



ILTA  
Since 1950

# JILTA

Journal of Indian Leather Technologists' Association

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2022  
2023

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# Our Activities

- An Association with over 600 members from India and abroad working since last 68 years for the growth and development of Leather and its allied industries.
- Organize seminars, symposiums, workshops in order to share information, knowledge & latest development and interactions for the benefit of all concerned.
- Organize Human Resource Development programmes on regular basis.
- Publish for over 60 years, a technical monthly journal namely "Journal of Indian Leather Technologists' Association" (JILTA), widely circulated through out the World.
- Publish books for the benefit of the students at various levels of study, for the Research Scholar and the Industry.
- Work as interface between Industry and the Government.
- Assist Planning Commission, various Government Institutions, Ministry and autonomous bodies to formulate appropriate policies for the growth of the Industry.
- Assist small and tiny leather goods manufacturers in marketing their products by organizing LEXPOs in Kolkata and different parts of India.

## Indian Leather Technologists' Association

[A Member Society of International Union of Leather Technologists' and Chemists Societies (IULTCS)]

'Sanjoy Bhavan', 3rd Floor, 44, Shanti Pally, Kolkata- 700 107, WB, India

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**JOURNAL OF INDIAN LEATHER TECHNOLOGISTS' ASSOCIATION  
(JILTA)**

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**Contents**

Portfolio.....03 - 08

Editorial.....09 - 10

STAHL Corner.....11 - 16

ILTA News.....17 - 18

Solidaridad Corner.....19 - 22

Article -'Periodical Evolution of Clicking of Upper components in Footwear Industry: A Brief study' by Arjun Verma,.....23 - 29

IULTCS Corner.....30 - 31

News Corner.....32 - 38

Down Memory Lane.....39 - 49

Economic Corner.....50 - 58

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**Opinions expressed by the authors of contributions published in the Journal are not necessarily those of the Association**

# JOURNAL OF INDIAN LEATHER TECHNOLOGISTS' ASSOCIATION (JILTA)

Indian Leather Technologists' Association is a premier organisation of its kind in India was established in 1950 by Late Prof. B.M.Das. It is a Member Society of International Union of Leather Technologists & Chemists Societies (IULTCS).

The Journal of Indian Leather Technologists' Association (JILTA) is a monthly publication which encapsulates latest state of the art in processing technology of leather and its products, commerce and economics, research & development, news & views of the industry etc. It reaches to the Leather / Footwear Technologists and the decision makers all over the country and overseas.

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(Member Society of International Union of Leather Technologists and Chemists Societies)

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(Member Society of International Union of Leather Technologists and Chemists Societies)

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Portfolio

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# Economic Turbulence on Energy Perspective

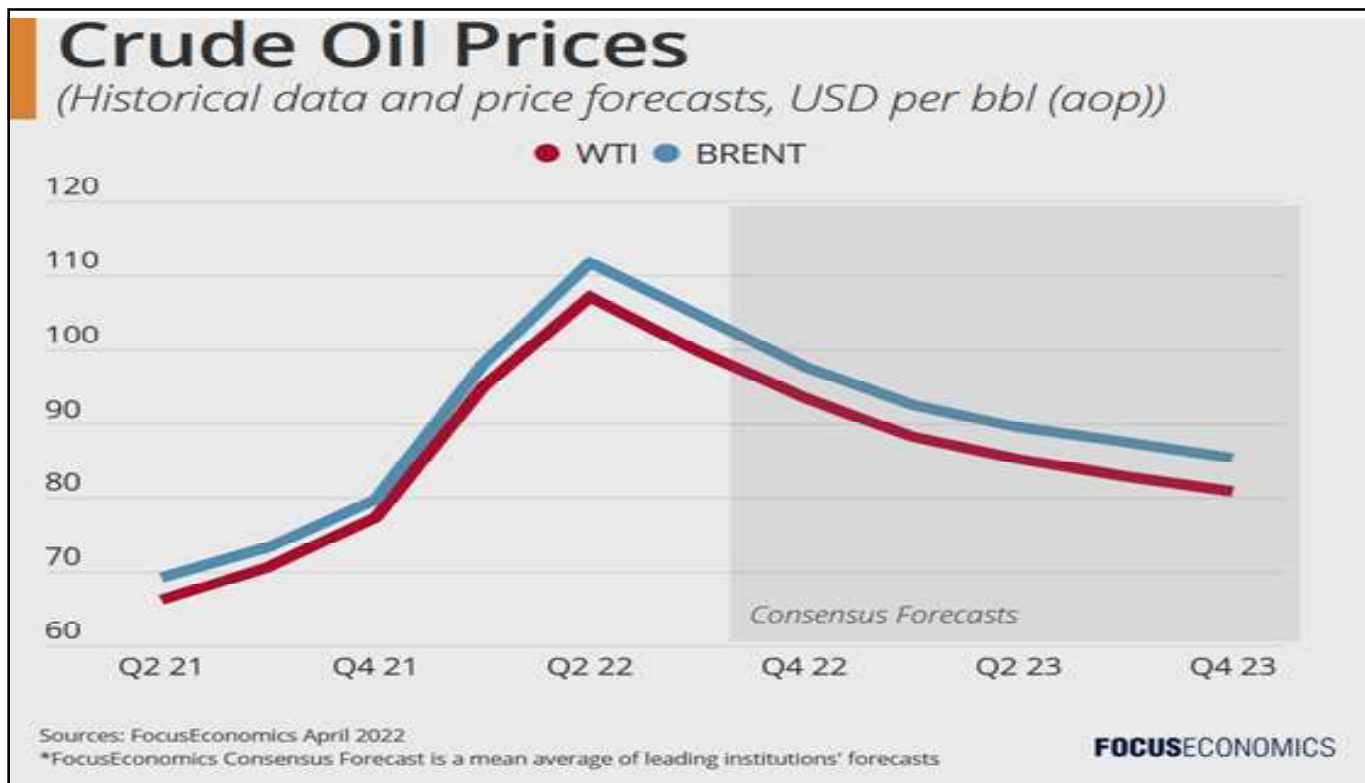


(Part - II)

Oil prices were extremely elevated over the last month as Canada, the UK and the U.S. announced bans on Russian oil imports. Meanwhile, tough EU sanctions—including a total ban—on Russian oil have become more probable. In its latest April report, the IEA estimated that the hit to Russian output from sanctions and self-sanctions would be around 13% in April and double that in May. Meanwhile, OPEC+ refused to speed up its output increases at its latest meeting on 31 March. That said, the U.S.'s pledge of the largest oil reserve release in its history—although unlikely to fully compensate for the hit to Russian supply—has provided some downward pressure, with the IEA later promising a further oil release in concert. Moreover, demand headwinds

have strengthened: In its April report the IEA lowered its forecast for global demand in Q2 amid a Covid-19 outbreak in China and the effect of rising inflation on consumption in OECD countries.

Economic forecast expects Brent prices to fall by year-end from March's average prices, amid easing economic momentum and rising inventories. However, prices will remain at the highest levels in nearly a decade. The market remains illiquid and thus highly volatile, with significant risks being posed by the evolution of the war in Ukraine, possible EU sanctions and a strengthening of demand headwinds.



Henry Hub gas prices have continued to perform strongly over the last month. Supply remains tight, with the EIA's latest monthly Energy Outlook report published on 12 April indicating that U.S. gas inventories ended March 17% below their five-year average. Moreover, freeze-offs caused production to dip

to the lowest level since February in early April. Near-term domestic demand prospects have also been boosted by forecasts of cold weather across parts of the U.S. going into April. Meanwhile, U.S. exports continue to operate at full capacity, with the U.S. recently penning a deal with the EU to supply it

with natural gas. That said, U.S. gas prices remains relatively insulated from the fallout of the Russia-Ukraine war, given plentiful U.S. gas reserves. Consensus Forecast expects Henry Hub prices to fall by year-end from March's average prices amid stronger U.S. supply. However, prices will remain substantially above their long-run average amid record LNG exports. The market remains volatile and risks exist in both directions, which include potential EU sanctions on Russia gas and the weather.

In March, prices for Australian thermal coal briefly doubled following the first announcement of Western sanctions on Russian energy exports, with coking coal prices posting similarly impressive gains. Prices have since softened as market panic eased amid extremely high trading volatility. That said, prices remained at historically high levels. Factors underpinning the market include extremely high oil and gas prices, which could reignite Western countries' appetite for coal, and Western energy sanctions. Meanwhile, production in Australia continued to be constrained by wet weather—which is set to continue until May—and Covid-19-related worker absences. Consensus Forecast expects both coking coal and thermal coal prices to fall substantially by year-end from March's average prices amid reduced disruptions to Australian supply and softening demand amid reduced global economic momentum. Market volatility remains elevated and swings in either direction may occur due to events such as an escalation of the war in Ukraine or China easing its ban on Australian coal.

Prices over the last month have hit levels not seen since immediately after the March 2011 Fukushima accident. High oil and gas prices have boosted demand prospects as nuclear power is a substitute of theirs which—unlike coal—promises to help countries meet Paris Agreement obligations. Meanwhile, the short-term supply outlook appears strained: Some Western companies have shunned uranium from Russia while U.S. senators recently introduced a bipartisan bill to ban imports of the metal from Russia. Economic Forecast expects uranium prices to fall by year-end from March's average prices. However, they will remain comfortably above next year's prices amid robust demand stemming from green transition plans and Western efforts to wean themselves off Russian energy. Risks include the path of Western sanctions on Russian energy, supplier discipline and potential nuclear disasters deterring future demand.

Europe hooks itself up to more North African gas, but will it be enough to replace Russian supply? The North African gas giant

Algeria signed a deal with Italy this week which will eventually boost its gas exports to its European neighbor by up to 50%. The Algeria-Italy gas deal should go some way toward easing upwards pressure on European gas prices. The global LNG market is incredibly tight and any increase in pipeline imports will boost the supply outlook. The deal may have contributed to the recent slight easing of European spot prices since the start of the month.

Nonetheless, prices are set to remain at record levels amid the ongoing hit to Russian production, at least in the near term. According to one source, the immediate boost to exports is estimated to be around 3 billion cubic meters per year, amounting to just 1.8% of total imports from Russia. Algeria's export capacity is restrained by a lack of prior investment and rising domestic consumption. In addition, there is only limited pipeline infrastructure to deliver gas from Mediterranean countries like Italy to those European countries which are most dependent on Russian gas in the center and east of Europe, meaning that prices there are set to remain elevated. The only way that Europe can wean itself off Russian gas right now is by paying higher prices to divert LNG cargoes from Asia. More direct deals between gas exporting countries and European countries, as well as construction of new infrastructure to move LNG supply, are developments to be on the lookout for as Europe aims to replace Russian gas supply as quickly as possible. Insights from economic experts have noted the bigger picture "European Energy Commissioner Kadri Simson recently said the bloc can't treat Russia as a trustworthy partner and that disruptions may occur. It has subsequently developed a plan to help Ukraine with reverse gas flows. The search for alternative sources also continues."/>

Meanwhile, analysts at Berenberg explain how vulnerable European economies would remain if energy completely stopped flowing from Russia: "Following up on other analyses, Germany's five leading economic research institutes today presented a joint estimate based on detailed calculations. They conclude that a full energy embargo as of mid-April 2022 would reduce EU27 annual economic growth by 0.5 percentage points in 2022 (from a 3.3% baseline to 2.8%) and by 2.5 points in 2023 (from 2.7% to 0.3%, rounded data) while raising inflation by roughly 1.0 percentage point in both years."

*Goutam Mukherjee*  
**Dr. Goutam Mukherjee**  
Hony. Editor, JILTA



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Tell me and I forget, teach  
me and I may remember,  
involve me and I learn

Stahl Campus®



As an active proponent of responsible chemistry, Stahl has established the Stahl Campus® training institute in its Center of Excellence for sustainable leather technologies in Kanpur. With our Stahl Campus® Leather Modules, we can offer training and information, such as responsible chemistry and sustainability in leather production. We believe that in this way, we facilitate transparency that inevitably will lead to a better supply chain with responsible chemistry.

Our approach is modular, making it easy to tailor learning programs to specific needs. Stahl Campus® has at its core the drive to unlock human potential and make that new

competitive advantage. By providing the possibility of sharing knowledge, we embrace our role in the dynamic leather and chemical industry. Stahl Campus® is a great opportunity to strengthen skills and capabilities in order to make working methods more efficient by sharing experiences and studying products and procedures.

If you're interested to receive more information on Stahl Campus®, please contact Prasanna Maduri ([Prasanna.maduri@stahl.com](mailto:Prasanna.maduri@stahl.com)).

If it can be imagined, it can be created.





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# Seize the opportunities of renewable chemistry



Today's leather consumers not only have to deliver high-quality durable products – they must also deliver them with minimal environmental impact and without compromising on the health and safety of people. At Stahl, we see this as an opportunity to support our customers and the wider leather industry in driving responsible products and sustainable living in close

cooperation with our partners, we recently launched Stahl 'Impact', a family of leather chemical solutions made with renewable ingredients. Stahl 'Impact' will help consumers to reduce their environmental footprint without compromising on the quality and performance of their products, since these ZDHC-compliant solutions follow the same rigorous

function performance to conventional alternatives. After the introduction of 7 product solutions of renewable carbon polyurethanes for tannin- and topcoats in leather finishing, we've now also introduced 13 specific solutions of renewable carbon wet-end products for leather processing.

If you would like more information about Stahl 'Impact' or how we can support you to embrace the opportunities of an exciting leather industry, visit [stahlteam.org](mailto:stahlteam@stahl.com) in touch with us at [communications@stahl.com](mailto:communications@stahl.com).

If it can be imagined, it can be created.



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## STAHL RELEASES ANNUAL ESG REPORT TO DRIVE FOCUS ON VALUE-CHAIN SUSTAINABILITY AND TRANSPARENCY

Stahl, an active proponent of responsible chemistry, has published on 10<sup>th</sup> May'2022 its 2021 Environment, Social, and Governance (ESG) Report. The report outlines the company's sustainable development ambitions and its achievements over the year. It also features Stahl's ambitious climate mitigation targets for 2030, such as the transition to more renewable feedstocks. Stahl's 2021 ESG Report is available as a fully digital version.



The 2021 Stahl ESG Report is a cornerstone of Stahl's commitment to reporting transparently on its progress toward a more sustainable chemicals value chain. This acknowledges the important role that industry must play in tackling climate change while enabling a higher quality of life for more people. A key focal point of the new report is a progress update on Stahl's ESG Roadmap to 2030. Introduced last year, this ten-year plan outlines the company's ESG commitments and targets for 2023 and 2030.

### Climate action

Stahl is focused on mitigating climate change by reducing greenhouse gas (GHG) emissions from all activities over which it has influence. This includes investing in renewable energy and process efficiencies to lower the GHG emissions caused directly by Stahl's own operations and the energy used to power them. On this point, progress was made toward the 2023 and 2030 targets in 2021, including a reduction in Scope 1 and 2 CO<sub>2</sub> emissions of 15%. Also covered are Stahl's indirect value-chain impacts, for example, from the raw materials it buys. Looking beyond Stahl's direct environmental impacts and fostering greater supply-chain transparency will be vital for tackling emissions on a wider scale.

### Creating responsible chemistry, together

In 2021, advances were made regarding the company's diversity and safety targets, which are areas of continuous improvement. Stahl is committed to ensuring a safe working environment, as well as nurturing a diverse and inclusive workplace to continuously improve employee skills.

### EcoVadis Gold rating

Fostering ethical behaviour through exemplary leadership and governance is key to Stahl's ambitions. Achieving the EcoVadis Gold rating was an important milestone in this respect. This well-established award reflects the company's ongoing commitment to supply chain transparency and working with partners to improve the sustainability of its products and operations.

Maarten Heijbroek, CEO of Stahl: "In my first full year as CEO, I have been impressed by the progress Stahl has made. The company's ambitious ESG Roadmap to 2030 continues to drive our efforts toward more responsible chemistry and transparency throughout the supply chain."



Accelerating our carbon emission reductions will require leadership, collaboration with value-chain partners, and a concerted effort from all Stahl colleagues. We are fortunate to be working with a highly motivated group of employees at Stahl, and I have no doubt we will achieve our ambitious goals.”

Read the full 2021 ESG Reportflby clicking on the link : <https://esg2021.stahl.com/esg-report-2021/start>.

