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- Indian Footwear & Leather Development Programme (IFLDP) 2021-26
- Highlights of Union Budget 2022-23

COUNCIL FOR LEATHER EXPORTS

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The Council for Leather Exports was set up in July 1984. The Council functions under the Ministry of Commerce & Industry, Government of India. The Council is entrusted with export promotion activities and overall development of the Indian leather industry. The Council's activities also include promoting Foreign Direct Investments and Joint Ventures in the Indian leather industry. The CLE serves as a bridge between Indian leather exporters and buyers all over the world.

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48 In Brief

Dear Members

As you are all aware, the Government has announced major support measures in recent days for the leather and footwear sector.

You are all aware that we have been representing to the Government to reinstate the import duty exemption on wet blue, crust and finished leathers and also reinstate the Duty Free Import scheme for import of critical inputs required to make value added products. In the Union Budget 2022-23, the Government has notified the Duty Free Scheme wherein certain critical inputs required for making leather garments, footwear and leather products can be imported by bonafide exporters. However, this scheme is not applicable now for exporters of finished leather. Though wet blue leather has been notified as a critical input under the duty free scheme, crust and finished leathers have not been notified. Also, certain other critical inputs have not been notified. We have represented these issues to the Government and we hope that the Government will positively consider the same.

The other major support measure is the announcement of interest equalization on rupee export credit from October 1, 2021 to March 31, 2024. The Revised interest equalisation rates under the Scheme will be 3 per cent for MSME manufacturer exporters exporting under any HS lines, and 2 per cent for manufacturer exporters and merchant exporters exporting under 410 HS lines.

Besides the above, vide DGFT Public Notice No. 58 dated 7.3.22, the last date for MEIS applications for exports made during 1.4.20 to 31.12.20 has been extended till 30.4.22, subject to limit of Rs.2 cr per IEC. This claim cannot be made for IEC with Nil exports during 1.9.19 to 31.8.20 or new IEC obtained on or after 1.9.20.

The guidelines of Indian Footwear and Leather Development Programme (IFLDP) have also been notified.

I would like to convey my profound thanks to the Government of India for notifying various support measures which will be of great help in enhancing our exports.

With best wishes

Sanjay Leekha

Chairman

COUNCIL FOR LEATHER EXPORTS



Dear Members

India is providing duty free status to 35 Least Developed Countries (LDCs) under Duty Free Tariff Scheme, as per Customs Notification No. 96/2008. As far as leather, leather products and footwear is concerned, duty free status is provided for import from LDCs for raw materials namely leathers (Chapter 41) leather goods under Chapter 42 and for most categories of footwear under Chapter 64. However, Third country invoicing is not permitted under the Duty Free Tariff Programme now. During a recent virtual meeting convened by the Department of Commerce, we have requested that third country invoicing may be considered under this scheme, considering that mostly raw materials namely leathers are imported from such countries.

CLE has been notified as an authorized agency to issue Non - Preferential Certificates of Origin (COO) vide DGFT Public Notice No. 35 dated 11.11.21. These non-preferential CoOs only evidence origin of goods and do not bestow any right to preferential tariffs i.e. reduction in duties. In order to avail non preferential COOs, the exporter has to apply (by choosing CLE as the issuing agency) through the common portal of DGFT <https://coo.dgft.gov.in>. The fee for each certificate is Rs.200 +GST which can be paid through the said portal.

CLE has also been notified as an agency for issue of Certificates of Origin (Preferential) under Asia Pacific Trade Agreement (APTA). CLE will be shortly on-boarded the website <https://coo.dgft.gov.in>. Once this on-boarding process is complete CLE will be in a position to issue Certificates of Origin (Preferential) for export shipments to China, Bangladesh, South Korea, Laos and Sri Lanka under APTA. A circular in this regard will be issued to members shortly

With kind regards

R. Selvam IAS

Executive Director

COUNCIL FOR LEATHER EXPORTS



MEETINGS OF CHAIRMAN, CLE

Industry Consultations by Shri Piyush Goyal, Hon'ble Union Minister of Commerce & Industry & Textiles

Shri Piyush Goyal, Hon'ble Union Minister of Commerce & Industry & Textiles held industry consultations on 7.3.22 on India-Australia FTA Negotiations. Shri Rajeev Singh Thakur, Additional Secretary, DPIIT; Shri Sanjay Leekha, Chairman, CLE & Shri RK Gupta, Chairman, CIFI attended. During the meeting, Chairman, CLE sought 0% import duty in Australia for export of leather, leather products and footwear from India.



Signing of India – UAE FTA

Shri Sanjay Leekha, Chairman, CLE took part in the event of signing of India-UAE CEPA held in New Delhi on 18.2.22



Meeting with Shri Nayaran Rane, Honble Union Minister of MSME

Shri Sanjay Leekha, Chairman CLE called on Shri Narayan Rane, Hon'ble Minister of MSME, Govt. of India on 7.3.22 and requested the Honble Minister to Grace LAFCAN 2022 scheduled on 9.3.22 in New Delhi



Meeting with Shri Bhanu Pratap Singh Verma, Hon'ble Minister of State for MSME,

Shri Sanjay Leekha, Chairman, CLE & Shri Motilal Sethi, RC (North) called on Shri Bhanu Pratap Singh Verma, Hon'ble Minister of State for MSME, Govt of India & invited him to Grace CLE Northern Regional Exports Awards on 9.3.22 at New Delhi as Guest of Honor & present the awards.



Meeting with Shri Rajeev Singh Thakur, IAS, Additional Secretary, DPIIT

Shri Sanjay Leekha, Chairman, CLE and Shri RK Gupta, Chairman, CFI met Shri Rajeev Singh Thakur, IAS, Additional Secretary, DPIIT on 7.3.22 at Udyog Bhawan, New Delhi and presented requests of Leather & Footwear Sector



Meeting with Dr. Amiya Chandra, Additional DGFT

Shri Sanjay Leekha, Chairman CLE and Shri Motilal Sethi, Regional Chairman (North), CLE called on Dr. Amiya Chandra, Additional DGFT on 3.3.22 and invited to grace LAFCAN 2022 scheduled to be held on 9.3.22 in New Delhi



Participation in QCO Review meeting

Shri Sanjay Leekha, Chairman, CLE participated in the QCO Review meeting of DPIIT chaired by Shri Rajeev Singh Thakur, IAS, Additional Secretary, DPIIT 9.2.22 and presented Leather and Footwear sector requests.



Participation in India – UK FTA Consultation meeting

Shri Sanjay Leekha, Chairman, CLE participated in the India-UK FTA Stakeholder Consultations virtual meeting chaired by Ms. Nidhi Mani Tripathi, IAS, Joint Secretary, Department of Commerce on 23.2.22 and presented requests of leather, leather products and footwear sector.



MEETINGS OF EXECUTIVE DIRECTOR, CLE

Shri R. Selvam, Executive Director, CLE participated in the virtual consultation meeting held by Shri S. Senthil Nathan, Director, Department of Commerce on 9.3.22 regarding Duty Free Tariff Programme of India for import from Least Developed Countries.



Indian Footwear & Leather Development Programme (IFLDP) 2021-26 – Notification & Guidelines issued on 03.03.2022

The Government of India has approved the Central Sector Scheme Indian Footwear and Leather Development Programme (IFLDP) with an outlay of Rs.1700 Crores for 5 years period 2021-26. The core objective of the IFLDP is to enable creation of world class infrastructure to cater to the exports and domestic market, facilitate additional investments into the industry via modernization, technology upgradation and capacity expansion, setting up of new units, address environmental concerns specific to the leather sector, promote Indian Brands, set up Design Studios in the country etc. The IFLDP consisted of six sub-schemes namely (1) Sustainable Technology and Environmental Promotion (STEP) – Outlay Rs.500 Crores (2) Integrated Development of Leather Sector (IDLS) – Outlay Rs.500 Crores (3) Mega Leather, Footwear and Accessories Cluster Development (MLFACD) – Outlay Rs.300 Crores (4) Brand Promotion of Indian Brands in Leather & Footwear Sector – Outlay Rs.100 Crores (5) Development of Design Studios – Outlay Rs.100 Crores (6) Establishment of Institutional Facilities – Outlay Rs.200 Crores.

The Department for Promotion of Industry and Internal Trade (DPIIT), Government of India has issued the Notification and Guidelines of the six sub-schemes on 03.03.2022.

Brief on the sub-schemes of Indian Footwear and Leather Development Programme (IFLDP) for 2021-26

(1) Sub-Scheme: Sustainable Technology and Environmental Promotion (STEP)

(i) Establishment or Upgradation of CETPs

The scheme would provide financial support to Leather Clusters to meet the prescribed pollution control discharge norms and would broadly cover the activities: (i) establishment/ /expansion/upgradation of CETPs (ii) Upgradation of constituent Primary Effluent Treatment Plants (PETPs) connected to concerned CETP (iii) Developing secure landfills (iv) conversion of waste into some by-products (v) any other techniques for hazardous waste management. The funding support would be @ 70% of the total project cost with a limit of Rs.200 Crore per CETP/project, with industry's/beneficiary share to be 30% of the project cost. For North-eastern Areas, funding support would be 80% of the total project cost, with industry's/beneficiary share to be 20% of the project cost. CSIR– Central Leather Research Institute (CLRI) would act as Appraising agency and also as Project Monitoring Consultant (PMC) for monitoring and concurrent evaluation, etc.

(ii) Preparation of Vision Document for Footwear & Leather Industry

The scheme would provide funding support for preparation of Vision Document which would serve as a guideline for the technological developments and policy directives to be made in the sector. The GOI assistance would be 100% of the project cost subject to a ceiling of Rs.5 crore. The Development Council for Footwear & Leather Industry notified by DPIIT shall be entrusted with the responsibility of preparation of vision document which would be prepared in stakeholders' consultations and view of various industry bodies would be suitably factored into the vision document.

(2) Sub-Scheme: Integrated Development of Leather Sector (IDLS) Scheme

This scheme proposes to incentivize investment and manufacturing by providing backend investment grant/subsidy for modernization/capacity expansion technology upgradation in existing units and also for setting up of new units. All existing units in the Footwear and Leather industry having cash profits for 2 years, undertaking modernization or capacity expansion or technology upgradation on or after 01.01.2020 are eligible for assistance. The assistance is available for the new units also. Financial assistance shall be considered for such projects in which (a) payments has been done and (b) machinery has been purchased and installed, on or after 01.01.2020. Assistance would be provided @ 30% of cost of Plant and machinery to MSME units and 20% to other units, subject to a ceiling of Rs.15 crores. For those units located in North-eastern areas, assistance would be provided @ 40% of cost of plant & machinery to MSME units and 30% to other units, subject to a ceiling of

Rs.15 crores. Additional 5% financial assistance would be provided for the domestically manufactured plant and machinery. CSIR-CLRI would be the Project Implementation Unit (PIU) for Tannery Sector, and FDDI would be the PIU for Footwear and Leather product Sectors.

(3) Sub-Scheme: Mega Leather, Footwear and Accessories Cluster Development (MLFACD)

The sub-scheme aims at world-class infrastructure and to integrate the production chain in a manner that caters to the business needs of the leather and footwear industry so as to cater to the domestic market and exports. This sub-scheme would provide infrastructure support for establishment of Mega Leather, Footwear & Accessories Clusters (MLFAC). The MLFAC may host production units of all segments namely leather, footwear, footwear components, leather goods including gloves, leather garments, saddlery & harness items. Graded assistance is proposed to be provided @ 50% of the project cost excluding cost of land (or @ 70% of the project cost if the project is in North-eastern areas). The maximum ceiling would be Rs.50 Crore (for land up to 60 acres), Rs.70 Crores (for land up to 100 acres), Rs.105 Crores (for land up to 150 acres) and Rs.125 Crores (for land more than 151 acres). DPIIT would be appointing a panel of professional agencies through tender process, to act as Project Management Consultant (PMC). DPIIT would be inviting proposals from all State / UTs by an open application process within a given time frame through a Public Notice.

(4) Sub-Scheme: Brand Promotion of Indian Brands in Footwear & Leather Sector

It is proposed to promote 10 Indian brands in the international markets

in 3 years. The GOI assistance is proposed to be 50% of total project cost subject to limit of Rs 3 crore for each brand, each year for the next 3 year to promote Indian brands. Eligible criteria to apply under this scheme is the unit should have (i) cash profits for last 3 years (ii) have minimum exports of Rs.50 Crores per year of products manufactured by them or having minimum of domestic sales of Rs.50 crores per year of products manufactured by them (iii) Indian Brands having registered logo in Indian/overseas market, undertaking viable brand promotion programmes. The eligible activities are (a) Displays in International Departmental Store (b) Publication of world class catalogues (c) Registration charges for Indian Brand / Logo overseas (d) Publicity campaign and Brand Promotion. The designated agency to implement the sub-scheme will be appointed by DPIIT. The designated agency may be an Institute like NID, NIFT, IBEF, IIFT or Institutes of similar standing.

(5) Sub-Scheme: Development of Design Studios

Assistance would be provided to develop Design Studios in the footwear & leather sector. The Design Studios will provide design support, technical assistance to artisans and MSME units, thereby upgrading their knowledge base, helping them to build their capacity to create employment or earn livelihoods and consequently upgrade their economic status. The Design Studios will dovetailing contemporary design with artisan's skills, provide incubation facilities to the budding entrepreneurs and assist in certification. Design Studios will be kind of 'one-stop-shop' providing a wide range of services: design, technical support, quality control etc. Institutes like FDDI, CLRI, NID, NIFT, IBEF, IIFT or institutes of similar standing may submit DPR to the PIU. The large units of the industry or group of industry can also be identified as beneficiary. PIU will be appointed by the DPIIT which may be an Institute like NID, NIFT, IBEF, IIFT or Institute of similar standing. GOI assistance under this scheme would be 50% of total project cost, subject to a limit of Rs.10 crores to each design studio. The share of the beneficiary would be balance 50% of the project cost.

