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- **Union Minister for Commerce and Industry, Consumer Affairs, Food & Public Distribution and Textiles, Shri Piyush Goyal's Review meeting on 3rd July, 2023 with EPCs and Industry Association on export performance**

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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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Dear Members

You are aware that some months back, CLE had called for cost data from members in connection with revision of All Industry Rates of Duty Drawback. In this connection, the Drawback Committee had a meeting with CLE in Chennai on April 18, 2023 wherein CLE made a presentation seeking increase in drawback rates for leather, leather products and footwear. With regard to the Drawback revision exercise, CLE also submitted detailed cost data of 18 companies in respect of various product categories.

CLE also submitted a representation seeking the following.

- All Industry Rate on Leather & other inputs procured locally to be factored for fixing AIDBK
- AIDBK for Crust Leather and EI Tanned Leather to be allowed
- DBK for uppers exported with socks to be considered by classifying them in the uppers category.
- Request for Change of product description for certain non leather footwear

I hope the Drawback Committee will positively consider the above requests.

CLE has also been following-up its request of allowing all value-added leathers for export without any export duty, inspection, testing or certification. I hope that the Department of Commerce will positively consider this request. Such a step will enhance the export of value added leathers, particularly the leathers with natural finishes, from the country, thereby boosting the growth prospects of the tanning industry in the country, which has remained stagnant for the past seven years.

With best wishes

Sanjay Leekha

Chairman
COUNCIL FOR LEATHER EXPORTS



Dear Members

You are aware that the DGFT had earlier notified the Amnesty scheme for Advance authorization and EPCG scheme vide Public Notice No.2/23 dated 1.4.23.

The Amnesty scheme is applicable only for those authorization issued under FTP 2009-14 till 31.3.2015 and for authorization issued under FTP 2004-09 and before, whose export obligation period (original or extended) was valid beyond 12.8.13. As per this scheme all pending cases of default in meeting export obligations under AA and EPCG for the said period can be regularised on payment of all Customs duties and 100% interest. Applicants willing to avail this scheme had to apply in DGFT portal on or before June 30, 2023.

Vide Public Notice No. 20/2023 dated June 30, 2023, the DGFT had extended the deadline for online registration to avail the Amnesty Scheme from June 30, 2023 to December 31, 2023. This Public Notice states that the authorisation holder should complete the payment of Customs duty plus interest with the Jurisdictional Customs Authorities by 31.3.2024.

The DGFT has also issued a Policy Circular No.02/2023-24 dated June 23, 2023 specifying the procedure for applying for the said Amnesty Scheme.

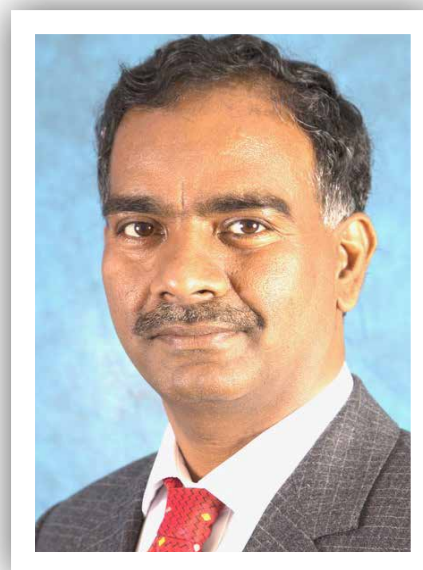
Our member exporters have informed that if there is a shortfall in the Annual Average Export Obligation under EPCG, it is considered as 100% default and the exporter is required to pay 100% of the Customs duties plus applicable interest. In this connection, we would like to state that the shortfall in annual average export obligation is caused due to the slowdown in market demand. Hence, CLE had taken-up the request that in case of shortfall in export obligation, the Customs duty in proportion to the shortfall alone may be charged under the Amnesty Scheme. This will be a major support measure for the exporters and will enable the exporters to contribute more to the growth of exports in the coming months.

With kind regards

R. Selvam IAS

Executive Director

COUNCIL FOR LEATHER EXPORTS



Hon'ble Union Minister for Commerce and Industry, Consumer Affairs, Food & Public Distribution and Textiles, Shri Piyush Goyal's Review meeting on 3rd July, 2023 with EPCs and Industry Association on export performance

Director General of Foreign trade (DGFT) organised a consultative meeting with Export Promotion Councils (EPCs) Industry Associations (IAs) under the Chairmanship of Shri Piyush Goyal, Union Minister for Commerce and Industry, Consumer Affairs, Food & Public Distribution and Textiles, to understand the ongoing sentiments of exports in the global market and also strategies the future course of action to propel the growth in the sector.

This meeting was moderated by Shri Santosh Sarangi, Director General of Foreign Trade (DGFT) in the presence of Shri Rajesh Kumar Singh Secretary, DPIIT, Shri Sunil Barthwal Commerce Secretary and Mrs Rachna Shah, Secretary Textiles.

At the outset Shri Sarangi welcomes the council and industry association and their representative. He also gave one small presentation on the current export growth of commodity and service sector. In his presentation he highlighted that in the first two months exports of both merchandise and service sector was sluggish on account of lower demand in Europe and USA and prevailing geo political tension that are prolonging the uncertainties in global market. He also spoke about the long-term growth strategies wherein focus has been given on the sectoral targets to be achieved by the various EPCs by the end of 2030. In this connection CLE has



Fig 1: Mrs Manmeet K. Nanda IAS, Joint Secretary DPIIT giving presentation to EPCs and Industry Associations on Trade & Investment of India

been given USD 12.5 bn. export target to be achieved by 2030.

Shri Rajesh Kumar Singh Secretary DPIIT presented his views and said that India's young and growing population coupled with thriving economy and market potential, make it an attractive investment destination for global investors seeking promising growth opportunities. He further elaborated that India's current demographic and economic advantages position it as a highly favourable investment destination. With young and dynamic population, India offers a vast consumer market and skilled workforce. Its robust economic growth, supported by ongoing reforms and infrastructure development creates conducive business environment. The government's initiatives such as make in India, and digital India further enhance the ease of doing business. These factors along with a stable political environment, make India an attractive choice for global investors seeking long term growth and profitability.

Shri Sunil Barthwal, Secretary DOC also gave his remarks and conveyed that India, as a dynamic and rapidly growing economy, possesses immense export opportunities across various sectors. By adopting a focused approach to harness market access, we can capitalize on these opportunities and

strengthen our position as a global exporter. In the manufacturing sector, India has a competitive advantage in industries such as textiles, automotive, engineering goods, pharmaceuticals, and electronics. With our skilled workforce, advanced manufacturing capabilities, and cost-effective production, we can cater to the growing global demand for high-quality products. In the services sector, India's strengths lie in IT and IT-enabled services, including software development, business process outsourcing (BPO), and knowledge process outsourcing (KPO). We have earned a reputation for delivering world-class services, and by further leveraging our technological expertise, we can tap into new markets and expand our export footprint. Additionally, the agriculture sector presents significant export potential for India. With a diverse range of agricultural products, including fruits, vegetables, spices, tea, and rice, we can cater to the increasing global demand for organic and sustainable food products. By adopting modern farming techniques and ensuring adherence to international quality standards, we can capture a larger share of the global agricultural market. To harness these export opportunities, a focused approach is crucial. This entails identifying target markets and understanding their specific requirements, preferences, and regulatory frameworks. By conducting thorough market research and analysis, we can tailor our products and services to meet the demands of different regions and countries.

Furthermore, it is essential to build strong trade relationships and collaborations with strategic partners in target markets. This involves engaging in bilateral trade discussions, negotiating favourable trade agreements, and fostering closer economic ties. By nurturing

these relationships, we can overcome trade barriers, create a conducive business environment, and secure long-term market access. In line with a focused approach, we must also invest in building a robust export infrastructure and enhancing logistical capabilities. Improving transportation networks, streamlining customs procedures, and developing world-class ports and airports will enable seamless movement of goods and facilitate efficient export processes.

