Report on the visit of Raw Materials / Leather Sourcing Delegation & Environment Management Study Delegation to Australia and New Zealand – May 5-9, 2014

A Report by Mr Taj Alam, Regional Chairman, (Central Region), CLE, - The 'Team Leader' of the Indian Leather Sourcing & Environmental Management Study Delegation.

Objective of the visit :

The Council for Leather Exports had organized the visit of Indian Leather Sourcing Delegation to Australia & New Zealand with the active involvement and support of Indian Missions in Australia and New Zealand.

The prime objective of the visit was to explore the possibility of (a) sourcing raw hides, brine cured hides, semi-processed leathers, such as wet-blue, wet-white, crust, etc; and also the finished leather from Australia and New Zealand (b) studying the Environmental Management of the industrial effluents of different nature being generated mainly by the Tanneries, Hide Processors and Abattoirs.

Australian & New Zealand Leather Industry and its potential :

Australia is a vast country marked by large variations in climate and geography, being more typical of a Mediterranean climate. The diverse environment stretches to include the arid north, tropical coastal areas and cooler southern states. New Zealand is relatively more greener and cooler place than Australia.

Australia's and New Zealand's agriculture-based economies have always been largely dependent upon the export of raw materials and primary commodities including unprocessed crop, wool, minerals, livestock, meat, dairy products, raw hides/skins, etc. thereby generating a lot of good quality raw material for Indian Leather Industry, especially due to the absence of sizable finished leather tanneries and leather products industries of their own, barring a few.

Their Feedlot cattle are hand or technically fed a grain-based diet to produce a consistent quality of meat – mostly for export to discerning overseas markets. These Feedlot environments produce Hides with superior grain quality and minimal defects.

A statement of Australia's Import of Leather & Leather Products and India's Share 2007-2011 is tabulated below :

(Value in US $Mn)

DETAILS	2007	2008	2009	2010	2011	2012	2013
Leather							
Import	92.69	111.73	64.54	77.51	87.90		
India's Export	2.23	1.63	1.41	2.01	2.35	2.00	1.87
% Share of India	2.41%	1.46%	2.18%	2.59%	2.67%		
Leather Footwear							
Import	575.13	661.31	588.61	663.89	738.47		
India's Export	10.75	12.07	13.94	11.81	14.26	21.72	23.02
% Share of India	1.87%	1.83%	2.37%	1.78%	1.93%		
Footwear Components							
Import	27.90	25.75	24.70	29.40	28.21		
India's Export	1.52	0.25	0.6	0.17	0.16	0.15	0.62
% Share of India	5.45%	0.97%	2.43%	0.58%	0.57%		
Leather Garments							
Import	17.54	24.35	22.99	32.54	36.90		
India's Export	1.91	3.60	5.64	4.84	6.61	5.70	5.40
% Share of India	10.89%	14.78%	24.53%	14.87%	17.91%		
Leather Goods							
Import	185.30	225.67	210.99	215.70	306.65		
India's Export	28.48	32.72	26.00	26.27	34.17	36.35	36.72
% Share of India	15.37%	14.50%	12.32%	12.18%	11.14%		

DETAILS	2007	2008	2009	2010	2011	2012	2013
Saddlery & Harness							
Import	30.39	29.50	30.55	30.25	38.29		
India's Export	5.30	4.48	5.37	5.88	9.12	7.70	10.50
% Share of India	17.44%	15.19%	17.58%	19.44%	23.82%		
Non Leather Footwear							
Import	366.44	418.20	429.04	514.34	594.28		
India's Export	0.25	1.02	0.96	0.84	1.17	0.55	0.17
% Share of India	0.07%	0.24%	0.22%	0.16%	0.20%		
Total							
Import	1295.39	1496.51	1371.42	1563.63	1830.7		
India's Export	50.44	55.77	53.92	51.82	67.84	74.16	78.31
% Share of India	3.89%	3.73%	3.93%	3.31%	3.71%		

Source : ITC, Geneva / DGCI& S

- India's Export of leather and leather products to Australia has increased from US$ 50.44 mn in 2007-08 to US$ 78.31 mn in 2013-14.
- Leather Goods and Leather Footwear are the major products of export from India, followed by Saddlery & Harness.

