

CLE'S Participation in Spoga Fair, Cologne, Germany

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By Roop Kumar Mishra, Office Incharge, CLE, Kanpur and A. Poorajan, AEPO, CLE



History of Saddle & Harness manufacturing in Kanpur & the initial participation in the SPOGA Fair (Germany) since 1978. Harness & Saddlery goods are the Horse riding & driving equipments, being manufactured in Kanpur since more than 100 years. It started in the 19th century by British India Corporation (BIC) in the 'Harness Factory' presently known as Ordinance Equipment Factory at Kanpur, to cater to the needs of the British Army and Police. The raw material for these products was also been manufactured in the Cooper Allen Tannery (another BIC unit at Kanpur, currently known as TAFCO). They had a comprehensive training programme for the local workers & artisans by the then British experts for Tanning & Saddle making within these two respective factories, whose generation now form the major workforce of the present day Saddlery industry in Kanpur & Unnao region.

By virtue of Kanpur & neighboring Unnao's specialization in vegetable tanned buffalo hides (from which harness leather is made) which is the main raw material for Harness & Saddlery goods and due to the trained manpower available in these cities, it has become the only region in India to manufacture Saddlery & Harness goods. It may be surprising for many that all the Saddlery manufacturing units are highly labour intensive and 100% export oriented. Harness & Saddlery comprises of a very wide range of products running into more than 1000 different items. In addition to the traditional leather equipments, it also includes metal hardware, nylon & textile items, such as horse rugs/blankets and also the riding apparel and the specialized riding boots, etc. Majority of metallic hardware, cotton webbing and the saddle trees used as components are manufactured in Kanpur by ancillary units.

In the late seventies some of the progressive exporters of Harness & Saddlery products started visiting & exhibiting their products in SPOGA fair at Koln (Germany) through STC (State Trading Corporation of India Ltd) to expand their business horizon. At that time SPOGA

used to be predominantly a sports goods fair and the big names like Adidas & Puma were the main German exhibitors at that time. Only a few German companies used to exhibit Saddlery & Harness goods in SPOGA fair at that time. But, due to some major reason the giants like Adidas & Puma had boycotted this fair and shifted their participation in a big way to ISPO Fair in Munich, followed by the exodus of the remaining small players, due to which SPOGA gradually got converted into world's major Equestrian fair from a prominent Sports goods fair.

Today India's participation in terms of number of exhibitors from any country is the highest in this fair, followed by Germany. India's current export of Harness & Saddlery products is about Rs.950 Crores and the growth rate is 13%.

GERMAN LEATHER INDUSTRY

The German Leather Industry is represented by the Verband der Deutschen Lederindustrie.V., German Leather Federation (VDL), which has a total membership of 50 companies that represent approximately 95% of German leather production, employing an estimated 2000 workers. These plants comprise 13 larger ones (with a turnover of more than €25 million and more than 50 employees) 17 medium sized ones (with a turnover of more than €10 million and between 50 and 20 employees) and 20 smaller plants with less than 20 employees.

The activities of the larger tanneries: -

- 9 tanneries process cattle hides from raw to finished
- 3 tanneries process sheep skins with the wool on from raw to finished
- 3 tanneries process lamb or deer skins from crust to finished leathers
- 2 tanneries produce finished leather from wet blue bovine splits
- 2 tanneries process deer and sheep skins into parchment

1 tannery processes salmon skins from raw to finished
3 tanneries offer contract works from raw to wet blue or crust

The producers of goat and sheep leathers as well as wool on lamb skins are among the smaller group of companies with less than 20 employees. Of the total production more than 90 % consists of calf skins and bovine hides. The rest is goat, lamb and deer skins for garment, gloves and shoes and some salmon skins for diverse uses. There is also one fully equipped tannery at the Lederinstitut Gerberschule Reutlingen, the national training, research and testing center for the leather industry in Germany. This tannery facility is used primarily for teaching purposes, but it is also used for a certain amount of commercial activity.

VDL as an industrial trade association provides professional services to its members and represents the interests of the industry towards government bodies as well as the related supplier and purchaser industries. The

biggest companies in the German leather sector are the suppliers of automotive and furniture upholstery leather. Then there are 2 larger companies for shoe upper and bag leather. One company is a contract tannery only that does hides until wet blue & crust. About 15 tanneries do the whole process from raw hides or skins until finished leather. Some tanneries do offer contract works for third parties. 35 tanneries start the process from semi finished hides or skins in the wet-blue or crust state and do the re-tanning, dyeing and finishing only. All but 3 companies qualify as SMEs; all are limited companies and the large majority is still family owned.