Moreover, it is crucial to focus on skill development and capacity building. By equipping our workforce with the necessary knowledge and expertise, we can enhance productivity, quality standards, and innovation in our export-oriented industries. This will not only boost our competitiveness but also strengthen our value proposition in the global market. In conclusion, India possesses vast export opportunities across multiple sectors. By adopting a focused approach, leveraging market access, and addressing specific market requirements, we can tap into these opportunities and elevate India's standing as a global export powerhouse. Through sustained efforts, strategic partnerships, and continuous innovation, we can unlock new markets, drive economic growth, and create a brighter future for our nation.

Mrs Manmeet K. Nanda, Joint Secretary, DPIIT also gave presentation on the short term future course of action chalked out by the DPIIT in close association with DOC from July to Dec 2023. She informed that DOC and DPIIT aims to promote exports from our great nation across various industries and commodities. She added that high level task force was created in March 2023 comprising of officials from the Department of Commerce (DoC), Department for Promotion of Industry and Internal Trade (DPIIT), Indian Missions, and Invest India which has taken commendable efforts to ensure comprehensive planning. She said that the task force conducted in-depth research to study the import-export trends across HS codes for more than 20 countries.

She further added that task force also analysed the outbound investment trends and strategic engagements with these countries. Based on this extensive research, an initial list of 10 priority countries was shortlisted, with a focus on specific sectors for trade and investment promotion. Mrs Nanda also conveyed that further progress was made during a Senior Officers meeting held on 26th May 2023. During this meeting, the priority countries were revised and allocated among the senior officers, ensuring a more targeted approach. As a result, 12 countries have been prioritized for focused efforts. These countries include the USA, Brazil, Canada, UAE, Saudi Arabia, UK, Germany, Nordics (specifically Sweden), Japan, Taiwan, South Korea, and Russia.

She said that the task force has worked diligently to identify a calendar of activities for each of the above-mentioned countries, taking into consideration anchor events taking place in those countries. This calendar includes participation in Market Access Initiative (MAI) events and investment roadshows. By aligning our activities with these key events, we can maximize our impact and engagement with potential partners. She also informed in addition to our focus on international outreach to priority countries, we are also committed to sector-focused domestic engagements. By organizing targeted events and interactions, we aim to create a conducive environment for businesses within specific sectors to explore opportunities, share knowledge, and form strategic partnerships.

Country-focused domestic engagements will also be a significant component of our strategy, she informed. These events will bring together key stakeholders, including industry representatives, Government officials, and experts, to discuss bilateral trade relations, explore avenues for collaboration, and address any challenges faced in specific countries

Recognizing the importance of engaging with domestic industries, we will conduct extensive outreach programs to understand their needs, address their concerns, and provide necessary support, she added during presentation. These efforts will foster a strong partnership between the government and the private sector, enabling us to collectively work towards enhancing India's exports

To attract strategic investments, we will undertake targeted outreach programs that focus on specific investment targets. By highlighting the potential benefits and incentives available, we aim to attract investments in sectors that align with our national development priorities.

Lastly, we recognize the significant contributions of the Indian diaspora (PIOs) in promoting India's trade and investment interests. We will actively engage with them through various outreach programs, leveraging their expertise, networks, and influence to further strengthen our trade relationships and expand market access.

In summary, she emphasized that the formation of the task force and the collective endeavours undertaken to date signify a momentous leap in our endeavour to promote exports from India. By focusing on priority countries, specific sectors, and targeted outreach, we are poised to elevate India's position as a global leader in trade and investment. I urge all stakeholders to actively participate



Fig 2: Shri Piyush Goyal Union Minister for Commerce and Industry, Consumer Affairs, Food & Public Distribution and Textiles with Shri Sanjay Leekha, Chairman CLE and Shri PR Aqeel Ahmed, Past Chairman CLE

and support these initiatives, as together, we can unlock new opportunities and propel our nation towards greater economic prosperity.

Shri Piyush Goyal, Hon'ble Minister elaborated on plans to organize a series of big exhibitions and events dedicated to showcasing the immense potential of Indian products and services on the global stage. He elaborated that India, with its rich heritage and diverse culture, has always been a land of immense talent and innovation. Our country is blessed with an abundance of resources, skilled artisans, and a booming entrepreneurial spirit. It is high time we leverage these strengths to propel our nation to new heights in the international trade arena. Hon'ble Minister elaborated that through these exhibitions and events, we aim to create a platform where our industries and businesses can showcase their prowess to a global audience. By bringing together buyers, sellers, investors, and industry experts, we will foster collaborations, encourage trade partnerships, and facilitate the exchange of knowledge and ideas. He further added that the exhibitions will cover a wide range of industries and commodities, including textiles, handicrafts, information technology, pharmaceuticals,

agriculture, and much more. Each event will be meticulously planned and executed to ensure that participants can explore and appreciate the finest products and services that India has to offer.

He also stressed that in these shows we will extend invitations to foreign delegates, embassies, trade commissions, and international media to ensure maximum visibility for our exhibitors. We will highlight our commitment to

quality, reliability, and competitive pricing, making India an attractive destination for global businesses seeking partnerships and investments.

He conveyed that our government is also dedicated to providing the necessary support and infrastructure to make these exhibitions a grand success. We will collaborate with industry associations, chambers of commerce, and trade promotion agencies like ITPO, NOIDA Mart and Dwarka Exhibition Centre to facilitate a seamless experience for all participants. Additionally, we will

work closely with state governments to identify suitable venues and ensure that the necessary logistical arrangements are in place. To complement these exhibitions, we will organize seminars, workshops, and networking sessions to facilitate knowledge exchange and skill development. This will enable our industries to stay abreast of the latest trends, technological advancements, and best practices, making them more competitive in the global market.

In conclusion, the upcoming series of big exhibitions and events will serve as a significant milestone in our journey to boost exports from India. It is an opportunity for us to showcase our capabilities, build lasting trade relationships, and position India as a global leader in various industries and commodities. I urge all stakeholders, both domestic and international, to actively participate and support this initiative. Together, let us embark on this exciting endeavour to promote India's exports, unleash our economic potential, and bring prosperity to our great nation.



Fig 3: Hon'ble Minister giving his remarks to EPCs and Industry Associations during the meeting.



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NITI Aayog Consultative meeting with Council for Leather exports on India Footwear & Leather Sector Performance, Growth Potential and Duty Structure



Shri Ishtiaque Ahmed, Sr. Advisor, Leather Sector NITI Aayog, with Shri Sanjay Leekha, Chairman CLE and Shri R Selvam ED CLE at NITI Aayog New Delhi, 4th July, 2023

The Indian leather and footwear sector has showcased remarkable growth and holds significant potential for further expansion. In recent years, the sector has witnessed a steady increase in exports, driven by India's skilled craftsmanship, quality products, and cost competitiveness elaborated by Shri Raghunathan CLE consultant to NITI Aayog during meeting. He briefed Sr Advisor Shri Ishtiaque Ahmed on historical development of the sector and informed that the history of leather stretches back approximately 400,000 years, with its origins traced to Hoxne, England. Since then, its production and use have evolved across different ages and civilizations, including the Stone Age, Bronze Age, Iron Age, Ancient Times, the Middle Ages, the Renaissance, the Industrial Revolution, and into modern times.

During the 18th century, industrialization and mechanization in Europe and the American colonies transformed the leather industry. By the 1870s, Germany and France emerged as major producers of premium leather goods, while the global per capita demand for shoes drove the expansion of the leather industry. In the 19th century, there was a decline in British leather exports, leading to the rise of the United States of America and Germany as major exporters of leather. In the 1950s, Italy became a leading shoe exporting country, followed by Japan in the 1960s, which significantly contributed to the global shoe production and export market.

During the 1980s and 1990s, Hong Kong held a prominent position as a manufacturer of canvas and rubber footwear products. However, the landscape shifted in the 2000s when China, Vietnam, and India emerged as major players in the ready-made shoe industry. China, in particular, opened 14 manufacturing centers and allowed foreign investment, leading to a significant shift in the industry from Hong Kong, Taiwan, and South Korea.

The year 2022 marked signs of recovery in key markets, such as the United States and the European Union, following the COVID-19 pandemic. The industry showed positive signs of rebounding to pre-pandemic levels, indicating a hopeful future for the global leather and footwear sector.