(6) Sub-Scheme: Establishment of Institutional Facilities

This scheme aims at providing institutional infrastructure by way of upgrading the existing infrastructure in the campuses of FDDI, which has been granted the status of 'an institution of national importance' under the FDDI Act 2017. Setting up of International Testing Centre, Sports Complex, replacement of conventional light fixtures with LED lights and construction of girls' hostel in FDDI campuses are planned.

For scheme guidelines and Notification, please visit DPIIT website www.dpiit.gov.in and also CLE website www.leatherindia.org

DPIIT proposes to develop a digital portal exclusively for the IFLDP 2021-26 and all the sub-schemes would be operated via this proposed digital portal.

As the industry body, the CLE would be coordinating with DPIIT, Government of India and stakeholder organizations for implementation of the sub-schemes for growth and development of the entire leather, leather products and footwear industry. Industry members are welcome to contact CLE office(s) for clarification or guidance on the sub-schemes of IFLDP.

Deforestation and Conversion Free (DCF) leather from Indian Leather Industry

M Viswanathana & Balaji Velua,
Leather Working Group Auditor

L Nachiappab,
Director, I-Square

Anil K Sondhic
Managing Director, AKS Leather

I. Background

Deforestation involves conversion of forest land to farms, ranches, or urban use thereby degrading the forest lands which in turn results into major environmental concerns like biodiversity loss, climate change, depletion of carbon sinks, etc. In recently concluded COP26, deforestation is one of the major global megatrends that led to discussions halting deforestation and securing conversion-free supply chains by several countries.

Consumer priorities always take the centre stage in businesses and leather supply chain is no exception. A study conducted in 2020 by Darmstadt University, Germany concluded that “Participants not only were willing to pay a significantly higher price for an environmental friendlier and safer production but would pay even more to know the origin of the hides that were used.” Establishing a clear traceability system in the supply chain could be easier for consumer to make informed decision on purchasing a leather product and not contributing to deforestation.

I.1. Proposal within Europe and UK’s Environment Bill 2020 to ban imports linked to deforestation includes leather

As a major economy and consumer of commodities linked to deforestation and forest degradation, recently, the European Commission proposed a Regulation to minimise EU-driven deforestation and forest degradation to minimise consumption of

products coming from supply chains associated with deforestation or forest degradation. Businesses within EU will have varying degree of due diligence like collecting the geographic coordinates of the location where they were produced. The Environment Bill 2020 of United Kingdom prohibits larger UK businesses from using commodities associated with wide-scale deforestation.

I.2. Report of Stand.earth Research Group about linking deforestation with leather industry

Stand.earth Research Group, an NGO, has recently published a report on how the fashion industry is linked to rainforest destruction. According to the report the cattle industry is the single largest driver of deforestation of rainforests and of tropical forests globally. A study by World Resources Institute found that from 2001-2015m cattle accounted for 36% of tree cover loss globally and cattle replaced nearly twice as much forest as all other commodities combined.

I.3. ICT statement on deforestation

The International Council of Tanners (ICT) observes the global leather industry recognises the very significant issue of deforestation and is greatly concerned about the presence in its supply chain of raw materials sourced from illegally deforested regions of the world’s forests. To address this topic, ICT has taken collaborative action to ensure, as far as possible, that the leather supply chain does not contain hides sourced from illegally deforested areas. Furthermore, hides are of little importance to the meat value chain, representing as little as 0.8% of the animal’s value, and with up to 40% of hides simply thrown away.

I.4. Private standards by brands and leather manufacturers committing to deforestation free leather

Several brands, as a part of their sustainability targets, commit to source deforestation free leather. These commitments start from announcing policies to guide the sourcing departments to comply to those policies and further goes up to avoiding sourcing from select regions that might have link to deforestation. Examples are VF Corporation, Tapestry, etc. As a part of complying to commitments, several tanneries are also gearing to provide traceability and transparency of hides and skins supply through their supply chain.

I.5. Deforestation reduction through traceability by Leather Working Group

With aim of achieving deforestation and conversion free (DCF) leather, Leather Working Group (LWG) is working towards developing a detailed

traceability roadmap that will map those our targets and goals. LWG is working closely with NGO partners, National Wildlife Federation & World Wide Fund for Nature. Recently, LWG instituted a Traceability Working Group (TrWG) to develop the requirements and define a roadmap. The roadmap will cover further due diligence requirements related to deforestation, as well as new requirements to drive supply chains to trace their material prior to the slaughterhouse stage to the farm level.

2. Forest cover in India and its changes over the last 30 years

1.6. Forest cover in India: 2021 Assessment

India ranks number ten in the world for forested area but only 120th in terms of the percentage of land area under forest. The Forest Survey of India (FSI) conducted in 2021 estimates a total of 713,789 square kilometres of forest and tree cover, which makes up 21.71% of the land area. In terms of canopy density classes, area covered by Very Dense

Forest (VDF) is 99,779 sq.km (3.04%), Moderately Dense Forest (MDF) is 3,06,890 sq.km (9.33%) and Other Forest (OF) is 307,120 sq.km (9.34%). In the current assessment,VDF and MDF together constitute 57% of total cover of the country.

As per the United Nations, Food and Agricultural Organisation (FAO) India has gained its forest cover by 12.9% between the years 1991 and 2021 . India is now ranked 3rd in the world for annual net gain in terms of forest area.

1.7. India’s commitments to increase tree and forest cover

At the UN Framework Convention on Climate Change (UNFCCC) Conference of Parties (COP, 2015), India, under the Bonn Challenge committed to the goal of restoring 13 million hectares (mha) of degraded and deforested land by 2020 and an additional 8 mha by 2030. As part of India’s nationally determined contributions (NDC) as well as national forest policy goals, India plans to boost tree cover to 33% of its land area. The Indian government is pursuing afforestation and reforestation through policies and programmes such as the National Mission on Green India, the National Afforestation Programme, compensatory afforestation, and plantation drives across States. In the Union Budget 2020-21, the overall allocation for the Union Ministry of Environment, Forest and Climate Change (MoEFCC) has increased to ₹31,000 million for 2020-21 from ₹26,579.4 million in the revised estimate of 2019-20, a significant portion of which is expected to be channelled to the integrated development of forest ecology .

Besides protection of existing forests,afforestation is the second major activity undertaken by the state forest departments for regenerating the degraded forests and bringing more areas under forest and tree cover.

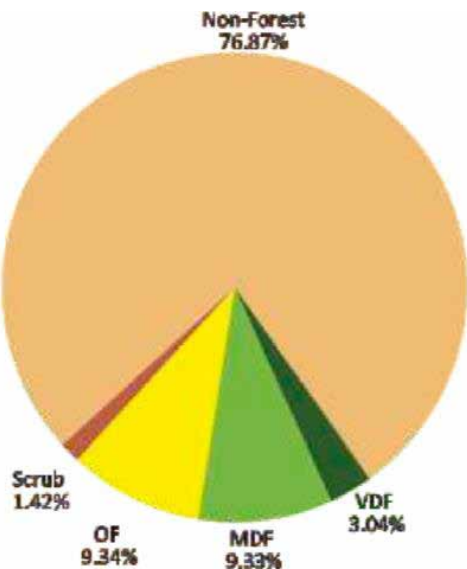


Figure 3:A representative forest in Western Ghats in India

1.8. Compensatory Afforestation Fund Management and Planning Authority (CAMPA)

The Compensatory Afforestation Fund Management and Planning Authority (CAMPA) was established in 2009 as a National Advisory Council for the monitoring, technical assistance and evaluation of compensatory afforestation activities. It is meant to promote afforestation and regeneration activities as a way of compensating for forest land diverted to non-forest uses.

1.9. National Mission for a Green India (GIM)

One of the eight national missions of the government under its National Action Plan on Climate Change, GIM is a 10-year program aimed at improving the quality of five million hectares of degraded forests and bringing another five million hectares of non-forest areas under forest cover through social and farm forestry.

1.10. National Afforestation Program (NAP)

The NAP Scheme aims to support the ongoing process of devolving forest protection, management, and development functions to decentralized institutions of Joint Forest Management Committee (JFMC) at the village level, and Forest Development Agency (FDA) at the forest division level. The overall objective of the scheme is to develop the forest resources with people's participation, with a focus on improving the livelihood of the forest-fringe communities, especially the poor.

3. Legal Provisions in India and Government Policy Initiatives

Following list of laws and policies enacted since Independence with further amendments time to time ensures preventions of biodiversity losses, climate change and other losses due to deforestation.

The Ministry of Environment, Forest and Climate Change (MoEFCC) Is the nodal agency in the administrative structure of the Central Government for the planning, promotion, co-ordination and overseeing the implementation of India's environmental and forestry policies and programmes.

Act	Extract
The Indian Forest Act, 1927	Sought to consolidate and reserve the areas having forest cover, or significant wildlife, to regulate movement and transit of forest produce, and duty leviable on timber and other forest produce. Defines the procedure to be followed for declaring an area to be a Reserved Forest, a Protected Forest, or a Village Forest. Defines forest offence, prohibitions in a Reserved Forest, and penalties leviable
Forest Conservation Act, 1980	Slows down deforestation caused by the conversion of forestlands to non-forest purposes. Under this Act, no State Government can authorise such conversion without securing Central Government's approval
The Biological Diversity Act 2002	Creates a three-tier structure of authorities to manage the biodiversity of the country. This includes the National Biodiversity Authority (NBA), the State Biodiversity Boards at the state level and the Biodiversity Management Committees at the local level
National Forest Policy, 1988	Protects the forest and forest related activities. Ensures environmental stability and maintenance of ecological balance including atmospheric equilibrium which are vital for sustenance of all life forms, human, animal and plant .
National Environment Policy, 2006	Emphasises conservation of resources, and points that the best way to aid conservation is to ensure that people dependent on resources obtain better livelihoods from conservation, than from degradation of the resources
The Environment Protection Act, 1986	Under the Act, the Central Government is vested with power to take all such measures, as it deems necessary or expedient for the purpose of protecting and improving the quality of environment and preventing, controlling, and abating environmental pollution. Though these Acts do not have specific action points on biodiversity, their liberal interpretation and use can have wide implications for biodiversity conservation
Wildlife Protection Act, 1972	Is the single most significant statute on wildlife conservation in India. Under it, over five hundred National Parks and Sanctuaries termed protected areas (PAs) in common parlance (though this is not a legal term), have been created or given legal protection
Cattle Trespass Act, 1871	The cultivator or occupier of any land, or the vendee or mortgagee of such crop or produce, may seize or cause to be seized any cattle trespassing on such land, and doing damage to any crop or produce and to the pound established for the village in which the land is situated
National Conservation Strategy and Policy Statement on Environment and Development, 1992	To stop over-grazing, dwindling of forest wealth, over-exploitation both for commercial and house-hold needs, encroachments, unsustainable practices including certain practices of shifting cultivation and developmental activities such as roads, buildings, irrigation and power projects, the national conservation strategy and policy focuses on restoration and reclamation of degraded areas including weed infested areas, mined areas, grazing lands and salt affected soils (i) Promotion of stall feeding and rotational grazing (ii) Restoration and protection of grazing lands

1.11. Rules Regulating the Grazing of Cattle

Most of the States have also formulated rules regulating the grazing of cattle in the reserved forest and to other forests or lands that Conservator of Forest of the state may direct. Under the said Grazing rules areas that are open to grazing are earmarked. Further, grazing is prohibited in certain blocks in accordance with the working plans of the said area. The rules also provide for grant of permit for grass cutting and the conditions on felling or lopping of any tree.

4. Animal farming practices Vs afforestation in India

1.12. Animal farming as a household practice in India

Livestock sector is an important sub-sector of agriculture in Indian economy. It forms an important livelihood activity for most of the farmers, supporting agriculture in the form of critical inputs, contributing to the health and nutrition of the household, supplementing incomes, offering employment opportunities, and finally being a dependable “bank-on-hooves” in times of need. In rural households in India, 11.9% of income comes from animal farming, while the same is as high as 25.9% for those having less than 0.01 ha of land.

About 75 percent of the Indian rural households are keeping the livestock out of which, the resource poor farmers own nearly 80 percent of the livestock. Farming households with some cattle head are better able to withstand distress due to extreme weather conditions. National Sample Survey Office's (NSSO) 70th round survey showed that more than one-fifth (23 per cent) of agricultural households with very small parcels of land (less than 0.01 hectare) reported livestock as their principal source of income.

1.13. Livestock Rearing – Cause & Effect

In just two per cent of the world's geographical area, India accounts for 15 per cent of the world's livestock population. Agriculture, including livestock rearing, is of prime importance to India as more than 70 per cent of the country's population subsists solely on agriculture. Therefore, natural grazing lands and cultivated fodder crops are of prime importance and development of forage production systems is vital for livestock maintenance and sustenance.

Farmers and the cattle owners including the pastoral community had practiced the free grazing system of allowing the cattle on their own agricultural land, besides leaving the livestock population to common pasture lands and forests for grazing.

In the Indian context, livestock production is a mixed crop-livestock system, where nearly half of the feed and fodder derived both by large and small ruminants is through grazing on post-harvest stubble and being stall fed crop residues, and the balance from grazing on other lands traditionally constituting common property resources. Minimal quantities of fodder and feed are purchased. In fact, studies indicate how in semi-arid agro-ecological regions, 60% of all fodder resources for ruminants – large and small – is derived from crop residues that are either grazed or hand cut and fed. Even pastoralists in India, whose primary livelihood is from livestock extensively grazed, graze their animals on harvested crop fallows as also traditional ‘grasslands’.

