point for global leather industry representatives to exchange experiences, share good practices, and explore tools to foster safer, socially responsible, and sustainable workplaces worldwide. The Workshop was a joint initiative of COTANCE and industriAll-Europe, organised and hosted by ILO with the financial support of the European Commission under DG Employment envelope for project regarding decent supply chains.

The two-day workshop, titled “**Safety & Health in Tanning and Leather Industries,**” brought together stakeholders from 4 continents along with representatives from the Cornell University

Global Labor Institute, OSHA EU, ILO, UNIDO, ITCILO, IndustriAll-Global, and national employers organisations and trade unions. Through peer-to-peer learning, group discussions, and presentations, participants explored emerging sustainability practices, global and regional frameworks, occupational safety challenges, and strategies for promoting responsible business conduct and effective social dialogue within the sector.

From the European industry perspective, COTANCE proudly presented the findings of its recently completed Green Deal Leather **“Accidents/Incidents at the Workplace”** Study. This comprehensive study provides key baseline statistics, establishes industry benchmarks, and showcases best practices from European tanneries to improve health and safety standards in the industry.

Key findings include a 16% decline in tannery-related accidents across EU countries (Italy, Spain, France, Germany, Portugal, Hungary, and Austria) from 2019 to 2021, of which 15% on the way to/from work, and over 90% of recorded accidents being qualified as of "minor" severity. However, with an overall incidence rate of 3.2% in 2021, there is still room for improvement.

COTANCE members contributed significantly:

- **Luca Boltri (Vice Director, UNIC, Italy)** highlighted best practices in Italian tanneries, showcasing health and safety innovations like 4.0 systems, remote monitoring, solvent-free finishing chemicals, and new-generation drums. He also emphasized the role of social dialogue in advancing safety standards. UNIC recently launched a comprehensive digital platform detailing the Italian tanning industry's commitment to sustainability: sustainability.unic.it which will be useful for everyone - from consumers to experts interested in leather.

- **Andreas Meyer (Managing Director, VDL, Germany)** presented statistics on accident types and costs, revealing the leather industry is much safer than what people think. Most accidents occur on the way to/from work, with the majority classified as "minor" severity. Occupational diseases have also decreased, with "Noise" issues being the most reported.

Additional insights included:

- **OiRA Risk Assessment Tool:** made available for the tanneries through a social dialogue project in 2012 and updated in 2018, this interactive resource provides free health and safety guidance for tanneries worldwide.

- **Occupational Safety and Health Aspects of Leather Manufacturing Course:** Launched in April 2023 by UNIDO, with contributions from COTANCE, SLF, and IULTCS, the course offers free, up-to-date safety and health advice for leather manufacturing facilities.

- **ERICA:** An online repository of national Collective Agreements in the European leather sector. The public area offers unrestricted access to general information, agreements in their original language and English, and other Social Dialogue resources, while the private section contains a database with searchable fields on details of every collective sector agreement and the possibility to compare results of participating countries. Couples of Social Partners of the tanning industry of any country can apply jointly to integrate the tool.

- **ILO toolkit for Social Justice & Decent Work:** a platform that will bring together ILO resources and address the key decent work challenges and opportunities faced by the TCLF sectors, and will be available soon.

For years, a lack of information has fueled speculation about safety practices in the leather industry. These perceptions often stem from outdated practices in tanneries in emerging and developing countries, where poor working conditions and unethical management have unfairly tarnished the reputation of the entire sector.

In stark contrast, European tanneries are modern, responsible enterprises that prioritise their workers' physical and psychological well-being. The ILO Workshop in Turin provided an excellent platform to share EU best practices, inspire others, and demonstrate that a global shift toward safer and more responsible tanneries is not only possible but achievable.

“Since 1999, the European social sectoral dialogue in tanning has driven pioneering initiatives like the Social Code of Conduct, the OiRA tool for tanneries, the ERICA project, and many, many more of which the last was the Green Deal Leather project.; With them we have been improving industry standards in the leather industry. Our goal is to showcase the power of the social dialogue and inspire a global shift toward best practices across the leather industry. We should be aware that our tanneries will be judged not only by their own actions, but also by the industry's collective progress”, - **said Gustavo Gonzalez-Quijano, Secretary General of COTANCE.**

Throughout the workshop, participants had access to an e-learning platform featuring a range of tools and resources designed to enhance their learning experience and deepen their understanding of the topics discussed, provided by the ITC-ILO e-Campus.