Throughout its history, the leather industry has experienced transformations,

geographical shifts, and market fluctuations. As we move forward, countries in Asia, including China, Vietnam, and India, are expected to continue playing vital roles in the growth and development of the global leather and footwear industry.

Shri Raghunathan elaborated on global trade of leather and footwear and explained that the global trade in the leather and footwear sector has witnessed both significant growth and fluctuations over the years. From USD 117 billion in 2009, it expanded to USD 201.6 billion in 2019, indicating a strong decadal growth of 8.6% between 2001 and 2009. However, during the period of 2014-2019, the sector experienced a slowdown, with growth slowing down from 11.6% to -0.2%. He added that despite these challenges, global trade in leather and footwear rebounded to reach USD 198.33 billion in 2021. Furthermore, in the post-COVID era, it is expected that global imports will grow by more than 15%, indicating positive prospects for the sector's recovery and future growth. During the first half of the decade (2009-2014), the leather and footwear industry demonstrated consistent robust growth, recording an impressive 11.6% growth rate.



Shri Raghunathan Consultant CLE making presentation before Sr Advisor NITI Aayog on Leather and Footwear sector of India

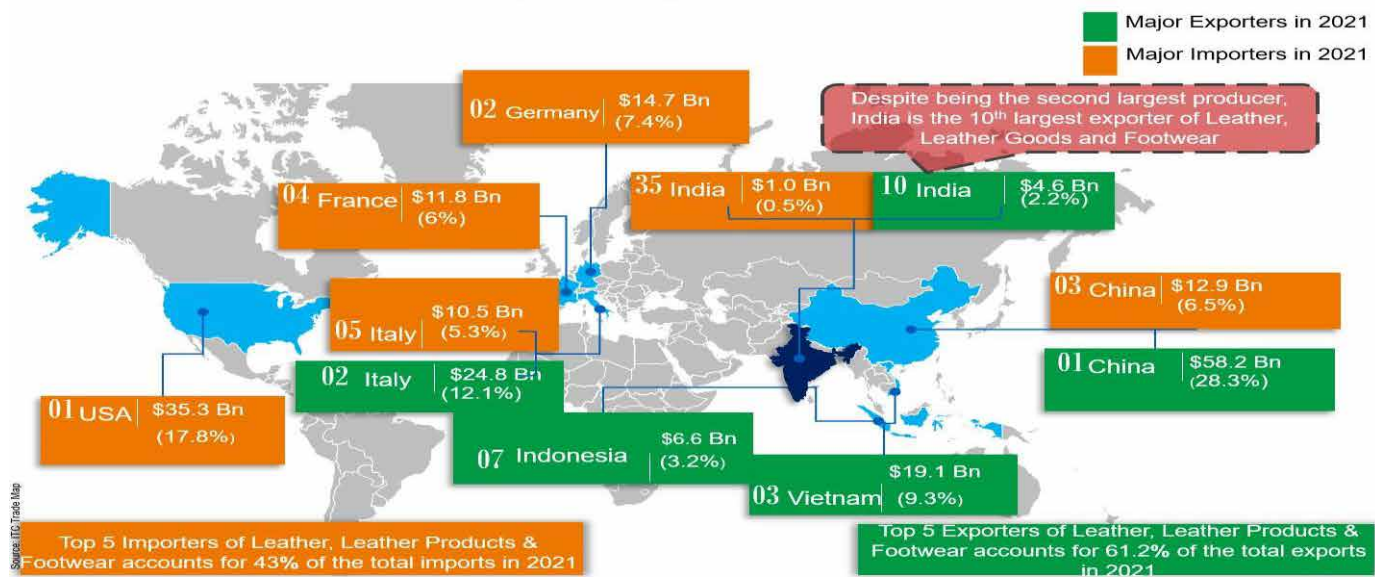
However, in the second half of the decade (2015-2019), the growth rate slowed down significantly.

These fluctuations in growth rates highlight the dynamic nature of the global leather and footwear market, influenced by various factors such as economic conditions, consumer preferences, and market dynamics. As the world emerges from the COVID-19 pandemic, there is an optimistic outlook for the sector, with expectations of renewed growth and increased global imports.

Overall, while the leather and footwear sector faced challenges in recent years, the potential for growth remains significant. By adapting to changing market trends, focusing on innovation, and leveraging emerging opportunities, the industry can position itself for sustained growth in the future.

The global trade in Leather, Leather Products, and Footwear experienced notable growth from USD 167.2 billion in 2011 to USD 204.0 billion in 2014,

Major Trading Countries



representing a significant compound annual growth rate (CAGR) of 6.8%. However, since 2014, the market has witnessed a degrowth at a CAGR of -3% until 2020. Nevertheless, there was a positive year-on-year growth of 21.1% in the market thereafter. The outbreak of the Covid-19 pandemic had an adverse impact on exports in 2020, resulting in a decline of USD 31 billion compared to the previous year. Among the exports in Leather, Leather Products, and Footwear, the Footwear category held the largest share at 74.3%, followed by Leather Products (18.7%) and Leather (7.1%) in 2021.

Over the past decade, there has been a notable shift in global trade from Leather and Leather Products to Non-Leather Products, particularly in the Footwear and Leather Goods categories, such as bags and belts.

In 2021, the top 5 importers of Leather, Leather Products, and Footwear accounted for 43% of the total imports, while the top 5 exporters accounted for 61.2% of the total exports. Despite being the second-largest producer, India ranked as the 10th largest exporter of Leather, Leather Goods, and Footwear. These market trends highlight the dynamic nature of the global Leather, Leather Products, and Footwear trade. The Covid-19 pandemic and changing consumer preferences have impacted the industry, leading to fluctuations in exports and a shift towards non-leather products. However, opportunities for growth and market expansion remain, and it is essential for stakeholders to adapt to evolving market dynamics and explore new avenues for innovation and competitiveness.

Shri Sanjay Leekha, Chairman CLE said that the Indian leather industry has undergone significant transformations over the years. From 1950 to 1970, the focus was primarily

on Raw Hides & Skins and Semi-Finished Leathers, which accounted for 90% of the sector's exports. However, from 1970 to 2000, there was a shift towards value addition, with a focus on producing finished leather products. Between 2000 and 2020, the industry emphasized modernization, expansion, technological upgradation, skill development, and environmental management. These efforts aimed to enhance competitiveness and sustainability in the sector.

Looking ahead to the period from 2021 to 2030, the Indian leather industry has set ambitious targets to achieve USD 13.70 billion in exports. The strategy includes capitalizing on emerging business opportunities, creating mega clusters, developing a strong component ecosystem, and focusing on product diversification, particularly in the casual and athleisure segments. By embracing these strategies, the Indian leather industry aims to position itself as a global leader, tapping into new markets and meeting the evolving demands of consumers. Through a combination of innovation, value addition, and sustainable practices, the industry seeks to expand its export potential and contribute significantly to the country's economic growth and employment generation.

Shri R Selvam ED CLE elaborated on the export performance and explained that the export performance of the Indian leather industry in the fiscal year 2022-23 showcases both positive and negative trends across different categories. He presented a summary of the export figures and percentage changes compared to the previous year:

Finished Leather: The export value declined from 456.1 million USD in 2021-22 to 430.93 million USD in 2022-23, representing a decrease of 5.52%. The category accounted for 8.19% of the total export share

Leather Footwear: The export value increased from 2047.08 million USD in 2021-22 to 2377.23 million USD in 2022-23, showing a growth of 16.13%. Leather footwear held the largest share at 45.20% of the total exports

Footwear Components: Export value in this category rose from 249.87 million USD in 2021-22 to 289.81 million USD in 2022-23, indicating a growth of 15.98%. The category contributed 5.51% to the overall export share

Leather Garments: Export value slightly increased from 342.38 million USD in 2021-22 to 353.07 million USD in 2022-23, registering a growth of 3.12%. Leather garments accounted for 6.71% of the total export share

Leather Goods: Export value also experienced a slight increase from 1287.06 million USD in 2021-22 to 1301.34 million USD in 2022-23, representing a growth of 1.11%. Leather goods had a significant share at 24.74% of the total exports

Saddlery and Harness: The export value declined from 276.1 million USD in 2021-22 to 222.17 million USD in 2022-23, showing a decrease of 19.53%. This category accounted for 4.22% of the total export share

Non-Leather Footwear: Export value significantly increased from 214.11 million USD in 2021-22 to 284.98 million USD in 2022-23, indicating substantial growth of 33.10%. Non-leather footwear contributed 5.42% to the overall export share.