India's Import of Raw Hides and Skins and Leather from Australia (Value in Mn $)

Product	2008	2009	2010	2011	2012	2013
Raw Hides & Skins	2.87	1.79	2.02	1.93	0.87	0.36
Leather	7.09	4.74	6.76	3.55	6.65	12.46
Total	9.96	6.53	8.78	5.48	7.52	12.82

Source: DGCI& S

- India's import of raw hides and skins which was down in 2011 and 2012 has picked up and increased to US$ 12.82 mn in 2013.

A statement of New Zealand's Import of Leather & Leather Products and India's Share 2007-2011 is tabulated below :

(Value in Mn $)

DETAILS	2007	2008	2009	2010	2011	2012	2013
Leather							
Import	5.14	5.15	4.77	4.88	4.06		
India's Export	0.36	0.24	0.12	0.66	0.25	0.30	0.34
% Share of India	7.00%	4.66%	2.52%	13.52%	6.16%		
Leather Footwear							
Import	111.01	114.26	98.38	110.08	118.74		
India's Export	1.08	1.98	1.17	1.58	1.82	1.68	3.70
% Share of India	0.97%	1.73%	1.19%	1.44%	1.53%		
Footwear Components							
Import	6.87	4.01	3.71	3.32	3.88		
India's Export	0.31	0.02	0.03	0.04	0.14	0.07	0.05
% Share of India	4.51%	0.50%	0.81%	1.20%	3.61%		
Leather Garments							
Import	4.28	3.95	3.16	3.87	3.83		
India's Export	0.10	0.13	0.12	0.20	0.28	0.26	0.24
% Share of India	2.34%	3.29%	3.80%	5.17%	7.31%		
Leather Goods							

DETAILS	2007	2008	2009	2010	2011	2012	2013
Import	26.41	27.35	24.91	25.14	33.79		
India's Export	2.25	2.02	1.56	2.35	3.34	3.33	3.89
% Share of India	8.52%	7.39%	6.26%	9.35%	9.88%		
Saddlery & Harness							
Import	7.19	7.28	5.85	6.75	7.62		
India's Export	1.50	1.05	1.23	1.12	1.34	1.48	1.34
% Share of India	20.86%	14.42%	21.03%	16.59%	17.59%		
Non Leather Footwear							
Import	87.56	91.26	92.39	106.68	123.18		
India's Export	0.01	0.04	0.05	0.04	0.12	0.10	0.10
% Share of India	0.01%	0.04%	0.05%	0.04%	0.10%		
Total							
Import	248.46	253.26	233.17	260.72	295.1		
India's Export	5.61	5.48	4.28	5.99	7.29	7.23	9.66
% Share of India	2.26%	2.16%	1.84%	2.30%	2.47%		

Source : ITC, Geneva / DGCI& S

- India's Export of leather and leather products to New Zealand has increased from US$ 5.61 mn in 2007-08 to US$ 9.66 mn in 2013-14.
- Leather Goods and Leather Footwear are the major products of export from India..

India's Import of Raw Hides and Skins and Leather from New Zealand (Value in Mn $)

Product	2008	2009	2010	2011	2012	2013
Raw Hides & Skins	10.85	6.73	10.42	8.29	5.22	6.33
Leather	6.15	9.50	10.46	5.98	4.69	8.94
Total	17.00	16.23	20.88	14.27	9.91	15.27

Source : DGCI& S

India's import of raw hides and skins which was down in 2012 has picked up and increased to US$ 15.27 mn in 2013

The Itinerary of the Programme was as follows :

Monday – 5th of May, 2014 (Melbourne, Australia)

- 1000 – 1130 hrs. Meeting & Factory visit with Mr Trevor J. Korn, Managing Director, M/S Fulop Australia Pty. Ltd. (Cattle Hide Processors through Brine-curing process).
- 1300 – 1430 hrs. Meeting, Factory & Primary ETP visit with Mr Christian Cazenave, Managing Director, M/S Philippe Rives Pty. Ltd; (Sheep Skin Processors).
- 1500 – 1600 hrs. Meeting & City Sewage & Industrial Effluent Treatment Plant visit with Mr Vincent and Mr Wes Douglass, Manager, Sewage Quality & Environment, M/S West Water Ltd; Melbourne.
- 1630 – 1800 hrs. Meeting & Factory visit with Mr Emad Dabbagh (Skin Manager), M/S Dabbagh Trading (MLSS) Pty. Ltd; and Mr Basel Dabbagh, Operations Manager, M/S Dabbagh Meat Trading Pty. Ltd; (Abattoir and Sheep skin Processors).
- 1830 – 1930 hrs. – Courtesy meeting with Ms. Manika Jain, Consul General, Indian High Commission, at her residence in Melbourne to meet and appraise her about our four visits to various Hide/Skin Processors during our first day in Melbourne and also to extend our gratitude to her for all the support & cooperation which she and her office had very kindly extended to our delegation in organizing our meetings in Australia. The delegation was invited for high tea at her residence.