*(Stahl News – 10/05/2022)*

## INFORMATION OF THE PUBLIC ABOUT SAFETY MEASURES ACCORDING TO § 8A AND § 11 OF THE 12TH FEDERAL IMMISSION CONTROL ORDINANCE

### Company address:

Stahl Chemicals Germany GmbH  
Benzstrasse 11  
70771 Leinfelden-Echterdingen  
Tel : 0711 9032 – 0  
Fax : 0711 9032 – 335

### Warehouse address:

Stahl Chemicals Germany GmbH  
Ernst-Mey-Strasse 23  
70771 Leinfelden-Echterdingen  
Tel : 0711 9032 - 235



### Legal basis

The Stahl Chemicals Germany GmbH warehouse at Ernst-Mey-Strasse 23 in Leinfelden-Echterdingen falls under the Hazardous Incident Ordinance. flThe business premises are subject to the extended obligations, since chemicals can be stored here in quantities that are above the quantity threshold in column 5 of Appendix I of the 12th BImSchV. flThese are in particular the hazard categories H1 - acutely toxic and E1 - hazardous to the aquatic environment. flThe operating area of the upper class was approved by the regional council in accordance with § 16 BImSchG. A safety report and an internal alarm and hazard prevention plan were drawn up in accordance with § 9 and § 10 of the Hazardous Incident Ordinance. flAs a warehouse operator, we fulfill our obligation to provide information within the framework of statutory precautions for our neighbourhood by informing you about possible dangers,

### Our company

Stahl Chemicals Germany GmbH is part of the Dutch Stahl Group. flIt is a leading global supplier of products for the leather and coatings industry. flAt the Leinfelden site, mainly aqueous polymer dispersions and paints are manufactured. flIn order to be able to increase the storage capacity for the required raw materials, some of which are classified as hazardous in the sense of the GHS/CLP regulation, the Stuttgart regional council for our raw and finished goods warehouse at Ernst-Mey-Straße 23 in Leinfelden in August 2020 granted approval as a so-called upper-class operating area.

In this warehouse, only closed, transport-legally approved containers are stored and retrieved and the corresponding delivery and delivery transports are processed. flThere is no filling or decanting process, no handling of open chemicals.





## **Dangerous substances**

Some storage areas store chemicals that are toxic, flammable, or hazardous to the environment. In addition, substances with other hazardous characteristics are handled.

## **Possible dangers**

Due to the properties of the substance, the following dangers could arise in principle:

- **Release of hazardous substances if containers are damaged**
  - Spread of dangerous vapours or dusts
  - Contamination of soil, plants, water
  
- **Fire**
  - Spread of dangerous fire gases and clouds of soot
  - Thermal radiation from the fire
  
- **Explosion**
  - Debris throw
  - Pressure wave, possible damage to windows

As part of the risk assessment, “nonetheless accidents” that could reasonably be ruled out were also examined. In the safety report, these hazards have been analysed and preventive measures have been taken to prevent incidents and limit their impact in order to protect your health, the health of our employees and the environment.

## **protective measures taken**

The warehouse equipment and work processes meet all the requirements for storing and handling chemicals, including fire protection, soil protection and occupational safety. In particular, the scenarios of material leakage, ie leakage of chemicals in the storage area, fire and explosion, are taken into account. A corresponding security and protection concept is described in the security report, which you are welcome to inspect with us on request. These include, among other things, fire alarm and extinguishing systems, chemical and extinguishing water retention systems, structural, constructive, organizational and personal protective measures. The civil protection authority is provided with the information required to create an external alarm and hazard prevention plan.

## **Behaviour in the event of an accident**

If, despite all preventive protective measures, a dangerous situation arises, the emergency organization takes action. Coordinated with external emergency services, the alarm and averting of danger is carried out to limit or minimize damage. In the event of an incident, the constantly manned control centre of the Esslingen fire brigade is automatically informed, which forwards the emergency call to the Leinfelden-Echterdingen fire brigade, the police, rescue services and authorities. The further procedure is determined by the external emergency services with the support of the company’s own emergency organization. The police or fire brigade will inform you via loudspeaker announcements and, if necessary, via radio. Please follow these instructions for your own safety.

- Loudspeakers - Pay attention to loudspeaker announcements from emergency services or authorities
- Radio Switch on the radio, preferably the following transmission frequencies



SWR1 - 94.70MHz  
SWR3 - 92.20MHz  
SWR4 - 90.10MHz

- Neighbours If necessary, please inform your immediate neighbors
- Outdoors Don't stay outdoors, go into a room
- Windows Close windows and doors, turn off ventilation systems if necessary.
- Ignition sources Avoid all ignition sources
- fiDoctor If you have health problems, contact your family doctor or the medical emergency service
- Accident site Keep roads and paths to the accident site clear for the emergency services and avoid the accident site
- Telephone Only call the police, fire department or other authorities in an emergency so that the telephone lines are not blocked
- All-clear Pay attention to the all-clear on the radio or loudspeaker announcements

## Further information

If you are interested or have a need, please feel free to contact our site manager, our logistics manager or our SHE manager (Safety, Health & Environment Manager). You can reach them via our reception on Tel. 0711 9032 - 0. Date of the announcement: August 2020 Date of the last on-site inspection according to § 17.

Para according to § 17 paragraph 1 Major Incident Ordinance are available from the competent supervisory authority, i.e. Regional.

## Council Stuttgart

Telephone : 0711 904 - 0  
Internet : [www.rp.baden-wuerttemberg.de](http://www.rp.baden-wuerttemberg.de)  
Email : [abteilung5@rps.bwl.de](mailto:abteilung5@rps.bwl.de)

A high safety standard not only in accordance with legal requirements, but also in accordance with our own Stahl SHE Guideline is a fundamental part of our Environment, Social & Governance company policy. Thank you for allowing us to familiarize you with this.

**Please keep these safety instructions in an easily accessible place.**

*(Stahl News – 29/04/2022)*







## *From the desk of* **General Secretary**

### **ELECTION SCHEDULE FOR RECONSTITUTION OF EXECUTIVE COMMITTEE OF ILTA AND THE REGIONAL COMMITTEES FOR THE TERM 2022 - 2024**

The Executive Committee of ILTA at its 548<sup>th</sup> Meeting held on 24/02/2022 approved the following schedule for Election of Executive Committee of ILTA and the Regional Committees for the term 2022-2024.

| Sl. No. | Events   | Election Schedule for 2022-2024 | Day                       |
|---------|--|---------------------------------|---------------------------|
| 01      | Mailing of Nomination papers & Voters' List on or before   | 02.05.2022                      | Monday                    |
| 02      | Last date for receipt of Nomination Papers   | 24.05.2022                      | Tuesday                   |
| 03      | Last date for receipt of Consent   | 13.06.2022                      | Monday                    |
| 04      | Last date for withdrawal of candidature  | 17.06.2022                      | Friday                    |
| 05      | Mailing of ballot papers on or before  | 06.07.2022                      | Wednesday                 |
| 06      | Last date for receipt of ballot papers From voters residing outside KMDA area & 24-Pgs (N & S)   | 03.08.2022                      | Wednesday                 |
| 07      | Casting of votes by voters residing in KMDA & 24-Pgs (N & S) Area at ILTA Administrative Office 10-00 to 17-00 hrs.<br>(LUNCH BREAK : 1-30 to 2-30 PM) | 02.08.2022<br>&<br>03.08.2022   | Tuesday<br>&<br>Wednesday |
| 08      | Counting of votes at ILTA Administrative Office from 11-00 hrs. onwards  | 05.08.2022                      | Friday                    |



**(Susanta Mallick)**  
General Secretary

### **YOUTUBE CHANNEL & FACEBOOK PAGE OF ILTA**

An official **YouTube Channel** namely **ILTA Online** and a **Face Book Page** namely **Indian Leather Technologists' Association** has been launched for sharing the activities of our Association since November' 2020 and July' 2021 respectively.

You may find all the Lives / Video recordings of different Seminar, Symposiums & Webinars on both of these social medias along with our website **www.iltaonleather.org** time to time.

You are requested to kindly do **Like & Subscribe** the YouTube Channel and "**Follow**" the FaceBook Page to get regular updates on the activities of our Association.

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We have started to post Printed copy of JILTA from April' 2022 to members and all concerned as it was before Covid period. Simultaneously we have been sending the e-copy of JILTA through email also to all the concerned receivers.

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# Solidaridad

Solidaridad Network is a global civil society organization providing efficient, scalable and economically effective and innovative sustainability solutions in various agricultural and industrial commodities such as:





# EFFECTIVE WASTE MANAGEMENT AND SUSTAINABLE DEVELOPMENT IN KOLKATA LEATHER CLUSTER(BANTALA)

## 2020 -2023

Circular Economy

Effective solid waste management

Capacity building programme



Trainings on Occupational Health and Safety

Robust public- private partnership

Efficient water consumption practices

EFFECTIVE WASTE MANAGEMENT AND SUSTAINABLE DEVELOPMENT  
**KOLKATA LEATHER CLUSTER**

### PROJECT PARTNERS IN ASIA



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## Bioremediation greenway for sustainable environment

**M**other nature cannot be controlled by anything” – we all know this. The quality of life in earth is connected inevitably with the purity of the environment here. Earlier, we had an imagination of having ample amount of land and resources, but however, today due to our carelessness and negligence, we are corrupted by the curse of pollution.

Accepting the limitation and find a way within the vein of nature can be the only way to cure the impurity and contamination of hazardous chemical coming from industries like Leather.

Solidaridad, as a nonprofit making organization, collaborated with other organization to start and automated the green process technologies in Kolkata Leather Complex and bring its glory and sustainability back.

Controlling the ongoing pollution will not be enough at this point but also reducing the previous one will be something that we need additionally. The leather industry, responsible for transforming hides and skins into shoes, clothing, furniture, horse saddles and car seats among others, is huge. Every year, around 1.5 billion square meters of leather is produced worldwide with an estimated value of  $\square$  40 billion. A large portion of the world’s tanning industry operates in low- and middle-income countries, and the percentage of these countries contributing to light and heavy leather. Many of these tannery sites are clustered together, creating heavily polluting industrial areas in many countries. In Bantala, for example—a particularly large tanning region of Kolkata that has over 330 separate tanneries.

These pollutants are responsible for the contamination of all nearby surface and groundwater systems with severely high levels of chromium and other toxic chemicals.

To get rid of these toxic heavy metals and to fight with it without doing any further pollution – in a greener way of undoing the pollution, Bioremediation can be effective. In some of the region of India, scientists are already working

with it to reduce the environmental load and to reduce the devastating effect in future.



### What is Bioremediation?

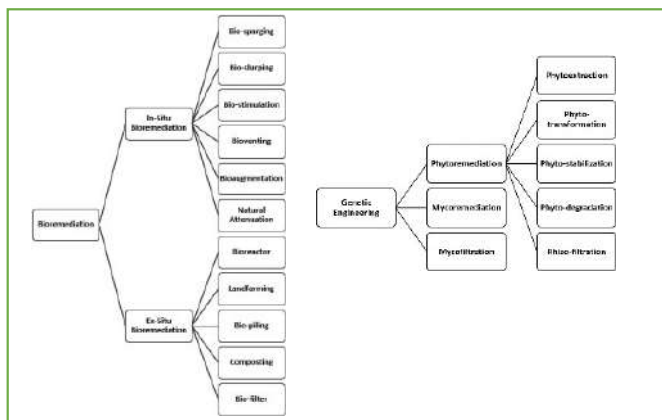
It is the use of microorganism to degrade the environmental contaminates into less toxic forms. Used to treat contaminated media, including water, soil and subsurface material, by altering environmental conditions to stimulate growth of microorganisms and degrade the target pollutants. These toxic compounds are metabolized by enzymes present in microorganisms.



### Types of Bioremediations that can be used in Leather Industry:

When leather Industry is concern, bioremediation can be diversifying in two ways; (a) For Solid Waste, we can consider Ex-situ bioremediation where we are treating the

pollutant far from the actual site by using nutrients, air (means oxygen mainly). (b) for Waste-water and downstream operation for reducing the pollutants in the affected water we can consider the In-situ Bioremediation Genetic Engineering Approaches where we can use some specific plants (including mycelia, fungus) to break down the toxic pollutants to nontoxic particle.



### Solidaridad’s pilot intervention with CLCTA: -

Tannery effluents are a massive source of water pollution in Kolkata with chemical oxygen demand (COD), biological oxygen demand (BOD) and hexavalent chromium. Nearly 95% of the tanneries in Kolkata are engaged in the chrome tanning process. The tannery waste primarily consists of chromium and protein long term disposal of tannery wastes has resulted in extensive contamination of agricultural land and water sources. In the process of tanning, chromium salts are used to convert hide to wet blue and the waste water generated is discharged into the environment which contains chromium salts in the excess of the maximum permissible limits. Tannery industry is one of the major industries in India



Solidaridad along with Biostrats Venture, initiated this pilot level trial under the immense support of Calcutta Leather Complex Tanners Association at their designated place. Purpose of this small trial is to determine whether the specie of the plant involved can survive or not. There are few layers of this intervention, where we need to assess the specie of the plant, after that we need to investigate the chemical changes of the effluent (Water body).

In tannery effluent, Cr (VI) is present as either dichromate in acidic environment or as chromate in alkaline environments. Microbial cells can convert metal ion from one oxidation state to another, hence reducing their harmfulness. Bacteria use metals and metalloids as electron donors or acceptors for energy generation. Metals in the oxidized form could serve as terminal acceptors of electrons during anaerobic respiration of bacteria. Reduction of metal ions through enzymatic activity could result in formation of less toxic form of mercury and chromium.

In KLC (Kolkata Leather Complex), Solidaridad is using In-situ Phyto- remediation (Bioremediation & Bioengineered application) using organic fiber bed on the sewage waste water to absorb the toxic heavy metals and convert it to non-toxic particle. This intervention has the capability of converting noxious effluent to a less polluted water body for green and prosperous future of Calcutta Leather Complex.



# PERIODICAL EVOLUTION OF CLICKING OF UPPER COMPONENTS IN FOOTWEAR INDUSTRY : A BRIEF STUDY

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## ABSTRACT

Leather material is used in making complete shoe for a long time. The operation of cutting of leather or other materials can be performed either manually or mechanically. The work done in the clicking room affects a huge number of subsequent operations than any other single process, and this fact alone is sufficient to justify the closest study. If leather is used, it is often so variable in nature that great difficulty will be experienced in making the shoes unless the clicker is thoroughly familiar with the material and thus able to make the best use of it at the time of interlocking of patterns. The cost of upper materials is such that the greatest care must be taken during estimating and checking their correct use in hide. A systematic examination of the records kept is necessary in order to check the profit or loss that may be made on cutting, with the object of discovering the cause and finding a remedy if needed. The section is concerned not only with the tools and technique of the clicker but also with the buying and selection of the materials which are used in this department, their special characteristics as they affect the shoe making process, with the methods of costing in general use and with the management of the room and the leather store.

**KEY WORDS :** Clicking, CNC, Hide, Knowledge Engineer, Laser, Sensor, & Hydraulic

## 1. INTRODUCTION

Leather received for cutting is examined and sorted into the following grades: a) Leather from which vamps can be obtained in great quantity, b) Leather with less vamps, & c) Damaged leather having loose texture, growth marks, cuts, & flaying marks. Cutting should be started with biggest size and side by side other sizes should also be fitted in such portions where big

sizes are not possible. The most important thing is to keep in view the interlocking of patterns i.e., the patterns should be so adjusted that no surplus space is left between two patterns. The best part of the leather is "BUTT" which has the finest grain and tight texture; therefore, vamps and toe-caps are taken out from this portion as the weight of the human body is mainly on the vamp of the shoe, the vamps and toe-caps should always be taken from the best portion of the leather [1]. After utilizing the "BUTT" portion, quarters and other components such as Heel counter, Back strap, & Tongue etc. are cut from neck and belly portion. The patterns should be adjusted in such a way that the growth marks disappear after lasting. Portions having deep growth marks should always be used for tongues of shoes or for some other small components for allied products. Lining for shoes is also cut in the clicking department and is usually marked with sizes and lot numbers (on lining marking machine). Though clicking presses for "Upper Cutting" are available, it is not economical to use them where shoes of various designs are to be produced because of extra expenditure on sets of cutting knives for each design. Therefore, hand cutting is to be preferred where production is small and in different varieties [1,2].

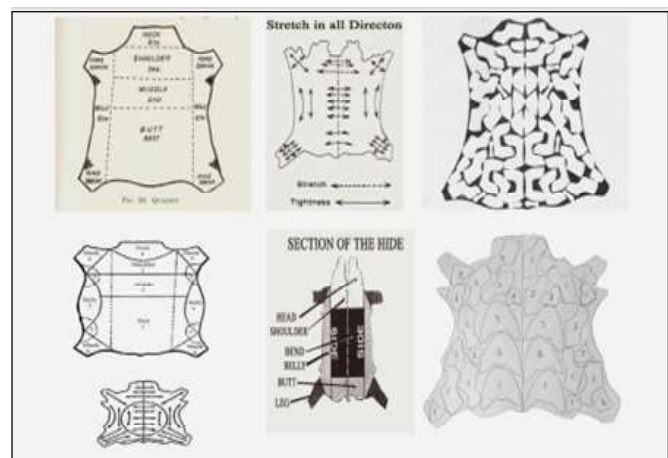


Fig. 1 Structure & Quality regions in hide

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## 2. LITERATURE REVIEW

In the very beginning in Footwear industry, layout of patterns on the skin was done with white pen or with white pencil and then cut the components with the help of scissor. This could easily enable the worker for making alternative interlocking arrangement. Then, clicking of upper components with the help of clicking knife using tin templates came into existence, but it is a time-consuming process and not so much accurate. The major drawback was to cut thick leather like buff leather with clicking knife or scissor. Therefore, the clicking machine came into existence. To click different components of leather the clicking dies are used on the heavy-duty mechanical clicking press. To enhance the clicking accuracy different clicking pressures are needed, which motivated to make hydraulic machines which works on the principle of Pascal's law i.e., pressure is same throughout the process by which the pressure and time can be controlled. There are a few demerits because every time there was a requirement of different clicking dies of different shapes and sizes for different components of footwear. As a result, huge investment of money was required. To overcome this problem, the concept of laser was introduced to cut components as well as to engrave easily in a very effective way. The concept of laser was discovered in 1960. It uses a large amount of energy generated by a laser to concentrated on a very small area in order to cut or engrave material effectively. Only a computer aided design (CAD) file is required and rest of the work is done by the machine. So, no dies and other stuff were not required for cutting and engraving. At present, automatic nesting machines are there for interlocking of patterns by using nesting software. The latest machine for cutting of upper components is automatic sensor machine which identifies the quality of leather, marks the defects, & pass all the relevant information to the nesting team. Once nesting is completed, the command is forwarded to the sensor machine for clicking the components at a very good speed [3].