He said overall, the Indian leather industry witnessed a positive growth of 7.94% in total exports, reaching 5259.53 million USD in 2022-23. Despite certain categories experiencing declines, others demonstrated notable growth, showcasing the sector's resilience and potential for further expansion.

The overview of the import figures and percentage changes compared to the previous year was presented by ED CLE and conveyed that overall, the Indian leather industry witnessed a substantial growth of 30.77% in total imports, reaching 1468.88 million USD in 2022-23. "The import data for the Indian leather industry in the fiscal year 2022-23 reflects significant changes in various categories", he said. The growth was driven by significant increases in import values for categories like leather footwear and non-leather footwear. These import trends reflect the evolving market dynamics and the retail industry's response to meet consumer demands and expand product offerings.

Shri Selvam further elaborated that the Indian leather industry possesses several strengths that contribute to its position as a significant player in the global market. Some key highlights are:

Huge Raw Material Base: India boasts a substantial raw material base, accounting for 13% of the global production of hides and skins. This abundant supply of raw materials provides a strong foundation for the industry's growth and sustainability.

Highly Labour Intensive: The Indian leather industry is highly labor-intensive, with a current workforce of 4.42 million, of which 30% are women. This abundant labor pool enables the industry to meet production demands efficiently.

Diversified Product Mix: The Indian leather industry offers a diversified range of products, including leather garments, leather accessories, gloves, saddlery and harness products, and footwear. This diverse product mix enables the industry to cater to a wide range of customer preferences and market segments.

Impressive Milestones: The Indian leather industry has achieved significant milestones, such as being the world's second-largest producer of footwear, the second-largest exporter of leather garments, the third-largest exporter of saddlery and harness items, and the fourth-largest exporter of leather goods. These accomplishments highlight India's expertise and global competitiveness in various segments of the leather industry.

Large Production Capacity: India holds a substantial share in global leather production. It is the second-largest producer of footwear with a global share of 19.4%, the second-largest producer of leather garments with a global share of 7.08%, and the largest producer of saddlery and harness items with a global share of 13.28%. Additionally, India produces 2.5 billion square feet of leather annually, indicating the industry's vast manufacturing capacity.

Opportunity for Investments and Collaborations: Despite its significant production capacity, India's tanning capacity is currently utilized at only 60%. This presents an opportunity for investments and technical collaborations to further enhance production capabilities and efficiency in the leather industry.

Institutional Support: The Indian leather industry receives substantial institutional support through organizations such as the Footwear Design and Development Institute, Central Leather Research Institute, Leather Sector Skill Council, Central Footwear Training Institute, and the National Institute of Fashion Technology. These institutions provide crucial support in terms of research, development, skill training, and design innovation, bolstering the industry's growth and competitiveness.

With its strengths, achievements, and growth potential, the Indian leather industry is well-positioned to expand its global footprint and capitalize on emerging opportunities in the dynamic global market.

Shri Sanjay Leekha Chairman CLE elaborated on Opportunities in the Indian Leather and footwear Industry. He explained that

Export Opportunities: The export potential of leather, leather products, and footwear from India is expected to reach USD 5.6 billion by 2023-24. There is a significant scope to increase exports to traditional markets like the European Union (EU) and the United States (USA). Additionally, emerging markets such as Japan, Canada, Australia, and Russia offer lucrative export prospects.

Domestic Market Potential: The domestic market in India presents a huge opportunity for the leather industry. As the second-largest producer of footwear globally, with an annual production of 2,600 million pairs in 2021, there is considerable potential to cater to the domestic demand. Currently, 90% of footwear produced in India is consumed domestically. India is also the second-largest consumer of footwear, with a consumption of 2,559 million pairs in 2021. The per capita footwear consumption is projected to increase from 2 pairs to 3 pairs in the next 5 years, indicating a growing domestic market.

Transformation of the Sector: The Indian leather industry has the potential to undergo a significant transformation. One opportunity lies in attracting large-scale Foreign Direct Investment (FDI) across the value chain. This would bring in expertise, technology, and capital, further enhancing the industry's competitiveness and production capabilities

Boosting High-Value Non-Leather Footwear Exports: India has the potential to enhance its exports of high-value non-leather footwear. By focusing on design innovation, quality improvement, and market diversification, the industry can tap into new export markets and increase its share in the global non-leather footwear segment

Infrastructure Development: The development of plug-and-play infrastructure facilities can play a vital role in scaling up the leather industry. Creating dedicated manufacturing zones and industrial clusters with state-of-the-art infrastructure will attract investments, foster collaboration, and streamline operations, ultimately boosting production capacities

Employment Generation: The leather industry has the potential to generate significant employment opportunities in India. As the sector expands and modernizes, more job opportunities will be created across various skill levels, contributing to economic growth and social development

By capitalizing on these opportunities, the Indian leather & Footwear industry can strengthen its position both in domestic and international markets, fuelling growth, increasing exports, and creating a vibrant ecosystem for the sector's sustainable development.

Shri Raghunathan explained the India's duty structure in the leather and footwear sector has undergone

positive reforms, aiming to boost domestic manufacturing and promote exports. The introduction of the Goods and Services Tax (GST) has streamlined taxation and reduced complexities, benefiting both manufacturers and consumers.

He further explained the export and import duties play a crucial role in shaping the dynamics of the leather industry. He conveyed that export duty is applicable only on specific types of leathers. However, value-added products such as leather goods, leather garments, saddlery & harness items, footwear, and footwear components are allowed to be exported without any export duty. This promotes the export of higher value-added products, encouraging the growth of the industry. While Raw hides and skins are exempted from import duty. However, other types of leathers, inputs and components, as well as value-added leather products and footwear, are subject to import duty. The import duty is levied to protect domestic manufacturers, regulate imports, and ensure a level playing field for the domestic industry.



NITI Aayog Team with CLE

He further explained that certain exemptions from import duty are granted under schemes like Advance Authorisation, IGCR (Import of Goods at Concessional Rate) and EPCG (Export Promotion Capital Goods). These schemes aim to provide incentives and facilitate the import of raw materials, inputs, and components necessary for the production of leather goods and footwear.

The duty structure aims to strike a balance between promoting exports, protecting domestic industries, and encouraging value addition within the country. It incentivizes the export of value-added products by exempting them from export duty, while also ensuring that imports are regulated and subjected to the necessary duties.

Overall, the export and import duty structure in the leather industry plays a crucial role in shaping the industry's competitiveness, promoting value addition, and balancing trade flows. The exemptions and schemes provide additional support to the industry by facilitating the import of essential inputs and encouraging investment in the sector.

In the response to CLE presentation Sr Advisor thanked CLE team for the presentation and requested that further clarification and concept note may be shared with NITI Aayog on raw material & inputs of non leather footwear as well as duties on intermediary and capital goods directly affecting the sector.

GOI re-opens online portal NSWS for submission of applications/project proposals under IFLDP 2021-26

The Central Sector Scheme Indian Footwear and Leather Development Programme (IFLDP) approved for implementation during 2021-26 with a combined outlay of Rs.1700 Crores, and the applications / proposals were to be submitted in the online portal National Single Window System (NSWS) www.nsws.gov.in. It may be recalled that vide Public Notice dated 21.11.2022, the Department for Promotion of Industry & Internal Trade (DPIIT), Government of India has stipulated 15.12.2022 as the last date for submission of applications / project proposals under the sub-schemes of IFLDP in the NSWS online portal.

Vide E-mail dated 14.07.2023, the DPIIT, Government of India has informed the CLE that it has decided to re-open the NSWS portal to submit the applications/proposals under the following sub-schemes of Indian Footwear and Leather Development Programme 2021-26:

- (a) Integrated Development of Leather Sector (IDLS) sub-scheme
- (b) Development of Design Studios in Footwear and Leather sector sub-scheme
- (c) Brand Promotion of Indian Brands in Footwear and Leather sector sub-scheme

The CLE calls upon the industry to prepare and submit the applications/project proposals under the above mentioned three sub-schemes as per the respective scheme guidelines in the online portal NSWS.