India - Germany Leather Trade

Germany is the second-largest global importer of Harness and Saddlery items, with its imports increasing from US \$ 100 million in 2009 to US \$ 132.06 million in 2013. India's exports of Harness and Saddlery items to Germany has also been growing, from US\$ 18.02 million in 2009 to US\$ 30.31 million in 2013.

(Value in million USD)

DETAILS	2009	2010	2011	2012	2013
Leather					
Import	637.83	756.39	971.11	812.36	871.41
India's Export	22.02	24.17	28.91	28.13	34.53
% Share of India	3.45%	3.20%	2.98%	3.46%	3.96%
Leather Footwear					
Import	3580.52	3894.55	4836.79	4341.46	4733.24
India's Export	182.68	239.23	285.80	226.78	278.56
% Share of India	5.10%	6.14%	5.91%	5.22%	5.89%
Footwear Components					
Import	426.81	509.95	596.59	516.29	479.08
India's Export	38.87	45.03	65.92	46.05	64.28
% Share of India	9.11%	8.83%	11.05%	8.92%	13.42%
Leather Garments					
Import	449.97	471.10	561.21	436.12	461.05
India's Export	109.18	110.72	153.96	130.65	138.5
% Share of India	24.26%	23.50%	27.43%	29.96%	30.04%
Leather Goods					
Import	793.11	901.65	1223.17	1150.35	1308.03
India's Export	117.75	135.34	172.24	174.89	215.21
% Share of India	14.85%	15.01%	14.08%	15.20%	16.45%
Saddlery & Harness					
Import	100.00	108.33	131.65	125.68	132.06
India's Export	18.02	18.45	22.18	22.32	30.31
% Share of India	18.02%	17.03%	16.85%	17.76%	22.95%
Non Leather Footwear					
Import	2457.20	2920.33	3690.82	3472.86	4010.13
India's Export	2.75	2.44	1.99	2.42	2.16
% Share of India	0.11%	0.08%	0.05%	0.07%	0.05%
Total					
Import	8445.44	9562.30	12011.34	10855.12	11995
India's Export	491.27	575.38	731.00	631.24	763.55
% Share of India	5.82%	6.02%	6.09%	5.82%	6.37%

Source: Germany's Import - ITC Geneva / India's export DGCI&S

A Statement showing India's export of Saddlery & Harness:

(Value in million USD)

2006-07	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
82.33	92.15	83.39	87.92	107.54	110.41	145.54	162.70

Source: DGCI&S

During 2014-15, India's export of Saddlery & Harness touched US\$ 162.70 million, accounting for a share of 2.51% in India's total export from leather sector (US\$ 6494.41 mn).

Country-wise analysis

The major markets for Indian Leather & Leather Products are Germany with a share of 12.32%, USA 11.83%, U.K. 11.57%, Italy 7.76%, France 5.72%, Hong Kong 6.50%, Spain 5.41%, Netherlands 3.46%, China 2.99%, Denmark 1.29%, UAE 4.3%, Belgium 1.68%,

These 12 countries together accounts for nearly 75% of India's total leather& leather products export. Export of leather & leather products to major markets like Germany, USA, UK, France, Spain, Canada, South Africa, Japan, Portugal, UAE, China, Belgium have shown positive growth during April-March 2014-15.

About Koelnmesse

The success story of Cologne trade fairs began in 1924 with the opening of the first event on the exhibition grounds in Cologne-Deutz. During the "economic miracle" of the post-World War II era, the "Rheinische Messe" became a global trading center. Today Koelnmesse has the world's fifth-largest exhibition complex and organizes approximately 75 trade fairs in Cologne and all over the world.

The spoga horse autumn 2015 in figures: At the spoga horse autumn, 432 companies from 33 countries, 80 percent of which were from abroad, participated at spoga horse autumn. These included 85 exhibitors and 3 additionally represented companies from Germany as well as 331 exhibitors and 13 additionally represented companies from abroad. Including estimates for the last day of the fair, around 37,000 visitors from over 108 countries attended spoga horse and spoga+gafa 2015. The share of foreign trade visitors was over 60 percent.

** All numbers have been calculated according to the guidelines of the Society for Voluntary Control of Fair and Exhibition Statistics (FKM).