## 3. PRINCIPLES OF UPPER CLICKING

- During cutting, clicker has to remember all the principles of clicking, which are:
- Keep the clicking knife always sharp and properly shaped.
- Ensure proper lightening on the working table provide an even distribution of light without heavy shadow or glare.
- Examine each skin on both sides for defects and mark them prominently with chalk provided the material is strong the

defective portion may be placed where it could be covered i.e., lasting allowance, underlay allowance etc.

- Consider the quality requirement of the various components of the upper to be clicked.
- Arrange the patterns on the skin in interlocking positions in such a way that the better quality of leather occurs where it is most needed and the line of tightness conforms to the requirement of the various components.
- Consistent with the above requirement, develop a systematic arrangement of the pattern which could be repeated as many times as the area of the skin permits and involves a minimum possible amount of waste.
- Start clicking from butt and out across the skin from side to side thus keeping the skin square and avoiding long narrow and awkwardly shaped pieces.
- Cut the components of each pair matching in shade and substance. In case of rare leather like the skin of reptiles or other printed materials great care should be taken in sorting the skins. If for instance three skins are needed for one pair, the whole stock must be sorted into lots of three skins similar in colour and grain.
- Work out the sole or skin in complete pairs.
- Never cut any section without making quite sure as to where the next two or three cuts is to be made.
- Cut the larger sizes first and select larger and stronger skin for bigger sizes.
- Cut towards your body or parallel to the cutting edge of the board.
- Maintain continuity when cutting
- Avoid over cutting at the corners as it creates waste.
- Mark pricks holes correctly and clearly [4].

## 4. INSTRUCTION FOR LEATHER CUTTING

- Cut the leather according to ticket number & sheet.
- Always keep in mind the size & no. of pairs.
- Set the pressure of m/c before cutting.
- Match the grains & colour pairs wise.
- Keep in mind the line of stretch & tightness.



- See defects are present anywhere or not.
- Make the bundles of the cut components & mark the no. of pairs, sizes and also fix the ticket no.
- Keep the die properly for cutting purpose [4].

## 5. VARIOUS TOOLS AND TECHNIQUES USED FOR UPPER CLICKING OF COMPONENTS

- a) Scissors and white pencil are used to click the upper components.



Fig.2 Upper clicking of components

- b) The tools and equipment's used for clicking are very simple and few. They are: a) Clicking Knife; b) Clicker's cutting board and table; c) Pricking awl; d) Carborundum stone; e) Buff knife or scrapper [4].

The continental type of knife consists of a metal handle and a blade which sticks into the handle together with a hold fast. A well-tempered blade of good steel is used.

### SHAPE OF THE BLADE :

The shape and length of the cutting edge of the blade is determined by the type of leather intended to be cut.

1. For light leather such as calf and glace kid, a fairly straight and slanting blade is used.
2. For thick leather, a slightly curved blade is used.
3. For very heavy and thick leathers like jug grain, a much-curved blade is used.

The reason for using a curved blade is that strength exerted by the clicker is aimed at pulling the blade through the leather and the curvature of the blade ensures that the cutting edge is nearly at right angles to the surface of leather. The length of the cutting edge of the blade is usually kept about 22 mm.

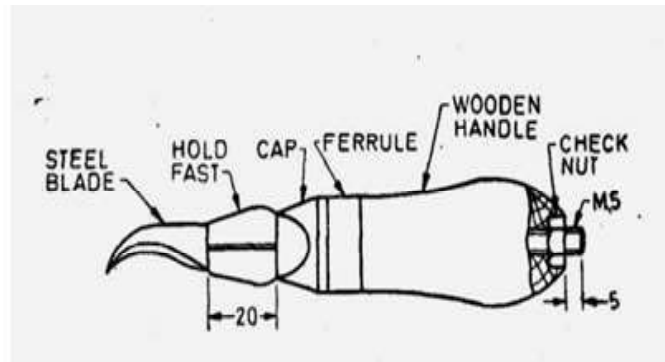


Fig.3 Clicking Knife



Fig. 4 Manual upper clicking with knife

### c) HYDRAULIC CLICKING

In this cutting method, the operator has the collection of cutting dies by his side, instead of the collection of molds, as in the case of manual cutting, and place the material on the top of the rigid board of the equipment, where there is a movable arm, which the operator moves over the cutting die, previously placed in the right place of the material, where it is desired to remove the piece. The cutting operation is performed by the cutting press, after being actuated by the pressure exerted on its pins by both hands of the operator, by means of a dry blow on the cutting die. The cutting press head automatically lifts after the blow, being moved away by the operator in order to allow the removal of the cutting die and the cut piece. The process is ready for further cutting. As with the manual cutting method, the consumption of raw material also depends exclusively on

the experience of the cutting operator, since it's him who chooses the best area of the leather to place the cutting dies and it's in his hands to make the best use of the material. This cutting method with cutting press is the most used in the shoe industry, although in many companies exist simultaneously, automatic cutting machines [5].



Fig. 5 Swing arm clicking press



Fig. 6 Rotating head clicking press

#### d) LASER CUTTING AND ENGRAVING

In recent years, Leather cutting by LASER (Light Amplification by Stimulated Emission of Radiation) machine has become popular among many industries. Laser cutting machines utilize digital and automatic technology to hollow out, engrave, & cut in the product effectively [6]. The laser cutting machine has broken the limits of traditional manual and electric cutting like hydraulic swing arm and Rotating head with their slow speed and pattern layout difficulty. The CO<sub>2</sub> / Diode/ Fibre laser fully solves the problem of unreachable efficiency and wastage of materials. The speed as well as accuracy of laser cutting is high and the operation is simple which involves giving the graphics and piece size to the computer which enables the machine to cut out the finished product in a non- contact manner.

#### WORKING OF LASER CUTTING

The laser beam in the leather cutting machine, the energy is focused into a small spot so that the focal point achieves a high-power density which quickly turns the photon energy into heat to form holes. As it moves on the material, the hole produces a small cutting seam continuously. So, there is no workpiece deformation [7]. There are basically three phenomena by which an atom can emit light energy and that are Absorption, Spontaneous Emission, & Stimulated Emission.

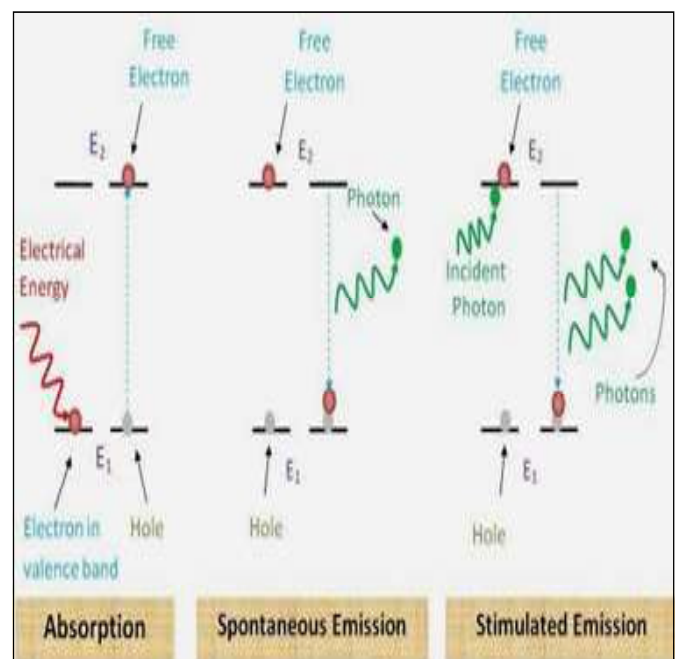


Fig.7 Principle of Laser Action

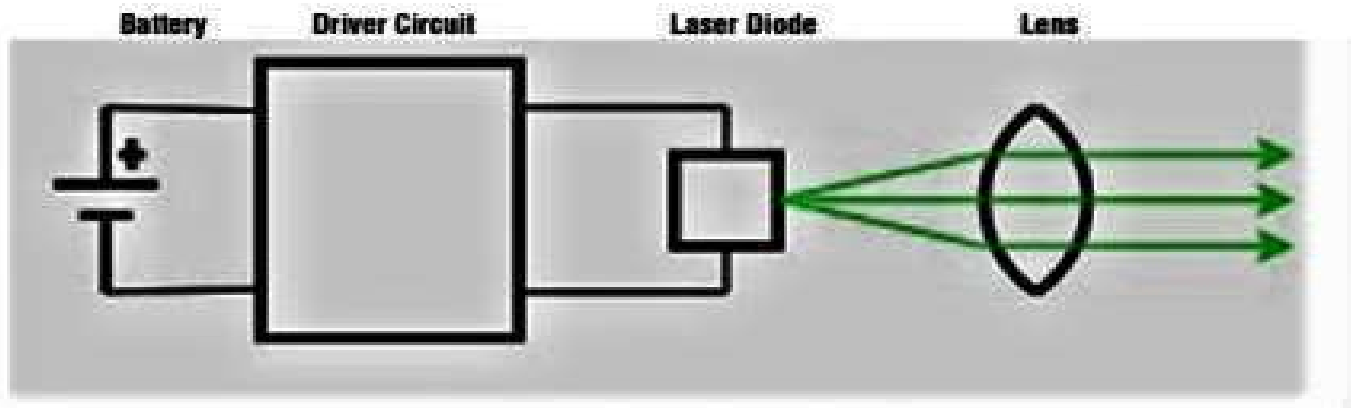


Fig.8 Schematic diagram of Laser diode working

#### d) AUTOMATING NESTING AND SENSOR MACHINE FOR UPPER CLICKING

The use of an automatic cutting method implies, in addition to the acquisition of the CNC cutting equipment itself, that the product development is computerized, through a CAD design system, to the point where it is possible to send to the automatic cutting machine all the information on the pieces of the model to be produced, their quantity and even their placement on each leather to be cut. The CAD system is therefore a key part of the whole automatic cutting cell. One of the advantages of an automatic cutting system is precisely to eliminate the need for cutting dies, since all the information about the parts to be cut is sent directly from the CAD system to the cutting machine, with the consequent reduction of costs and significant gains in terms of response time. The CAD system also allows to calculate and optimize the leather consumption to produce a model, by executing several nesting studies involving the respective molds. The consumption of the model is calculated

by combining molding information with data on the material in which it is to be cut. The nesting calculations are performed automatically, and the results obtained can be used in the placement process.

In the automatic cutting method, there are two possibilities of placing the pieces on the leather before they are cut automatically :

- the process is all automatic,
- the process is semi-automatic and the parts are virtually placed in the cutting machine itself.

In the fully automatic process, all the leathers that are to be cut are scanned, that is, its contour and type of defects is reproduced in the computer, the parts of the model are placed automatically and then it is just to put the leather in the cutting machine and start the cutting process [8].



Fig. 9 Automating sensor clicking machine

## 6. INTERLOCKING OF UPPER PATTERNS

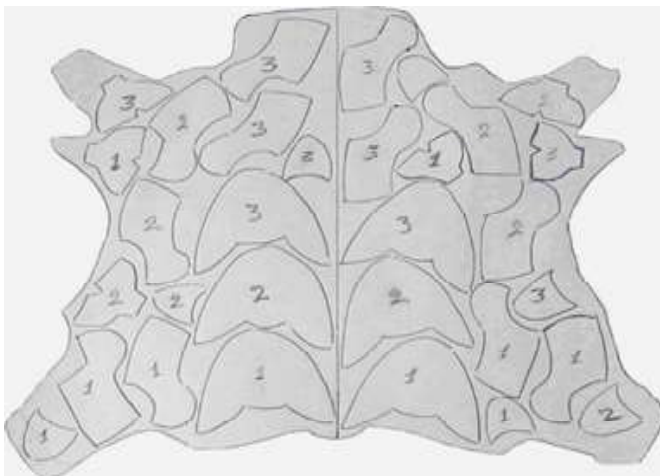
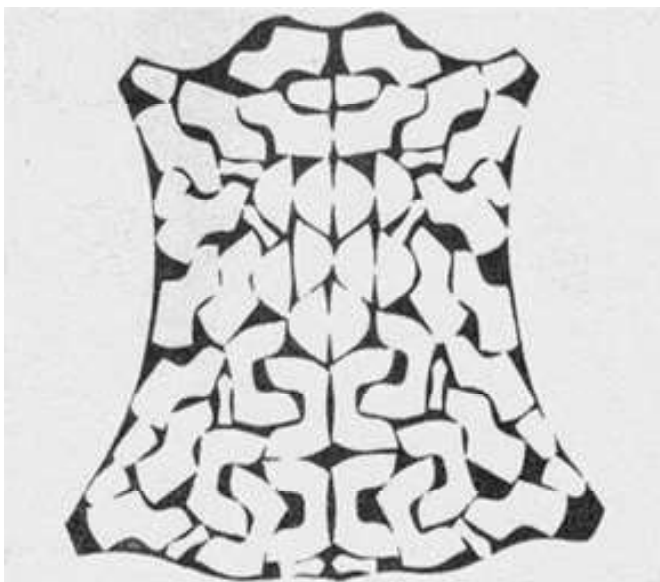
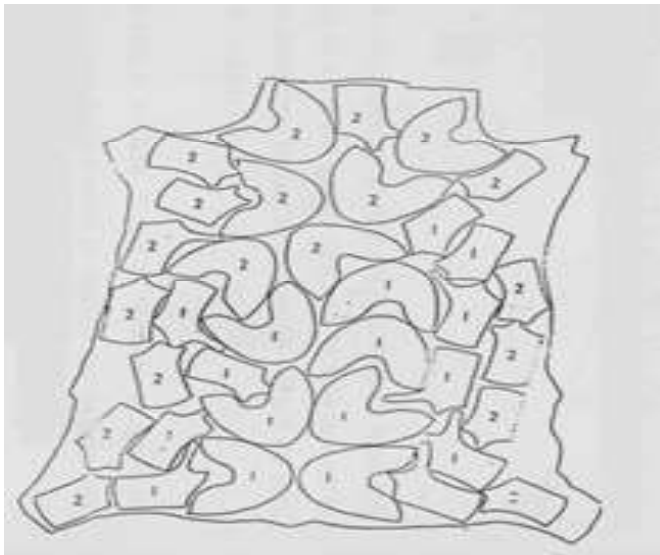


Fig. 10 Nesting exercise

- How this sensor machine came into the existence of clicking the upper components?
- Answer is Knowledge Engineer

## 7. KNOWLEDGE ENGINEER

A knowledge engineer is a professional engaged in the science of building advanced logic into computer systems in order to try to simulate human decision-making and high-level cognitive tasks. A knowledge engineer supplies some or all of the “knowledge” that is eventually built into the technology. Knowledge engineering is a field of **artificial intelligence** (AI) that creates rules to apply to data to imitate the thought process of a human expert. It looks at the structure of a task or a decision to identify how a conclusion is reached [9]. A library of problem-solving methods and the collateral knowledge used for each can then be created and served up as problems to be diagnosed by the system. The resulting software could then assist in diagnosis, trouble-shooting, and solving issues either on its own or in a support role to a human agent OR in other words, it is defined as the transferring knowledge from an expert to a computer program [9,10].