For more information or to request the workshop materials, please contact: cotance@euroleather.com

IULTCS, ICHSLTA & WHL new signatories of the Joint Statement on durability in the A&F PEFCR



We are proud to announce that the International Union of Leather Technologists and Chemists Societies (IULTCS), the International Council for Hides, Skins and Leather Trade Associations (ICHSLTA), and its affiliated German National Association for hides & leather (WHL) have endorsed our initiative and joined as co-signatories of the Joint Statement on Durability in the Apparel & Footwear PEFCR.

These associations bring unparalleled expertise and influence to the initiative. IULTCS endorsement provides strong support from the science side of the leather industry, evidencing that the durability

metrics the Statement advocates for reflect empirical reality and... common sense. ICHSLTA's voice further shows the cohesion in the global leather value chain in defending the material's durability benefits that leather lends to consumer products. Together, they enhance the statement's truth and amplify its message, advocating for fair and accurate representation of natural materials in environmental assessments.

Joint Statement

*"The IULTCS Board immediately and unanimously agreed to support this statement calling for fair and accurate metrics on the durability of leather and the longevity of products made thereof. IULTCS, as the scientific body of the global leather industry, could not remain silent in front of durability metrics that do not reflect the reality and that risk to cause serious harm to the uptake of leather in a fashion industry that needs to turn more circular and sustainable" - says **Joan Carles Castell, President of IULTCS***

***Toni Baltes, President of ICHSLTA and WHL says:** "I am very pleased to add the support of ICHSLTA, the International Council for Hides, Skins and Leather Trade Associations, and the WHL, its German national association to this Joint Statement on durability metrics of natural materials and fibres and their products. It is crucial that their sustainability credentials in terms of longevity are fully acknowledged and accounted for in environmental footprints".*

*"We are proud to have IULTCS and ICHSLTA+WHL endorsing our initiative. They bring to the table world-class expertise and further evidence the cohesion of the global leather industry in fighting for the recognition of its positive contribution to a greener and circular fashion sector. Each additional signatory strengthens our message and improves our chances of achieving a fair and balanced outcome," - says **Gustavo Gonzalez-Quijano, Secretary General of COTANCE.***

★ ★ ★

ECHA adds five hazardous chemicals to the Candidate List and updates one entry

The Candidate List of substances of very high concern (SVHC) now contains 247 entries for chemicals that can harm people or the environment. Companies are responsible for managing the risks of these chemicals and giving customers and consumers information on their safe use.

Two newly added substances (*octamethyltrisiloxane* and *perfluamine*) are very persistent and very bioaccumulative. They are used in the manufacture of washing and cleaning products and in the manufacture of electrical, electronic and optical equipment.

Two substances have persistent, bioaccumulative and toxic properties. *O,O,O-triphenyl phosphorothioate* is used in lubricants and greases. The *reaction mass of: triphenylthiophosphate and tertiary butylated phenyl derivatives* is not registered under REACH. It was, however, identified as an SVHC to prevent regrettable substitution.

6-[(C10-C13)-alkyl-(branched, unsaturated)-2, 5-dioxopyrrolidin-1-yl] hexanoic acid is toxic for reproduction and used in lubricants, greases and metal working fluids.

Tris (4-nonylphenyl, branched and linear) phosphite has endocrine disrupting properties affecting the environment and is used in polymers, adhesives, sealants and coatings. The entry for this substance is updated to reflect that it is an endocrine disrupter to the environment both due to its intrinsic properties and when it contains $\geq 0.1\%$ w/w of *4-nonylphenol, branched and linear (4-NP)*.

ECHA's Member State Committee (MSC) has confirmed the addition of these substances to the Candidate List. The list now contains 247

entries – some of these entries cover groups of chemicals so the overall number of impacted chemicals is higher.

These substances may be placed on the Authorisation List in the future. If a substance is on this list, companies cannot use it unless they apply for authorisation and the European Commission authorises its continued use.