The CLE takes this opportunity to inform that CLE will continue to organize the Industry Outreach Events / Webinars every Wednesday at 11.30am to provide guidance and offer clarifications to the queries of industry entrepreneurs on the guidelines of IDLS sub-scheme and other sub-schemes of IFLDP. So far, 43 editions of the weekly webinars on IFLDP have been successfully conducted. The official(s) from Project Implementation Units Footwear Design & Development Institute (FDDI), CSIR-Central Leather Research Institute (CLRI) and Council for Leather Exports (CLE) are joining the Webinar every Wednesday and interacting with the participants.

We request the members / eligible units to make it convenient to participate in the CLE Webinars organized every Wednesday and interact with officials of CLE, FDDI and CSIR-CLRI.

(Ref: CLE Circular No.CLE-HO/PTLM/IFLDP / 2023-24 dated 17th July 2023)



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Quality Control Orders (QCOs) implementation in the Footwear Sector, came into effect from 1st July 2023

The Department for Promotion of Industry & Internal Trade, Ministry of Commerce & Industry, Government of India has mandated the Quality Control Orders [QCOs] for Footwear Sector which has come into effect from 1st day of July 2023. 13 footwear products covered under the Footwear made from All-Rubber and all Polymeric material and its components (Quality Control) Order, 2022 and 11 footwear products covered under the Footwear made

from Leather and other materials (Quality Control) Order, 2022 is under implementation from 1st July 2023. The Bureau of Indian Standards (BIS) shall be the certifying and enforcing authority for the goods or articles.

Extension of time till 31.12.2023 for the Indian Standards revised recently.

(BIS Reference: CMD-2/G-94 Dated: 10.07.2023)

For the following products for which standards have been revised recently, the manufacturers making the products as per these revised specifications will be given an additional time of 6 months to comply i.e., up to 31 December 2023. The following are the details:

Existing Indian Standards	Date of Withdrawal of this Standard was:	Date of Withdrawal of this Standard was:	Revised Indian Standards	Date of Establishment of this Standard
IS 6721: 2023 Specification for PVC Sandal	09.09.2023	31.12.2023	IS 6721: 1972 Sandal and Slippers – Specification (First Revision)	09.09.2023
IS 11544: 1986 Specification for Slipper, Rubber	09.09.2023	31.12.2023	IS 10702: 2023 Hawaii Chappal – Specification (Third Revision)	01.06.2023
IS 10702: 2023 Rubber Hawaii Chappal – Specification	01.09.2023	31.12.2023	IS 15844 (Part 1): 2023 Sports Footwear Part 1 General Purpose (First Revision)	13.06.2023
IS 15844: 2010 Sports Footwear – Specification	13.12.2023	31.12.2023	IS 15844 (Part 2): 2023 Sports Footwear Part 2 Performance Sports Footwear	13.06.2023

The following are the explanations for the above amendments and validity periods of above four existing Indian Standards:

- The standard for Rubber Hawaii Chappal has been amended from IS 10702:1992 to IS 10702:2023. The new standard was established on

01.06.2023. The word in the title 'rubber' has been omitted in the amended Indian Standard. The old standard has been earlier given time till 01.09.2023 and the Government of India has now extended its validity date till 31.12.2023.

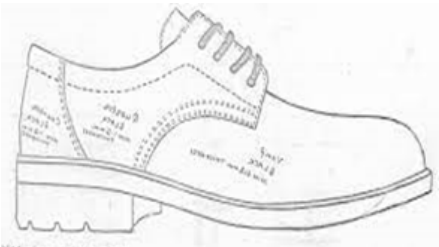
- The standard for PVC Sandal (IS 6721:1972) and Standard for Slipper, Rubber (IS 11544:1986) have been merged and a new standard for Sandal & Slippers (IS 6721:2023) was established on 09.06.2023. The old standards have been earlier given time till 09.09.2023 and the Government of India has now extended the validity date till 31.12.2023.

• The standard for Sports Footwear (IS 15844:2010) has been amended and 3 separate standards have been formulated, namely Sports Footwear (General Purpose) IS 15844 (Part 1):2023, Sports Footwear (Performance Sports Footwear) IS 15844 (Part 2):2023. The old standard has been given time earlier till 13.12.2023, which has now been extended till 31.12.2023. Please note that the 3rd standard is for Sports Footwear (Professional Sports Footwear) which is currently under revision by BIS.

The above details along with the Notifications issued by the DPIIT, Govt of India, and BIS Reference CMD-2/G-94 dated 10.07.2023 was circulated to all the units registered with CLE vide CLE circular dated 12.07.2023.

All the above relevant details were hosted in the CLE website www.leaseindia.org and kept in public domain. These can be accessed from homepage itself.

BIS clarification regarding Derby Shoes ; IS 17043 : 2018
(BIS Reference: CMD-2/G-94 Dated: 10.07.2023)



Derby shoes as per IS 17043:2018 will be under compulsory BIS certification from 1st July 2023 according to the Leather and Other Materials (Quality Control) Order, 2022

Since “Derby shoes” may refer to the formal/semi-formal shoes of “derby” type design being used by the general population as well as derby shoes

being used by the armed forces/police personnel, stakeholders have sought clarification regarding whether the standard and QCO would be applicable to all shoes of derby design including for civilian use or only derby shoes being which are to be used by armed forces/police forces.

In this regard, BIS has clarified that currently only the Derby Shoes which are to be used by armed forces/police forces are covered in the scope of IS 17043:2018 and therefore, only these derby shoes will be covered under the Leather and Other Materials (Quality Control) Order, 2022.

Therefore, the Leather and other Materials (Quality Control) Order, 2022 shall not apply to derby shoes for civilian use as of now.

BIS clarification regarding to Implementation of QCOs on Sandals, Slippers and Hawaii Chappals (BIS Reference: CMD-2/G-94 Dated: 10.07.2023)

It has been informed vide the clarification ref no. Ref: CMD-2/G-94 dated : 10.07.2023 that for the following products for which standards have been revised recently, the manufacturers making the products as per these revised specifications will be given an additional time of 6 months to comply i.e., up to 31 December 2023.

Current IS No. (Product)	Revised IS No. (Product)
IS 10702 : 1992 – Rubber Hawaii Chappal	IS 10702 : 2023 – Hawaii Chappal
IS 11544 : 1986 – Rubber Slipper	IS 6721 : 2023 – Sandal and Slipper
IS 6721 : 1972 – PVC Sandal	

In this regard, it is to further clarify, that in accordance with the above:

a) QCO shall be applicable on Hawaii Chappals made from Rubber of two types depending on the design of the sole as per IS 10702:1992 w.e.f 1st July 2023.

However, for Hawaii Chappals made from material other than rubber such as polymers for example TPR/EVA/PU/TPU etc or combinations thereof, the QCO shall be applicable on the product as per IS 10702:2023 from 1st Jan 2024, and

b) QCO shall be applicable on Slipper made from rubber as per IS 11544:1986 w.e.f 1st July 2023.

However, for slippers made from material other than rubber such as polymers for example TPR/EVA/PU/TPU etc, whether fully moulded or assembled, the QCO shall be applicable on the product as per IS 6721:2023 from 1st Jan 2024., and

c) QCO shall be applicable on Sandal made of PVC and manufactured by injection moulding process as per IS 6721:1972 w.e.f 1st July 2023.

However, for sandals made from material other than PVC such as polymers for example TPR/EVA/PU/TPU etc, whether fully moulded or assembled, and for sandals made from PVC manufactured by a process other than injection moulding, the QCO shall be applicable on the product as per IS 6721:2023 from 1st Jan 2024.

PRODUCT DATA MANAGEMENT for Managing Design Data in a Footwear Manufacturing Unit CFTI, Chennai

Product Data Management (PDM) or also called the Graphical Documentation Manager (GDM) is a system for managing design data and engineering processes in one central location. Engineering teams use PDM software to organize product-related information, track revisions, collaborate, manage change orders and generate Bills of Materials (BOMs).