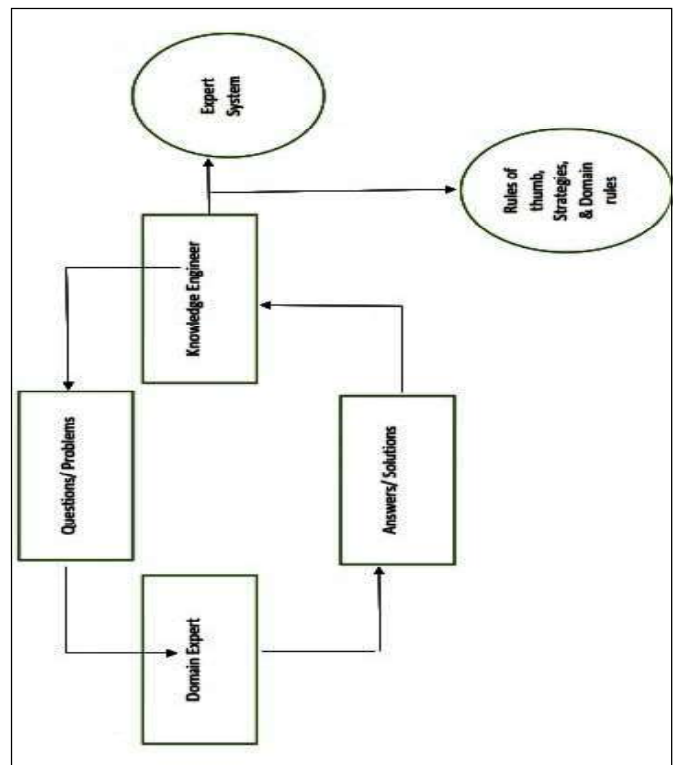


Fig. 11 Block diagram of KE



This field of AI especially in this industrial era of 4.0 helps to make that machine where the information about the clicking of leather, certain properties of leather, quality regions were collected from the domain expert via KE where he makes the strategies, thumb rules for clicking of leather and then transfer all the important information to the expert system where the high-level programming is done [11].

## CONCLUSION

Technology helps to cut the components in a very effective way, reducing the error and producing the high accuracy rate. Earlier clicking processes were not achieved that much level of production like 1000 pairs or 2000 pairs etc. but with the advancement of technology, everything is possible at present condition. Hydraulics and sensor machines play a very crucial role in the footwear industry for large scale production. Nesting machine software helps to get the proper interlocking with minimum wastage of leather material.

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**INDIA'S EXPORT PERFORMANCE OF LEATHER AND LEATHER PRODUCTS INCLUDING NON-LEATHER FOOTWEAR DURING APR -FEB. 2021-22 VIS-À-VIS APR - FEB. 2020-21**

As per officially notified DGCI&S monthly export data, the export of Leather and Leather products including Non-Leather Footwear for the period April-February 2021-22 touched US \$ 4401.20 Mn as against the performance of US \$ 3307.45 Mn in April-February 2020-21, recording growth of 33.07%. In rupee terms, the export touched Rs.327322.47 Mn in April-February 2021-22 as against Rs.245926.21 Mn in April-February 2020-21, registering a growth of 33.10%.

**INDIA'S EXPORT OF LEATHER AND LEATHER PRODUCTS INCLUDING NON-LEATHER FOOTWEAR DURING APRIL-FEBRUARY 2021-22 VIS-À-VIS APRIL- FEBRUARY 2020-21**

*(Value in Million Rs)*

| CATEGORY             | APR - FEB<br>2020-2021 | APR - FEB<br>2021-2022 | % VARIATION   | % Share<br>2020 | % Share<br>2021 |
|----------------------|------------------------|------------------------|---------------|-----------------|-----------------|
| FINISHED LEATHER     | 25012.41               | 30598.7                | 22.33%        | 10.17%          | 9.35%           |
| LEATHER FOOTWEAR     | 98625.46               | 137284.48              | 39.20%        | 40.10%          | 41.94%          |
| FOOTWEAR COMPONENTS  | 13509.87               | 16910.44               | 25.17%        | 5.49%           | 5.17%           |
| LEATHER GARMENTS     | 20807.65               | 23872.5                | 14.73%        | 8.46%           | 7.29%           |
| LEATHER GOODS        | 62946.53               | 86519.77               | 37.45%        | 25.60%          | 26.43%          |
| SADDLERY AND HARNESS | 12267.28               | 18651.76               | 52.04%        | 4.99%           | 5.70%           |
| NON-LEATHER FOOTWEAR | 12757.01               | 13484.82               | 5.71%         | 5.19%           | 4.12%           |
| <b>TOTAL</b>         | <b>245926.21</b>       | <b>327322.47</b>       | <b>33.10%</b> | <b>100.00%</b>  | <b>100.00%</b>  |

Source : DGCI & S

*(Value in Million US \$)*

| CATEGORY             | APR - FEB<br>2020-2021 | APR - FEB<br>2021-2022 | % VARIATION   | % Share<br>2020 | % Share<br>2021 |
|----------------------|------------------------|------------------------|---------------|-----------------|-----------------|
| FINISHED LEATHER     | 336.39                 | 411.52                 | 22.33%        | 10.17%          | 9.35%           |
| LEATHER FOOTWEAR     | 1326.41                | 1845.85                | 39.16%        | 40.10%          | 41.94%          |
| FOOTWEAR COMPONENTS  | 181.69                 | 227.42                 | 25.17%        | 5.49%           | 5.17%           |
| LEATHER GARMENTS     | 279.84                 | 321.19                 | 14.78%        | 8.46%           | 7.30%           |
| LEATHER GOODS        | 846.57                 | 1163.21                | 37.40%        | 25.60%          | 26.43%          |
| SADDLERY AND HARNESS | 164.98                 | 250.86                 | 52.05%        | 4.99%           | 5.70%           |
| NON-LEATHER FOOTWEAR | 171.57                 | 181.15                 | 5.58%         | 5.19%           | 4.12%           |
| <b>TOTAL</b>         | <b>3307.45</b>         | <b>4401.2</b>          | <b>33.07%</b> | <b>100.00%</b>  | <b>100.00%</b>  |

Source : DGCI & S



**MONTH WISE INDIA'S EXPORT OF LEATHER & LEATHER PRODUCTS  
INCLUDING NON- LEATHER FOOTWEAR FROM APRIL 2021 TO FEBRUARY 2022**

*(Export Value in Million US \$)*

| COMMODITY            | APRIL 2021    | MAY 2021     | JUNE 2021     | JULY 2021     | AUG 2021      | SEPT. 2021    | OCT. 2021     | NOV. 2021     | DEC. 2021     | JAN. 2022     | FEB. 2022     | APR-FEB 2021-22 |
|----------------------|---------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-----------------|
| FINISHED LEATHER     | 40.15         | 40.38        | 37.26         | 38.2          | 34.56         | 34.68         | 38.29         | 33.42         | 38.16         | 39.05         | 37.37         | 411.52          |
| LEATHER FOOTWEAR     | 131.87        | 115.82       | 155.86        | 175.6         | 184.87        | 174.74        | 162.87        | 161.55        | 195.86        | 193.77        | 192.95        | 1845.85         |
| FOOTWEAR COMPONENTS  | 16.7          | 17.66        | 19.53         | 23.06         | 22.28         | 21.34         | 19.86         | 20.11         | 23.4          | 21.83         | 21.63         | 227.42          |
| LEATHER GARMENTS     | 14.18         | 18.85        | 29.51         | 39.36         | 36.18         | 36.04         | 29.11         | 30.45         | 32.27         | 31.52         | 23.74         | 321.19          |
| LEATHER GOODS        | 86.67         | 76.14        | 82.89         | 111.49        | 108.01        | 121.53        | 120.93        | 112.51        | 115.09        | 114.15        | 113.93        | 1163.21         |
| SADDLERY AND HARNESS | 18.02         | 17.24        | 21.35         | 24.96         | 24.34         | 26.79         | 25.94         | 22.07         | 22.91         | 23.94         | 23.3          | 250.86          |
| NON LEATHER FOOTWEAR | 15.8          | 9.5          | 12.47         | 16.3          | 14.27         | 14.72         | 15.24         | 12.47         | 17.28         | 25.37         | 27.7          | 181.15          |
| <b>TOTAL</b>         | <b>323.39</b> | <b>295.6</b> | <b>358.87</b> | <b>428.97</b> | <b>424.51</b> | <b>429.84</b> | <b>412.26</b> | <b>392.59</b> | <b>444.97</b> | <b>449.63</b> | <b>440.62</b> | <b>4401.2</b>   |

Source : DGCI & S

**INDIA'S IMPORT PERFORMANCE OF LEATHER AND LEATHER PRODUCTS INCLUDING  
NON-LEATHER FOOTWEAR DURING APR-FEB 2021-22 VIS-À-VIS APR - FEB 2020-21**

As per officially notified DGCI&S monthly India's Import Data, the Import of Raw Hides & Skins, Leather and Leather products for the period April-February 2021-22 touched US \$ 1010.44 Million as against the performance of US \$ 684.66 Million in April-February 2020-21, recording a growth of 47.58%.

**INDIA'S IMPORT OF LEATHER & LEATHER PRODUCTS INCLUDING NON-LEATHER FOOTWEAR  
DURING APRIL - FEBRUARY 2021-22 VIS-À-VIS APRIL - FEBRUARY 2020-21**

*(Value in Million US \$)*

| CATEGORY             | APR - FEB 2020-2021 | APR - FEB 2021-2022 | % VARIATION   | % SHARE 2020-21 | % SHARE 2021-22 |
|----------------------|---------------------|---------------------|---------------|-----------------|-----------------|
| RAW HIDES AND SKINS  | 14.53               | 26                  | 78.94%        | 2.12%           | 2.57%           |
| FINISHED LEATHER     | 272.47              | 358.54              | 31.59%        | 39.80%          | 35.48%          |
| LEATHER FOOTWEAR     | 187.25              | 302.16              | 61.37%        | 27.35%          | 29.90%          |
| FOOTWEAR COMPONENTS  | 16.72               | 28.24               | 68.90%        | 2.44%           | 2.79%           |
| LEATHER GARMENTS     | 1.94                | 1.88                | -3.09%        | 0.28%           | 0.19%           |
| LEATHER GOODS        | 32.05               | 46.57               | 45.30%        | 4.68%           | 4.61%           |
| SADDLERY AND HARNESS | 1.37                | 2.8                 | 104.38%       | 0.20%           | 0.28%           |
| NON-LEATHER FOOTWEAR | 158.33              | 244.26              | 54.27%        | 23.13%          | 24.17%          |
| <b>TOTAL</b>         | <b>684.66</b>       | <b>1010.44</b>      | <b>47.58%</b> | <b>100.00%</b>  | <b>100.00%</b>  |

Source : DGCI & S

## MONTH WISE INDIA'S IMPORT OF LEATHER & LEATHER PRODUCTS INCLUDING NON-LEATHER FOOTWEAR FROM APRIL 2021 TO FEBRUARY 2022

(Value in Million US \$)

| PRODUCT              | APRIL<br>2021 | MAY<br>2021 | JUNE<br>2021 | JULY<br>2021 | AUG<br>2021  | SEPT.<br>2021 | OCT.<br>2021 | NOV.<br>2021 | DEC.<br>2021  | JAN.<br>2022  | FEB.<br>2022  | APR-FEB<br>2021-22 |
|----------------------|---------------|-------------|--------------|--------------|--------------|---------------|--------------|--------------|---------------|---------------|---------------|--------------------|
| RAW HIDES AND SKINS  | 1.95          | 3.27        | 2.29         | 2.76         | 1.7          | 2.17          | 1.95         | 1.48         | 2.68          | 2.12          | 3.6           | 26                 |
| FINISHED LEATHER     | 27.47         | 31.4        | 30.8         | 22.26        | 29.69        | 33.51         | 35.13        | 32.2         | 35.9          | 39.31         | 40.81         | 358.54             |
| LEATHER FOOTWEAR     | 20.62         | 21.1        | 35.75        | 27.58        | 21.33        | 24.76         | 23.31        | 25.8         | 31.69         | 33.06         | 36.98         | 302.16             |
| FOOTWEAR COMPONENTS  | 1.78          | 2.18        | 1.65         | 2.11         | 1.91         | 2.69          | 2.65         | 3.75         | 2.82          | 3.96          | 2.76          | 28.24              |
| LEATHER GARMENTS     | 0.04          | 0.02        | 0.26         | 0.18         | 0.46         | 0.18          | 0.13         | 0.11         | 0.26          | 0.12          | 0.1           | 1.88               |
| LEATHER GOODS        | 3.68          | 1.76        | 2.9          | 3.64         | 4.55         | 4.91          | 4.92         | 6.35         | 5.45          | 4.14          | 4.24          | 46.57              |
| SADDLERY & HARNESS   | 0.18          | 0.28        | 0.34         | 0.25         | 0.2          | 0.15          | 0.36         | 0.24         | 0.38          | 0.23          | 0.19          | 2.8                |
| NON LEATHER FOOTWEAR | 18.47         | 24.3        | 32.83        | 22.25        | 14.28        | 20.37         | 20.64        | 17.4         | 22.31         | 24.78         | 26.58         | 244.26             |
| <b>TOTAL</b>         | <b>74.19</b>  | <b>84.8</b> | <b>106.8</b> | <b>81.03</b> | <b>74.11</b> | <b>88.74</b>  | <b>89.09</b> | <b>87.32</b> | <b>101.49</b> | <b>107.72</b> | <b>115.26</b> | <b>1010.44</b>     |

Source : DGCI & S

## COUNTRY WISE EXPORT PERFORMANCE OF LEATHER AND LEATHER PRODUCTS INCLUDING NON- LEATHER FOOTWEAR FROM INDIA DURING APR - FEB 2021-22 VIS-À-VIS APR - FEB 2020-21

(Value in Million US \$)

| COUNTRY     | APR - FEB<br>2020-21 | APR - FEB<br>2021-22 | % Change<br>2021-22 | Share in<br>APR-FEB. 2020-21 | Share in<br>APR-FEB. 2021-22 |
|-------------|----------------------|----------------------|---------------------|------------------------------|------------------------------|
| U.S.A.      | 564.03               | 1039.49              | 84.30%              | 17.05%                       | 23.62%                       |
| GERMANY     | 441.44               | 489.62               | 10.91%              | 13.35%                       | 11.12%                       |
| U.K.        | 293.24               | 415.62               | 41.73%              | 8.87%                        | 9.44%                        |
| ITALY       | 225.47               | 257.78               | 14.33%              | 6.82%                        | 5.86%                        |
| FRANCE      | 225.89               | 252.27               | 11.68%              | 6.83%                        | 5.73%                        |
| SPAIN       | 142.24               | 197.05               | 38.53%              | 4.30%                        | 4.48%                        |
| NETHERLANDS | 141.66               | 194.04               | 36.98%              | 4.28%                        | 4.41%                        |
| CHINA       | 83.84                | 125.49               | 49.68%              | 2.53%                        | 2.85%                        |
| BELGIUM     | 71.28                | 104.13               | 46.09%              | 2.16%                        | 2.37%                        |
| U.A.E       | 67.85                | 91.6                 | 35.00%              | 2.05%                        | 2.08%                        |
| AUSTRALIA   | 66.17                | 83.09                | 25.57%              | 2.00%                        | 1.89%                        |
| POLAND      | 78.56                | 74.49                | -5.18%              | 2.38%                        | 1.69%                        |
| HONG KONG   | 52.08                | 62.01                | 19.07%              | 1.57%                        | 1.41%                        |
| DENMARK     | 56.94                | 60.66                | 6.53%               | 1.72%                        | 1.38%                        |