S. No	Species	Number (in millions)	Ranking in the World Population
1	Cattle	192.49	Second
2	Buffaloes	109.85	First
	Total (including Mithun and Yak)	302.79	First
3	Sheep	74.26	Third
4	Goats	148.88	Second
5	Pigs	9.06	-
6	Others	0.91	-
	Total livestock	535.78	

1.15. Grazing practices

Grazing in forest areas are regulated with the involvement of the community. Special conservation areas, young plantations and regeneration fully protected. Adequate grazing charges are levied to discourage people in forest areas from maintaining large herds of non-essential livestock. The rights and concessions, including grazing, always remain related to the carrying capacity of forests. The capacity itself is optimised by increased investment, silvicultural research and development of the area. Stall-feeding of cattle & rotational grazing (regenerative concept) is encouraged. The requirements of the community, which cannot be met by the rights and concessions so determined, are met by development of social forestry outside the reserved forests.

However, at the time of drought grazing shall be allowed at selective regions of the Reserved Forests with appropriate permits granted by the Forest Officer in charge. Such grazing permits also include free cutting and removal of the grass however prohibits the usage of bill hooks, felling of trees etc. The number

& size of the cattle is restricted if it exceeds the grazing capabilities of the forest. Also, the restriction is imposed in the region where the plantation is not old enough to be attacked by the cattle. Grazing is allowed usually with the issuance of permits that will restrict the details. Collector has discretionary powers to either allow or disallow certain group with and without payment of fees wherever necessary .

1.16. Government supported fodder development programmes

To supplement the states on feed and fodder development, the Accelerated Fodder Development Programme (AFDP) envisages fodder production through promotion of integrated technologies and process for enhancing the availability of green and dry fodder.

This programme supports in the contingency planning to overcome the shortage of fodder that is caused by natural calamities such as droughts and floods. The interventions in the post-harvest technology adds to the availability of fodder during the lean period & protects the environment from over grazing of agricultural lands by animals and from the pollution due to the burning of these crop residues . These programmes of central and state Government help protecting the forest land degradation. Under the Mission on Fodder and Feed Development, forage production from non-forest wasteland, rangeland, grassland and non-arable land has been increased by about 6 times and forage production from forest land is reduced by one third during 2020.

1.17. Large scale animal farms

There are few large-scale dairy farms promoted by Government and private agencies in few parts of India. There are also few goshalas managing the stray cattle for providing shelter and food. These are not located in forest lands and feed to those animals are grown within the farm or brought from nearby agricultural stubbles. However, these contribute a small portion of animal farming compared to the huge animal population in India.

5. How Indian Leather Industry can demonstrate the Leather is DCF

The immediate solution for demonstrating the leather is deforestation and conversion free is by having traceability of the raw hides and skins that are traceable to the source. With the information on traceability, the manufacturers, suppliers and brands will have informed sourcing of raw materials, thus eliminating of materials that are linked to deforestation.

1.18. Issues related to traceability in India

The slaughter practices in India are highly decentralised primarily considering the demographic, cultural, logistics practices prevailing and as well due to the non-industrial farming practices in India. The raw hides and skins are generated almost in every village, town, or city throughout the country. The network of collection of raw hides and skins is unique and several people are engaged at different levels. The following diagram broadly explains the raw hide and skin collection system in India.

Because of the fragmented generation of raw hides and skins, and involvement of several middlemen, traceability of raw hides and skins has been a challenge for tanneries in India.

1.19. Traceability of hides and skins by LWG protocol

Realising the challenges in traceability of raw hides skins in India, the current LWG Protocol allows 'regional traceability'. However, the traceability score for such regional traceability is only 60% as against physically marked traceability up to slaughterhouse can get the maximum score of 100%. Leather manufacturers and traders of raw hides and skins are expected to declare their geo-references of warehouses and the raw material collection radius in kilometres. The tanneries are expected also to demonstrate the procurement of raw skins and hides using the tax invoices and electronic waybill documentation.

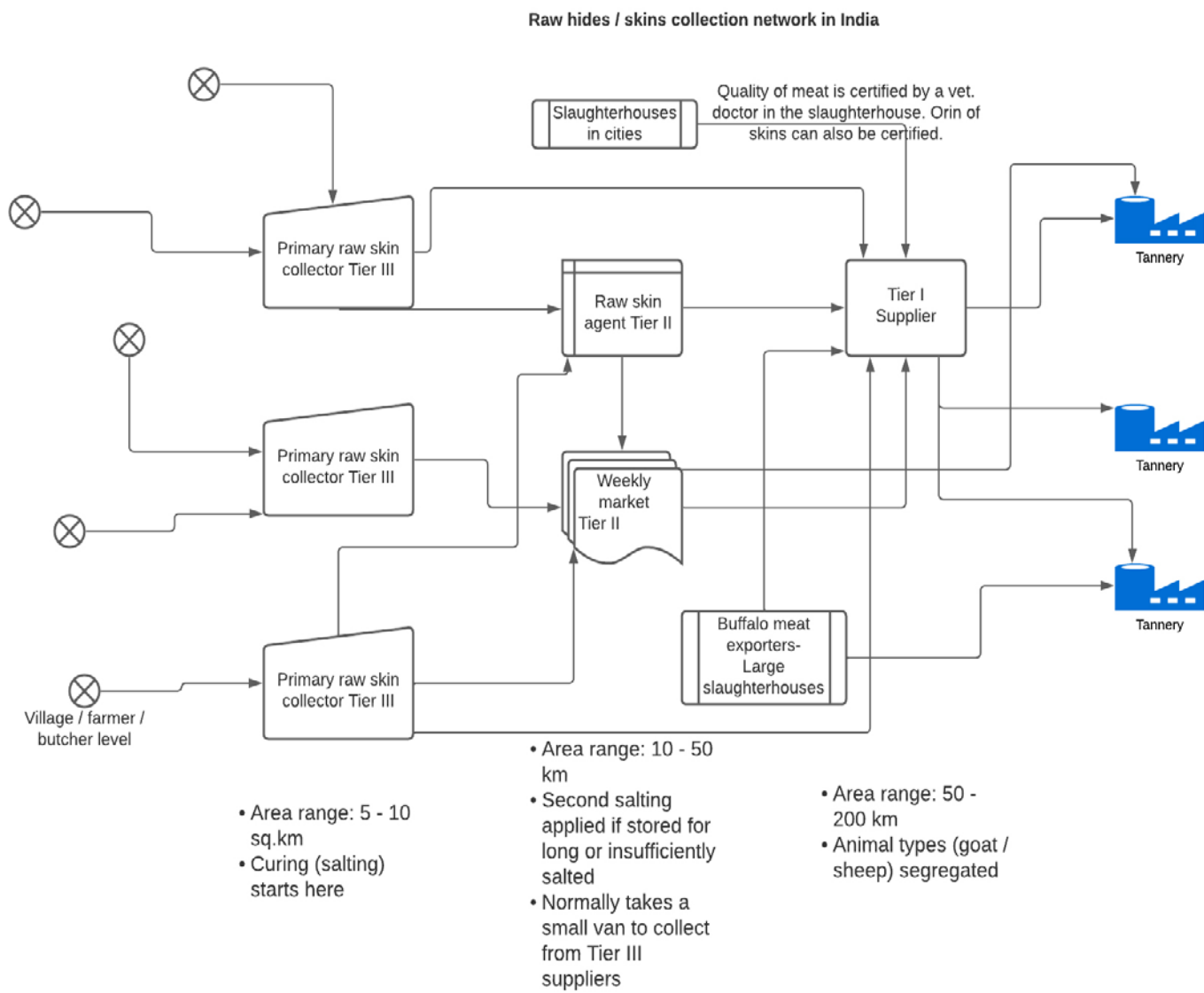
With an aim to further continue the traceability even in semifinished to finished leather manufacturers, the LWG protocol encourages 'outgoing material traceability'. The supplier data and thus the origin details (traceability) are tracked through the production until the dispatch of finished leather.

The tanneries in India should make use of traceability systems as required by LWG to the extent possible up to the slaughterhouse level to demonstrate the Deforestation and Conversion Free (DCF) leather.



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1.20. Other initiative of leather industry

To supplement, there is an example of the leather industry in Dindigul of Tamil Nadu state in India contributing to afforestation by creating social forestry that uses a portion of treated effluent from the tannery sector along with treated sewage from the City Corporation. This social forest extends to about 18.6 ha of land using 400 m3 of treated effluent per day from the TALCO DINTEC CETP.



Figure 5: Social forest developed by CETP, Dindigul



Figure 6: A view of tree plantation in the social forest

6. Conclusion

Cattle are mostly fed using post-harvest stubble and being stall fed with crop residues, and the balance from grazing on other lands traditionally constituting common property resources. There are not any known or registered restricted biomes nor any organized industrial farming in forest land in India and there is no history of forest destruction due to grazing. This proves that animal hides of Indian origin have no connection with deforestation.

As per the United Nations, Food and Agricultural Organisation (FAO) India has gained its forest cover by 12.9% between the years 1991 and 2021. India has added to forest cover and not contributing deforestation. Despite challenges in slaughterhouse traceability, Indian tanneries are now possible to demonstrate the regional traceability. Thus, the regionally traceable leather from India can safely be concluded as deforestation and conversion free (DCF) leather.

The views expressed are of those authors only and not necessarily shared by their organizations.

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UNION BUDGET 2022-23 HIGHLIGHTS

The following are the highlights concerning leather, leather products and footwear sector in the Union Budget 2022-23 presented by the Hon'ble Union Minister of Finance Smt. Nirmala Sitharaman, Government of India today.

Duty Free Imports (BCD exemption)

1) Vide Serial No. 257 B of Customs Notification No. 2/2022 dated 1.2.22 (copy enclosed), Basic Customs Duty (BCD) exemption is provided for import of notified inputs like fasteners, inlay cards, lining and inter-lining materials, wet blue chrome tanned leather, etc. by bonafide exporters to be used in manufacture of textile or leather garments meant for exports.

2) Vide Serial No. 257 C of Customs Notification No. 2/2022 dated 1.2.22, Basic Customs Duty exemption is provided for import of specified items like buckles, buttons, locks, wet blue chrome tanned leather etc. by bonafide exporters to be used in manufacture of leather or synthetic footwear or other leather products meant for exports.

The above imports are subject to the following conditions, as specified in Customs Notification No. 2/2022

CONDITION No. 108 : If the items manufactured using the imported goods are exported by the importer within six months of the date of the import of the said imported goods.

CONDITION No. 9 : If the

importer follows the procedure set out in the Customs (Import of Goods at Concessional Rate of Duty) Rules, 2017.

Customs (Import of Goods at Concessional Rate of Duty) Rules, 2017 have been amended vide Customs Notification No. 07/2022 (NT) dated 1.2.22 (copy enclosed)

Other announcements

- Vide S. No. 439 of notification No. 50/2017-Customs, concessional BCD rate of 5% is prescribed on machinery used in the leather or footwear industry, falling under Chapter 84, 85 or 90. On review, this entry would be omitted with effect from 1st April, 2023 [S. No. 113 of notification No. 2/2022-Customs, dated 1st February 2022 refers]. Consequently, these goods will attract an applicable BCD rate, with effect from 1st April, 2023
- Serial No. 288 of Customs Notification No. 50/2017 allows Basic Customs Duty exemption for import of lining and interlining materials by leather garment exporters to the extent of 2% of FOB value of exports in previous year. This S. No. 288, having been subsumed under new S. No. 257B, is being omitted. (Serial No. 75 of Customs Notification No. 2/2012 dated 1.2.22 may be referred)
- Vide S. No. 396 of notification No. 50/2017-Customs, NIL BCD rate is prescribed on 'machinery or equipment for effluent treatment plant for leather industry' falling under Chapter 84 or any other chapter. On review, this entry is being omitted with effect from 1st April, 2022 [S. No. 98 of notification No. 2/2022-Customs, dated 1st February 2022 refers]. Consequently, these goods will attract an applicable BCD rate, with effect from 1st April, 2022
- The date for commencement of manufacturing operations for newly incorporated domestic manufacturing companies for availing concessional corporate tax of 15 per cent has been extended from 31st March, 2023 to 31st March, 2024.
- Along with proposed reforms in SEZs, reforms in Customs Administration of SEZs will be undertaken and it shall henceforth be fully IT driven and function on the Customs National Portal with a focus on higher facilitation and with only risk-based checks. This will ease doing business by SEZ units considerably. This reform shall be implemented by 30th September 2022
- Emergency Credit Line Guarantee Scheme (ECLGS) will be extended till March 2023.
- Concessional BCD rate of 2.5% on 'Myrobalan fruit extract (3201 90 20) notified vide S. No. 233 of notification No. 50/2017 removed w.e.f. 2.2.22



Currency Forecast Report for March 2022- By Ritesh Victor

USDINR

Financial markets continue to be nervous and panicky about the confrontation between Russia and Ukraine. Global equities have collapsed, bond yields have plummeted, gold and dollar (safe haven assets) have surged on a massive risk aversion. Interesting formations on the daily USDINR candlestick chart. A long standing price gap got filled up - the gap of 75.82 (20 Dec'21) to 75.7450 (21 Dec'21) – coloured in red dashed horizontal lines. Goes on to emphasize the significance of price gap closing in USDINR daily charts. There are some price gaps that are yet to be closed: from 74.73 (23 Feb'22) to 75.0225 (24 Feb'22) – purple horizontal lines, and from 73.9750 (13 Jan'22) to 74.04 (14 Jan'22) – green horizontal lines. Last candlestick has long upper and lower shadows: in a trend of rising prices, such a candlestick tends to suggest indecision among market participants and could be the first sign of a reversal.