Consequences of inclusion on the Candidate List

Under **REACH**, companies have legal obligations when their substance is included – either on its own, in mixtures or in articles – in the Candidate List.

If an article contains a Candidate List substance above a concentration of 0.1 % (weight by weight), suppliers must give their customers and consumers information on how to use it safely. Consumers have the right to ask suppliers if the products they buy contain substances of very high concern.

Importers and producers of articles must notify ECHA if their article contains a Candidate List substance within six months from the date it has been included in the list (21 January 2025).

EU and EEA suppliers of substances on the Candidate List, supplied either on their own or in mixtures, must update the safety data sheet they provide to their customers.

Under the **Waste Framework Directive**, companies also have to notify ECHA if the articles they produce contain substances of very high concern in a concentration above 0.1 % (weight by weight). This notification is published in ECHA's database of substances of concern in products (SCIP).

Under the **EU Ecolabel Regulation**, products containing SVHCs cannot have the ecolabel award.

Global Leather Industry PART – IV

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(contd. from Dec issue)

8. NEGATIVE PUBLICITY ABOUT LEATHER ⁸

Incorrect and obsolete information about the leather industry continues to be published or broadcasted on television and radio, in newspapers and magazines, even in reports from reputable organisations such as World Bank or FAO.

Such opinions fail to recognize that tanners take a waste product from the meat industry and convert it into a highly versatile and beautiful material.

The negative publicity about leather can be classified into five main categories.

The negative publicity about leather can be classified into five main categories Table – 8 A

- Accusations linking raw hides and skins supplies with cruelty toward animals
- Accusations linking raw hides and skins supplies with deforestation (in particular rain forests)
- Following that logic, raw hides and skins production and ultimately the tanning industry is held responsible for a substantial share of carbon footprint due to greenhouse gases (GHG), especially methane generated by livestock. The recent EU decision of attributing carbon footprint load only from the slaughterhouse floor to the tannery exit gate might settle that issue.
- Applying the principle pars pro toto, a few remaining ugly spots in developing countries (those in North Africa, which in terms of production are actually irrelevant and kept mainly as tourist attractions) are constantly presented as representative of the whole industry and confirming its prevailing polluting and harmful character.

The negative publicity about leather can be classified into five main categories Table – 8 A

- Disregarding the fact that tanners all over the world use only “instant” powders containing harmless trivalent chromium (Cr3+) salts, chrome tanned leather and leather goods made of it are drummed as being carcinogenic due to presence of hexavalent (Cr6+) and, in the best case, only chrome-free leathers should be used.

A typical case of negative publicity is the campaign group The Friends of Earth, which, using data compiled by the consultancy group Trucost claim:

- 50.2m² of land and 14.5m³ of water (or even 25m³ if untreated) needed for one pair of boots
- The largest factor in the land footprint for a pair of boots is from cattle farming (86%)
- Workers in tanneries there are exposed to dangerous chemicals (true), including hexavalent chromium (untrue), a known carcinogen (only if inhaled).

A particular contradiction (contradicio in adjecto) is the term “vegan leather”. Since vegans do not eat or use animal products so how can the word leather (“a material made from the skin of an animal by tanning”) be associated with veganism!

Due to their (in old days) noxious nature, tanning activities and tanners in virtually all cultures all over the globe were assigned to a very low social status, very often entirely outside “normal” society. In the worst-case scenario, such deeply rooted biases compounded by very aggressive campaigns based on false claims and agendas and possibly excessive legislation might jeopardize the future of the tanning industry as we know it.

Admittedly, it (unnecessarily) took some time for tanners to accept that under some circumstances (long storage, high temperatures, use of low quality fatliquors etc.) small amounts of Cr3+ can be oxidised to Cr6+ form. Again, the real risk from the Cr6+ is regularly grossly exaggerated. Furthermore, nowadays this can be easily prevented by using appropriate retanning agents (e.g., tara vegetable tannin) and appropriate fatliquors.

It is a paradox that contemporary tanners only in very old books can read about long forgotten times when the two baths tanning method was used (e.g., for chevreaux leather) or when tanning liquors were made by converting (reducing) chromium dichromate (Cr6+) into trivalent chromium (Cr3+) with molasses within a tannery's own premises. The problem of the testing method itself, detection level etc. only contributed to the cacophony and confusion stemming from a lack of understanding of elementary chemistry and unfounded myths.