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## News Corner

| COUNTRY        | APR - FEB<br>2020-21 | APR - FEB<br>2021-22 | % Change<br>2021-22 | Share in<br>APR-FEB. 2020-21 | Share in<br>APR-FEB. 2021-22 |
|----------------|----------------------|----------------------|---------------------|------------------------------|------------------------------|
| JAPAN          | 40.61                | 55.3                 | 36.17%              | 1.23%                        | 1.26%                        |
| CANADA         | 31.67                | 54.73                | 72.81%              | 0.96%                        | 1.24%                        |
| VIETNAM        | 47.65                | 54.35                | 14.06%              | 1.44%                        | 1.23%                        |
| PORTUGAL       | 40.27                | 53.36                | 32.51%              | 1.22%                        | 1.21%                        |
| CHILE          | 27.4                 | 43.09                | 57.26%              | 0.83%                        | 0.98%                        |
| RUSSIA         | 36.82                | 42.28                | 14.83%              | 1.11%                        | 0.96%                        |
| KOREA REP      | 32.75                | 35.41                | 8.12%               | 0.99%                        | 0.80%                        |
| AUSTRIA        | 25.77                | 34.46                | 33.72%              | 0.78%                        | 0.78%                        |
| SOUTH AFRICA   | 22.9                 | 30.28                | 32.23%              | 0.69%                        | 0.69%                        |
| MEXICO         | 15.22                | 30.07                | 97.57%              | 0.46%                        | 0.68%                        |
| SWEDEN         | 25.79                | 29.37                | 13.88%              | 0.78%                        | 0.67%                        |
| SAUDI ARABIA   | 20.49                | 25.29                | 23.43%              | 0.62%                        | 0.57%                        |
| SOMALIA        | 38.57                | 24.03                | -37.70%             | 1.17%                        | 0.55%                        |
| MALAYSIA       | 28.78                | 23.63                | -17.89%             | 0.87%                        | 0.54%                        |
| INDONESIA      | 15.72                | 19.39                | 23.35%              | 0.48%                        | 0.44%                        |
| HUNGARY        | 19.76                | 18.34                | -7.19%              | 0.60%                        | 0.42%                        |
| SWITZERLAND    | 25.73                | 17.95                | -30.24%             | 0.78%                        | 0.41%                        |
| SLOVAK REP     | 13.6                 | 15.98                | 17.50%              | 0.41%                        | 0.36%                        |
| BANGLADESH     | 12.12                | 15.72                | 29.70%              | 0.37%                        | 0.36%                        |
| ISRAEL         | 11.97                | 15.24                | 27.32%              | 0.36%                        | 0.35%                        |
| TURKEY         | 10.38                | 15.18                | 46.24%              | 0.31%                        | 0.34%                        |
| NIGERIA        | 11.26                | 14.96                | 32.86%              | 0.34%                        | 0.34%                        |
| THAILAND       | 13                   | 14.19                | 9.15%               | 0.39%                        | 0.32%                        |
| FINLAND        | 10.94                | 13.08                | 19.56%              | 0.33%                        | 0.30%                        |
| CZECH REPUBLIC | 7.41                 | 11.46                | 54.66%              | 0.22%                        | 0.26%                        |
| SINGAPORE      | 4.16                 | 10.23                | 145.91%             | 0.13%                        | 0.23%                        |
| NEW ZEALAND    | 7.55                 | 9.74                 | 29.01%              | 0.23%                        | 0.22%                        |
| KENYA          | 10.49                | 6.57                 | -37.37%             | 0.32%                        | 0.15%                        |
| SRI LANKA DES  | 3.95                 | 6.52                 | 65.06%              | 0.12%                        | 0.15%                        |
| TAIWAN         | 3.68                 | 6.12                 | 66.30%              | 0.11%                        | 0.14%                        |
| OMAN           | 5.82                 | 5.8                  | -0.34%              | 0.18%                        | 0.13%                        |
| NORWAY         | 6.15                 | 5.78                 | -6.02%              | 0.19%                        | 0.13%                        |
| GREECE         | 7.62                 | 5.71                 | -25.07%             | 0.23%                        | 0.13%                        |
| CAMBODIA       | 4.15                 | 5.29                 | 27.47%              | 0.13%                        | 0.12%                        |
| SUDAN          | 9.79                 | 3.63                 | -62.92%             | 0.30%                        | 0.08%                        |
| DJIBOUTI       | 2.79                 | 2.2                  | -21.15%             | 0.08%                        | 0.05%                        |
| OTHERS         | 144.04               | 179.13               | 24.36%              | 4.36%                        | 4.07%                        |
| <b>TOTAL</b>   | <b>3307.45</b>       | <b>4401.2</b>        | <b>33.07%</b>       | <b>100.00%</b>               | <b>100.00%</b>               |

Source : DGCI & S

The Top 15 countries together account about 79.58% of India's total leather and leather products export during April-February 2021-22 with export value of us \$ 3502.64 Million.

### KANPUR DM WARNS 19 TANNERIES FOR NON-PAYMENT OF CONTRIBUTION FOR CETP CONSTRUCTION



District magistrate Neha Sharma issued warning to 19 tanneries of Kanpur for not paying their contribution for the construction of a 20 MLD common effluent treatment plant (CETP).

The DM warned tanneries of issuing a recovery certificate against them if they failed to pay their contribution. Nineteen tanneries have not paid the first and second instalments of their contribution. A 20 MLD CETP is being constructed at Jajmau to treat the tannery waste before its discharge in the Ganga. The tanneries of Kanpur are contributing their share in construction in instalments. The defaulter tanneries are Allied Leather & Leather Prod, Asia Tannery, Crow Tanners, Dawn (Don) tanning, Euroasia Leathers Ltd, Firoz Ki Tannery, Gazala Tannery, Globe Leather Finishers, Guljar Overseas, Imperial Leather Finishers, Jishan Trading Company, Laeek Tanners, Lari Tannery, Sabra Leathers, Star Leather Enterprises, Swan Tanning, Tajammul Ki Tannery, United Province Tanners, and Zaz Tannery.

*(Times of India – 13/05/2022)*

### WHY ARE ALTERNATIVE BIOMATERIALS TARGETING GENUINE LEATHER ?



Many in the leather industry are annoyed that companies and brands producing and championing new biomaterials are choosing to target genuine leather over other competitor materials and for good reason; it makes very little sense.

Leather is a natural, premium material prized by brands, retailers and OEMs in the fashion, automotive and furniture industries for its unique range of attributes. Although many are accepting a responsibility to take action over leather's links to issues such as deforestation or animal welfare, leather is first and foremost an upcycled by-product from the food industry.

In 2022, the leather industry is more focused on sustainability than ever before and is taking the already circular nature of a natural, collagen-based biomaterial to new heights with more responsible chemistry, ethical sourcing, biodegradability, waste treatment and so much more. No wonder then that so many are confused that sustainability-focused products like "lab-grown (or cultivated) leather" and so-called "vegan leather" are choosing to target leather in the market instead of obvious targets like synthetic materials, which are easy to criticise for the danger they pose to the environment and their fossil-derived origins. Surely, it's these materials that should be targeted as they are the worst offenders.

British leatherworker Yusuf Osman, interviewed in the May/June issue of ILM, said: "I think people are being hugely misled because, actually, the vegan alternatives are not an alternative to leather, they're an alternative to polyurethane (PU). They're an alternative to 100% PU because they are, maybe, 50% PU. And that's great but don't come for the leather industry, go after the PU industry."

Materials that reduce the amount of plastic needed in footwear and upholstery are a move in the right direction, and non-leather materials which use no fossil fuel derived ingredients are even better. It's unsurprising that these materials are stealing headlines and catching fire on social media as they are developed and picked up by brands, but the choice to use that leverage over public perception to attack leather is confusing.

One reason could be found in leather's competition with synthetic materials. From a purely business perspective, synthetics have won out and secured market share for the same reason that production moved to China, India and other countries with low manufacturing and labour costs; spend less money and make more money.



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Leather is a premium material which finds itself front and centre of the most expensive and exclusive brands and products in the world. With materials such as “cactus leather” (the majority of which is synthetic), mushroom biomaterial or other lab-grown biomaterials, development and scale-up production are costly, particularly at a time when those companies are only beginning to build up commercial production and refine manufacturing processes. Perhaps this has led these companies to naturally compete with leather for a share of the markets and brands that are willing to invest and have the margins to do so.

It's certainly not because these materials offer substantial benefits over leather from a performance standpoint. The oft-referenced FILK study set the record straight on this front and no sooner would someone advise a motorcyclist to choose synthetic protection than they would advise no protection at all.

And let's not forget one important fact. If any material replaces genuine leather, it will not stop a single farmed animal from being culled for the food industry and, instead of being turned into leather, those hides and skins would most likely end up in landfills and emit CO<sub>2</sub> as they decompose. Whereas, if the new generation of biomaterials were to replace synthetics, they could have a positive impact on the environment as society moves away from fossil-derived products.

### Money talks in a post-pandemic world

It's also likely not because of the ethical or environmental benefits. Although these aspects are vital and will be at the centre of marketing for any material which can boast them, after years of pandemic-related financial insecurity and a post-Covid world which is proving more perilous than ever, there is little that will trump the bottom line in terms of priorities.

Covid-19's repercussions on the global economy, continuing issues in countries such as China with zero-tolerance policy lockdowns and now the seeds of large-scale geopolitical unrest with the Russian invasion of Ukraine are all finding their way into financial results of the largest companies in the world as they justify their subsequently weakened revenues and profits.

So perhaps it has nothing at all to do with the environment, veganism or plastics. It's simply, as many things are, about money. And the leather industry cannot do much about that. If that's the case, then it will not come down to sustainability or ethical choices, it will simply come down to bang for your buck.

Thankfully, leather has plenty of its own, and it's going to be hard to dethrone a material which provides unbeatable performance in every category with a relatively low price to boot.

*(Tom Hogarth, ILM Deputy Editor – 09/05/2022)*

### OPPORTUNITIES IN LEATHER SHOULD APPLY TO ALL GENDERS



This year's keynote Wolstenholme Memorial Lecture at the 124th SLTC International Conference in the UK on April 23 was titled Leather – The Passion and the Opportunity and given by a woman, Master Saddle Maker Suzie Fletcher.

There was a solid presence of senior female executives involved in this year's conference, but this does not change the fact that to become stronger, more creative and more advanced, we need to significantly enlarge the participation of women at every level and in particular in the day-to-day technical running of tanneries and research.

Fifty years ago, when I left Leeds University to enter the industry, having followed a woman as President of the Students Union there, I found myself working with a lead female finisher whose skills and judgment were exceptional.

The industry also had Betty Haines working at the then British Leather Manufacturers Research Association (BLMRA now Eurofins BLC) doing leading edge microscopy studies on raw material, one of a line of important female scientists employed in the BLMRA. Nevertheless, today women still remain largely absent from staff roles on the factory floor and in the decision making on the technology and processing of leather.

During a recent visit to Northampton, the Worshipful Company of Glovers of London heard that only around 30% of the student input at the ICLT leather school are female, and this was roughly in line with the UK national average for University STEM (science, technology, engineering and mathematics) numbers. Yet I am sure they would agree that too many of their female graduates end up in the service side of the leather industry rather than in the cut and thrust of manufacture, where we badly need their presence.

### A major rethink of the workplace

While it is vital that we get more female students entering leather education and apprenticeships we now also need to spend time looking at the working environment in our tanneries to ensure that all areas are adjusted to make all genders able to work comfortably and freely. We have had millennia of male domination in leather manufacture. Facilities, attitudes, calendars, cleanliness, structures, business meetings and decision-making processes and working procedures all require reconsideration in order to attract and retain female staff.

Birth rates have been variable through the pandemic with increases in some countries while in large areas uncertainty about the future has made couples postpone having children. Yet none of this changes the overall trend of decline.

Data shows that in the OECD between 1980 and 2019 fertility rates have dropped from near 2.3 to 1.6 and while there is still growth in Africa and India families are getting smaller everywhere as urbanisation and education advance.

So, any industry looking for future staff must be much more inclusive of women, whose role in the workforce has become much more important in recent years. It is well documented that the more balanced an organisation is in its staffing, the better it performs.

Leather is a material consumed by all genders and, to be properly understood and appreciated, should be designed and crafted for the whole population. In emerging markets, it has become clear that the employment of women will be essential for the global economy to recover from the multiple hits it is taking.

### Essential role

Leather has an essential role in this since, regardless of whether the output is small numbers of luxury items or large numbers of well crafted, long lasting but affordable items, leather employs very large numbers, pulling them out of unemployment or the informal economy and providing the kernel of an income tax system to create longer term economic stability. There are some two billion informal workers in the world and often over three-quarters of working women are in this informal sector.

Figures just announced by the French Conseil National du Cuir show that France currently has 133,000 people employed in the leather, tanning, footwear, leather goods and glove making and leather goods retail industries, numbers I used in a letter published recently in the Financial Times. As the leather industry relocated during the late 20<sup>th</sup>-century, talk was about shoemakers and others chasing cheap labour, but what France and others show is that the skills of handling, cutting and sewing leather are not trivial; that the work is rewarding and can create strong career paths.

The leather industry is exceptional in being able to both create and offer quality employment at every level for female staff. But to make it really work to match the transformation in our tanneries and our communications, we need to trash many old attitudes and transform our working environment, both mental and physical.

Do that and we will see more female graduates and many others on the tannery floor designing and running the day-to-day.

*(Mike Redwood, ILM – 26/04/2022)*

*Read and Let Read :-*

# JILTA



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SEPTEMBER 1981

9

## Problems of Transition : Finished Leather To Leatherware

By J M DEY, Honorary Editor of Journal of Indian Leather Technologists Association

*This article is the text of the keynote address at the seminar on Finished Leather and Leatherwares, on August 14 at the Great Eastern Hotel in Calcutta. The seminar was part of the ILTA's 30th Foundation Day function. The keynote address was presented by Mr J Sinha Roy.*

The continuing crisis in the world economic situation during 1980 keeps on creating an atmosphere of gloom in the Indian leather industry. With the world market still critical, Indian leather and leatherware manufacturers faced another year of slump in exports during 1980-81. The export of leather and leather products suffered a 29 per cent shortfall during 1980-81 and totalled Rs. 303.73 crore against 1979-80 exports which were Rs. 424.98 crore, the shortfall thereby being about Rs. 120 crore. Industry Ministry sources esti-

ated that the production of finished leather goods during 1980 was about 26 million pieces against 28 million pieces produced in 1979. The production of leather footwear was 133 million pairs against 134.6 million pairs produced in 1979. Even finished leather exports were 30 per cent lower and leather goods were down by 36 per cent.

**Comparative statement of finished leather and leather products in 1978-79, 1979-80 and 1980-81**

( Figures in million rupees )

|                                 | 1978-79 | 1979-80 | 1980-81 | Variation %<br>( over last year ) |
|---------------------------------|---------|---------|---------|-----------------------------------|
| Finished leather                | 1812.59 | 2660.08 | 1860.47 | - 30                              |
| Leather goods                   | 146.17  | 182.35  | 115.78  | - 36                              |
| Leather footwear                | 149.99  | 180.51  | 205.98  | + 14                              |
| Footwear components             | 83.65   | 295.84  | 169.45  | - 43                              |
| Industrial leather manufactures | 32.51   | 36.15   | 112.47  | + 211                             |

(Source : *Lexport Bulletin*)

### Export Target

In spite of the decline in leather exports in the past Financial year, the export target for 1981-82 has been fixed at Rs. 425 crore by the Export Promotion Council for Finished Leather and Leather Manufactures: Semi-finished leathers: Rs. 80 crore; finished leather: Rs. 250 crore; leather goods and industrial leather: Rs. 35 crore; footwear and components: Rs. 60 crore.

The export target by the Export Promotion Council for 1979-80 was Rs. 400 crore, which was scaled down to Rs. 400 crore for 1980-81, and was lower than even the actual exports of Rs. 425 crore effected in 1979-80. This was due to the demand recession prevailing in the international markets. But even this target could not be achieved and the value totalled Rs. 303 crore resulting in a shortfall of about Rs. 97 crore below the fixed target. It is necessary to analyse pragmatically our capacity and ability to achieve the export target of Rs. 425 crore fixed for the year 1981-82.

Under the present demand recession, it is impossible to escape the prolonged depressions and crisis in the international market. This should prompt us to formulate a long-term perspective plan for ensuring the growth and viability of the leather industry.

At present, South Korea, Taiwan, Hong Kong, Brazil, Argentina, Italy and Spain have emerged as the leaders in the world trade. There are indications to show that China is preparing on a massive scale to import American hides and export leather products in the

near future. Hence the Indian leather industry will have to face, on the one hand, stiff tariff barriers abroad and, on the other hand, stiff competition from the above newly emerged countries in the world leather trade. How far India will succeed depends on the correct strategies being evolved and adopted.

### Added Value Concept

If one is to take a long-term view of the development of the industry, it is the export of high-value-added products that should receive our attention.

Till 1971-72, value-added items such as finished leather and leather products constituted only an insignificant portion. Based on the Setharamiah Committee recommendations, the Government of India introduced various incentives such as cash compensatory support on exports, duty drawbacks, air freight subsidy, import replenishment licences, quota restrictions etc., but all these incentives have failed to achieve the desired results.

According to an UNCTAD report in 1974, the value which could be added for the conversion of raw hides and skins into finished leather and leather products is mentioned below:

|                        | Hides<br>(Per cent) | Skins<br>(Per cent) |
|------------------------|---------------------|---------------------|
| Raw                    | 100                 | 100                 |
| Wet-blue               | 122                 | 153                 |
| Finished leather       | 236                 | 296                 |
| Footwear/leather goods | 600                 | 600                 |

How far the above added-value figures were applicable to India was checked by some exercises made by





CLRI and their findings in the case of raw to finished leathers are :

|                  | Hides<br>(Per cent) | Skins<br>(Per cent) |
|------------------|---------------------|---------------------|
| Raw              | 100                 | 100                 |
| Wet-blue         | 159                 | 150                 |
| Finished leather | 252                 | 237                 |

According to UNCTAD estimates, chemicals represent 15 to 17 per cent and labour content 12-13 per cent in the total cost of production. But in the CLRI study, chemicals represent about 35 per cent and labour content 12%. In certain cases it was reported that Indian chemicals were costlier than imported ones. Unless we reduce the cost of chemicals, it is impossible to bring down the cost of finished leather.

How far we have been able to attain the added value according to the above established formula and why we failed remains to be examined carefully and remedial measures for this gap should be found.

#### Causes of Debacle

Various factors are responsible for the inability of the Indian leather industry to stand up to the present international situation. One of the main factors is the tense trading climate characterized by protectionistic measures in many developed countries which are facing serious problems in their leather and leather products industries. European buyers have built substantial inventories and, therefore, they are not willing to effect any further purchases from India. The resistance of the importing countries' official policy not to

allow Indian finished products to get a foothold in their countries was responsible for the fall in Indian leather products exports. Some argue that we are unable to compete because our quality of leather and leather products is below the international standard.

Some are of the view that the gloomy condition of our Indian leather industry is due to our complete dependence on foreign markets, ignoring the home market. While the importance of increasing exports cannot be over-emphasized it must be supported by a sound home market.