High level of internationality at the spoga horse autumn

After three excellent trade fair days, spoga horse autumn have achieved a first-class result when it closes its doors. The trade fair not only recorded a slight plus in the number of exhibitors, but also increased its share of foreign exhibitors up to 80 percent in total. 432 exhibitors from 33 countries presented the new products.

"The increased growth and the level of internationality confirm the quality of the event. Spoga horse is 'the place to be' on the international events calendar of the equestrian sport industry." The portfolio of exhibits ranged from clothing for the horse and rider, saddle and

leatherware, care products, through to health and feed products. Traditionally, spoga horse autumn is held parallel to the garden and leisure trade fair, spoga+gafa.

According to an independent visitor survey, 80 percent of the trade visitors interviewed are involved in the procurement decisions, 56 percent are involved in the decision-making process.

In turn, the trade visitors also let themselves be convinced by the quality and the innovations of the exhibitors. 92 percent gave a positive feedback regarding the range of exhibits at the spoga horse autumn.

Spoga horse award

For the first time this autumn, in addition to innovations, entries in the categories Sales Concepts and Sustainability were also distinguished with the spoga horse award. In the Innovations category, the happy winners were H+P Handels GmbH & Co. KG/Suedwind Equestrian with the sole technology, IceLock 3S, and Gloria Brushes with the one-handed, wooden sweat scraper. The company Cavallo won first place for its benefits package in the category Sales Concepts, followed by HKM Sports Equipment with its 'Horse' shop furniture. In the category Sustainability/CSR, Kentucky Horsewear came second with its synthetic sheepskin, behind Mountain Horse, who dispenses with the use of real fur and substances that are harmful to the environment, while at the same time implementing only waste down left over from meat production processes.

COUNCIL'S PARTICIPATION

With the aim of enhancing India's market share in Germany and also to project our brand in this country, the Council organized "Group Participation" of the following 36 member exporters of Harness & Saddlery member-exporters & booked an area of 463.75 Sq.mt. in the event with the support from the Market Access Initiative Scheme (MAIS) of the Government of India:

Sl.No.	Company Name
1.	Kings International Ltd.
2.	Olympia Exports L.L.P.
3.	Taj Export Corporation
4.	S.R. Global
5.	Ryders Equestrian Products (P) Ltd.
6.	Ruksh Garments (P) Ltd.
7.	Northern Exports
8.	Java International
9.	Sterling India
10.	Global Export
11.	Lederwares (India)
12.	Ansi Exports

13.	Kurubh Saddlery
14.	Euro Plus
15.	AKI International (Leder)
16.	AKI India Pvt. Ltd.
17.	Silverlinetack
18.	Mars Impex
19.	Leatherline
20.	Poonam International
21.	Hamraz Traders
22.	Kava Exports Inc.
23.	Leather Wave
24.	A.T.O. Exims (P) Ltd.
25.	RNZ Exports
26.	Aalee India Exports (P) Ltd.
27.	A & Z Exports
28.	Star Tanning Industries
29.	Excel Impex
30.	A.S. International
31.	R.E. Exports
32.	Ruksh Enterprises
33.	Jamiq International
34.	Shri Vaibhav Equestrian Pvt. Ltd.
35.	Young Stallions
36.	Shriya International

Council's Information Booth:

Mr. Roop Kr. Mishra, Office-In-Charge and Mr. A. Poorajan, Asst. Export Promotion Officer was the CLE coordinator for CLE the Group Participation of 36 member exporters in the fair. The queries by visitors, buyers & participating companies visited the CLE's Information Booth were well attended by CLE's officials up-to their satisfaction.

Council's publications:

Catalogue Booklets containing profiles of the participants of Spoga Fair, Members Directory, 2015 and Monthly Magazine "Leather News India", UITIC promotional material etc. were displayed at CLE's Information Booth No.F-28.

Visitors at CLE's Pavilion:

Shri Rakesh Kumar, Executive Director, Export Promotion Council for Handicrafts, Shri Dinesh Kumar, Chairman - Export Promotion Council for Handicrafts, Ms. Kiran Khatri, Third Secretary (ECO & COM), Consulate General of India, Frankfurt, Ms. Sonja Meuters, Marketing Officer of Consulate General of India, Frankfurt and Mr. Ashwani Pande, Managing Director Koelnmesse YA Trade Fair Pvt. Ltd alongwith CLE officials visited the Stands of India Pavilion and interacted with the participants. The flow of potential buyers / visitors in India Pavilion was good during all the fair days and information kid were distributed to them.