Reference : 8. & Table – 8 A. The framework for sustainable leather manufacture, Second edition - Jakov Buljan, Ivan Krač - 2019 the United Nations Industrial Development Organization

9. Higgs Index & Leather Industry - LEATHER INDUSTRY CALLS FOR HIGG INDEX REVIEW ⁹

Leather Naturally is one of the co-signatories requesting that the Higg index MSI score for leather be suspended pending review of the underlying methodologies and data.

The leather industry is offering support to Higg Index and welcomes the opportunity to discuss the basis for the score, to provide the necessary data and assist with development of appropriate methodologies, to address its shortcomings.

The use of inappropriate methodologies and out of date, unrepresentative, inaccurate and incomplete data, means that leather has been burdened with a disproportionately high Higg Index score.

This has led to a negative perception of leather which does not reflect its sustainable, circular nature.

- In the quest for improved sustainability, manufacturers will reference the Higg Index when designing products and making choices on materials.
- On the basis of current Higg score, these manufacturers are deselecting leather in favour of fossil fuel-derived, unsustainable synthetic products.
- As such, we believe that the reputation and viability of leather and leather manufacturers is being unfairly damaged by an assessment that does not reflect the true nature of leather or indeed, the alternatives.

There are several areas of concern in the current basis for the Higg Index score for leather.

A viable and transparent alternative would be for the Higg Index score to be derived using the EU Product Environmental Footprint Category Rules (PEFCR) for Leather. The PEFCR have been developed and adopted by a credible and independent inter-governmental organisation, the European Commission, in consultation with the industry and using current and reliable datasets.

Leather manufacture takes a waste from another industry and transforms it into a durable, versatile and sustainable product. As a result of a number of factors, including multiple campaigns of disinformation, demand for leather has fallen and we are now seeing vast amounts of renewable raw hides and skins simply being thrown away.

It is estimated that as much as 16% of the cattle hides produced in the USA (5.5 million) were disposed of to landfill in 2019, with the negative environmental consequences this entails. In Brazil, a similar number have been diverted to lower value destinations, such as collagen and gelatine.

Regrettably, the flawed Higg Index score for leather is one of those factors that has brought us to this point. It is hard to imagine that those companies using the Higg Index would want to be associated with the unnecessary waste of a sustainable, renewable and recyclable raw material.

We would welcome the opportunity to discuss the basis for the score, to provide the necessary data and assist with development of appropriate methodologies, to address its shortcomings. Sustainability in products is an admirable and necessary ambition but it can only be achieved by informed and balanced consideration of the whole story of those products. At this time, it is clear that leather is not being given that consideration.

9.1 Concerns that leather-sector bodies raise in the letter include the MSI's - Higg Materials Sustainability Index

Concerns that leather-sector bodies raise in the letter include the MSI's - Higg Materials Sustainability Index Table – 9 A
--

- | |
|---|
| <ul style="list-style-type: none">• Use of old, inaccurate data• Narrow geographical focus |
|---|

**Concerns that leather-sector bodies raise in the letter include the MSI's
- Higg Materials Sustainability Index Table – 9 A**

- Misconceptions about the raw materials tanners use
- Reluctance to take into account the durability and longevity of leather in assessing its environmental impact

More troubling is the lack of transparency on the basis for the score and the lack of engagement with the wider leather industry to ensure that the data is accurate.

Reference : 9. & Table 9A. Leather Industry calls Higg Index Score for Leather to be Suspended Published on October 8, 2020

9.2 Signing parties

Signing parties Table – 9 B

International Council of Tanners (ICT)
 Australian Hides, Skins and Leather Exporters Association (ASHLEA)
 Centro das Indústrias de Curtumes do Brasil
 (Brazilian Tanners Association – CICB)
 Confederation of National Associations of Tanners and Dressers of the
 European Community (COTANCE)
 International Council of Hides, Skins and Leather Traders Association
 (ICHSLTA)
 International Union of Leather Technologists and Chemists Societies
 (IULTCS)