Product Data Management (PDM) is the use of software to manage product data and process-related information in a single, central system. This information includes Computer-Aided Design (CAD) data, models, parts information, manufacturing instructions, requirements, notes and documents.

Salient Features

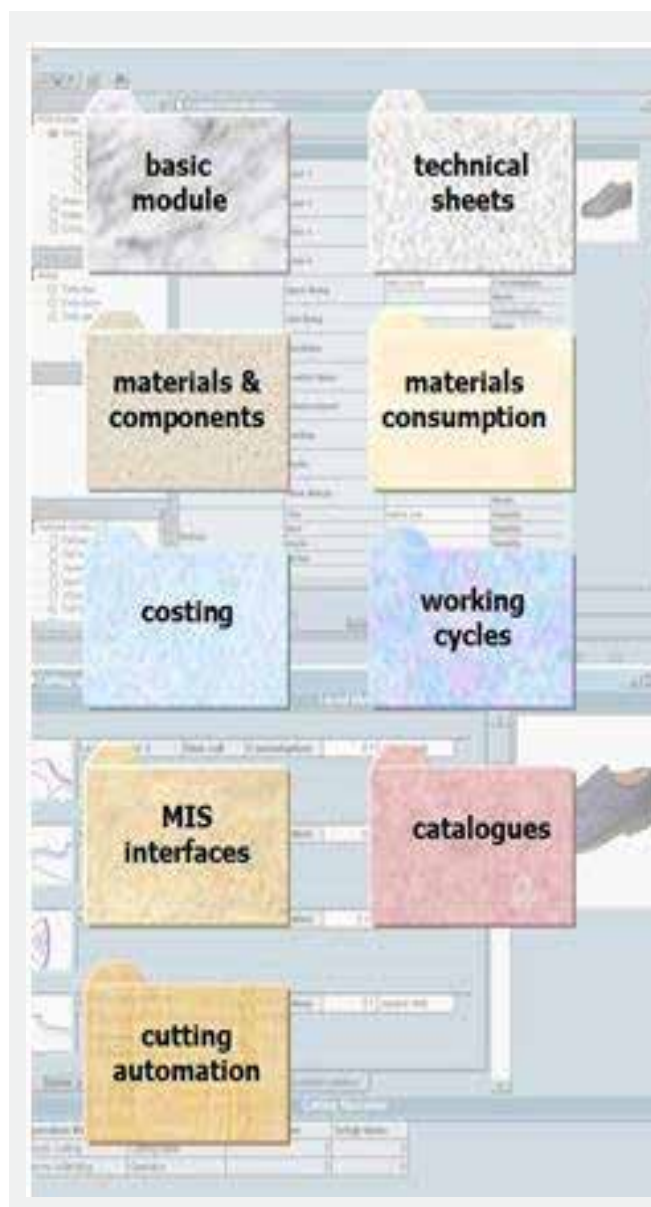
- A Product Data Management (PDM) system holds all relevant information used in the pre-production stage including product descriptions and detailed specifications.
- The software connects all the processes that are part of the development phase, minimizes manual labour and supplies relevant departments, partners and overseas subcontractors with fast and detailed product information.
- The PDM solution covers all areas from sketching, product and technical specifications to detailed pre-costing throughout the supply chain, particularly in pre-production.
- It is therefore the ideal tool for an efficient supervision of the complete production process.

NEED FOR PDM SOLUTIONS

- Reducing the time from concept to the consumer.
- With a development process that is increasingly complex, retailers must have Product Data Management (PDM) solutions to give departments and divisions across an organization the ability to collaborate on product design and development.
- Managing and controlling access to product data and imagery. This requires retailers to collaborate on product designs simultaneously with internal design teams and global suppliers.
- Supply chain optimization - Traditional supply chains are being challenged as sourcing trends shift and retailers explore global supply chain options. International quotas are gone, and effective outsourcing is now a matter of survival with improved collaboration between suppliers and vendors.
- More frequent fashion cycles - Consumers are demanding more fashion options throughout the year, propelling the need for faster speed to market.
- It is therefore the ideal tool for an efficient supervision of the complete production process.
- Keeping the existing formats, PDM can be easily integrated to any existing system with ease and enhance the limits of the current application to a very high level.
- Thus, it is very compatible with most of the Database management systems such as MS Access.
- PDM turns data redundancy down. An entire set of characteristics of a model can be managed in an advanced way keeping all data in the same sheet.
- It uses standard formats such as XML for exchanging data and UML for creating documentation formats.

MODULAR FORMAT

- PDM is further broken down into modular forms based on the need, size and the demands of company.
- Each module can be procured separately depending upon the extent of use and can be tailor-made to suit the particular factory.
- This modular option helps in reducing the cost and gives an option to buy only those features which are necessary for the company and gives the option of adding up modules as and when required this growing with the demands of the company.
- All minor aspects are taken into account and have been spread over modules based upon its complexity and sequence.



MODULES

Basic Module

It can be considered as the backbone of the entire PDM system: a super flexible relational server Database, compatible with the most common Management Systems DB. With this basic module it is possible to control all the other modules and every datum leaded from the same interface.

Technical Sheets

A set of production specification sheets to organize all the information on models, articles and production tools: they allow the contemporary management of all the model variants. It includes: Bill of material, Cutting Specification, Stitching specification, Making & Assembling specification.

Materials and Components

This module is 100% integrated with the Technical Sheets and provides the database of materials and components in a simple and flexible way: it also allows a check through a print review. It can be queried in every release of CAD and is compatible with most popular DBMS existing in the factory.

Materials Consumption

This module supplies the entire tool needed to estimate, in a fast and precise way, an always updated "first" costs for the shoe project. It can link to all other Product database, material and Components database, production cycles and material database.

Costing

All the tools needed to estimate, in a fast and accurate way, your shoe first cost.

Working Cycles

This module is especially designed to schedule optimized production cycles and provides all the information useful to control the process and the production times.

MIS Interfaces

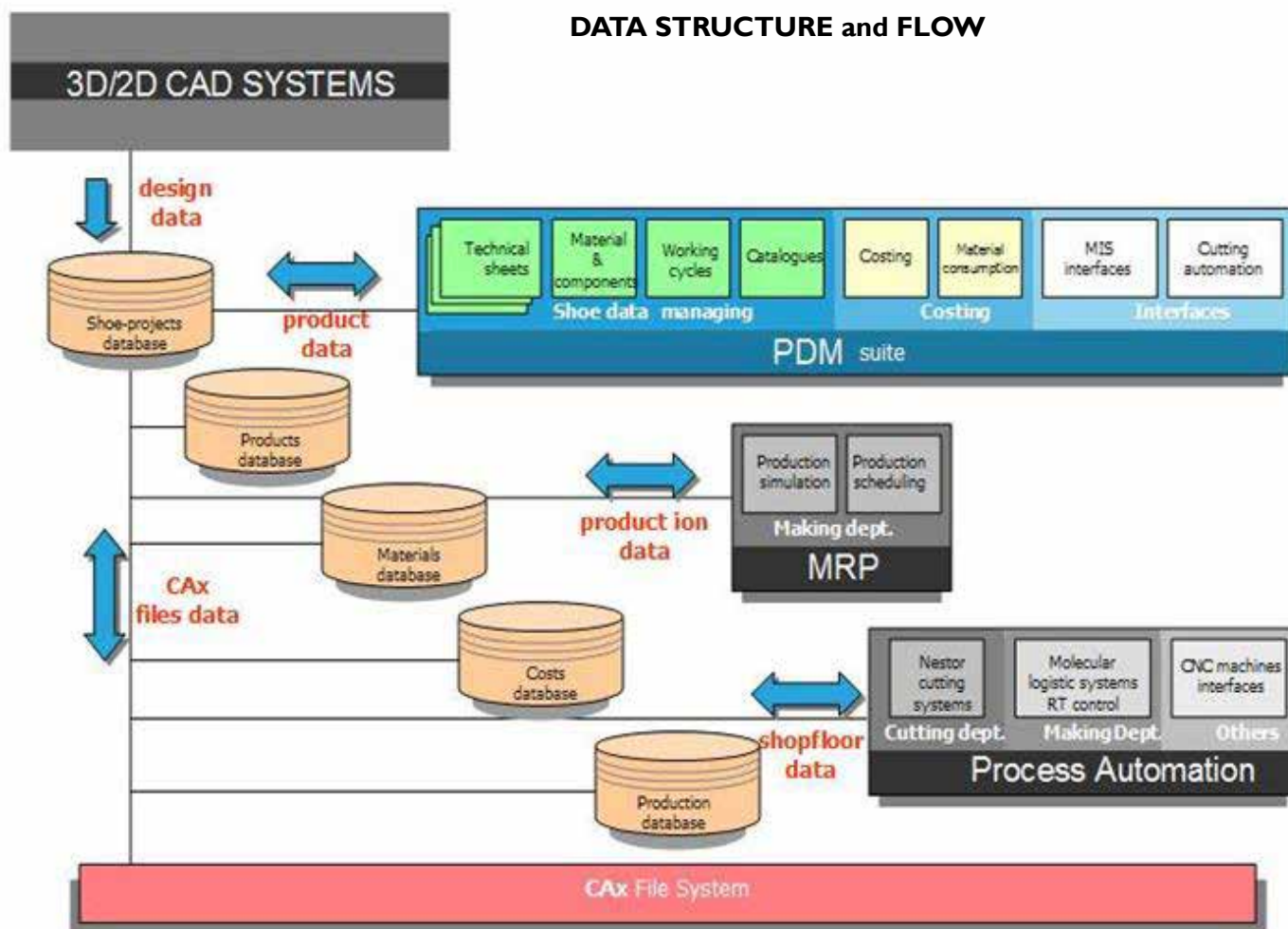
Import/Export data in standard formats to other ERP-PDM and MRP systems.