#### World Market Has Not Improved

The world leather market is still in the doldrums. Though the price trends in the world market are steady, there is an undertone of weakness. In the West, there are no orders for winter production. Expectations of a revival of the world market have proved illusory.

At a Press conference on July 20, Mr Sanjoy Sen, who visited the European and American markets in June, said: 'Recession in Europe continued unabated and the international leather and leather goods market did not show any immediate signs of improvement. There is no motivation to buy Indian semi-tanned or finished leather as the ruidg prices in India do not offer a sufficient differential to motivate European buyers to buy and a process of de-stocking continues on large stocks of earlier supplies at distressed prices. To sell Indian leather in America is difficult as American prices for finished leather are not more than



those of ours. However, where products are concerned the situation is similar to Europe and Indian exports have a great potential provided infrastructural facilities can be created. The difficulty of servicing the American market lies in its largeness of orders'.

**Export Potential for Leather and Leatherware**

According to a UNIDO report, the total world requirement of manufactured leather by the year 2000 will be around 159 billion sq. ft.

A recent assessment of the US market for leather goods by the Tanners Council of America has revealed that it holds a vast potential for leather goods export.

In 1978, the world market for leather footwear was worth US \$ 5,726 million and the USA, West Germany, France, the U.K., Canada, Belgium—Luxembourg imported more than 70% of total imports. India has only a negligible share of 0.76% in the world market.

**India's Share in World Exports**

|                               | In million US dollars |                 |                 |
|-------------------------------|-----------------------|-----------------|-----------------|
|                               | World Exports         | India's Exports | India's Share % |
| Leather                       | 1530.5                | 188.0           | 12.3            |
| Footwear ( all types )        | 3936.4                | 23.9            | 0.61            |
| Travel goods, handbags etc.   | 798.5                 | 7.3             | 0.92            |
| Leather garment & accessories | 871.7                 | 1.3             | 0.15            |
| Total                         | 7137.1                | 221.3           | 3.10            |

**Diversification Recommended**

Based on study conducted by the Indian Institute of Foreign Trade under

the Swedish International Development Agency and International Trade Centres Integrated assistance programme for India, IIFT recommended diversification of exports of medium-priced chrome-tanned leather goods made from cow calf and sheep skins to Hong Kong, Malaysia and Singapore as these countries are heavily dependent on imports for meeting their mounting domestic demand for leather goods.

Recently, the State Trading Corporation signed an agreement with Holland for 200,000 pairs of leather shoes and also succeeded in securing a big order for shoe uppers from Bulgaria. Exports of shoe uppers to the German Democratic Republic are likely to be 1.5 million pairs compared with nearly a million pairs in 1980-81. Besides a long-term agreement for 1981-84 with GDR for shoe uppers is expected to be signed at the end of the year. More shoe uppers and leather goods will be exported to Romania. STC is launching joint-venture projects exclusively for export production, such as manufacture of shoe uppers, shoes, gloves (with

Bulgarian collaboration), leather board and leather products (with West German participation), leather shoes and uppers (with US collaboration).



SEPTEMBER 1981

13

The Ministry of commerce wants to promote joint ventures with foreign firms with buy-back arrangements to provide assured outlets for leather goods on a long-term basis.

It is a great relief that the US authorities have decided to withdraw the countervailing duties on India's leather sandals, slippers and chappals imported by them in October 1979. The countervailing duties on unlasted leather footwear uppers were withdrawn in March 1980. However, no such relaxation has been made for relatively important items of exports from India—leather shoes and leather uppers other than the unlasted variety.

Judging from the projections of world demand for leather goods, the scope for increasing India's exports is vast. A major thrust is needed in the area of product diversification and exploring new markets. Over-dependence on a few markets has been a severely limiting factor. Expansion of exports will greatly depend on the industry's initiative and dynamism in making new products for existing markets as well as for new markets.

#### **Government's Present Policy Help or Hindrance ?**

There appears to be some confusion over the relative importance being assigned to the different sections of leather exporters. The export duty cut on semi-finished leather from 25 to 10 p.c. *ad valorem* has been welcomed by the exporters of semi-finished leather, while the manufacturers of leather products are dissatisfied as this would

affect their availability of finished leathers and retard the growth of the much advocated value-added leather products. The Government has not yet been able to identify priorities in the matter of fixing targets and export policy formulations.

The Government's present policy in reserving the leather industry in the small-scale sector and of not allowing export-oriented units to enter the different fields of leather, leather products production without a very high export obligation has failed to motivate the infrastructural growth. At the same time, the Government has declared the policy of encouraging joint ventures with overseas buyers with a buy-back arrangement for expediting growth of export.

The policy of export incentives introduced by the Government has encouraged the export of semi-finished and finished leather to such an extent that manufacturers of footwear and leather products have cried out in vain for raw materials that were not available. Further the 10.5 per cent excise on footwear production has served as a disincentive to mechanization.

#### **Deficiencies in Basic Approach**

The latest report of the Committee on Public Undertakings on the export of leather and leather goods by the STC brings into sharp focus the deficiencies in India's basic approach to the development of the export-oriented industries. The Committee expressed the hope that the leather and leatherware industry should receive the attention it



deserved and the Government should adopt a massive programme for this labour-intensive industry by diverting to it a large volume of plan funds for development, research and export promotion. The Committee said further that the system of export controls and export subsidies that was evolved was not effectively enforced and the subsidies went largely to benefit rich middlemen in the country and affluent consumers abroad. What is needed is 'an imaginative sales promotion effort, not to mention development of skills or infra-structural facilities in the country for the value-added finished leather goods export'.

The Committee pointed out that no specific study of the impact of the incentive scheme had been undertaken by the Government and it was important to review the export strategy critically in the context of incentives and subsidies. The Committee suggested that the Government should set up a Leather Board on the lines of the Coffee and Tea Boards to exploit the export potential. This Board should be under the Ministry of Commerce. They have also recommended the introduction of a quota on finished leather exports to boost the export of leather products. But the Ministry rejected the suggestion on the ground that the Bharat Leather Corporation has been set up as an apex body under the administrative control of the Ministry of Industrial Development for the overall growth of the leather industry and various States have also established Leather Development Corporations. But Bharat Leather Corporation has not

yet been able to create any impact on the growth of the industry in different regions of the country, nor has it developed close co-ordination with State-level Leather Development Corporations and also with other agencies. This is also true in the case of the different State Leather Development Corporations.

There is need for re-structuring the present export and import policies to encourage the export of high-value-added products and to accelerate a balanced growth of the leather and leatherware industry within the country. It is felt that alternative measures should be evolved to strengthen its infrastructure and its bargaining power. Frequent changes in the export, import and licensing policies discourage the orderly growth of the industry and the export trade. In the import of essential leather auxiliaries and sophisticated machinery, a flexible import policy should be followed. The existing duties of importing these items need re-consideration to reduce the import burden. The 40 per cent preferential duty lists need addition as suggested by a Subcommittee of the Leather Development Council.

#### **Vital Issues Not Resolved**

There are other vital issues that have not been resolved by the Government—for example, how to bring harmony between the decentralized and organized sectors of the industry, or between units engaged in production for domestic markets and those for export. Allocation of product lines between the



decentralized small-scale sector and the organized sector needs careful consideration in view of their implications on the general growth of the industry.

Will the Government's reported move to sanction ad hoc quotas for export of wet-blue chrome harm the interests of finished leather exporters? At a time when imports of wet-blue leathers are permitted without licence and the Government wants to increase exports of finished leathers, footwear and leather products, is this move a contradictory one and will it hinder the pace of growth of added value exports?

Recently, the Government of India decided to liberalize the licensing policy for leather footwear and leather goods to promote decentralized development of the industry, and provide an assured market to the small-scale and cottage sectors. In terms of new policy, applications for the organized sector for the manufacture of leather footwear (closed shoes) and leather goods will be considered favourably. But the Government had laid down certain conditions that the units will have to set up in notified backward areas, they will have to export not less than 70% of their production, and the remainder can be sold in the domestic market at a minimum ex-factory price of Rs. 150 per pair of gents shoes, Rs. 110 per pair of ladies shoes and Rs. 70 per pair of children's shoes. Large houses will have to procure at least 50% (by value) of their requirements of components like shoe uppers from the small-scale and cottage sectors. Other companies will have to procure at least 35% (by value) of their require-

ments from these sectors. Foreign collaboration, both technical and financial will be permitted. How far the present liberalization will help the small-scale and cottage sectors is a matter of doubt since the small-scale and cottage units are unorganized, the product base is poor and limited and their outlook extremely traditional. A major portion of their production is low-value chappals and sandals and the average price realization for their items is very low.

#### Present Constraints

The main reason for the slow growth of finished leather and leather products is lack of the necessary infrastructure. The infrastructure has not yet been built as the manufacturers and exporters in the majority are interested in getting quick returns by exporting semi-finished and the so-called finished leathers, and are afraid of investing capital required for building the infrastructure. Many of the exhibitors in the last leather fairs frankly admitted that they would not be in a position to execute bulk orders for all the items they were displaying had there been such orders. This is an indication of the extremely unsatisfactory state of affairs in the Indian leather and leather products industry.

For several reasons, the transition to leatherware is likely to be more difficult than the transition which has so far been made from semi-finished to finished leather. Finished goods involve far more specialized manufacturing and marketing capabilities, which are lacking today. It is for this reason that footwear and leather goods still constitute only 5% of

16 JOURNAL OF THE INDIAN LEATHER TECHNOLOGISTS ASSOCIATION

total leather exports. The constraints faced by the manufacturers of leather products and footwear are :

**Scarcity of Raw Materials**

For the manufacture of leather footwear, leather goods, garments etc. the main raw material—finished leathers of superior grade—is not available as needed. This is a great handicap. The avail-

Hide shortage to the tune of 6.5 million pieces is expected by 1987-88, whereas skins show a comfortable surplus to meet the growing needs for leatherware production and exports in the form of finished leathers.

The specific additional requirements of finished leathers for 1987-88 are estimated at 236 million sq. ft :

| Items               | Quantity         | Consumption of finished leathers<br>In million sq. ft |
|---------------------|------------------|---|
| Shoes and Sandals   | 25 million pairs | 69  |
| Shoe uppers         | 15 „ „           | 60  |
| Chappals            | 75 „ „           | 56  |
| Garments            | 1.5 „ pieces     | 30  |
| Other leather goods |                  | 21  |
|                     |                  | 236 million sq. ft.                                   |

ability of additional finished leather by 1982-83 would be approximately 153 million sq. ft from hide and 29.6 million sq. ft from skins. It is likely that about 80% of the additional available finished leather by 1982-83 would be consumed in the footwear industry for both domestic and exportable shoes and the rest 20% would be available to the leather goods and garment manufacturers.

According to the report of the Task Force Committee, India will require by 1987-88 the following quantum of finished leathers :

While projecting these export figures, a growth rate of about 20 per cent per annum has been taken into account.

It is therefore necessary to produce high quality finished leathers to feed to the leatherware industries for the manufacture of high-value quality products.

**Accessories, Fittings, Tools, Shoe Lasts etc.**

Good quality accessories such as zips, locks, rivets, frames, buckles, buttons, corners etc. are not available and those available are not accepted by foreign buyers.

|  | Hides   |         | (million pieces) |         |         |         |
|--|---------|---------|------------------|---------|---------|---------|
|  | 1977-78 | 1982-83 | 1987-88          | 1977-78 | 1982-83 | 1987-88 |
| Availability   | 32.3    | 33.2    | 34.0             | 67.4    | 69.87   | 72.42   |
| Consumption of leatherware production (footwear, garments and leather goods) | 22.5    | 31.0    | 40.5             | 13.2    | 20.6    | 37.1    |



SEPTEMBER 1981

17

Imported accessories should be used to improve the overall finish and get-up and improve the image of leather goods. For this purpose, it is necessary to allow duty-free imports of fittings, accessories etc.

There is a general complaint that the stitching of leather goods lacks uniformity, which affects the get-up and saleability of these products and therefore it should be avoided by using precision machines and good workmanship.

For the manufacture of closed shoes, shoe lasts form the foundation. One of the main difficulties faced by shoe manufacturers is shortage of standard-size shoe lasts. The estimated demand for shoe lasts by 1982-83 is about 382,000 pairs per annum. Thus there is a vast gap of 332,000 pairs of shoe lasts per annum and sufficient capacity to meet the gap is very essential. There is also a need to take up production of plastic shoe lasts, which can withstand the stress and strain of weather conditions.

### Product Development

Product development is one of the most important marketing activities and the range of leather products developed must be based on material availability and the production capability of the plant. India has shown no initiative in creative product designs or product ideas. There is need to give closer attention to planning and development strategy, product ranges tailored to market needs and aimed at pre-researched market areas. Sophisticated ranges should be made on a pilot scale production volume in readiness for future de-

mands or market area changes. Leather goods exporters should keep pace with fashion changes and effect necessary product development to suit foreign markets,

### Quality Control and Standardization

On the ground of bad quality some of the major foreign buyers slashed or cancelled their orders for leather goods drastically. Buyers complained about the indifferent quality and poor finish of leather products. This is due to lack of proper and effective control and supervision over bulk of the export production which is mostly organized by the export house on job work basis. Hence quality control should be introduced at all stages, production supervision and final inspection unremittingly applied. Product quality must be kept to the highest possible standard through careful quality control.

### Technical Manpower

Indian artisans possess a degree of skill that is fast becoming extinct and it is therefore necessary to harness this skill. The training facilities presently available are too inadequate to meet the needs of the industry. Existing training facilities should be assessed and training programmes formulated for building technical manpower. Training institutions in the field of footwear, leather goods and garments should be set up on a regional basis.

### Marketing

The main problems of marketing may be described as inadequacy of statistical

data, absence of means for collection, evaluation and dissemination of marketing information and insufficient feedback from markets.

Lack of knowledge of the nature and structure of export markets and their methods of doing business and lack of know-how and experience as regards sales strategies, products, selling methods and sales servicing are the most pressing problems of the individual exporters. Market intelligence and marketing advisory services are essential for facilitating prospecting and development of new markets. These could be provided by trade associations to be set up and supported by the industries concerned. The functions of such trade associations could include, in addition to providing market information, training, observation of design and fashion trends and changes, liaison with service industries and end-products in industrial organizations and participation in trade promotional fairs etc.

Expansion of exports will greatly depend upon marketing new products in existing markets as well as for new markets.

#### Specific Suggestions

In the context of the aforesaid observations, the foremost requirements for the development, expansion and protection of the leather and leather-based industries is for planning pragmatically on a long-term perspective and effective execution. If the present stagnant state of affairs is allowed to continue without a planned change for the better, than we can only blame

ourselves for the resultant debacle. With this view in mind, some specific measures are suggested for careful consideration.

If we can succeed in implementing the following planned programme and achieve an annual growth of 10 per cent exports, taking 1979-80 as the base year, then we can claim pride for placing India honourably on the world leather map : (a) Survey of the manufacturing potential, infrastructural development in leather footwear, leather goods, garments and industrial products industry in different States. (b) Study the employment potential, upgradation of the technical training, managerial and organization skill necessary: (c) Study of product diversification and diversified markets. (d) Viable size of units and investments for export production for leather footwear and other leather products. (e) Technical collaboration and tie-ups to make available technology, design and market, enabling interaction between buyer and seller. (f) Integrated marketing approach embodying all basic elements e.g, production development, distribution, sales promotion and styling. (g) Requirement of institutional support for the integrated measures for infrastructural development, productivity improvements, marketing practice and commercial policies. (h) Setting up leather complexes for technocrats. (i) Setting up common facility centres for footwear and leather goods with financial aid from the STC Leather Development Fund, which has been accumulated and remains unutilized.

*(Continued on page 26)*



## PROBLEMS OF TRANSITION : FINISHED LEATHER TO LEATHERWARE

*(Continued from page 18)*

(j) Steps to ensure steady and easy supply of : (i) cow, buff, sheep skins, softy and nappa plain, aniline, semi-aniline and printed leathers of thickness 0.5 mm to 0.8 mm for leather bags. (ii) Chrome-tanned cow and buff hide and sheep skins of economic quality for work gloves. (k) Design development—Indian style—ethnic. (l) Pattern-cutting central cell for cut components. (m) Training of workers—unskilled to semi-skilled and skilled. (n) Setting right all reconditioned sewing machines and import of multi-purpose latest sewing machines. (o) Central clicking unit near concentration of leather goods units or export units. (p) Buyers' contact, development on the basis of buyers seasonal requirements. (q) Buyers—sellers meets. (r) Packaging improvement. (e) Checking all exporters' executing orders for production or procurement planning to adhere to delivery dates.



*Read and Let Read :-*

JILTA

### **PERHAPS THEY WANT MSMES TO DIE - K E RAGHUNATHAN, CONVENOR, CONSORTIUM OF INDIAN ASSOCIATIONS**



**‘The finance minister said, the MSME is the backbone of the economy. My question is, what have you done for the sector?’**

One sector that continues to struggle despite all the stimulus packages announced by the government is the MSME sector (Micro, Small and Medium Enterprises).