L'Unione Nazionale Industria Conciaria (Italian Tanners Association – UNIC)
 Leather and Hide Council of America (LHCA)
 Leather Naturally Leather UK Leather Working Group (LWG) One 4
 Leather
 Society of Leather Technologists and Chemists (SLTC)

Reference: Table 9 B. LEATHER INDUSTRY CALLS FOR HIGG INDEX REVIEW. Leather Naturally. info@leathernaturally.org

The global leather industry is represented by the International Council of Tanners (ICT), International Council of Hides, Skins and Leather Traders Association (ICHSLTA) and International Union of Leather Technologists and Chemists Societies (IULTCS), which are the three main global leather organisations that comprise the Global Leather Coordinating Committee (GLCC), and COTANCE, the representative organisation for the European leather industry. GLCC receives technical support from various organisations including the Leather Working Group (LWG).

10. Responsible chemistry and Life Cycle Assessment (LCA) ¹⁰

Focus is on three priorities to improve our environmental footprint and that of our customers:

- Using low-impact manufacturing chemicals
- Using biotechnology to replace non-renewable resources
- Using waste and recycled content contributing to circularity

From a sustainability viewpoint, it is equally important to look at what happens when the products we help to make reach the end of their respective roads. We actively try to replace petrochemicals with renewable resources.

10.1 Responsible Chemistry Figure – 10 A



Using the Life Cycle Assessment methodology, we measure the impact of a product on the environment over the course of its life.

10.2. What is Life Cycle Assessment (LCA)? ¹⁰

LCA is a methodology that measures the impact of any product on the environment over the course of its life. The LCA methodology can provide quantitative data in a format that permits comparisons to be made. LCA will be an important value-added service for our customers in the supply chain in the future.

10.3 The 9 LCA impact categories explained Figure – 10 B



Reference : 10 . & Figure – 10 A & 10 B .RESPONSIBLE CHEMISTRY INVOLVES RETHINKING PRIORITIES- STAHL .
<https://www.stahl.com/responsible-chemistry/vision>

11. Cleaner production, Green Chemistry Principles

11.1. Cleaner production ¹¹

The terms Cleaner Production, Pollution Prevention and Responsible Care are often used interchangeably.

Cleaner production Table – 11 A

Cleaner Production stands for a proactive and preventive approach to industrial environmental management and aims for process- and/or product-integrated solutions that are both environmentally and economically efficient ('eco-efficiency').

Cleaner Production (CP) and Pollution Prevention (P2) focus on a strategy of continuously reducing pollution and environmental impact through source reduction -- that is eliminating waste within the process rather than at the

Cleaner production Table – 11 A

end-of pipe. Waste treatment does not fall under the definition of CP or P2 because it does not prevent the creation of waste.

Cleaner production (CP) is a general term used to describe a preventative approach to industrial activity It encompasses: waste minimization, waste avoidance, and pollution prevention.

Reference : 11. & Table 11 A. A Cleaner Production and Pollution Prevention In the Chemical Industries, Prof. Dr. El-Sayed Khater, Cleaner Production and Pollution Abatement Consultant National Research Center, Department of Chem. Eng. And Pilot Plant

12. Best Available Techniques & BAT reference documents (BREF) ¹²

BAT what does mean - Best Available Techniques .Best Available Technology. Best practicable means. Best practicable environmental option. Best Available Control Technology (US Clean Air Act).

Definition of Best Available Techniques, BATs Table - 12 A

- “best” means most effective in achieving a high general level of protection of the environment as a whole

- “available” techniques are those developed on a scale which allows implementation in the relevant industrial sector, under economically and technically viable conditions, taking into consideration the costs and advantages, whether or not the techniques are used or produced inside the Member State in question, as long as they are reasonably accessible to the operator;

- “techniques” includes both the technology used and the way in which the installation is designed, built, maintained, operated and decommissioned;

Source: 12. & Table-12 A. Review of some EU normative documents and legislation and their relevance for the tanning industry in developing countries, Best Available Techniques Reference Document (BREF),

12 .1 BAT Documents for Leather

BAT Documents for Leather Table – 12 B

- 1. Best Available Techniques (BAT) Reference Document for the Tanning of Hides and Skins