Tuesday –6th of May, 2014 (Brisbane, Australia)

- 1030 – 1200 hrs. : Meeting, Factory & ETP visit with Mr Brian Topper, Managing Director, M/S Al Topper & Co. Pty. Ltd; (Hide Processors & Wet-Blue Tanners). They have units in various states of Australia.
- 1400 – 1600 hrs. : Meeting, Factory & complete Primary & Secondary ETP visit with Mr Gary King, By-Products Manager, JBS (Australia) Pty. Ltd; (Abattoir & Cattle Hide Processors).
- 1600 – 1800 hrs. : Visit to JBS's adjoining Cattle Abattoir.

Wednesday – 7th of May, 2014 (Brisbane, Australia)

- 1030 – 1200 : Meeting with Mr Gary Foster, Sales Manager, M/S Teys Australia Pty. Ltd; (Cattle Hide

Processors). Their factory could not be visited as it was too far from Brisbane.
- Afternoon - Travel to Auckland (New Zealand)

Thursday – 8th of May, 2014 (Napier, New Zealand)

- 1000 – 1300 hrs. : Meeting with Mr David, Marketing Manager, Animal Bye-Products, M/S Lowe Corporation (Tanners & Hide & Skin Processors). Visit to Tomoana (Lowe) Fellmongery and Lowe Bovine Tanners (wet-blue tannery).
- 1400 – 1530 hrs. : Meeting & Factory visit with Mr Bruce Reay (CEO) and Mr David Tester (Sales & Marketing Manager), M/S Progressive Leathers (Fellmongery). Having a very nice Primary ETP, Odour/Air Pollution Control system covering entire factory through Bio-Filter.
- 1600 – 1800 hrs. : Visit to AFFCO (Bovine Tannery).

Friday – 9th May, 2014 (Wanganui, New Zealand)

- 1100 – 1230 hrs. : Visit to ANZCO (Sheep Abattoir) on the way to Wanganui.
- 1530 – 1800 hrs. : Meeting with Mr Hunter Tail (Managing Director) and the production team of Tasman Tanning Co. Ltd. (A complete tannery from raw to finished leather). This tannery did not show their Beam house & Tanning activity. However, they did show us their finishing facilities. They also did not allow us to see their Primary ETP system for the reasons better known to them.

Members of the Delegation :

An overview of Indian Leather Industry and the purpose of delegations' visit was briefly mentioned by Mr Taj Alam, Regional Chairman, (Central), CLE, during all the meetings with various Australian/NZ companies :

The opportunity was availed to inform all the Hide/Skin Processors, Abattoirs & Tanneries we had visited highlighting India's export of finished leather & leather products which stood at US$ 5 billion in 2012-13, has increased to around US$ 6 billion during 2013-14 giving us annual growth rate of 20%. Hides & skins are of course the essential raw materials to make the finished leather and value added leather products, such as footwear, garments, hand bags, belts, saddlery goods, gloves, pets accessories, hunting accessories, etc.

It is estimated that the current domestic availability of leathers is to the tune of 2 billion sq.ft. Out of which 85% is through domestic resources & 15% from imported material. However, in order to achieve the export target of US$ 14 billion by the year 2016-17, the Indian leather industry requires an additional 4.2 billion sq.ft of leather. In spite of having 321 million bovine heads, 66 mn sheep & lambs and127 million heads of goats/kids in our own country and about 1632 tanneries across India to process that leather, there is still a sizeable requirement of imported material of different origins which accounts for about a billion sq.ft. of leather.

In order to combat this shortage and source the required quantity of raw material for the leather trade, there is a need to enhance the cooperation between various stake holders and natural allies, both within the country and globally, so as to augment the domestic availability of finished leather.