It all started with demonetisation, followed by the faulty implementation of GST. Then came the pandemic and the circle of woes was complete. Reports say 9% of MSMEs have closed down due to the pandemic in the last two years.

**In this year’s Budget speech, there was no mention of the MSME sector. Do you think the government has decided to leave the sector to take care of itself?**

The Budget speech was an absolute disappointment, from the point of the suffering MSMEs. We thought the finance minister would come up with some proposals to help entrepreneurs as around 52 sectors which suffered badly due to government-imposed restrictions are suffocating. According to the finance minister, India is back on the rails, and has become the fastest growing economy.

So, she said this year, relief would be given to those who were not eligible for relief earlier. The Rs 5 lakh crore credit guarantee schemes (*ECLGS*) got extended till March 2023. But almost 30% of those who have availed the loan, have not availed withdrawal till now. What does it indicate — either a. They are not sure of repayment or b. The quantum is insufficient.

Then, those who really want the money, are not made eligible. For example, the scheme was available for SME- 0 and SME-1 category account holders whereas SME-2 account holders are not eligible. The finance minister said the MSME is the backbone of the economy. My question is, what have you done for the sector?

**According to the government, they have been helping through various packages, but the sector has not been coming up at all...**

I will tell you another story. The MSME ministry has come out with its annual report 2021-2022, and it is in the public domain. If you go through that report, it quotes MSME data that was taken 7 years ago, that is of 2015-2016. It says that there are 6.33 lakh crore MSMEs in 2015-2016. Imagine this is the report by the ministry of MSME. The ministry has not updated any data in the last 7 years. They haven’t done any fresh analysis.

You say that the MSME sector is the backbone of the Indian economy, but the ministry does not have even the latest data. How can a ministry not know how many enterprises are there, which sector they belong to, how many in each state, employment creation etc? How can you support them without these basic inputs? In the report, the government talks about its contributions as under MSME Samadhan to address delayed payments to the MSMEs.

But nothing has happened on the ground. Today also, people are crying because payments are delayed. Then they talk of an MSME Sambandh portal launched 5 years ago, which is supposed to be monitoring the procurement by central government ministries, departments and central public sector enterprises and enabling them to share the list of required products and services from the MSMEs. Then, there is a job portal called ‘MSME Sampark’ which not many uses. In fact, nobody knows about it as well!

**Though the government talks about the sector contributing to 30% of India’s GDP, do you feel there is a lack of real concern on their part?**

That is because there is lack of knowledge, lack of intelligence and lack of capabilities to come out with proper solutions. There is a huge disconnect between what is happening on the ground and the policy makers. Or they don’t want to help the sector. Perhaps they want the sector to die. The finance minister went



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to Mumbai and told the banks to go easy on extending loans. But how is that possible unless norms are relaxed and availability of grievance system in place?

*(Rediff.com – 31/03/2022)*

### TOO EARLY TO CHEER UP ON ECONOMY



So, while it is great that India's numbers look relatively good, don't raise a cheer just yet, points out T N Ninan.

The Indian economy, however troubled, looks better than almost any other. Start with prices. Consumer price inflation in the US is at 8.5 per cent, a 40-year high. In the Euro area, it is 7.5 per cent. These are economies used to inflation averaging less than 2 per cent. Here in India, we may groan over rising petrol and diesel costs and some spectacular price tags on individual food items. Lemon prices, for instance, have been reported as high as Rs 300-Rs 350 per kg in some wholesale markets. Naturally, criticism of the Reserve Bank has grown for not having placed greater emphasis much earlier on controlling inflation, which is now well above the target range. Still, India's consumer price inflation is moderate at fractionally under 7 per cent.

Compared with the Brics economies, Brazilian inflation is in the double-digits at 11.3 per cent, as is Russia's at 16.7 per cent. Only China has the inflation beast virtually slain, breathing slowly at just 1.5 per cent. (All numbers are as compiled by *The Economist*.)

The comparative picture is even better when it comes to economic growth. India tops the forecasts for 2022, at 7.2 per cent. China comes the closest among the large economies with

5.5 per cent, while the US and the euro area are naturally lower at 3 and 3.3 per cent, respectively — the advanced economies tend to grow slower than those tagged 'emerging'.

Regardless, Brazil is stagnant and Russia is headed for deep trouble with a projected 10.1 per cent shrinkage of its GDP. Japan on its part has low inflation with modestly accelerating growth. The comparative good news for India doesn't stop there. The inflation challenge confronting the RBI may be easier to tackle since the required moderation in India is less than in the advanced economies.

Two other positive elements in the picture are the exceptional performance on tax collection (achieving among the highest tax-GDP ratios in recent years) and on exports. Confidence in the country remains high. The rupee has been one of the more stable currencies, dropping against the dollar by just 1.4 per cent in the last 12 months.

Other than the yuan, the only currencies to have gained against the dollar belong to oil exporters: Brazil, Indonesia, and Mexico. How long can the good news last in the face of visible headwinds? The rupee could wilt if oil prices stay high. More importantly, the 3 per cent economic growth predicted for the US may prove optimistic. The inversion of the interest yield curve (sloping down over time rather than up) has led market observers to suggest that the world's largest economy is headed for recession.

The key question is whether the US monetary authority can calibrate interest rate hikes to control inflation without provoking a recession that, if it comes about, will impact all economies. If world trade slows, India's exports too will lose bounce. Even without that, the comparative numbers spell bad news for the world rather than any particular good news for India.

Compared to a quarter ago, all growth forecasts for India have been tempered even as the inflation picture has got worse. The monthly production numbers remain modest while surveys show a dip in the business mood. Indeed, the RBI expects growth in the second half of 2022-2023 to be no more than 4.1 per cent — with acceleration after that.

Uncertainty is implicit in such forecasts. There is little the government can do to improve the outlook, given its stretched finances, the repeated disruption caused by the pandemic, and now by the war in Ukraine. China, which has followed a zero-

tolerance approach to Covid, has shut down its largest metropolis, Shanghai.

It would be idle to think that there will be no fall-out on that country's economy and indeed on the rest of the world — in parts of which yet another Covid wave seems to be building even as the war in Ukraine threatens to drag on, and possibly escalate.

So, while it is great that India's numbers look relatively good, don't raise a cheer just yet. We still live in a troubled world.

*(Business Standard – 29/04/2022)*

### **FM & PM KEEP DENYING REALITY ABOUT UNEMPLOYMENT'**



According to CMIE data, employment in manufacturing saw a reduction from 51 million in the country in 2016 to 27 million in 2021. 'That is, it has halved in just 5 years. 'At the same time, the national lockdown resulted in reverse migration to rural areas, and an increase in the number of workers in agriculture. 'It also means joblessness has increased in agriculture because there are too many workers; the number of workers went up from 200 million to 232 million.'

Will the RBI's sudden decision to increase the repo rate hike bring down inflation? Will it increase employment? Will it increase demand in the market? Will the lending cycle start?

"This government, much as it likes to get the economy going, has proven itself incapable of ensuring a stable and comprehensive recovery," human development economist Prof. Santosh Mehrotra, Visiting Professor, Centre for Development, University of Bath, UK, and Research Fellow at the IZA Institute of Labour Economics, Germany, tells *Rediff.com*.

**There was no investment happening as there was no demand in the market. What kind of impact will a rate hike have on the economy when unemployment and inflation are very high?**

The point is, low interest rates were not leading to any particular increase in private investment. But real interest rates were negative for the last few years. When I say negative, what does it mean? It means, when you borrow Rs 10, you not only pay no real interest, you return to them Rs 8! Why? Because inflation is higher than the interest rate.

The biggest problem the country is facing now is unemployment, and it has reached record high. And people are suffering...But the government doesn't believe so.

**Do the government is still in denial mode?**

Of course, they are in denial mode. Both the FM and the PM keep denying the reality about unemployment and falling worker participation rate, at a time when the share of the working age population in the total population has been rising (this is the demographic dividend that we keep talking about), both in Parliament and outside Parliament.

**When the government is in denial mode, how will any corrections happen?**

I do not believe any corrections will happen. Because this government, much as it likes to get the economy going, has proven itself incapable of ensuring a stable and comprehensive recovery. There has been a recovery in the organised sector in the last 6-8 months, but it has been a selective recovery.

However, the unorganised sector was suffering before covid, and continues to suffer. And they are doing precious little for the unorganised sector, and the MSMEs. Then, the share of manufacturing in GDP, which was 17% of GDP, for 25 years after 1992, fell after 2016. It was 15% before covid, and it fell from 15% to 12% post-covid. It has barely risen back to 13%. It means the share of manufacturing to GDP is still 4% less than what this government inherited in 2014! This is despite Make in India!

I will give you one example. The leather and the footwear industry is a big contributor in both the organised and unorganised sectors. It was a big contributor to the exports too. That has



fallen thanks to this government's cow slaughter ban. Kanpur and Agra were among the country's biggest centres of the leather industry. After the ban, they collapsed completely there. Some also moved out to other cities. And joblessness increased in those sectors in Kanpur and Agra. All this happened across the country wherever the BJP had its government.

So, who is responsible for the share of manufacturing to GDP falling? And more people went back to their villages in 2021 too! So, the real wages have fallen further.

### **When there is no private investment happening because there is no demand, why is there an increase in interest rate?**

Yes, when you don't want to borrow, why are the banks raising the interest rate? Can you push someone to the bank saying, please borrow? If there is little demand, then why will people borrow?

When capacity utilisation in industry is still 72%, why will according to CMIE data, employment in manufacturing saw a reduction from 51 million in the country in 2016 to 27 million in 2021. That is, it has halved in just 5 years.

At the same time, the national lockdown resulted in reverse migration to rural areas, and an increase in the number of workers in agriculture by 30 million between 2019 and 2020, which is a reversal of nearly all the reduction in number of workers in agriculture that had been taking place between 2005 and 2019.

It also means joblessness has increased in agriculture because there are too many workers; the number of workers went up from 200 million to 232 million. I industry borrow?

### **Why is the demand not picking up? What is the solution?**

Yes, investment demand and consumption demand are not rising. The solution to increase demand is, the government should cut fuel taxes first: Especially, petrol, diesel and gas prices. This will have a knock-on effect on inflation.

Next, the government needs to increase public spending and for that, the money has to come from somewhere. Today, they have decided to squeeze the middle class and the poor by taxing petrol, diesel and gas.

### **Have wealth tax?**

This is the government that eliminated wealth tax in 2015. So, don't expect them to suddenly bring the wealth tax back. However, there are at least two other things they can do. One is, when it eliminated the wealth tax, it put a surcharge of 2% on the super-rich people, those who were earning more than one crore per annum.

In covid times, when they had to increase spending, who was preventing the government from imposing yet another super surcharge on the personal income tax of the super-rich? They didn't do it. But they can still do it. In the 2019 Budget, they had raised the threshold of personal income tax weeks before the elections, and the result of that was, it eliminated 75% of personal income tax players. Corporate income tax was cut from 30% to 25% in the middle of 2019. Why can't they impose a covid surcharge on corporate income tax now? They can do all these and mobilise resources and spend more, and that is the solution.

*(Economic Times – 09/05/2022)*

### **WHY IS GOVT INCREASING TAXES FOR MIDDLE CLASS?**



'When you need to revive the economy, when you need to revive aggregate demand, you cut taxes.' 'But what's this government doing?' 'It's increasing taxes for the middle class and the vast majority of the poor on fuel, which has a ratchet effect on most other products.'

Will the RBI's sudden decision to increase the repo rate hike bring down inflation? Will it increase employment? Will it increase demand in the market? Will the lending cycle start? "Please remember that inflation, especially food inflation, has been very high in the last two years. And the government is

responsible for this, not so much the RBI,” human development economist Prof. Santosh Mehrotra, Visiting Professor, Centre for Development, University of Bath, UK, and Research Fellow at the IZA Institute of Labour Economics, Germany, tells Rediff.com.

### **When unemployment is high and when there is no demand in the market, should the RBI be hiking the repo rate citing inflation as the reason?**

Yes; for the simple reason that the RBI increasing the repo rate barely makes an impact on inflation. It is the increase of CRR (cash reserve ratio) that reduces liquidity and will have an impact. The impact of repo rates on inflation are limited. If you look at the composition of the consumer price index, you will see that in urban areas, 45% of CPI is accounted for by food items, and 5-6% by fuel.

But in the rural areas, food accounts for 55% of CPI, and a slightly higher share is accounted for by fuel. It means, what accounts for over half of the weight in the CPI are food and fuel. The RBI repo rate has practically no impact on these two items.

However, on the remaining items, the so-called core inflation, is affected by the repo rate. So, it was appropriate for the RBI to raise rates since there is a limit beyond which, after a recession, the market rates of interest should remain in negative territory.

Real interest rates were in negative territory for a significant period as inflation was running. If real interest rates remain in negative territory for long periods, it means that the borrower is paying back less than he actually borrowed; in other words, there is practically no cost to borrowing.

### **Why do you say so?**

In the case of food, most of the transactions in our highly informal agriculture sector, whether it is production, distribution or consumption, takes place in cash. It does not take place using any credit at all, least of all credit from the banks.

So, unlike in a much more formalised economy, where the monetary policy, specifically the repo rate, has a significant impact on actual credit, that is not the case in a highly informalized cash transaction-based economy.

### **So, what will be impacted by the repo rate hike?**

What is impacted by the RBI's repo rate is the remainder which is not more than 45% weight in CPI, that's manufactured products which is called core inflation. I don't expect the repo rate to have much of an impact on inflation. Please remember that inflation, especially food inflation, has been very high in the last two years. And the government is responsible for this, not so much the RBI.

### **Not the pandemic?**

Yes, covid did disrupt supplies, and supply chains, but that happened only during the lockdown. In recent times, what has impacted the supply chain is the Ukraine war which is only a 2-3- month-old phenomenon.

So, most of the problem is caused by government policies. This government had been facing a silent fiscal crisis before covid began. That was because it had made major policy mistakes that led to a decline in the growth rate. As a result of which its own tax revenues were falling even before 2019.

### **Because of demonetisation?**

Demonetisation and GST. But those were not the only ones; there were many other policy mistakes along the way. For example, exports collapsed. When this government came to power, exports were \$315 billion. After 2014, it collapsed and never recovered to \$315 billion in the next 5 years of this government. Back to the inflation that the economy is facing right now. As per the RBI bulletin data, food inflation climbed to 31% between July 2020 and July 2021. This was happening in a whole series of products in the food sector like oil seeds, vegetables, cooking oil, etc.

The question is, why was it happening? After having bankrupted itself before covid, it had to increase public spending during covid. Due to its very poor management policies during covid, the collapse of the Indian economy was much greater than in the majority of G-20 countries. Now, the way in which this government has increased petrol, diesel and gas prices is nothing short of catastrophic for the economy.

### **But they blame it on the worldwide fuel price hike due to the Ukraine war...**

They can blame anything and everything on somebody else but themselves! They blame it on the oil bonds taken by the



ILTA  
Since 1950

previous government to pay for the fuel subsidies the government was giving to the population.

In 2014, the value of oil bonds was Rs 70,000 crore. Do you know how much has the current government has raised over 8 years on the strength of excise duties and cesses on petrol, and diesel in India? Rs 26 lakh crore! You divide that by 8 years, and you will get more than Rs 3 lakh crore every year.

When the global economic crisis hit and oil prices were quite high during the UPA period, we cut taxes in order to trigger an increase in domestic consumption demand, which would have a multiplier effect on an economy facing due to exogenous factors; factors beyond the control of the national government. That's what fiscal stimulus is meant to be all about. When you need to revive the economy, when you need to revive aggregate demand, you cut taxes. But what's this government doing? It's increasing taxes for the middle class and the vast majority of the poor on fuel, which has a ratchet effect on most other products. This is the opposite of macro-economics 101.

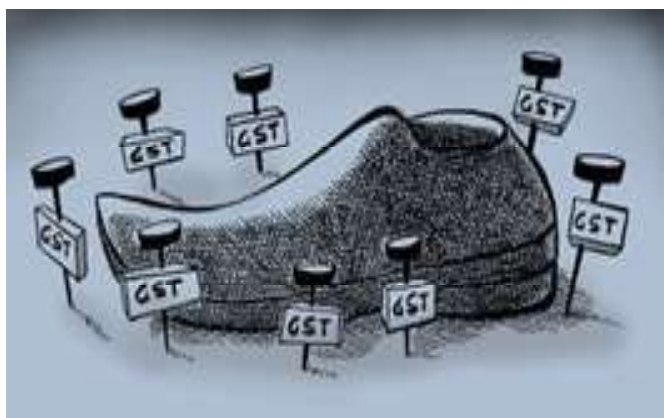
### But the government blames the UPA for the economic mess....

It's a political play, that's all. What economic mess are they talking about?

From 2004-2014, the economy was growing at 8% per annum, the highest in India's post-Independence history. The growth rate started collapsing after 2015, thanks to the government's policies.