Technically speaking, the price gaps indicated above should close – suggesting a move towards 75-74 figure. USDINR Spot around 76.96-77 are all time high levels last seen in April 2020. Would recommend dollar exporters to gradually increase their hedge ratios – partially forward sell your dollars. Forward premiums have come back to usual levels – 4.1% - 4.5% annualized. Dollar importers can hold on for a while – let the pair cool off and find a stable footing. First target to hedge for importers for immediate term will be around 75.30-40. Increase hedge ratios if Rupee gains towards 74.80-90. In addition to forwards, vanilla options should also be used - despite large



volatility in the spot prices, options volatility has increased only a bit and hence lower option premium cost.

Emerging market currencies weakened and our beloved Rupee continues to be under pressure. USD/INR remains close to weakest level, the latest loss of footing takes clues from strong oil prices as India's trade deficit widens. That said, crude oil prices have refreshed their peaks at \$140/barrel. It's worth noting that India's trade deficit rose to \$21.19 billion from \$13.12 billion recorded in February 2021. The month starts with GDP numbers for Q3 and Fiscal deficit numbers. GDP is expected to slow down to 6.0 % from 8.4 % previously. Indian markets will remain closed on 18th March for a local holiday. The Federal Reserve will launch a new monetary cycle at the mid-March meeting. The Fed chief said he supported a 25-basis-points interest rate increase at this month's meeting and indicated his willingness to move more aggressively by raising the rates by more than 25 basis points at one or more meetings if inflation does not come down later this year.

URUSD

The member of ECB council Klaus Knot stated that he expects the European Central Bank to increase rates in the last quarter of this year, including that he



promote winding down the program of asset purchasing as quickly as possible. Russia-Ukraine tension will pile up the pressure on the pair. The major events in the upcoming month include German Manufacturing PMI (Feb), German Unemployment Change and CPI (YoY), Deposit Facility Rate (Mar) and ECB Interest Rate Decision (Mar). The euro has been very volatile in the past week as the massive moves were driven by the Russian invasion of Ukraine, and also due to the change in the interest rate differentials. The Euro has moved all over the chart during the course of the trading week, as it went through breaking lows and then bouncing back.

All things considered this market will continue to be very volatile as the Russian invasion continues and there are concerns it might spiral into something much larger. It looks the traders are coming to terms with the fact that a larger continued war is unlikely.

The chart indicates that \$1.08 handle is worth paying close attention as it has been an important support region in the past but if we were to break down from there again, a possibility of a big lower move opens up. Alternatively, if the market bounces back into a rally, it will encounter significant resistance near the \$1.15 handle and above since it has been a very resistive region from the past. After considering all the evolving factors forex market participants need to be very cautious when it comes to Ukraine as it will continue to create a lot of headline noise in the foreseeable future. We believe the pair might be headed for the downside not only due to the war but also because of the interest rate differentials which always seem to favor the US dollar.



GBPUSD

GBP/USD fell 0.2% this month, pair registered its biggest weekly loss in the last week of month for the pair since Nov 21 amid geopolitical tension between Ukraine and Russia, continuous surging crude prices also remained a pair for the sterling. Pair made a high of 1.3643 and went as low as 1.3269 in February. In our view, again Russia and Ukraine will be the key driver for the pair in upcoming days.

Going ahead Market participants will be eying on Fed Interest rate decision which is expected to be out

in the mid of month. It's a quiet month for the pair – Composite PMI and Manufacturing production is set to release in the start of the month. While claimant count change is scheduled for mid of the week along with BOE Interest Rate decision - A higher than expected rate is positive for the GBP, while a lower than expected rate is negative for the sterling.

In the short term, if the Russia-Ukraine crisis worsens we can expect a flight to safety, leading to a weaker Pound (and stronger dollar) and a probable attempt towards 1.30 support. If the tensions subside, we can expect an attempt towards the 1.35-1.38 region. However, we should keep in mind that this market will be dominated by the risk appetite most. Another thing difficult to ignore is downtrend which is still holding. This chart indicates that we should continue to expect volatility, but the best bet could be shorting this market on the shorter time frames and the longer-term trader could pay attention to the \$1.32 handle. We can expect some recovery in the pair before it ultimately falls.

USDJPY

Japanese economic health has further declined as the factory output, industrial production and retail sales fall along with a small increase in the inflation levels (though still below Bank of Japan's target of 2%). The Ukraine-Russia war has taken its toll on the forex market but safe-haven Japanese Yen has held steady unlike the major currencies which have tanked as the risk-averse sentiment sets in deeper.

Investors' eyes would be on the major central bank meetings in mid-March.

In 2022 so far, Yen has touched levels last seen in Jan 2017 twice. First on Jan 1, post that some consolidation was seen which gave it some strength to aim again for 116.36 on Feb 10. All the charting was within the upward sloping channel (yellow and orange lines) since 2021 beginning. Since the end of January, a formation of head and shoulders pattern (H&S) is visible as marked in blue. H&S pattern is technically bearish and the fall in the price of the currency pair can be seen to the extent of the height of the head to the neckline-marked in white line. See the white dotted line – a fall towards 114.30 – also coinciding with the 100 day moving average (red line) and then further towards 113.36 – orange line – which is a support line connecting



points of January and September 2021. Thus immediate supports are seen at 114.30 and 113.36. Dollar index is at its 52-week high, and that can dampen the Yen bulls hope.

Resistance for the USDJPY pair are seen at 117.53 and 118.20.

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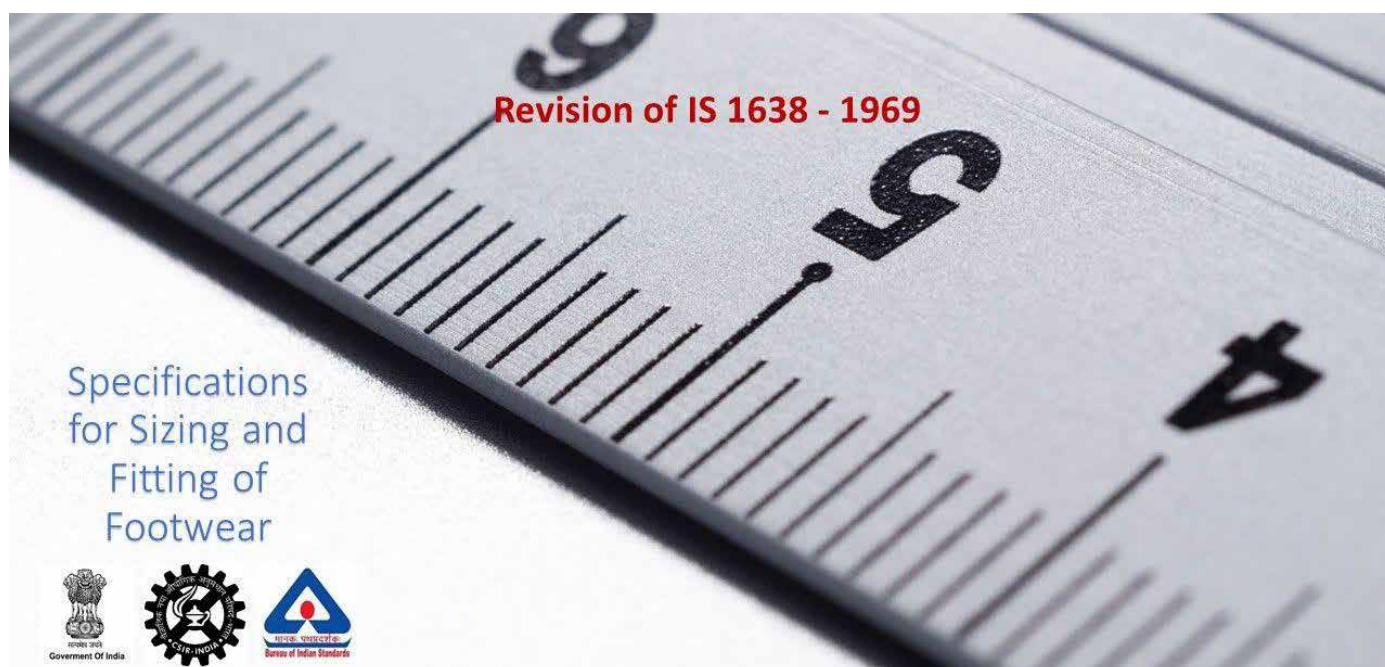


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DEVELOPMENT OF INDIAN NATIONAL FOOTWEAR SIZING SYSTEM

Revision of IS 1638 – 1969



DPIIT & CSIR-CLRI endeavour supported by the Council for Leather Exports and other trade bodies

Need for an Indian National Footwear Sizing System

- Design of footwear is a complex, multidisciplinary task spanning many fields of Science and Engineering. Comfort of a shoe and proper foot health is ensured by a proper footwear size.
- For very long, INDIA has been following the British Shoe Sizing System with equivalents to the European and American sizes.
- The Indian consumer is getting increasingly aware about FOOT Comfort and Foot Health. Not always do the English sizes fit the

shoe.

- In the absence of an India specific 'Footwear Sizing System', it is imperative that an 'Indian Footwear Sizing system' be developed based on the Foot Dimensions of the Indian feet.
- CSIR-CLRI under the aegis of Department for Promotion of Industry and Internal Trade, Government of India, Ministry of Commerce is conducting a nationwide survey for reliable data on foot dimensions of the Indian population using 3D Digital Imaging technique to establish the Indian Footwear Sizing System.
- The Indian National Footwear Sizing System that is being developed will help the populace to get well fitting shoes that adhere to the contours of their feet thus ensuring perfect fit and comfort and also prevent foot debilitations.

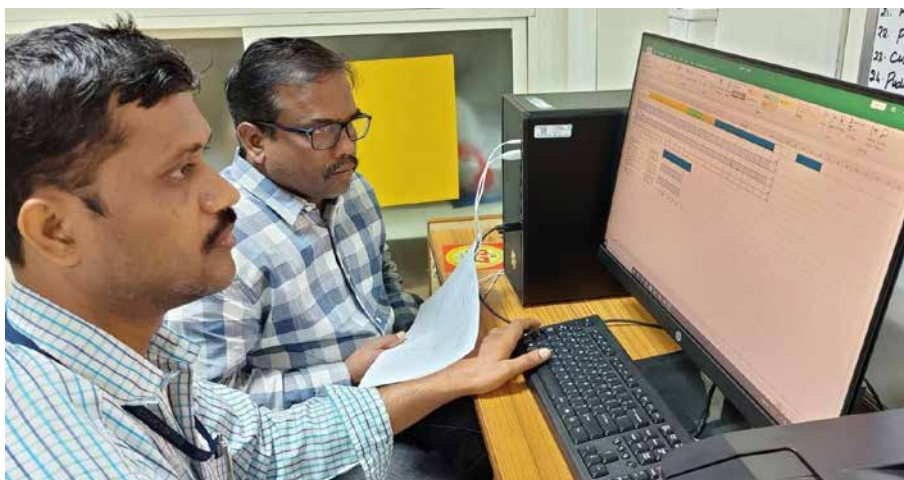
Knowledgebase/CSIR Strength:

- Anthropometric zonation of the country based on geographical, ethnic, social and biological variables.
- Selection of locations for measurement representative of the foot profile of the entire country's population including 'Rural' and 'Urban' representation.

- Scientific knowledge of the 'Foot Parameters' and "Foot Proportions" required to model the Indian Feet, that is, Foot Anthropometry.
- Adoption of the latest state-of-the-art 3D Scanning Technology to capture the Indian Feet 'digitally' and in 'three dimensions.'
- Statistical algorithms and techniques to analyze the foot data collected and identify the length, width ranges required to cover the need of the local population for footwear, to define proportions and rules for constructing footwear which would be well-fitting for the Indian population and provide for better foot health and comfort.
- The BIS Standard for Footwear Sizing was formulated in the Year 1969 and there is no footwear sizing system catering to the current demographic profiles of the Indian Feet. Therefore, by harnessing the CSIR/CLRI Strengths - the New Footwear Sizing System would be established and would be called as "IS 1638:2022."

Way forward:

- The "comfort" of a footwear and proper foot health is ensured by a proper "last" which is the 'basic building block' on which the footwear is made.
- To arrive at the "last" parameters it is imperative that anthropometric investigations of the feet be undertaken.
- There is no 'Indian Footwear Sizing System' that is based on authentic measurements of the Indian feet, it is imperative that an 'Indian Footwear Sizing system' be developed based on the Foot Dimensions of the Indian feet.



Data being received from the various districts in the five major zones

- This is essential because footwear that is currently made in India is made on adapted systems from other geographical locations, and this can never be comfortable for our feet as they have foot characteristics which are very different from Indian feet.
- Hence, we have embarked on a project to successfully capture the foot data, statistically analyse the data and evolve the 'Footwear Sizing System' for the Indian feet.



Checking of the image files being done at the HUB at the Design and Fashion Studio

Scope of the Project

- The main objective of this foot survey would be to collect data on the anthropometric properties of the population's feet. It is expected that the survey would:
 - o Highlight the differences among various ethnic groups and geographic areas - if they exist or prove that no differentiation exists when the footwear is produced and supplied anywhere pan India

- o Establish and define characteristic age and size groups requiring specific attention when footwear is designed for them
- o Specify measurements to be used for marking sizes of footwear, establish size ranges providing the required coverage of the population with correct and well-fitting footwear
- o Enumerate rules and numerical databases for designing well-fitting footwear for the Indian Population.