In this regard, the Council for Leather Exports has organized this leather sourcing delegation to Australia and NZ to source wet-salted raw hides/Brine-cured skins & hides, wet-blue and wet-white material and even semi-processed crust leather to com-

Sl No.	Name of the Company	Name of the Delegate
1	M/S Kings International Ltd; Kanpur	Mr Taj Alam (Team Leader)
2	M/S Alpine Apparels Pvt. Ltd; Faridabad	Mr Sanjay Leekha
3	M/S Industrial Infrastructure Services Ltd; Unnao	Dr Subhash Awasthi (Env. Engr.)
4	M/S Good Leather Shoes Pvt. Ltd; Chennai	Mr K.R. Munikannan
5	M/S Overseas Leathers, Ranipet	Mr M.Sreenivasa Reddy
6	M/S Allure Enterprises Pvt. Ltd; New Delhi	Mr Ajay Bhutani
7	M/S Osman Shariff, Kolkata	Mr Osman Shariff
8	M/s Kamil Leathers, Chennai	Mr Anees Ahmad
9	M/S Gaitonde Leather & Accessories Pvt. Ltd;	Mr Abdul Mujahid
10	Council for Leather Exports	Mr V. Samson, (Assistant Director)

pliment & supplement the availability of all types of raw materials on a long term basis, to accelerate the productivity, processing and marketing of value-added leather products.

The aim of this delegation was also to study the environmental efforts being made by abattoirs, hide/skin processors & tanneries, so that the good pollution control methods may be adopted & practiced in our treatment plants across the country, for a cleaner, greener and pollution-free environment which is the need of the day.

Host companies were informed that the delegation comprises of members from the various segments of leather industry, such as, Footwear, Leather Bags, Gloves, Saddlery & Harness goods, Pets Accessories, Belts, Garments, etc. So, the raw material of almost all the categories in terms of thicknesses and weight range would be required.

Delegates holding interactive meeting with with Mr Trevor J. Korn, Managing Director, M/S Fulop Australia Pty. Ltd.

Key role of Skin/Hide Processors in Australian & NZ Meat Works and Tanning Industry:

It has been observed both in Australia & New Zealand that the functional tanneries are just a few. Out of these tanneries, most of them are doing from raw stock/brine-cured to wet-blue or pickling stage only. The key role is being played by the Hide/Skin Processors, who are intermediate stage trading partners of the Abattoirs & Tanneries, and whose main job is to collect the fresh/chilled green hides & skins direct from various abattoirs, grade and select them according to weight/area, flesh, trim and brine-cure them either in drums or raceway. Thus, these hide/skin processors develop alliances with a number of key Meat Works across Australia and NZ linking end-users and primary producers.

95% of the material is then exported to different countries. Till recently China had been their main trading partner, but on account of some environmental issues and other compelling reasons China's import has dras-

Delegates holding interactive meeting with with Mr Wes, dealing with Environment aspects of the Tanneries

Delegates holding interactive meeting with Mr Brian Topper, Managing Director, M/S Al Topper & Co. Pty. Ltd;

Delegates holding interactive meeting with Mr Gary Foster, Sales Manager, M/S Teys Australia Pty. Ltd; (Cattle Hide Processors).

tically gone down in the recent past. That's why a lot of processed raw stock can be seen awaiting shipment in most of these Processing Plants.

Bush marks, Tick marks and Brandings are generally found in Australian hides. Relatively Tasmanian, Victorian and NSW material is cleaner and better in quality as compared with Northern Territory or Queensland hides due to breed, climate and landscape variations which prevail in each area. However, when Australian hides in general are compared with NZ hides you would find NZ material better & costlier too. Both countries prefer to trade in US Dollars against sight LC, though the terms are negotiable.

Delegates during the Tannery Visit

Livestock availability and the Production details in Australia and New Zealand as per FAO 2012:

Description	Australia	New Zealand	World
No of Bovine Animals (mn Heads)-	28.31	10.00	1632.92
No of Sheep & Lambs (mn heads)	67.87	30.92	1088.86
No of Goats and Skins (mn Heads)	4.5	0.070	918.99
Production of Bovine hides and skins -million pieces	8.3	4.2	355.2
Production of Bovine Hides and Skins -			
Wet salted weight (Million pieces)	173.9	58.4	6446.2
Production of Sheepskins and Lambskins "	24.3	25.7	531.5
Production of Sheepskins & Lambskins Dry wgt "	32.8	36.0	395.8
Production of Goatskins &Kidskins "	1.1	0.1	475.8
Production of Goatskins &Kidskins (Dry wgt) "	1.1	0.1	337.5

The majority of cattle in Australia are raised and slaughtered in the eastern states of Queensland, New South Wales and Victoria. Cattle industry statistics indicate that approx. 50% of the cattle slaughter occurs in Queensland, almost 30% in NSW and 15% in Victoria. Rest 5% in Tasmania and other places. Beef and Dairy origins are graded and sold separately.