J R C R E F E R E N C E R E P O R T S, Industrial Emissions Directive 2010/75/EU(Integrated Pollution Prevention and Control) by Michael Black, Michele Canova, Stefan Rydin, Bianca Maria Scalet, Serge Roudier, Luis Delgado Sancho . 2013.
- 2. EUROPEAN COMMISSION, Integrated Pollution Prevention and Control (IPPC), Reference Document on Best Available Techniques for the Tanning of Hides and Skins, February 2003.
- 3. Review of some EU normative documents and legislation and their relevance for the tanning

industry in developing countries -Part I-Best Available Techniques Reference Document (BREF) by Jakov BULJAN Leather consultant (Environmental/OSH Regulations) & Ivan KRÁL Project Manager. UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANIZATION (UNIDO).

12 .2 BAT is a dynamic concept and so the review of the BREFs is a continuing process. ^{12 C}

- Leather could be the Ultimate in Sustainable Materials if manufactured with best available technologies (BAT). Sustainability and leather do match up.
- The leather making process is the transfer of a 100 % renewable resource to a highly valuable and toxicological safe substrate.
- In fact, leather manufacturing is part of a big recycling industry and solves a huge waste problem of the meat industry.

- Leather can be made without sustainable damage of the environment if best available technologies are followed

Reference :12 C. & Table-12 B . Review of some EU normative documents and legislation and their relevance for the tanning industry in developing countries, Best Available Techniques Reference Document (BREF), UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANIZATION + Introduction to Best Available Techniques (BAT) and Best Environmental Practices (BEP) Prof. Dr. Ivan Holoubek, UNIDO.

13. Responsible Manufacturing ¹³

As with most global industries, leather manufacturers must contend with the potential impact of their production on the environment. Responsible manufacturing practices should aim to reduce the amount of energy, water and chemicals used during production, as well as reducing the amount of solid waste, wastewater, and air emissions.

Responsible leather manufacturers often turn to certifications such as the LWG Leather Manufacturer Audit Protocol (LMAP) to demonstrate their commitment to sustainable leather manufacturing to customers. LWG's flagship certification has been assessing leather manufacturing facilities based on the environmental impact of their manufacturing processes for over 15 years.

The LWG's audit standard covers many elements of leather manufacturing, including water use, energy consumption, chemical management, disposal of solid waste, effluent treatment, and management of air and noise emissions. And the standard is continuously developing and evolving to become a holistic standard for assessing all elements of Environment, Social responsibility, and Governance (ESG). Most recently, the LWG introduced additional requirements for traceability and social auditing with the launch of Protocol 7 in 2021, in response to growing demand for additional transparency within the supply chain.

Whether using renewable energy, treating wastewater effectively, being socially responsible, or swapping to safer chemistry, there are many actions leather manufacturers can take to reduce their impact and demonstrate responsible, more sustainable leather manufacturing.

14. A general consensus in the industry not to use the word 'leather' for synthetic, polyurethane or polyvinyl chloride sheets or any sheets not originating from animal skins or hides ¹⁴

14.1 WHEN IS LEATHER NOT LEATHER? DIFFERENT MATERIALS HAVE DIFFERENT BENEFITS, BUT LABELS CAN BE CONFUSING. GET THE FACTS ^{14 A}

- Leather is of natural origin and made from the hide or skin of an animal. The internationally recognized definition of leather as the International Standard Organization (ISO) is:

Hide or Skin with its original fibrous structure more or less intact, tanned to be imputrescible, where the hair or wool may or may not have been removed.

- TO BE CLEAR TO CONSUMERS ABOUT THE ORIGIN AND BENEFITS OF THE MATERIALS USED TO MAKE THE PRODUCT THEY ARE BUYING, THE TERM LEATHER SHOULD ONLY BE USED FOR MATERIALS THAT MEET THIS DEFINITION.
- 'Vegan leather' is usually either artificial or synthetic, or one of a new variety of alternative materials. Any material that is not of animal origin can be referred to as vegan. **It is important to note that 'vegan' does not necessarily mean 'natural'** and there is no relationship with the environmental impact of the product and whether or not it is biodegradable or can be recycled unless it is specifically stated.
- It is deceiving to call a material '**Vegan Leather**', but this is often done to market the material to imply it has the beauty, natural quality and long-lasting benefits of leather.