Data being segregated zone-wise

Measurement Methodology

- The measurement methodology would consist of a high precision, fully automated laser based 3D Foot Scanning equipment where the subject's feet would be captured as 3D Digital images. The software embedded into the system would automatically compute about fourteen foot measurements computed from the various anatomical landmarks of the foot from the 3D digital images of the foot captured by the scanning device.
- The software would automatically write down the captured foot dimensions and the statistical investigations would then be carried out to arrive at the Indian Footwear Sizing System which would be final deliverable of the project.

PRESENT STATUS:

- National Sample Survey Office, Ministry of Statistics and Programme Implementation, Government of India(NSSO) has advised the 'sampling locations for the foot measurement survey' covering seventy-nine locations pan India with a total of 1,01,880 measurements in five zones (North Zone; Gangetic Basin Zone; North East Zone, West Zone and South Zone).
- CSIR-CLRI has on-boarded synergy partners including industry associations, leading footwear institutions and the sister laboratories of CSIR who will be closely associated in this project.
- The 3D Foot Scanners (for Digital Image capture of the Feet) have been procured and hands-on training on the setting up of the equipment, calibration, image capture, file saving, checking of data coherence and data transfer has been completed for all team members across the country.
- To help in efficient data capture and analysis, the zones and further sub divided into age and gender groups and the Teams, pan India have been mandated to carry out foot measurement surveys at various locations in schools, colleges, factories and housing societies.
- 'Field work' will be undertaken with 28 teams fanning out to the 79 locations identified. The survey is likely to be completed between 3-4 months from its commencement and the project completion is envisaged by June 2022 or slightly beyond in case of unseen circumstances owing to COVID and non-reopening of schools.



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आप निर्यात पर ध्यान केन्द्रित करें, हम जोखिम से रक्षा प्रदान करेंगे. • You focus on exports. We cover the risks.

The Design Needs of the Indian Leather Sector:

“Raising Indian Design Education and Expertise to Global Standards of Excellence



Design and Fashion Studio (since inception in August 1993) has been addressing the following areas of the design needs of the Indian Leather and Leather Products Sector:

1. **Shoe Styling Course:** A unique pattern-making programme including with CAD was offered as early as 1994. Soon after the staff of CLRI were trained on foreign soil, within six months, the shoe styling programme was structured and this was very successful for ten years with 160 design students trained. With one staff member leaving CLRI and with competition from institutions like FDDI, NIFT and CFTI who offered a similar programme at one-fifth of the course fee; CLRI moved on to offer 3D Shoe Design Course.
2. **Fashion Forecasting for Leather and Leather Products:** Gaining berth at MODEUROP in Year 1994, there was no looking back for the Design and Fashion Studio at CLRI. For 28 years, CLRI has been providing seasonal trends and forecasts and colour cards for the discerning members of the Indian Leather and Leather Products Industry.
3. **Customized Colour Cards:** Industry started seeking CLRI's advice on developing customized colour cards for individual companies and CLRI conceptualized colour cards for the members at a fee. Customized colour cards were developed for over 50 companies and these include: TATA, PKL, CHEVRO, RR, PAKKAR, NMZ, FORWARD, SHAFEEQ SHAMEEL, FLORENCE among others.
4. **Customized Shoes/ Retail:** CLRI supported brands like H&S and KETHINI in conceptualizing shoe designs and also providing 'customized shoes' through retail.

5. Design Juror: CLRI Design and Fashion Studio has been an international juror at all major international fairs in Hong Kong, China, Italy and in India and gained immensely in knowledge.
6. CLRI Trend & Technology Trend seminars/ outreach programmes: Invited by the Industry associations, CLRI has been continuously presenting trend and technology seminars at the major leather centres in the country as well as overseas.
7. Technical design: With added strength from technology foundation in design including gait analysis studies, last scanning, 3D foot survey; CLRI remains a step ahead in technology design interventions as well.

These make the CSIR-CLRI Design and Fashion Studio unique. CLRI Design and Fashion Studio can today be the HUB of Design Activities in our country and connect with all other Institutions through networking. Challenges remain in areas that include: man power, training & re-training of staff on foreign soil and a state-of-the-art Design Studio. CLRI must remain ahead of the Industry and Institutions for a vantage position in this area.

Conceptual Design | Design and pattern Development | Product Development Cell | 2D & 3D CAD | Sample Development | Brand Building | Marketing | Training | Domestic market | Subscription to Memberships & Magazines | Bringing out Newsletter and Magazines | Trend Conferences | Leather Incubator | Creation of Collections | Trend Forecasting | Innovation in Design



Trend dissemination at the Design & Fashion Studio, CSIR-CLRI

Before dwelling upon the Design Needs of the Sector ‘activity – wise,’ the following pie diagrams will help us understand the current status/ scenario of the Indian Leather Sector in the field of Design for Leather and leather products.

In a globalizing economy, **design** is being perceived as a **new engine of economic and industrial growth**.

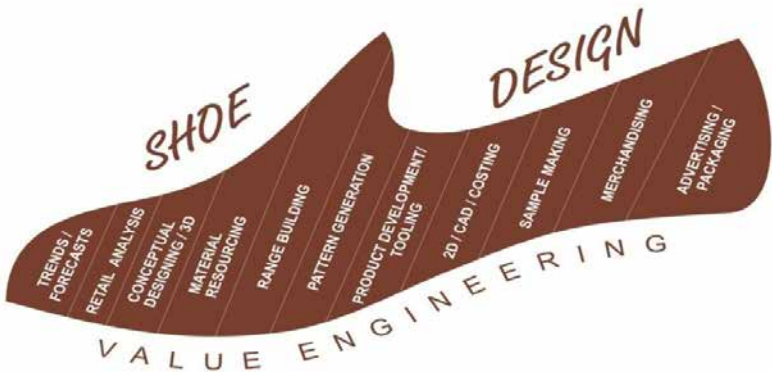
Design and breakthrough innovations can play a pivotal role in positioning of Leather and Leather Product industries in the global arena by value addition apart from enhancing competitiveness.

“Success in being able to work with **high-end customers** requires building design capabilities that enable us to **offer exciting collections** that can compete internationally.”

A lot of attention is to be paid to honing ‘Design’ capabilities, introduce technologically advanced tools to aid in the ‘design process’ and to develop ‘merchandizing’ expertise amongst our product design teams in the footwear companies.

From ‘concept’ to ‘market’ encapsulating the stages of Product Engineering in a value chain.

(PS: For the sake of simple understanding and illustration a shoe pie diagram is interpreted while the Design Needs addresses all segments of the Leather Industry and is generic)

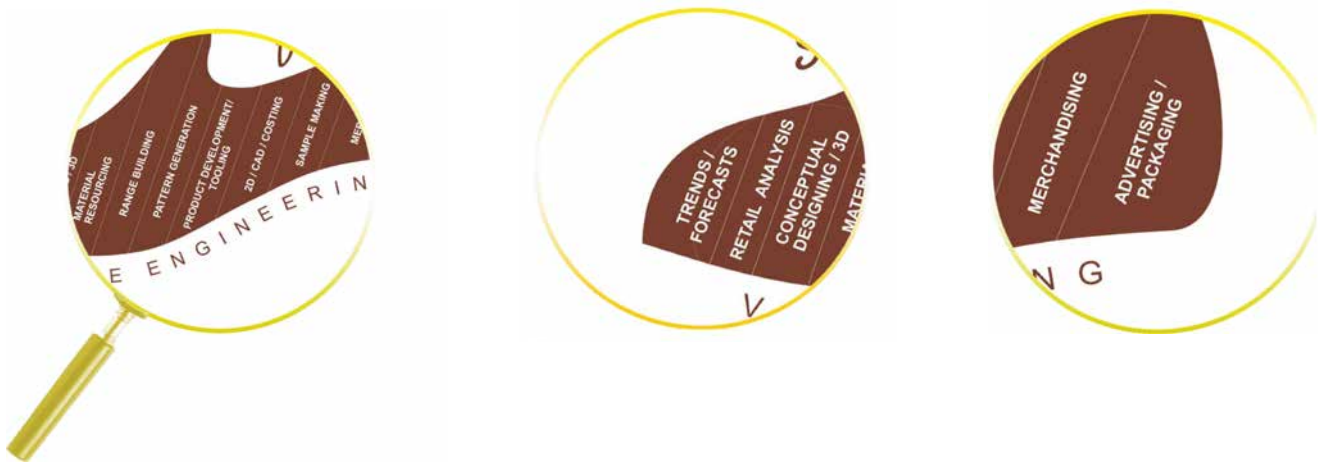


Design and brand driven value chain need to be developed as core strengths of Leather Products Manufacturing Industries which is currently focused in the middle pie of the above chain engaging in pattern development, engineering and sample prototype development.

The time to move up the value chain has come.

To achieve this one has to build not only in-house design capabilities, but also work in consultation with design companies internationally that have a deep understanding of lifestyle and fashion trends in Europe and the US, which will continue to be primary markets for the foreseeable future for up market products.

‘Merchandizing & Retailing’ would be another crucial area of attention and synergies would have to be built with international agencies to master this art.



The Design Needs of the Indian Leather Sector are:

Conceptual Design

Status:

The Indian Footwear Sector caters to several International brands but the focus has been largely on manufacturing for 'Designs and Styles' suggested by the buyers being catered to. While very few companies have been moderately successful in making the buyers accept their indigenously conceptualized Designs, there is a lot of scope for deeper penetration of our own 'creative designs.'

Need:

We need to strengthen our in-house design capabilities and forge collaborations with Design Studios internationally that have a deep understanding of lifestyle and fashion trends in the primary markets worldwide. This would help us create 'original designs' that would satisfy the requirements of customers in the global markets.

This means that we need to send our Designers to work in Studios abroad and also for training and re-training.

Design & Pattern Development

Status:

We have established ourselves in the area of Design and Pattern Making with the support from Training Schools and Institutions.

Need:

There is a continuous need to focus on Design and Pattern Development for Leather Products and Institutional support in this aspect is necessary. Institutions may like to train/ re-train their personnel with exposure to International methods. The same is applicable for candidates from the Industry as well.

PDC/ Design Studio

Status:

Existing Product Design Cells (PDC) in factories and Design Studios, run either by established Institutions or free-lance designers provide design packages for Indian manufacturers.

Need:

Progressive looking exporters who desire to invest in 'design range building' may be supported to set-up Design Studios in their factories.

Design Studios in Institutions that need to complement their activities and add value to the services rendered by them to the Industry or for Design Research may be supported as well.

Studios run by Free-lance Designers may be given opportunities at Indian expositions (at subsidised costs) to enable them to reach out to the Industry through Design Alleys.

2D, 3D CAD

Status:

We have gained self-sufficiency in the use of 2D CAD systems for Pattern Engineering. Almost all leading product manufacturers have access to these CAD systems either in their factories or through CAD Service centres at leading Institutions. These systems are used for Grading of patterns for Die making and Marking patterns and Norm calculation for estimation of leather consumption.

Need:

We need to popularize the use of 3D CAD systems for Last Digitization and Modelling, Conceptual Designing and Sole Design and Manufacture.

The Design Studios in Institutions and Factories need to be equipped with the latest CAD systems in addition to other automated peripherals like the Die-less cutters to directly cut the leather and punch cutters for cutting materials of higher thickness.

Sample Development

Status:

The existing Sample Development Cells are attached to the Design Studios of companies to realize the prototype of the Designs/styles created by the Design team.

Sample Development Cells both in Industry and Institutions need state-of-the art machinery that can improve the quality of samples produced.

Facilities for laser-cutting of leathers, embroidery, plating and embossing and plates required for this purpose could be housed in all the leading Institutions. These are just a few examples of innovation in sample making and there is a vast scope

Need:

We need to upgrade the Sample Development Cells and employ trained technicians to use world-class equipment to translate them into products comparable with the best worldwide. The Sample Development Cells should be stocked with samples of leathers, fabrics, lasts, soles, heels and other components, in accordance with the latest Fashion trends and produce samples that can be exhibited at International fora.

Brand Building

Status:

We have been playing the role of 'Resourcing Partner' to the leading International Fashion Brands in the area of Leather and Leather products. However, we do not have a presence in the niche Fashion markets of the world with our own brand.

Need:

We need to move up in the value chain. Design and Brand Building through a brand driven value chain need to be developed as core strengths of the Leather and Leather Products Manufacturing Industries. With our own Brands we can achieve breakthrough innovations that can play a pivotal role in the positioning of India's Leather and Leather Product industries in the global arena.

Marketing

Status:

The Council for Leather Exports has been very proactive in helping the Indian manufacturer showcase his products at various National and International fairs. They have also organized many B2B meets, Buyer-Seller Meets (BSM) and reverse BSM's to bring the Manufacturer and clients face to face. In addition, many companies undertake their own marketing campaigns to interact with buyers globally.

Need:

Marketing of Indian Leather and Leather Products is a crucial area of attention and synergies would have to be built with international agencies to promote Brand India. A mapping of opportunities for the leather sector would have to be undertaken and the vision to be in the vanguard of global leather and leather products producer should employ a collaborative approach to leverage the strengths of the International and National institutions and industry, and develop an integrated nexus of Design - Technology - Market Linkage, that would establish an edge for the Indian Leather industry globally.

Domestic Market

Status:

The Domestic Footwear market in India is growing rapidly. With rapidly changing lifestyles of the Indian consumer, the demand for footwear and other lifestyle accessories in the domestic market has good potential.

Need:

We need to address the domestic market and cater to it with the latest Designs and styles in conformity with the trends worldwide. The quality of input materials and manufacturing processes also need to be upscaled so that the domestic consumer would get the product that is excellent in quality, durability, comfort and style.