Catalogue

This module gives a powerful tool to the salesman to show the various collections in an attractive way. It also includes tools for the registration and transmission of the orders and provides sales statistics.

Cutting Automation

This is the ideal module to increase the productivity of an automated cutting department; it links in-line with the Cutting Software and your management System and supplies the operator with production orders, thus reducing the communication times.



- The Design Data is obtained from the styles fed into the 2D/3D CAD systems which get stored in the Shoe-projects database.
- This data then forms an input for technical sheets, costing and interfaces which results in data stored in the products database.
- The MRP and Process automation also generate data which gets stored in their respective databases.
- Integration with existent system (CAx, ERP, Legacy systems and other PDM) is a fundamental paradigm which is achieved through choice of open platform for database development and transport data sharing with other CAD/CAM systems.
- The database structure and the usage of Microsoft Access for report printing provide the possibility of reaching a complete customisation of the system behaviour.
- Documents print out graphical format can be completely designed by the customer and also integration with Microsoft office will increase the level of customisation reachable by any PDM user.



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Example of PDM/GDM output by CFTI,Chennai CAD Department

GDM

GRAPHICAL DOCUMENTATION MANAGER

TECHNICAL SPECIFICATION SHEET

ARTICLE - SNEAKER -001




LATERAL VIEW

SIZE

39404142434445464748

1

SNEAKER - 001



TPR

ARTICLE	SNEAKER -001
LAST	D- 8927
UPPER LEATHER	SHEEP
LINING LEATHER	SHEEP
UPPER THREAD	40 - WHITE
LINING THREAD	60 - BEIGE COLOUR
TYPE OF SOLE	TPR (8927)
CONSTRUCTION	CEMENTED

NYLON STRAP

UPPER TOUNGUE

UPPER QTR 2

DOG TAIL

STIFFENER

SOLE

UPPER LEATHER STRAP

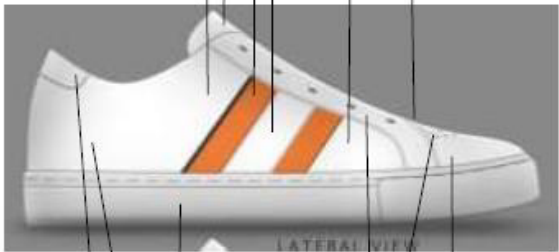
UPPER QTR

UPPER VAMP

TOE PUFF

R5 PUNCH

EYELET FACING



LATERAL VIEW

2

UPPER COMPONENTS

UPPER LEATHER	SHEEP
UPPER COLOUR	WHITE
UPPER THICKNESS	1(MM) - 1.2(MM)

UPPER VAMP

UPPER TOUNGUE

UPPER EYELET FACING

UPPER QUARTER IN 2

UPPER QUARTER OUT 2

3

LINING COMPONENTS

LINING LEATHER	SHEEP
LINING COLOUR	BEGIE
LINING THICKNESS	0.8(MM)-0.9(MM)