Characteristics of Australian Cattle Hides across different states showing inherent differences as explained below :

Queensland (Qld.) :

Straight Run Hides. These are mostly ticky hides, however there are certain regions in Qld. Which are designated as Tick-free areas. Brand marks and horn marks are a normal characteristics of Queensland production.

New South Wales (NSW):

Hides with good grain, no cattle tick. However, 30-40% of cattle are branded. Slightly better yielding in area than other Southern Australian origins. Feedlots are becoming more prominent.

Victorian (Vic.) :

Hides with good grain, no cattle ticks. However, 10-20% cattle are butt branded. Beef and Dairy origins graded and sold separately.

South Australia (SA) :

Tick-free hides with generally good grain. Similar to NSW and VIC origins.

Central Australia (CA) :

Cattle derived from the Northern areas of SA may have additional scratch marks as a result of more harsh vegetation and terrain.

South-West Australia (SWA):

Hides with very good grain selection. No tick, with minimal brands.

Tasmania :

Hides with excellent grain characteristics, no brands or ticks. Beef and Dairy origins graded and sold separately.

Slaughtering, Trimming, Classification, Packaging and Containerization of Hides for shipping :

Slaughtering & Trimming - Hides are machine-pulled, thereby assuring a minimal amount of damage during take-off. Hides from all origins are trimmed in a similar manner with short shanks and necks, without ears, lower lip and tail with all excess removed.

Meat works Firsts/Sound quality – Well flayed hides with some fat and meat adhering, no cuts in the prime region, but may have up to 3 cuts in the offal. No major grain defect.

Meat Works Seconds - For hides from origins other than ticky areas, but it has brands & horn marks. A hide with more than 3 cuts is down-graded.

Country Hides – Hides collected from small country abattoirs. Hides are generally well hand-flayed, although exhibiting a percentage of score marks.

Low Grade Hides – Hides which are generally machine-pulled but which can include "Faulty" hides and/or "Flesher-Damaged" hides.

Containerization for shipping - Hide productions are shipped in 20' general purpose container, each carrying a maximum net weight of approximately 21,000 Kgs. Containers carrying Brine-cured hides are always lined in plastic with hides securely strapped onto disposable wooden pallets, suitable for export.

Brine-curing Process of Cattle Hides :

Fresh or chilled green hides (depending upon the distance they travel from Abattoirs to Hide Processing Plants) are immersed in Brine Curing Raceways or drums and are processed for a minimum of 16 hours in a saturated brine solution of 96% salinity with added bactericides.

Salinity, Ash-moisture ratios and hide temperatures are continuously monitored throughout the entire process to guarantee correct and proper curing, thereby ensuring more than adequate shelf life, as well as enabling them to be transported to any part of the world without fear of damage specially during the longer voyage durations.

Brine-curing process also reduces the salt load on tanneries effluent treatment plant which should be replicated in India at least by organized and mechanized Abattoirs before selling their raw hides to tanneries.

Wet-Blue / Wet-White Hides :

On arrival at the tannery, hides are green fleshed, weight-ranged, and loaded into drums for the tanning process. From wet-blue drums, all hides are sammyed to a consistent moisture content of 58-60% and then graded for both, grain quality and weight. Chrome content on dry weight is 3.5-4.5% and pH 3.30 – 4. Nil TCP/PCP. Once graded and weight-ranged, hides are packed on pallets and shrink-wrapped.

Not all tanneries are geared-up to do wet-white. Even those who have the technology, do it only on special request for the required weight-range. No tannery keeps stock of wet-white material.

Wet blue hides are offered either as full substance whole hides or as Grain Splits.

'A' Selection – Prime areas may show up to 10% open scratches or up to 25% light healed scars. Generally free of tick and parasite damage. 'Native' or 'Butt' branded.

'B' Selection – Prime area may show up to 25% open scratches and up to 50% healed scars. Prime area is generally free of tick / parasite damage. Butt or Rib branded.