(From L to R) Ms. Sonja Meuters, Marketing Officer of Consulate General of India, Mr. Dinesh Kumar, Chairman, Export Promotion Council for Handicrafts, Ms. Kiran Khatri, Third Secretary (ECO & COM), Consulate General of India, Frankfurt, Mr. Rakesh Kumar, Executive Director, Export Promotion Council for Handicrafts, Mr. Roop Kr. Mishra, Asst. Export Promotion Officer, CLE, Mr. Ashwani Pande, Managing Director, Koelnmesse YA Trade Fair Pvt. Ltd. and Mr. A. Poorajan, Asst. Export Promotion Officer seen in the photographs at CLE's information booth.



Mr. A. Poorajan, Asst. Export Promotion Officer discussing with a trade visitor.



CLE officials discussing with a trade visitor at CLE's information booth



CLE officials discussing with a trade visitor at CLE's information booth



Mr. Mohammad Iftekhhar of M/s. Ryders Equestrian Products (P) Ltd. during discussion with Mr. Dinesh Kumar, Chairman, Executive Director, Export Promotion Council for Handicrafts & Mr. Rakesh Kumar, Executive Director, Export Promotion Council for Handicrafts.



Mr. Taj Alam of M/s. Kings International Ltd. (left) during discussion with Ms. Kiran Khatri, Third Secretary (ECO & COM), Consulate General of India, Frankfurt and Mr. Ashwani Pande, Managing Director, Koelnmesse YA Trade Fair Pvt. Ltd.



Mr. Taj Alam of M/s. Kings International Ltd. during discussion with Ms. Rakesh Kumar, Executive Director, Export Promotion Council for Handicrafts.

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Snapshots of Indian Participants in CLE Pavilion



A view of Ruksh Garments (P) Ltd. during presentation of CLE's Information material.



Mr. A. Poorajan, Asst. Export Promotion Officer & Mr. Roop Kr. Mishra, Asst. Export Promotion Officer in Star Tanning Ind. Stand.



CLE officials presented information material in Leatherwave Stand.



Mr. Roop Kr. Mishra, Asst. Export Promotion Officer discussing in Java International Stand.



CLE officials discussing with Mr. Asif Anwar of Lederwares (India)



A view of Shri Vaibhav Equestrian Pvt. Ltd. Stand

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A view of Mars Impex Stand



A view of Kurubh Saddlery Stand



A view of Kava Exports Inc. Stand



A view of A.T.O. Exims (P) Ltd. Stand



A view of Aalee India Exports (P) Ltd. Stand



CLE officials presented CLE's information material in Euro Plus Stand.



CLE officials presented CLE's information material in Poonam International Stand.



CLE official presented CLE's information material in Sterling India Stand.



CLE officials at Shriya International Stand during discussion.



A view of Hamraz Traders Stand



CLE officials at Global Export Stand



CLE officials at A & Z Exports Stand



CLE officials at Jamiq International Stand



CLE officials at Young Stallions Stand



CLE officials at RNZ Exports Stand



CLE officials at Ruksh Enterprises Stand.



CLE officials at Kings International Ltd. Stand.



A view of Silverline Tack Inc. Stand



A view of AKI India (P) Ltd. Stand



A view of Ansi Exports – presentation of CLE information material.



A view of A.S. International Stand



A view of AKI International Stand



Mr. Asif Samad of A.S. International and Mr. Roop Kr. Mishra, AEPO during discussion with trade visitors.



A view of S.R. Global Stand



A view of Excel Impex Stand



A view of Northern Exports Stand



A view of CLE's Information Booth.

Business Meeting in Progress



Business meeting in progress in Leatherline



Business meeting in Kurubh Saddlery



Business meeting in RNZ Exports



Business meeting in Northern Exports



Business meeting in Hamraz Traders



Shri Taj Alam of Kings International Ltd. during discussion with business visitors



Business meeting in Jamiq International Stand



Business meeting in R.E. Exports Stand



Business meeting in Taj Export Corporation Stand

Business Outcome:

During the fair, Spot Orders booked was to the tune of Euro 2,45,000 and Expected order were booked for Euro 8,35,000 approx. as per the feedback received from the member-participants.

Conclusion:

Germany is one of the main market for Indian Harness & Saddlery manufacturer – exporters. Spoga Fair provides an ideal platform to the Indian Harness & Saddlery Industry to showcase their products and explore business. We should hence continue our participation with full of our strength by way of increase of exhibition area in the coming edition.

SNAPSHOT OF INDIA PARTICIPANTS TOOK PART DIRECTLY







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