14.2 Leather & Sustainability ^{14 B}

Leather has many great and unique qualities such as:

- Durability, a leather product can last a lifetime – and even longer.
- It is made from a by-product of the meat industry. That means it recycles a hide or skin that otherwise would go to waste.

- Leather can be a sustainable, circular and biodegradable material when using the right chemicals.

We acknowledge the importance of a responsible leather industry around the world. It is our ambition to create a socially and environmentally sustainable leather value chain, together.

14.3 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. ^{14 C}

14.4 LEATHER IS A RECYCLED MATERIAL ^{14 D}

- Hides and skins are Natural By-Product of the Meat Industry.
- Leather Manufacturers upcycle them into beautiful, versatile valuable sustainable products.
- This reduces the amount of waste that goes to Landfill.

14.5 THE SUSTAINABILITY OF LEATHER – FAQ - LEATHER NATURALLY ^{14 E}

14.5.1 IS LEATHER SUSTAINABLE? YES

- Leather as a raw material is generated renewably because animal meat will always be required by consumers.
- The manufacturing processing, when done with good environmental controls, has minimal impact.
- Leather’s full life cycle has a low carbon and water footprint when considering its durability and long-lasting qualities.
- During the end-of-life phase leather degrades through chemical and biological means.

14.5.2 Leather and the Meat Industry, What is the Connection?

- 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 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.

14.6 A general consensus in the industry not to use the word 'leather' for synthetic, polyurethane or polyvinyl chloride sheets or any sheets not originating from animal skins or hides ¹⁴

The differences between genuine leather and imitations of leather have always been not very clear, even for professionals.

In all countries, there is a lack of clear and simple legislation to help consumers understand what they are buying, and companies that make leather imitations exploit this confusion through marketing campaigns that exploit the confusion in consumers and, most likely, also in brands.

Frankly, it's also surprising that brands don't rely on real experts when it comes to the technology of the materials they use.

In Italy, the council of ministers approved the provisions concerning the use of the terms leather, skins, fur. After a battle lasting several years by UNIC (National Union of Tanning Industries), these can only be used when referring to products that are made from real leathers.

The goal is to put an end to the use of terms such as Vegan leather, PU leather, PVC leather, synthetic leather in the advertising campaigns of all those companies that are competitors of the tanning companies.

This is a great milestone, which has yet to be achieved in many other production areas around the world.

15. Information on Harmonious Coexistence - Leather and Leather Alternatives

1. The Leather Industry needs to bring together all the good work being carried out into a cohesive platform that represents all and is accessible and understandable by consumers - Farming & Livestock, Deforestation & Biodiversity, Social Responsibility, Leather Manufacturing, Chemistry, Leather Technology, Machinery & Efficiency, Consumer Concerns, Brand Requirements, Business & Political Strategy.

2. 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.

3. 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.

4 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

(to be contd...)

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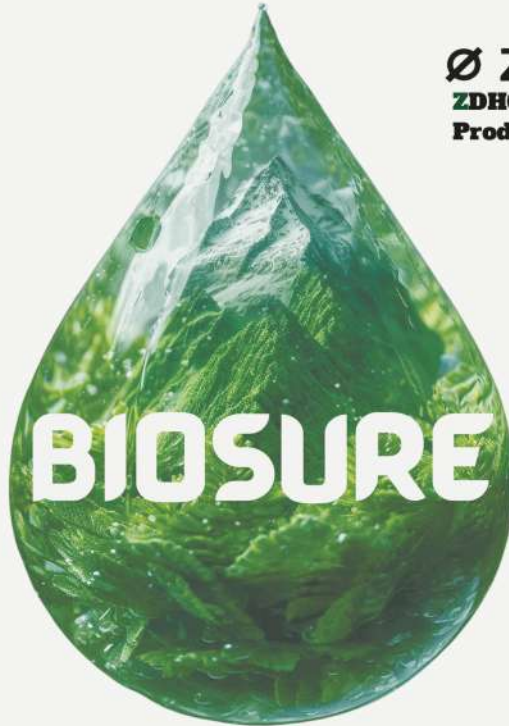
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