'C' Selection – Prime and Offal area may show light or open tick/parasite damage, healed scars. Open scratches, some light chrome salt staining. Butt/Rib branded.

Specifications:

Raw hide wt. range	Wet-blue Avg. wt.	Wet-blue Est. size	Hides/ 20' containe
6-14 Kgs	7-9 Kgs	19-21 sq.ft.	2500
14-18 Kgs	11-12 Kgs	29-31 sq.ft.	1700
18-23 Kgs	15.5-16.5 Kgs	34-36 sq.ft.	1300
23-27 Kgs	19-20 Kgs	39-41 sq.ft.	1000
27-31 Kgs	23-24 Kgs	44-46 sq.ft.	800
31+ Kgs	28-30 Kgs	50-54 sq.ft.	700

Fellmongery :

Most of the skin processors supply pickled Lamb and Sheep pelts, mid-micron wool, wet-blue pelts and salted skins from Lamb, Sheep, goat, Calves and Deer.
Pickled Pelts :
Run – These consists of fault-free pelts with no more than 5 minor faults in the cutting panel. Particular emphasis is placed on strain. This selection is suitable for fashion garments offering consistent area yield, tightness, flatness and fullness.

Run Grade	Area Range (sq.ft.)	Average feet/dozen	Dozen/Pallet
90	6.60 – 7.74	84	90
100	7.75 – 8.59	94	75
110	8.60 +	104	70

The average sq.ft. per dozen is a measured area at the pickle stage. Re-tanning and/or trimming can affect the final out-turn area.

Third Grade	Area Range (sq.ft.)	Avg. ft./dozen	Dozen/Pallet
TL	Less than 7.74	85	90
XTL	Over 7.75	94	75
110	8.60 +	104	70

Indian Delegation at a meeting with the Consul General of India, Ms. Manika Jain, CGI, Melbourne

Thirds – Defective Run Grades are put in to thirds, excluding Pinholes and Ribs as follows :

A minimum of 3 sq.ft. of unusable material is provided by this grade.

Pinhole – These are Run quality with light-medium pinholes and include all sizes

Rib – Blind and light Rib, comprising all sizes is included in this grade

Fourths – These include Pelts of all sizes with seed scars over the panel and heavy pinhole. Heavy cockle, rash, dermatitis along with heavy grain/panel strain are also included.

Salted Skins : Wool-on lamb skins for making woolskin products can be provided between November and February each season. Following a salting preservation process in large rotating drums, the skins are drained for 1-2 days on stillages before being palletized. Usually 200 skins are palletized per pallet.

Short lamb skins with coarser wool types are suitable for footwear products and these are available from March through to July. Fellmongery grade skins are mostly used for Nappa Leather production.

Wet-blue skins : Wet blue pelts are available against a firm contract which are processed at some tannery by Fellmongery.

Characteristics of New Zealand cattle hides:

The characteristics of NZ cattle hides are typical of Northern European breeds which are pasture-fed, providing raw stock that is clean and free of any manure related problems.

The majority of NZ cattle herds are identified by ear tags that are free from brands with a clean surface area, making it highly suitable for leather manufacturer. As mentioned above, the NZ hides are relatively costlier than Australian hides, but certainly better in quality.

Cattle wet blue material is available in Ox Hides, Cow Hides, Heifer Hides, and Bull Hides.

Indian Delegation during a Tannery Visit in New Zealand

Visit to AFFCO (Bovine Tannery).

Indicative Prices of the Wet-blue and Brine cured selections

WETBLUE FULL SUBSTANCE WHOLE HIDES

A selection

- ex w/s 6/14kgs @ US$ 57.50 per hide
- ex w/s 14/18kgs @ US$ 82.50 per hide
- ex w/s 18/23kgs @ US$ 96.50 per hide
- ex w/s 23/27kgs @ US$ 116.50 per hide
- ex w/s 27/31kgs @ US$ 133.00 per hide
- ex w/s 31kgs + @ US$ 147.50 per hide

B selection

- ex w/s 6/14kgs @ US$ 48.50 per hide
- ex w/s 14/18kgs @ US$ 73.50 per hide
- ex w/s 18/23kgs @ US$ 85.00 per hide
- ex w/s 23/27kgs @ US$ 108.00 per hide
- ex w/s 27/31kgs @ US$ 123.00 per hide
- ex w/s 31kgs + @ US$ 139.50 per hide