Subscription to Memberships and Magazines

Status:

Information is the key to success in the highly competitive Fashion World and we need to be up to date with the latest trend and fashion information to stay ahead of competition. However, except for some of the Institutions most of the Leather and Leather Product manufacturers do not access information from memberships to Design/Fashion Organizations nor subscribe to Magazines or Journals for keeping abreast of the latest fashion trend information. This is a serious handicap especially if you aspire to be a global player in this market.

Need:

Access to the latest seasonal trend forecasts from the highly acclaimed Design organizations from the fashion capitals and also subscription to fashion journals, publications and photopacks are necessary for those catering to the niche fashion markets worldwide. This helps them in focusing their collections and make the right product for the right season and the right market which ensures business success for them.

Bringing out Trend Newsletters/ Trend Periodicals/ Online

Status:

The Design & Fashion information gathered has to be analyzed and interpreted for the Indian manufacturer to understand and this dissemination of information would help them translate the design ideas suggested into acceptable products in the highly competitive fashion world. Few Trend Publications are in circulation like the MODEUROP Colour Card.

Need:

There is a major need to bring out more Trend Newsletters and Trend periodicals that addresses the fashion needs of all sectors of the Leather and Leather Products industry. With increased subscription to Fashion Journals, the design information needs to be translated into realizable products through regular dissemination via newsletter, magazines and online portals.

Trend Conferences

Status:

Trend Conferences update with information on Fashion and Trends in advance of the season in address which helps gain a huge lead time over competition. Moreover, these conferences help align the "Creative Thinking Process" in line with the Trend direction.

Need:

There is a need to forge working relationships with the leading Fashion Houses, Design Schools, Fashion Publishers and Independent Designers to organize Design and Fashion Trends related Workshops/Conferences to help imbibe the Fashion Sense and direction that need to be followed to cater with the most appropriate product in accordance with the market demands. These workshops/Trend Conferences would help the industry Design personnel to interact with the Fashion Makers and help them attune their "Design Thinking Process" in line with the Global Design thought process.

Leather Incubator

Status:

The mandate of 'The Leather INCUBATOR' is to nurture a culture of developing new leathers based on the seasonal demands, so that the designs and concepts metamorphose into newer and niftier products or services capable of being marketed and sold. The outcome is creation of a new class of world-class LEATHERS.

Need:

The Leather INCUBATOR that is needed should primarily use the experience in Leather Design and Trends from leading Leather Designers and experts and International Chemical Companies. It needs to forge collaborations with International Fashion Organizations to bring Fashion faster to the members of the industry.

In addition, Design incubation cells that are integral to most design led organizations in the world need to be set-up and consist of a dynamic team drawn from across-disciplines. Boundaries need to be constantly challenged to be able to dream. This is an important need of the industry.

Creation of Collections

Status:

Many of the companies look to the West for Design Silhouettes to create design collections that can compete internationally.

Need:

Undoubtedly, the concept and ideas will continue to come from the West. We need to forge alliances with design Studios/ Designers abroad to create design collections.

Another idea is to work with International brands and have suitable tie-ups to sell these designs in India.

Designing a product is not merely about aesthetics and there is a need to inculcate this in the Designers before they make their own Design Collections for which visit to International fairs and expositions by designers from both Industry and Institutions is a must.

Trend Forecasting/ Fashion Forecasting Cells

Status:

'Fashion Trend forecasting' for leather is an initiative to bring to the fore the ability of the Indian Leather Industry to take pro-active measures in fashion forecasting and design development by providing a scientific leather product development focus in the areas of colour forecasting, range building, design and retail analysis. The outcome envisaged is to strengthen the Indian leather product design capabilities which would be reflected in product quality enhancement.

Need:

Nations like India have remained in the backyard of fashion world for long. If India were to emerge as a strong global player in the world leather trade, all efforts must be made to take proactive measures to be ready with the fashion leathers and products when the fashion does emerge and we must make products that match International Styles and standards. Manufacturers have to understand their customers, anticipate the changes and envision the future of fashion.

Information is the key to success especially so in a fast changing and dynamic world and in this context the members of the Leather industry need to be enlightened with the vast international information base on 'Fashion and Trends' in Leathers & Materials, Colours and Textures, Shoe Design & Retail, Shoe Component & Accessories.

'Advance preparedness' is vital to stay ahead in today's competitive business and in the realm of International marketing of fashion related products, advance information relating to changing trends is a major business advantage. The leather industry of India is beginning to realize the importance of Fashion Trend forecasts to be able to cater to the buyers with original materials / products in leather.

Trend Forecasting/ Fashion Forecasting Cells must be established in India in the leading Institutions.

Innovation in Design

Status:
Smart Shoes are seen in sport related fields, Design App, Window dressing, Non-leather footwear (design, training and internship

Need:
Technology Innovation Design.
The “Smart Shoe” would be modelled based on the usage of New Materials, New Construction Methodology and with the incorporation of the advanced technologies which would ensure absolute overall comfort to the wearer of the Shoe.

Study of the Shoe Construction parameters, Material Characteristics for shock absorption, embedding of technological materials for enhancing the output of the shoe as well as human-physiological wear trials would form an integral part of the “Smart Shoe” development with the end objective being to provide an “Intelligent shoe” which would provide maximum comfort.
Development of App for design that would enable both Industry and students to gain access to knowledge and training. Categorization of seasonal shoes, shoes by performance and quality would enable better window dressing at retail. Continuous new developments in Non-leather footwear design and training (including internship) is essential for the growth and development of the non-leather footwear segment.

Authored by:



MD SADIQ from CSIR-CLRI India is a distinguished Leather Technologist with specialization in Footwear Science and Engineering in which he holds a Master’s degree.

His focus has been on Footwear Styling and Design; R & D in Trend Forecasting, Colours and Texture development. He has also innovated in HRD activities with accent on Shoe Design Education and Training. He has also excelled in Planning for the Indian Leather sector in the area of design, trends and global competitiveness. His signature contribution has been in enabling the ‘Travel of India in fashion forecasting for LEATHER’ - an R&D initiative for garnering global leadership.



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LINEAPELLE

FASHION + FRESH + COLOURFUL



Report by Mrs Marga Indra Heide, Fashion Trend Pool, Germany, www.fashion-trend-pool.com

LINEAPELLE is the most important international exhibition dedicated to leather, accessories, components, synthetics and models for footwear, leather goods, garments and furniture.

The fair system represented by LINEAPELLE and its connected “niche” events showcases the high quality of the exhibiting companies, with their outstanding style and customer service.

Launched in 1981, it has become the most qualified international exhibition of leather and accessories, components, synthetics for footwear, leather goods, garments and furniture. The event takes place twice a year, in February for the summer and September for the winter collections, at the Milan exhibition centre.

Lineapelle has been characterised by its constant leadership in quality and style innovation, which makes it indispensable to the leather demand worldwide.



Team FASHION TREND POOL at LINEAPELLE, Milan during 22-24 February 2022

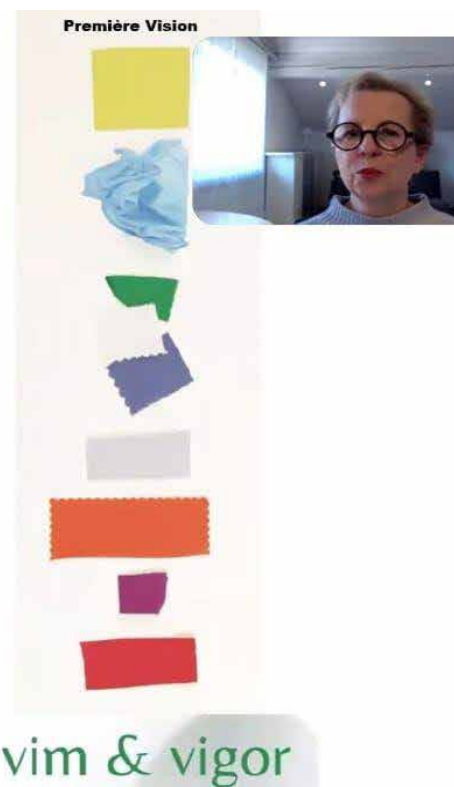
SS 23 decodings, product selections, replays of the Talks, theme-specific supplier searches, a focus on sustainable sourcing... everything you need to make your coming collections a success!

CODE #1 REACTION

FASHION
TREND
POOL



PREMIÈREVISION
The art & heart of fashion



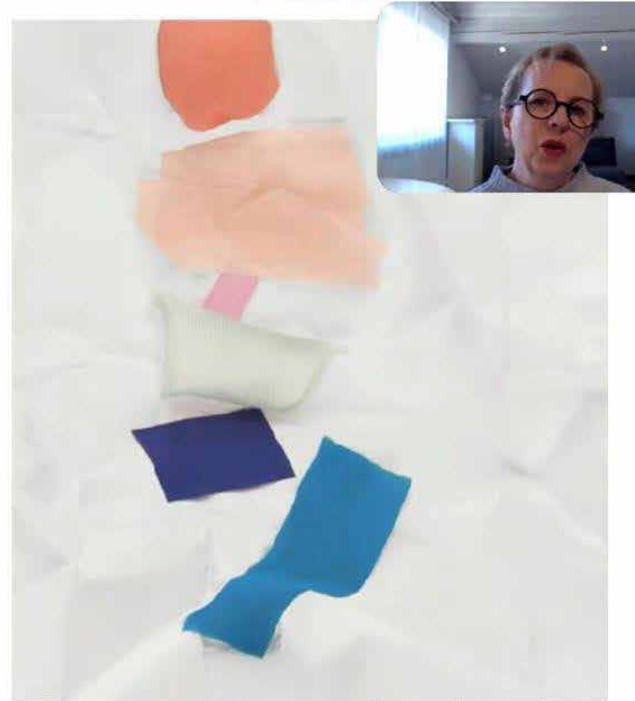
Colours full of energy, contrasts full of power. Fun and joie de vivre are the focus of the energetic Dopamine dressing. Expression and extravagance set the style pace. Courage and a breathless dose of craziness open up new design horizons full of strong statements. Sweet meets sour. Sexiness meets romance. Trash culture meets surrealism. Monochrome looks in signal colours pulsate just as powerfully as striking colour blockings and arty prints. Iridescent and glossy effects are reminiscent of Augmented Reality and Hyper Pop. The intense palette plays with candy colours, sci-fi pastels and bold, bright bolds.



CODE #2 REALISM

FASHION
TREND
POOLPREMIÈREViSiON
The art & heart of fashion

Première Vision



sensitive shades

The new self-confidence, the new maturity. Wisdom meets vision. To a confidence in one's own values and the strengths of the tried and tested. The result is a sensual realism that transcends the fast. Long-lasting classicism is lived here as a sustainable idea. Smartness defines the cuts as well as the natural, high-quality materials with technical benefits. College and campus influences are reflected in preppy details. Relaxed seaside silhouettes are predestined as escapism from urban uniformity. Clean retro elements and originals flow into a minimalist design language. A clear, familiar colour palette of freshly interpreted classics forms the basis.



CODE #3 REFLECTION

FASHION
TREND
POOL



dra-Heide's screen

PREMIÈREVISION
The art & heart of fashion



Awareness of the special, a reflection on oneself and the world. Nature in all its facets is the driving force behind the Reflection theme. Sustainability and Searching for a Better Life are at the centre of thought and action. Mixed in with this is a global feeling of connectedness across all cultures and continents. Comfort in a foreign land lends a new form to travelwear. Styles, colourways and details look like an endless summer. Dried colours and raw fabrics and leather meet new-generation technical materials. Botanical camouflage meets artisanal braiding. Craftsmanship is realised as modern tech craft as well as the rediscovery of almost forgotten techniques. Earthy tones form a harmonious melange with intense sunny shades and dusty nuances.



CLE's participation in the "Sourcing at Magic" and "Footwear Sourcing at Magic", Las Vegas, USA held during February 13-16, 2022

Council for Leather Exports (CLE) has organized group participation of members in the "Sourcing at Magic" and "Footwear Sourcing at Magic", Las Vegas, USA held during February 13-16, 2022 with the funding support of Government of India under Market Access Initiative (MAI) Scheme.

As per feedback received from the Organizers of Magic Show, over 2000 exhibitors from various countries participated in the fair. More than 7000 trade visitors and buyers visited the fair. Some of the top buyers/buying groups visited the Show are:-

Top Tier Companies Attended	Top Tier Companies Attended
H & M	MEDLINE INDUSTRIES INC
SHEIN	HAGGAR CLOTHING CO
FOREVER 21	PIAZZA INTERNACIONAL
LEVI STRAUSS & CO	FRENCH WEST INC
AMAZON	NORDSTROM PRODUCT GROUP
SHARON YOUNG	HATCO
BARCO UNIFORMS INC	SHOE PALACE LLC
HOT TROPIC	LAMBS & IVY INC
RIP CURL	COPPEL SA DE CV
WORKWEAR OUTFITTERS	REEBOK INTERNATIONAL
KARMAN INC	STITCH FIX
FILA USA	AMERICAN TRAVELER INC
HOT TOPIC/BOX LUNCH/HER UNIVERSE	ZAPPOS
FRENCH WEST INC	CINTAS UNIFORMS
NORDSTROM PRODUCT GROUP	MEDLINE INDUSTRIES INC
HATCO	HAGGAR CLOTHING CO

CLE's participation in the Magic Show

The below named 8 companies have participated in the Show through CLE:-

Footwear Sourcing at Magic

S. No.	Name of the Company	Place	Booth No
1	AMITY LEATHER INTERNATIONAL	MUMBAI	60810
2	EURO SAFETY FOOTWEAR (INDIA PVT. LTD.	AGRA	61012
3	HARMONY LEATHER IMPEX PVT. LTD.	MUMBAI	60710
4	PERFECT FOOTWEAR	AGRA	60811
5	ROGER INDUSTRIES LTD.	AGRA	60912

Sourcing at Magic

S. No.	Name of the Company	Place	Booth No
1	HOMERA TANNERS (P) LTD.,	KANPUR	62325
2	LABBAIK INTERNATIONAL	KOLKATA	62327
3	SONSE EXPORTS	NEW DELHI	62328

Indian companies displayed a wide range of footwear, leather garments, leather goods and accessories in the Show, for meeting with the buyers. As per feedback received from CLE's participants, more than 280 buyers visited their booths and 137 one to one business meetings were held during the 4 days show. Business worth Rs. 33 crores has been generated by the 8 member-companies participated through CLE

CLE's participants @ Magic Show





Visit of Consul General, Consulate General of India, San Francisco, California to CLE India Pavilion.