*(Business Standard – 10/05/2022)*

### GST REVENUES AT NEARLY RS 1.41 LAKH CR IN MAY' 2022



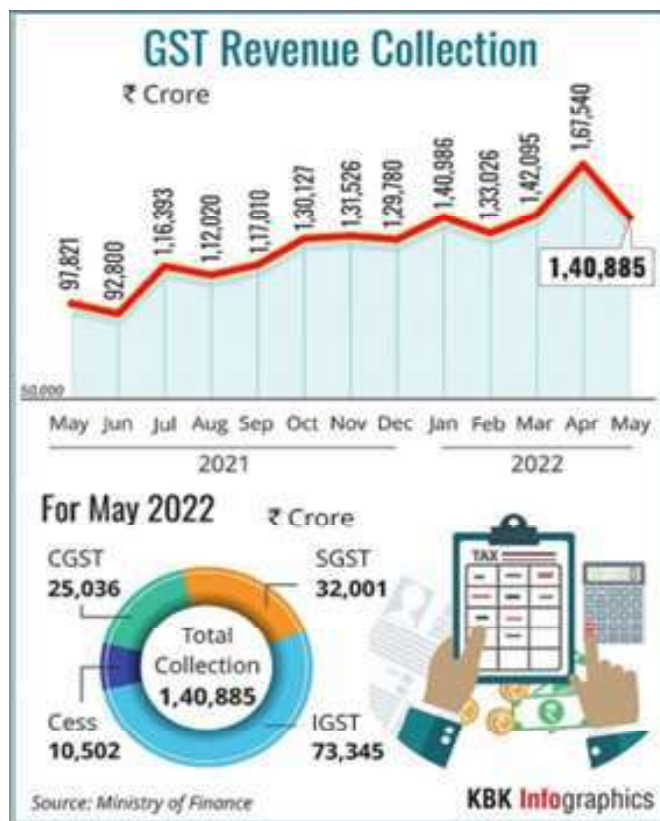
GST revenue for May stood at nearly Rs 1.41 lakh crore, a 44 per cent increase over the same month last year, the finance ministry said on Wednesday.

Bucking the month-on-month increasing trend of the last two months, the Goods and Services Tax (GST) revenues came in lower than the record high collection in April at Rs 1.68 lakh crore.

In March GST revenues were at Rs 1.42 lakh crore, while in February it was Rs 1.33 lakh crore.

“The gross GST revenue collected in the month of May 2022 is Rs 1,40,885 crore of which CGST is Rs 25,036 crore, SGST is Rs 32,001 crore, IGST is Rs 73,345 crore (including Rs 37469 crore collected on import of goods) and cess is Rs 10,502 crore (including Rs 931 crore collected on import of goods),” the ministry said in a statement.

The revenues for the month of May 2022 are 44 per cent higher than the GST revenues in the same month last year at Rs 97,821 crore.



This is the fourth time that the monthly GST collection has crossed Rs 1.40 lakh crore mark since the inception of GST and the third straight month since March 2022.

The collection in May, which pertains to the returns for April — the first month of the financial year — has always been less than that in April, which pertains to the returns for March, the closing of the financial year.

However, it is encouraging to see that even in the month of May 2022, the gross GST revenues have crossed the Rs 1.40 lakh crore mark, the ministry said.

The total number of e-way bills generated in the month of April 2022 was 7.4 crore, which is 4 per cent lesser than 7.7 crore e-way bills generated in the month of March 2022.

(PTI – 01/06/2022)

### AROUND 31 MN HOUSEHOLDS DEMAND WORK UNDER MGNREGA IN MAY



Around 31 million households have demanded work under the flagship MGNREGA in the month of May this year, which is almost 11 per cent more than the same period last year and much higher than the corresponding pre-Covid period, data sourced from the website showed today.

In April 2022, around 23.26 million households have sought work under the scheme which as per the provisional data for May has risen to almost 31 million households. The April 2022 work demand was almost 11.15 per cent less than the corresponding period of April 2021.

In May 2019, which was a year-before the COVID-19 pandemic struck, around 25 million households had sought work under the scheme. The rise in work demand civil society activists said was a reflection of the continued slow return to economic normalcy in the rural areas.

“In April 2022, there was slight dip in work demanded year on year but it is purely due to artificial suppression because of fund flow was constrained in several states which is why I feel work demand has come back to normal levels as soon as funds have started flowing in,” Nikhil Dey founder member of Mazdoor Kisan Shakti Sangathan, a grassroots based organization told *Business Standard*.

“Usually, when wage payments are timely and prompt, workers tend to come more for MGNREGA work and hence when the payment is delayed, they look for other work avenues,” Dey clarified. He said all these should make a case for increase in MGNREGA budget allocation for FY-23. Civil society activists and others have been pointing out that the Budget allocated for MGNREGA in FY-23 is grossly inadequate and could lead to artificial suppression of demand.

Their argument is despite allocation around Rs 73,000 crore in FY-23 for the scheme, actual spend could be quite less as a significant chunk (almost Rs 20,000 crore) could go towards clearing pending dues from the last financial year. In FY-22, the Centre had budgeted Rs 73,000 crore for MGNREGA but ended up spending almost Rs 98,000 crore due to continued robust work demand. Similarly, in FY-21, which is considered a landmark year for the scheme due to sudden spike in demand because of reverse migration of millions of laborers from cities to villages after the first lockdown, the Centre spent a record Rs 1,11,170 crore for MGNREGA.

Though, it had budgeted for much less.

(*Business Standard* – 01/06/2022)

### GLOBAL ECONOMIC CRISIS: WHAT INDIA CAN DO : SHANKAR ACHARYA, FORMER CEA, GOI







The employment situation remains dire. Whatever can be done to promote greater low-skill employment should be pursued aggressively.

Against the backdrop of sharply slowing economic growth over 2018-2020, the Covid/lockdown shock of 2020-2021, the K-shaped recovery thereafter and the legacy of record fiscal deficits and government debt-GDP ratios, fiscal year 2022-2023 (FY23) was always going to be challenging for macroeconomic management.

After the Union Budget a couple of months ago, I expected real GDP growth in FY23 to be about 7 per cent (mainly thanks to the low-base 'benefit' of the Delta shock in 2021-2022 Q1), inflation, as measured by the broad-based GDP deflator, to be around 6-7 per cent and nominal GDP growth to be 13-14 per cent.

### Global economy weakens

Since then, the global economic environment has worsened considerably on account of several factors:

- The sharp increase in inflation since February in America and some European nations, triggering a rise in policy and other interest rates in these jurisdictions;
- The sizable outbreaks of Omicron in China, leading to strong lockdowns of major cities, including Shanghai ;
- The Russo-Ukrainian war, which spawned unprecedented economic sanctions against Russia by the US-led 'Western' alliance, soaring prices of oil, fertilisers, metals, food grains and other commodities and major supply disruptions.

The net result is that world economic growth will be significantly lower than projected in January by the IMF, world trade expansion will also be slower and net capital flows to developing countries will be substantially weaker as private capital seeks 'safe havens', especially in the US.

Just how bad these effects will be for the international economy will depend on the duration and intensity of the European war and the Western economic sanctions, the trajectory of the Covid pandemic in China and elsewhere and the extent and duration of tighter monetary policies in the US and other major economies.

### Impact on India

For India, the marked worsening of the world economy will mean lower economic growth, higher inflation, a deterioration in the external payments balance on account of both negative foreign trade effects and reduced inflows of net foreign capital, and heightened pressures on our already strained fiscal situation.

The extent of the damage to economic prospects will depend on the duration and degree of weak global economic performance as well as the nature of our policy responses and, of course, the quality of the summer monsoon. At this early stage, one can only guess at outcomes in key macro parameters in FY23.

For what it's worth (which may not be much) my preliminary guesses suggest real GDP growth of 6 per cent or lower, a rise in inflation to 7-8 per cent as per the GDP deflator and around 7 per cent plus in the consumer price index, nominal GDP growth of 12-14 per cent, a current account deficit in our balance of payments in the order of 2.5-3.0 per cent of GDP (depending crucially on international oil price trends), some depreciation of the rupee, and a central government budget deficit of around 6.5-7.0 per cent of GDP.

These tentative projections are only a little more bearish than those presented by the Reserve Bank of India in its Monetary Policy Statement. The RBI projects growth at 7.2 per cent for FY23 and consumer price inflation (CPI) at just under 6 per cent. Interestingly, this 7 per cent plus anticipated growth of GDP is mostly because of the low-base benefit to be reaped in the first quarter, April-June.

The year-on-year, successive quarterly growth rates forecast by the RBI are 16.2 per cent, 6.2 per cent, 4.1 per cent and 4.0 per cent. Put another way, RBI expects y-o-y GDP growth to slump to an average of 4.6 per cent in the final three quarters and an even lower 4 per cent in the second half of FY23.

### What should India do?

Against this challenging background my suggestions for the broad direction of desirable policy responses are as follows:

- First, the government must strive to meet budgeted fiscal targets for expenditure and revenues. The

adverse terms of trade shift stemming from global developments is akin to a supply shock which cannot be 'cured' through higher fiscal deficits, certainly not at a time when our government debt-to-GDP ratio is at a record 90 per cent and the combined (Centre and states) fiscal deficit is at an elevated 10-11 per cent of GDP.

- Second, the recently announced beginning of withdrawal in exceptionally accommodative monetary policy should be pursued a little faster (the RBI has been a little 'behind the curve') to head off consumer price inflation from gathering momentum above 6 per cent. The repo rate needs to be raised and soon (perhaps immediately), if sharper increases are to be avoided in future.
- Third, we should use our ample forex reserves to keep 'soft brakes' on rupee depreciation to preclude destabilising volatility, but allow the necessary depreciation while refraining from attempting to defend any particular parity.
- Fourth, the government must make every effort to implement its ambitious public investment programme, especially in infrastructure.
- Fifth, while the recently concluded first stages of free trade agreements (FTAs) with the UAE and Australia

constitute promising signs of a new pro-trade policy, they are unlikely to significantly correct India's weak participation in global and regional supply chains.

For that to occur (and thus strengthen sustainable export growth, related investment and manufacturing competitiveness) the best approach would be for us to leverage our observer status in the Regional Comprehensive Economic Partnership (RCEP) to re-apply and join this most dynamic of 'mega-regional' FTAs.

This is particularly important at a time when WTO disciplines are likely to be subject to substantial geopolitical pressures.

- Sixth, the employment situation remains dire. Whatever can be done to promote greater low-skill employment through policies (such as implementation of new labour codes) or reform of job-discouraging procedures should be pursued aggressively. Higher rates of export growth will also help.

But all this will not compensate fully for slower global growth and the adverse terms of trade shock.

But it should help minimise the costs in terms of higher inflation, losses in output and employment and heightened external financial vulnerability.

*Read and Let Read :-*

**:- JILTA :-**

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# ILTA PUBLICATION

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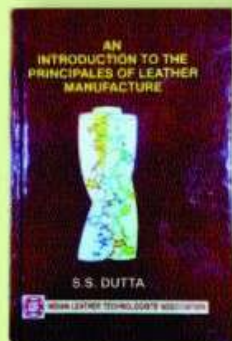
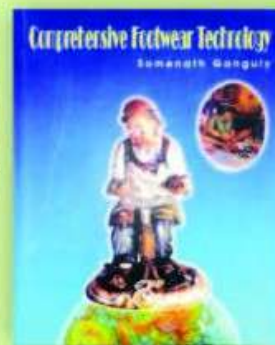
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# History and Activities of Indian Leather Technologists' Association

The Indian Leather Technologists' Association (ILTA) was founded by Late Prof. B. M. Das, the originator of Das-Stannay theory and father of Indian Leather Science on 14<sup>th</sup> August 1950.

The primary objectives of the oldest Leather Technologists' Association which celebrated its Diamond Jubilee year in the 2010, are:

- ◆ To bring all concerned with the broad spectrum of the leather industry under one umbrella.
- ◆ To organize seminar, symposium, workshop in order to create information, knowledge and latest development for the benefit of all concerned. To offer a common platform for all to interact with each other in order to understand each other's problems and prospects.
- ◆ To publish monthly journal as a supplement to those above objectives. The monthly journal of ILTA is known as journal of Indian Leather Technologists' Association and is the most widely circulated technical journal concerning leather technology.
- ◆ To publish text books for the benefit of students at various levels of study, for the researchers and industry.
- ◆ To have interface between urban and rural sector.
- ◆ To assist Planning Commission, various Government institutions, Ministry and autonomous bodies to formulate appropriate policies acceptable and adaptable to the industry.
- ◆ To organize practical training and to provide skilled manpower and to motivate good students for study.
- ◆ To conduct activities related to the growth of the export of leather and leather goods from India.
- ◆ As the part of many social activities ILTA has donated Rs. 1 lac to Consul General of Nepal towards relief of earthquake affected of Nepal on 15<sup>th</sup> Sept, 2015.

## INTERNATIONAL & NATIONAL SEMINAR

- ◆ ILTA is the Member Society of International Union of Leather Technologists & Chemists Societies (IULTCS), a 115 years old organization and for the first time the IULTCS Congress was organized in January 1999 outside the developed countries in India jointly by ILTA and CLRI.
- ◆ 2017 IULTCS Congress is scheduled to be held in India again.
- ◆ 8<sup>th</sup> Asian International Conference on Leather Science & Technology (AICLST) was organized by ILTA in 2010 during its Diamond Jubilee Celebration year.

## SEMINAR & SYMPOSIUM

ILTA organizes Seminar & Symposiums on regular basis to share information, knowledge & latest development and interactions for the benefit of all concerned. Few are as under:

- ◆ Prof. B. M. Das Memorial Lecture every year during the Foundation Day Celebrations on 14<sup>th</sup> August every year.
- ◆ Sanjoy Sen Memorial Lecture on 14<sup>th</sup> January every year, the birthday of our late President for several decades.
- ◆ Prof. Moni Banerjee Memorial Lecture on 15<sup>th</sup> March every year, the birthday of this iconic personality.
- ◆ Seminar on the occasion of India International Leather Fair (IILF) at Chennai in February every year.

It has also organized:

- ◆ Prof. Y. Nayakumma Memorial Lecture.
- ◆ Series of Lectures during 'Programme on Implementing Emerging & Sustainable Technologies (PRIEST)'
- ◆ Seminars in occasion of India International Leather Fair, 2014 and 2015 at Chennai etc. Many reputed scientists, technologists and educators have delivered these prestigious lectures. Foreign dignitaries during their visits to India have addressed the members of ILTA at various times.

## PUBLICATION

ILTA have published the following books:

- ◆ An Introduction to the Principles of Physical Testing of Leather by Prof. B. S. Dutta
- ◆ Practical Aspects of Manufacture of Upper Leather by J. M. Dey
- ◆ An Introduction to the Principles of Leather Manufacture by Prof. B. S. Dutta
- ◆ Analytical Chemistry of Leather Manufacture by P. K. Sarkar
- ◆ Comprehensive Footwear Technology by M. Somnath Ganguly
- ◆ Treatise on Fatliquors and Polishing of Leather by Dr. Sanku Dasgupta
- ◆ Synthetic Tanning Agents by Dr. Sanku Dasgupta
- ◆ Hand Book of Tanning by Prof. B. M. Das

ILTA has a good Library & Archive enriched with a few important Books, Periodicals, Journals etc.



## AWARDS OF EXCELLENCE

- ◆ ILTA awards Prof. B. M. Das Memorial, Sanjoy Sen Memorial, J. M. Dey Memorial and Moni Banerjee Memorial Medals to the top rankers at the University / Technical Institute graduate and post graduate levels to encourage the brilliants to evolve with the industry.
- ◆ J. Saha Roy Memorial Award for the author of the best contribution for the entire year published in the monthly journal of the Indian Leather Technologists' Association (ILTA).

## LEXPOs

To promote and provide marketing facilities, to keep pace with the latest design and technology, to have better interaction with the domestic buyers, ILTA has been organizing LEXPO fairs at Kolkata from 1977, Siliguri from 1992 and Durgapur from 2010. To help the big, cottage and small-scale sectors industries in marketing, LEXPO fairs give the exposure for their products. Apart from Kolkata, Siliguri & Durgapur, ILTA has organized LEXPO at Bhubaneswar, Gangtok, Guwahati, Jamshedpur and Ranchi.

## MEMBERS

The Association's present (as on 31.03.2018) strength of members is more than 800 from all over India and abroad. Primarily the members are leather technologists passed out from Govt. College of Engineering & Leather Technology, Anna University, Chennai; Haxcorol Butler Technological Institute, Kanpur; B. R. Ambedkar National Institute of Technology, Meerhar and Scientists from Central Leather Research Institute.

## ESTABLISHMENTS

In order to strengthen its activities, ILTA have constructed its own six storied building at 44, Shanti Pally, Kumbha, Kolkata - 700 107 and have named it "Sanjoy Bhavan".

This Association is managed by an Executive Committee duly elected by the members of the Association. It is absolutely a voluntary organization working for the betterment of the Leather industry. None of the Executive Committee members gets any remuneration for the services rendered but they get the satisfaction of being a part of this esteemed organization.



ILTA  
Since 1950

## Indian Leather Technologists' Association

[A Member Society of International Union of Leather Technologists' and Chemists Societies]

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