C selection

- ex w/s 6/14kgs @ US$ 39.50 per hide
- ex w/s 14/18kgs @ US$ 63.50 per hide
- ex w/s 18/23kgs @ US$ 74.50 per hide
- ex w/s 23/27kgs @ US$ 98.50 per hide
- ex w/s 27/31kgs @ US$ 113.00 per hide
- ex w/s 31kgs + @ US$ 128.00 per hide

BRINECURED CONVENTIONAL (UN-FLESHED) HIDES

1. Brinecured Conventional Victorian Meatworks Premium Grainfed Ox

Range 27kgs +
Avg 35/37 kgs
@ US$ 103.50 / hide

2 Brinecured Conventional Victorian Meatworks Premium Grainfed Ox/Hfr

Range 23kgs +
Avg 30/32 kgs
@ US$ 94.50 / hide

3. Brinecured Conventional Victorian Meatworks Premium Grainfed Ox/Hfr

Range 23kgs +
Avg 27/29 kgs
@ US$ 86.50 / hide

4. Brinecured Conventional Victorian Meatworks Grassfed Ox

Range 30kgs +
Avg 40/42 kgs
@ US$ 113.00 / hide

5. Brinecured Conventional Victorian Meatworks Grassfed Ox/Hfr

Range 27kgs +
Avg 35/37 kgs
@ US$ 100.00 / hide

6. Brinecured Conventional Victorian Meatworks Grassfed Ox/Hfr

Range 23kgs +
Avg 30/32 kgs
@ US$ 91.50 / hide

7. Brinecured Conventional Victorian Meatworks Grassfed Ox/Hfr

Range 23kgs +
Avg 27/29 kgs
@ US$ 82.50 / hide

8. Brinecured Conventional Victorian Meatworks Grassfed Ox/Hfr

Range 14/23kgs
Avg 19/21kgs
@ US$ 72.50 / hide

9. Brinecured Conventional NSW Meatworks Ox (est 70/80% Grainfed)

Range 30kgs +
Avg 40/42kgs
@ US$ 111.00 / hide

10. Brinecured Conventional NSW Meatworks Cow/Ox

Range 23kgs +
Avg 26/28 kgs
@ US$ 77.00 / hide

11. Brinecured Conventional NSW Meatworks Cow/Ox/Hfr

Range 17/30kgs
Avg 22/24kgs
@ US$ 70.00 / hide

12. Brinecured Conventional NSW Meatworks Cow/Ox/Hfr

Range 14/23kgs
Avg 17/19kgs
@ US$ 62.50 / hide

13. Brinecured Conventional Queensland Meatworks Ox TFA

Range 30kgs +

Avg 42/44 kgs

@ US$ 103.50 / hide

14. Brinecured Conventional Queensland Meatworks Ox TFA

Range 23kgs +
Avg 25/27 kgs
@ US$ 71.50 / hide

15.Brinecured Conventional Queensland Meatworks Ox S/Run (Ticky)

Range 23kgs +
Avg 34/36 kgs
@ US$ 89.00 / hide

Indian Delegates Meeting with Mr Hunter Tail (Managing Director) and the production team of Tasman Tanning Co. Ltd.

Conclusion :

Australia and New Zealand are virtually untapped market specially from import perspective with huge potential for (a) sourcing wet-salted/ brine-cured/pickled hides and skins (b) importing semi-processed material, such as, wet-blue, wet-white, crust, etc. (c) export of value-added leather products (d) forging collaborations and joint ventures specially in the field of brine-curing of hides and also in the leather sector, as they are already in the look-out for a suitable substitute of China, as their prospective major business partner in Asia.

All the delegates felt that we needed some more time to cover the tanning units scattered across other states, such as NSW, SA, etc; in Australia and South Island in New Zealand where we did not go at all and also to visit the tanneries of Victoria and Queensland where we had gone though, but could not visit the tanneries due to lack of time. All of the delegates felt that this trip should have been for a period of 2 weeks which we tried to do in just 1 week.

The delegates are of the opinion that similar Leather Sourcing Delegation should also be sent by CLE to Latin American countries, like Brazil, Argentina, Chile, Uruguay, etc. and also to the East European block, such as Poland, Hungry, Romania, Bulgaria, etc; where the cost of material is relatively lesser.