On the first day of the fair, i.e. on 13th February, 2022, Dr.T.V. Nagendra Prasad, Consul General, Consulate General of India, San Francisco, California visited CLE India Pavilion and interacted with CLE's participants at their stalls.



Dr.T.V. Nagendra Prasad, Consul General, Consulate General of India, San Francisco, California visiting booths of CLE participants.

Visit of Shri Dushyant Chautala, Hon'ble Deputy Chief Minister of Haryana to Bahadurgarh Park Association at Bahadurgarh on 18th February, 2022



Shri Dushyant Chautala, Deputy Chief Minister of Haryana and other distinguished members on Dias

Bahadurgarh Park Association in association with Bahadurgarh Chamber of Commerce & Industry organized a visit of Shri Dushyant Chautala, Hon'ble Deputy Chief Minister of Haryana on 18th February, 2022. During his visit, the HONble Deputy Chief Minister was accompanied by Shri. Vikas Gupta, MD, HSIIDC, Ms. Amneet P. Kumar, DG, MSME, Shri Shakti Singh, DC, Bahadurgarh, Shri Mandeep Singh Brar, MD, HARTRON, Shri Sardar Nishat Singh, President JJP, Haryana, Shri Noushad, Vice-President, CFI and other distinguished guests.

The objective of the visit was to take an overview of Common Facility Centre, Footwear Lab Testing Centre, Shoe manufacturing process, overall supply chain, its prospects for growth, employment generation and seeking investment in the State of Haryana for creation of Footwear Park.

Shri Motilal Sethi, Regional Chairman (North), CLE and Shri Sushil Kumar Singla, Zonal Coordinator, CLE also



Shri Motilal Sethi, Northern Regional Chairman, CLE welcoming Shri Dushyant Chautala, Dy. Chief Minister of Haryana

attended as a Guest of Honour and represented Council for Leather Exports.

Shri Subhash Jagga, General Secretary, Footwear Park Association, Bahadurgarh in his welcome address welcomed Shri Dushyant Chautala, Hon'ble Dy. Chief Minister of Haryana and other distinguished guests for their gracious presence at the premises of Common Facility Centre of Bahadurgarh Footwear Park at Bahadurgarh.



Shri Motilal Sethi, Northern Regional Chairman, CLE requesting Hon'ble Dy. Chief Minister to avail affordable land for Footwear Park

During his speech, briefing about Bahadurgarh Cluster, he informed that Bahadurgarh Cluster came into existence in the year 2006 with the support of Government of Haryana. During the span of years, with the collective efforts of Industry members, it has managed to become one of the most successful Industrial Clusters in India. He further added that there are around 5500 units in Bahadurgarh Cluster, out of them there are 1000 units of Footwear and Footwear allied units.

He also appreciated the entrepreneurial skills of Footwear Manufacturers of Bahadurgarh Cluster wherein he conveyed that Footwear Manufacturers with their design skill and economy of scale has outperformed in Non-Leather Footwear Sector. Moreover, if Government can handhold this sector in offering feasible land for creation of Footwear Park/Cluster, it will not only give impetus but also give an opportunity to compete, excel in exports sector as well.

During his speech, he also highlighted some issues pertaining to Bahadurgarh

Footwear Park like delay in issuance of Fire NOC, request for increasing ESI Hospital beds, repair of roads and sewage of Modern Industrial Estate (MIE) in Bahadurgarh, regularization of freehold plots under HSIIDC in Bahadurgarh and issue of commissioning of Electricity, etc.

Shri Motilal Sethi, Regional Chairman (North), CLE in his address thanked Hon'ble Deputy Chief Minister of Haryana for visiting Footwear Park at Bahadurgarh Industrial Cluster. He appreciated Hon'ble Dy. CM for his proactive approach and understanding the needs and requirement of Industry Members. He also added that Haryana State has made commendable progress in Industrial growth by the entrepreneurship skills of Bahadurgarh Cluster and attractive schemes and policies announced by the Government of Haryana in line with the vision of our Hon'ble Prime Minister.

During his address, Shri Sethi gave an overview of Indian Leather Industry, Export Performance and prospects to the august gathering wherein he said that the Indian Leather, Leather Products and Footwear Industry hold a prominent place in the Indian economy and has vast scope of growth. This sector is known for its consistency in high export earnings and it is among the top ten foreign exchange earners for the country.

He emphasized that Leather & Footwear Industry is a labour intensive providing job to about 4.42 million people, mostly from the weaker sections of the society. Women employment is predominant in leather & Footwear products sector with about 40% share.

During his speech Shri Sethi also informed that Non-leather footwear alone accounts for almost USD 66.68 billion and for the last 10 years' global non-leather footwear export is growing on an average more than 7%. However, India has a very minimal presence in the global export and accounts less than 0.5% share of the total global export of non-leather footwear. Therefore, keeping the view of potential of Non-Leather Footwear, he requested Government

of Haryana to provide feasible land for the formation of Footwear Park which will help industry fraternity to strategize their manufacturing capabilities by using state of the art technology, lean management and production engineering to optimize their output.

Shri Sethi informed that CLE has already sent a letter to Shri Manohar Lal Khattar, Hon'ble Chief Minister of Government of Haryana regarding creation of Footwear Park at Kharkhoda cluster and requested the State Government to reduce the cost of available land as manufacturers of Footwear Sector come under the category of MSME and cannot afford the cost at higher price.

He added that Union Budget 2022-23 has been favourable to Leather & Footwear Industry. Moreover, announcement of Indian Leather and Footwear Development Programme (IFLDP) Scheme will give further impetus to Leather, Leather products & Footwear Sector. Exporters can take advantage of this scheme in creating infrastructure, enhancing capacity in their factory to increase exports.

Shri Dushyant Chautala, Hon'ble Deputy Chief Minister of Haryana expressed his thanks to Bahadurgarh Footwear Park Association for facilitating his visit to Bahadurgarh Common Facility Centre and Shoe manufacturing units in Bahadurgarh



Fig – 4. Shri Motilal Sethi, Northern Regional Chairman, CLE greeting Shri Vikas Gupta, MD, HSIIDC



Shri Motilal Sethi, Northern Regional Chairman, CLE presenting memento to Sardar Nishant Singh, President, JJP



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and appreciated its state-of-the-art testing laboratory and manufacturing facility.

Shri Chautala conveyed that this visit has given him insight that Footwear Sector is a labour intensive industry which can provide substantial employment to locals as well as to the migrant workers and therefore this is the sector which can promote empowerment of people in achieving poverty eradication, social upliftment and employment generation.

Further he highlighted that there has been demand of Footwear manufacturers of Bahadurgarh for feasible land for creation of Footwear Park/Cluster at Kharkhoda Cluster. However, this cluster of around 900 Acres has already been earmarked to Maruti & Suzuki to make it an epicenter of 2-wheeler and 4 wheeler vehicles to boost employment and exports but he further stated that at this point of time, he is ready to give multiple options. One of the options



Shri Dushyant Chautala, Hon'ble Chief Minister of Haryana speaking on his visit to Bahadurgarh Footwear Park

was he offered was 500 to 600 acres of land in Rohtak towards Phase 3 adjacent to Bahadurgarh, which he has planned to earmark categorically for Footwear Sector to create world class Footwear Park.

Shri Chautala also said that there is a demand of club and world class exhibition centre so that all kind footwear styles/design can be displayed to international buyers therefore Government of Haryana will facilitate assistance in formation of Exhibition –cum-club of international standards so that International buyer can see Footwear products and can also stay and dine so that he doesn't have to visit units to see the products.

IN BRIEF

ECGC COVERAGE FOR SHIPMENTS TO RUSSIA

We have received a Press Note from ECGC stating the following.

- It has been reported in various media reports that ECGC has withdrawn its cover on the export transactions to Russia vide its circular dated 25.02.2022, which is factually incorrect.
- It is clarified that the coverage on export transactions to Russia has not been withdrawn by ECGC.
- In view of the prevailing situation, ECGC carried out a review of

the country risk rating of Russia as per its extant underwriting policy. Accordingly, with effect from 25.02.2022, the cover category of Russia has been modified from Open Cover to Restricted Cover Category – I (RCC-I) for which revolving limits (normally valid for a year) are approved specifically on a case-to-case basis.

- It is further clarified that this change has been made to ensure that ECGC is able to assess and monitor the risks covered under its export credit insurance policies and to place appropriate risk mitigation measures. The above measure will also enable the exporters / banks in India in assessing the export payment realization prospects from buyers and/or banks in Russia.
- The customers have been suitably advised to contact their servicing branch of ECGC for cover on shipments to Russia.
- ECGC continues to monitor the situation and further review of the underwriting policy will be undertaken based on future developments.

Meeting of Public Grievances Committee held at New Custom House New Delhi on 18th February, 2022

Public Grievances Committee and Permanent Trade Facilitation Committee meeting was convened by New Custom House, New Delhi under the Chairmanship of Shri Sanjay Bansal, Commissioner – Exports, New Custom House, New Delhi on 18th February, 2022 to address custom issues pertaining to IGI Airport/ Delhi Aircargo.

Shri Motilal Sethi, Regional Chairman (North), CLE, Shri Sushil Singla, Zonal Coordinator, CLE, Shri Ankur Vaish and Shri Atul Kumar Mishra, Regional Director, CLE attended the said meeting to present grievances of member- exporters with the Custom officials.

Shri Motilal Sethi, Northern Regional Chairman on behalf of member of Council for Leather Exports, complimented the customs on Special Drives being conducted frequently for the redressal of pending GST and Drawback issues. However, in spite of that, there are many issues pertaining to Drawback and GST which has not been cleared by the customs. He further added that exporters are already facing hardship due to financial crunch on account of Covid-19. Therefore, further delay in refund would severely affect their working capital and business.

During his discussion, he conveyed that Customs (Import of Goods at Concessional Rate of Duty) Rules, 2017 have been amended vide Customs Notification No. 07/2022 (NT) dated 1.2.22 wherein exemption is provided for import of notified inputs like fasteners, inlay cards, lining and inter-lining materials, wet blue chrome tanned leather, etc. by



Shri Motilal Sethi, Northern Regional Chairman, CLE addressing the customs issues to Shri Sanjay Bansal, Commissioner, Exports, New Custom House, New Delhi

bonafide exporters to be used in manufacture of textile or leather garments meant for exports which is effective from 2nd February, 2022. However, there is no clarification or procedure laid down by the Government as provisioned in Union Budget 2022-23 so that exporters/importers can get benefit out of it on online and offline mode.

Shri Sanjay Bansal, Commissioner-Exports, New Custom House, New Delhi conveyed that if there is an amendment which is effective from 2nd February, 2022 then it has to be followed by Customs immediately. He advised Exporters to follow IGCR Rule 2017 to import any materials required for export purpose for which a prior information may please be given and submitted along with the import items and quantity thereof to the Preventive Commissioner Office of Customs under whose jurisdiction your factory premises falling. He also highlighted that once the online portal is ready i.e. from 1st March, 2022 Exporters are supposed to import all such items through online mode. He also clarified that these rules are specified in Custom notification of 68/2017 and 07/22

Shri Sushil Singla, Zonal Coordinator, CLE raised the issue of pilferage of leather garments wherein he highlighted rampant stealing / theft of Leather jackets from the packed boxes at IGI Airport. He also mentioned that although status mentioned on the shipping document is always shown as “No Box Opened for Physical Examination”, some of the boxes are tampered

or disfigured. They came to know about the missing goods when the shipment reached to the buyer and contents were found to be short.

Commissioner-Exports on this issue conveyed that this is really a serious matter and to check it further he advised custom officials to track consignments and monitor its movement to ascertain to check from where it is happening.

Shri Ankur Vaish, Member, CLE highlighted the matter of duty being imposed and further substantial delay in clearance of free trade samples. He said that Export Oriented Units are buyers driven, hence there is an urgent requirement of samples for approval for further execution of orders and other obligations, therefore further delay in clearance of imported of courier samples may lead to the cancellation of orders.

Commissioner – Exports, in his reply advised to Exporters that they need to make a documentation of goods for identification marks, etc. so that at the time of import so that exporters can establish the relationship of same goods at the time of examination which were being re-imported. He conveyed that, Custom Officials are sometimes bound to hold the sample courier to stop misuse for check and balances.

Commissioner - Exports also clarified that import of Free Trade Samples are specified in Custom Notification No. 154/94-Cus dated 13th July, 1994.

Northern Regional Chairman, CLE also highlighted the problem being faced in clearance of Merchant Exporters Shipments. He conveyed that perception is that any Merchant Exporter who is exporting on IGST basis is considered suspicious. There are issues in clearance of Merchant Export shipment especially at night and documents clearance on holidays.



Shri Sanjay Bansal, Commissioner, Exports, New Custom House, New Delhi in discussion with Shri Motilal Sethi, Northern Regional Chairman, CLE



Since Air shipments are always critical and time sensitive, the clearance and processing should be 24 x 7 as available to manufacturer exporter. Different types of documents like purchase bills, etc. are being sought for clearance of shipments even when shipments are marked as inspected.

Commissioner – Exports on the issue of Merchant Exporter conveyed that Custom Official has to adopt parameters as per the custom norms irrespective of any category of exporter. Matter pertaining to delays in clearance of papers in holidays or late night of Merchant Export Shipment does happen due to insufficient custom staff. However, if prior information of shipments is given to the Customs, these issues may not arise.

Commissioner – Exports also took up matter of timely clearance of export shipments as delay causes huge losses, issues pertaining to delay in X-rays and demurrage waiver, packaging charges being levied by CELEBI, IT facilitation charges being collected illegally, digitization of documents for customs clearance of Export shipments, Allotment of safe deposits fo were also discussed.

LINEAPELLE 99 BRINGS 13,000 VISITORS TO MILAN AND DEFINES THE NEW NORMALITY

The new normality of a market reacts to pandemic complexities and war concerns. The horizon was defined by the 99th edition of Lineapelle, the most crucial business experience for supplying leather, materials, accessories, components for fashion and luxury. More than 960 exhibitors (distributed in 6 pavilions) from 31 countries welcomed more than 13,000 buyers, stylists, and creative consultants to their stands, offering a reassuring and long-awaited sign of vitality to the entire supply chain, despite the awareness of the forced absence of Asian visitors. Highlights included entries from France, Spain, the United States, Turkey, Germany, the United Kingdom, and Portugal.

Selection, quality, service

"This edition of Lineapelle, which presented the trends for Spring Summer 2023 - comments the president of Lineapelle, Gianni Russo - confirmed its dominant role as a reference point in the exhibition context of the fashion & luxury industry and well represented an increasingly selective market, oriented towards the search for maximum quality and service". These latter characteristics have been translated into the search for solutions based on the desire for a "return to freedom", but also the rediscovery of nature, beauty, quality

and durability. Lineapelle 99 thus offered a cross-section of this "new world", where fashion and style retake the stage.

A fair within a fair

All the events - a real fair within the fair - were very well attended and enriched the contents of Lineapelle 99 with an essential innovative vision in a green perspective. They were starting from A New Point of Materials, the second edition of the revolutionary project that allows knowing the concrete green journey of leathers, textile materials, and technologies from responsible innovation. There was great interest in the samples of leathers, materials and accessories for summer 2023 exhibited in the 3 Trend Areas and featured in the customary and eagerly awaited in-depth seminars. The spotlight, with a high level of interaction and social sharing, was on the Shift to Regenerative Mobility project, the result of 2 years of collaboration between Lineapelle and Hyundai Transys, which led to the development of a concept car with leather interiors, a futuristic example of "regenerative mobility". Finally, the Leather and its Circularity space was also a success, showcasing the most important business projects linked to the circular path of leather and Italian manufacturing.

The second edition of Mipel Lab

Great success also for the second edition of MIPEL Lab, the exhibition and digital concept dedicated to leather goods sourcing promoted by Assopellettieri and Lineapelle. "We close with success and satisfaction the second edition of MIPEL Lab, which, at this point, represents an international reference point for anyone who wants to produce luxury leather goods - comments the president of Assopellettieri, Franco Gabbrielli -. I want to thank personally and on behalf of our association, the ICE Agency and MAECI (Ministry of Foreign Affairs and International Cooperation) and, in particular, the ICE President Carlo Ferro, for understanding and sharing such an important project for the support and promotion at the international level of a supply chain of excellence such as that of leather production. Moreover, the partnership with Lineapelle has once again proved to be a winning one, and we are ready to follow them to New York, London, and Shanghai in the name of this synergy".

TRAVEL TO AZERBAIJAN

We have received a communication from Ministry of Commerce & Industry stating the following.

India has been included in the list

of countries whose citizens are allowed to travel freely to Azerbaijan, after COVID-19 pandemic restrictions.

The Indian travelers to Azerbaijan can easily obtain e-visa by visiting the official portal www.evisa.gov.az

LEATHER NATURALLY AND LEATHER WORKING GROUP JOIN FORCES

Two major leather industry membership not-for-profits, Leather Naturally and Leather Working Group, agree to closer working practices through reciprocal membership.

We are pleased to announce the reciprocal membership agreement between Leather Naturally and Leather Working Group, that will lead to both industry non-profits working more collaboratively in the future.

The industry membership association, Leather Naturally (LN), is dedicated to the promotion of leather and the provision of education on leather as a material. Through its activities, studies, and global resource center, it promotes the use of globally manufactured sustainable leather and seeks to inspire and inform designers, creators, and consumers about its beauty, quality, and versatility.

Egbert Dijkers, Chair of the Leather Naturally Management Board, said:

“We look forward to collaborating in educating about leather and communicating the role leather plays in a circular society where nothing is

wasted, and everything can be re-used.”

Leather Working Group (LWG) exists to drive improvement across the global leather supply chain, minimizing the environmental impact of leather production as well as inspire, educate, and challenge its member companies. LWG is the overarching standard for leather manufacturing, covering all elements and actors in the leather value chain.

Christina Trautmann, Head of Leather Working Group, said:

“This reciprocal membership agreement signifies the solidification of our collaboration with Leather Naturally. Our aligned focus is to provide consumers with the facts about sustainable leather and to better support brands with their communications about leather sourced from LWG supply chains.”

Both LN and LWG have agreed a more collaborative approach. One of the more significant joint-focus areas is targeting consumers with correct facts and figures about leather, which will in turn help consumers to overcome certain misconceptions about leather, and also more clearly define what sustainable leather is and where it can be sourced from, such as from an LWG certified tannery.

In January 2022, Leather Naturally, Leather UK, and the University of Northampton (ICLT) published a consumer research report ‘Leather and the Consumer’ that examines the opinions and buying habits of 2,000 UK consumers for leather and leather alternative products. With an extensive network of brand and retail members, LWG intends to leverage industry and consumer research such as this, to provide more concrete support for product and brand-level claims, as well as collaborate with LN on direct communications to consumers. In this way, both LN and LWG utilize their combined resources and can reach the entire leather value chain.

Both organizations are looking forward to progressing discussions for future collaborative work.

NEW IMPORT RULES IN EGYPT

We have received a communication from Embassy of India, Egypt stating the following.

On 12 February 2022, the Central Bank of Egypt issued a new guideline mandating importers to use letters of credit instead of a cash-against-documents. The move is to guarantee import operations through covering

risks associated with issuing letters of credit (L/Cs) from banks.

With effect from 22 February 2022, importers will have to present letters of credit to import goods from abroad. Documentary collection from exporters will no longer be accepted by banks to facilitate the import of goods into Egypt from the beginning of March. Imports of medicines, tea, meat and poultry, fish, wheat, oil, powdered milk, baby formula, beans, lentils, butter and corn are exempt. Imports with a value of less than \$5,000, express post shipments, as well as imports by foreign companies and their subsidiaries, are also exempt, as per media sources.

TFL SUCCESSFULLY RENEWS AND HARMONIZES ZDHC PRESENCE

TFL has successfully renewed the company presence on the ZDHC Gateway, the electronic catalogue of chemicals in which compliant products can be found.

The Roadmap to Zero program of the ZDHC Foundation is the world leading initiative to guide value chains in fashion industry towards the use of safer chemistry – for a cleaner planet- and a brighter future. The TFL Group as Formulator of chemicals used in leather manufacture is a value chain contributor to the foundation and active participant in its various sectors and task forces. Since ZDHC has approached the leather supply chain TFL has helped to shape the content and procedures according to which the foundation is working by sharing experience and know-how in sustainable chemistry.

The principle to replace hazardous substances by less harmful ones wherever technically possible has been one of the priorities in product development at TFL even before ZDHC. Consequently, TFL can offer a complete product portfolio for leather manufacture from Beamhouse to Finishing Touch Agent that is compliant to the strict requirements of the global ZDHC Manufacturing Restricted Substance List (MRSL Vs. 2.0).

Starting into 2022 TFL has successfully renewed the company presence on the ZDHC Gateway, the electronic catalogue of chemicals in which compliant products can be found. To make access easier for TFL customers and fashion brands, now all TFL supplied products are published on a single account of TFL Ledertechnik GmbH, including the products manufactured e.g. in India, Italy, China or former LANXESS sites. This results in the TFL account providing more than 1500 formulations, all tested and certified to the highest confidence Level 3 by TFL's partner and accredited service provider ChemMap. As benefits, ZDHC supply chain partners not only can be sure about the quality of products manufactured by TFL, they can directly link their chemicals and Wastewater Management System to the TFL gateway entries for ZDHC InCheck reporting.

In this way TFL is offering the highest support level to all our customers and once again demonstrating to be a global leader in the market of sustainable chemicals for the manufacture of leather which goes in line with our claim "Great Chemicals – Excellent Advice".

DGFT HELPDESK FOR RUSSIA-UKRAINE RELATED INTERNATIONAL TRADE ISSUES.

DGFT Trade Notice No.36 dated 25.02.22 regarding DGFT Helpdesk for Russia-Ukraine related international trade issues.

As per the trade notice, exporters can submit the details of difficulties/issues on Russia-Ukraine trade through the DGFT portal using the

following steps.

- i. Navigate to the DGFT website (<https://dgft.gov.in>)-->Services-->DGFT Helpdesk service
- ii. 'Create New Request' and select the Category as 'Russia-Ukraine'

The status may be tracked using the Status tracker under the DGFT Helpdesk Services. Email and SMS would be generated for immediate intimation as and when the status of these tickets are updated. Trade Community is requested to make use of the given Helpdesk facility suitably.



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INDIAN LEATHER INDUSTRY - STRIDING WITH CONFIDENCE



COUNCIL FOR LEATHER EXPORTS

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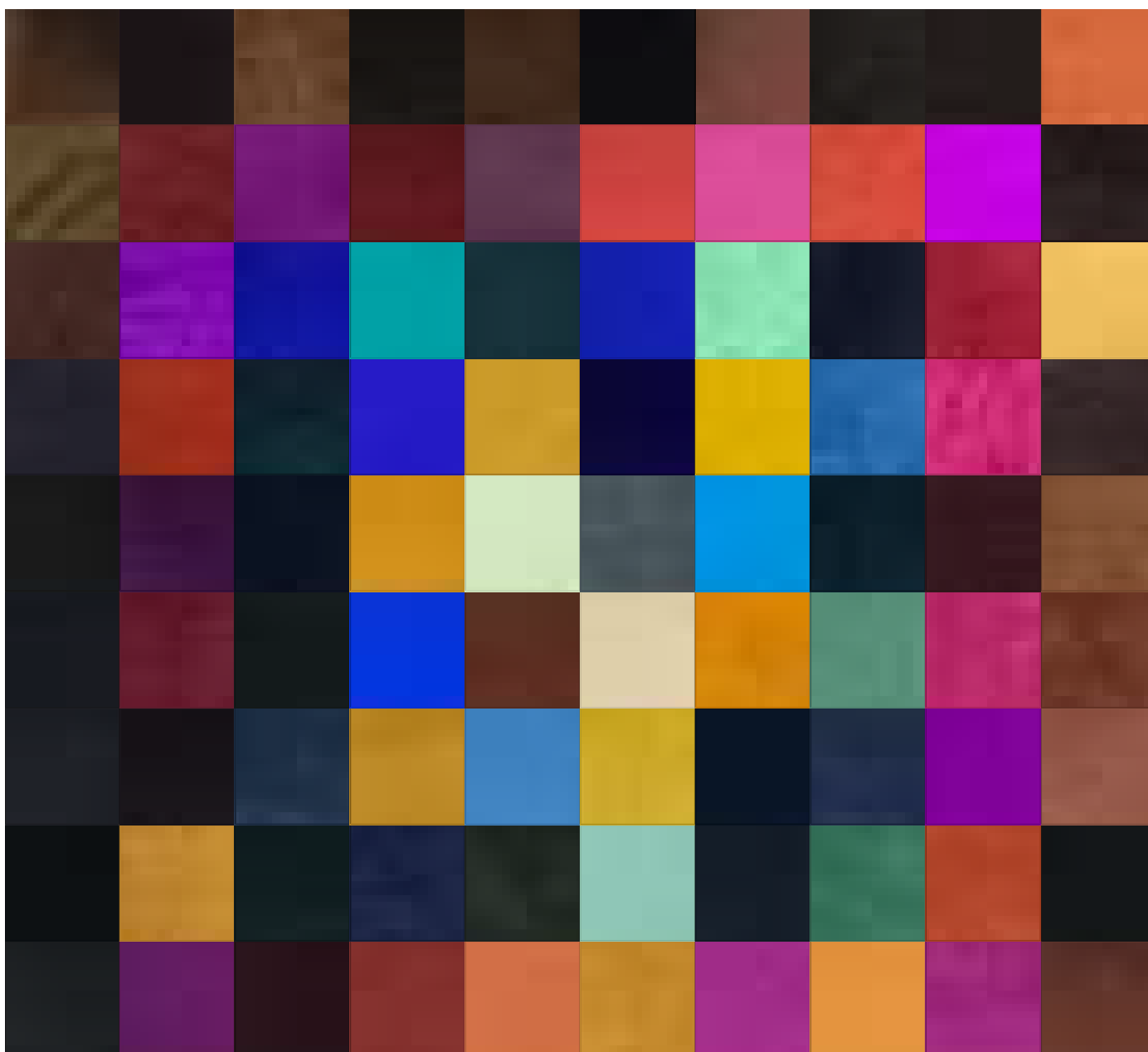
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