LINING VAMP

LINING TOUNGUE

LINING QUARTER

4

REINFORCEMENT

BKR EYELET

BKR VAMP

BKR QTARTER

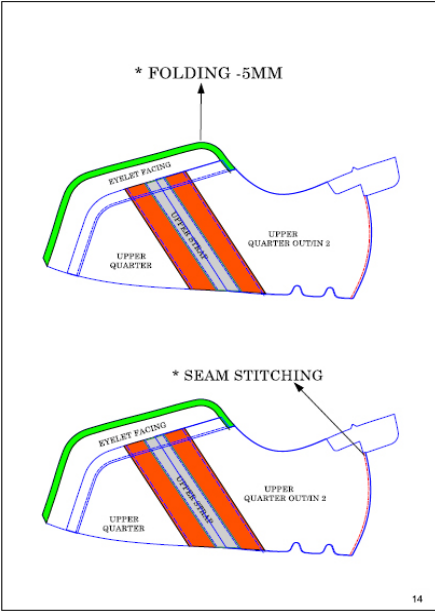
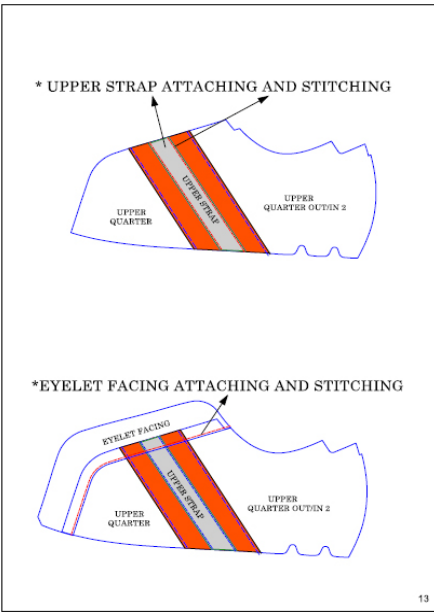
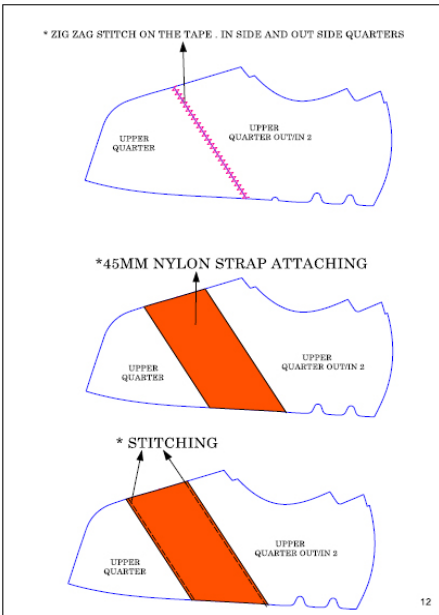
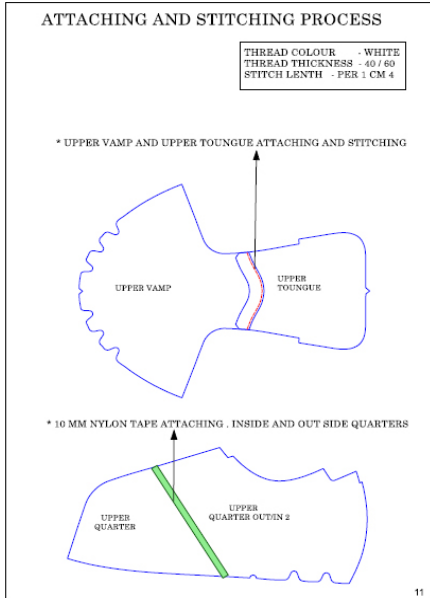
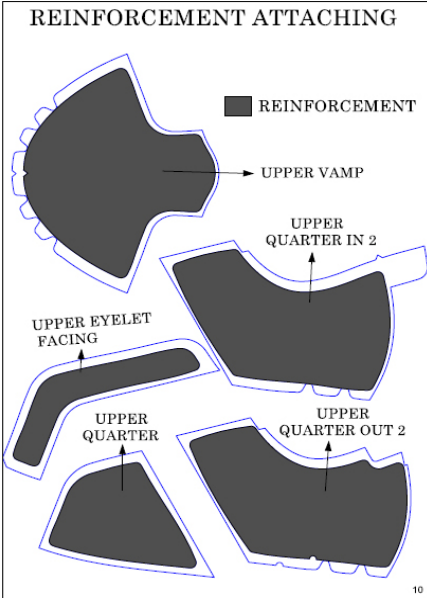
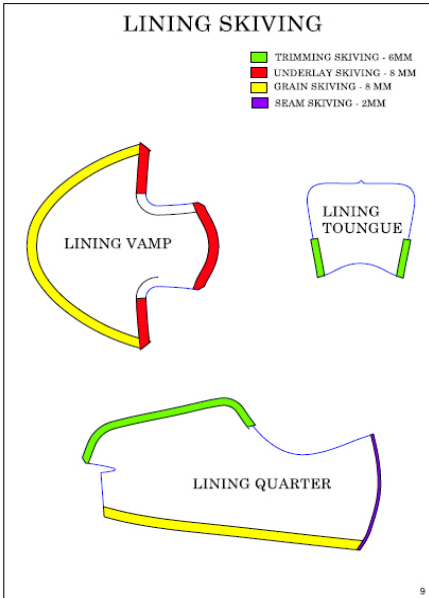
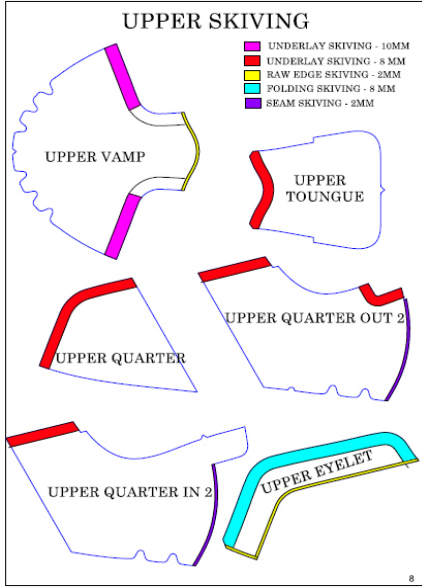
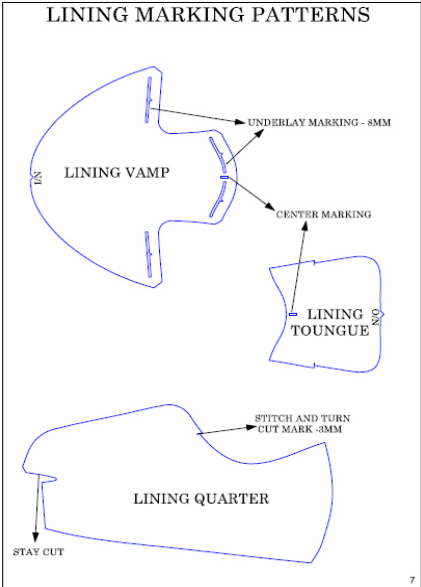
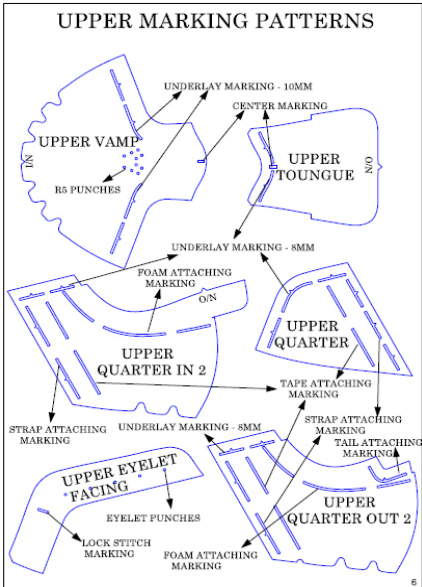
QUARTER OUT 2

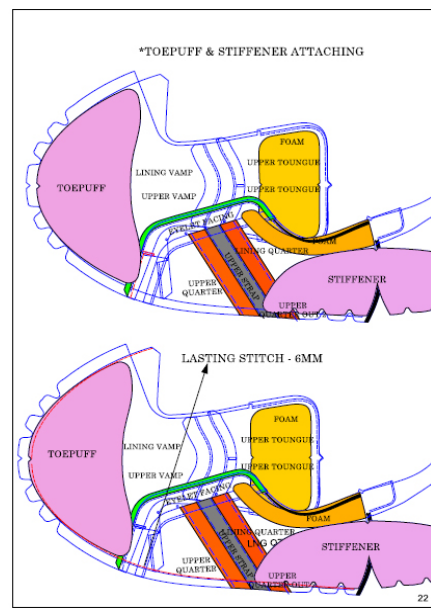
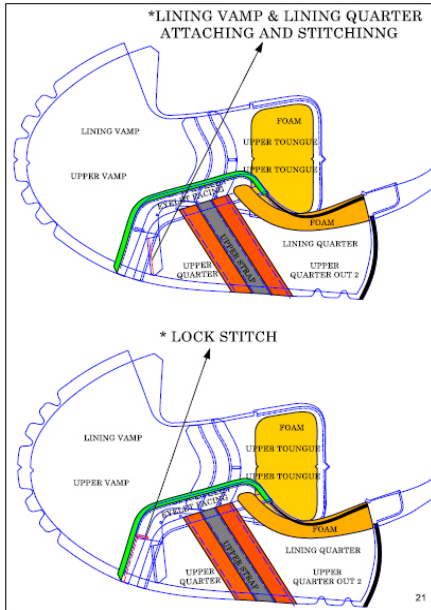
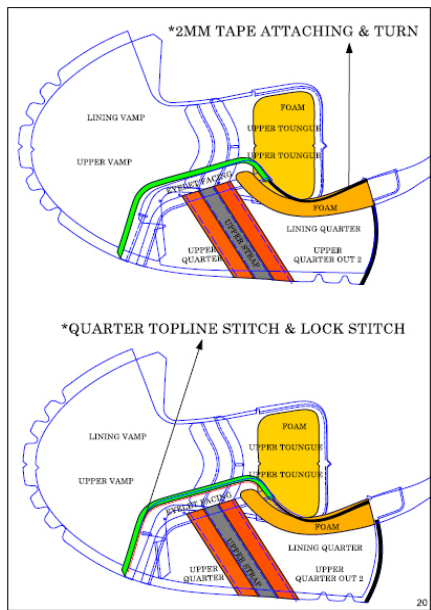
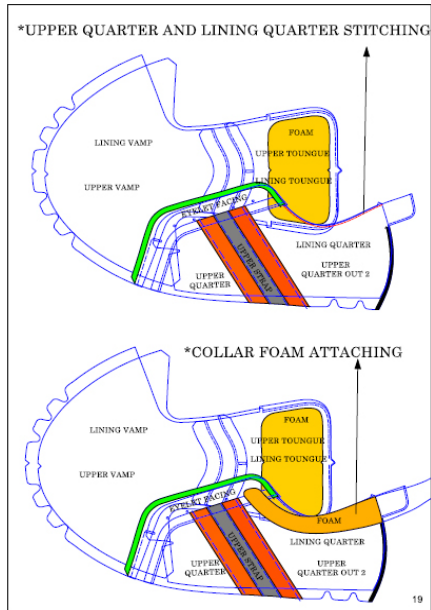
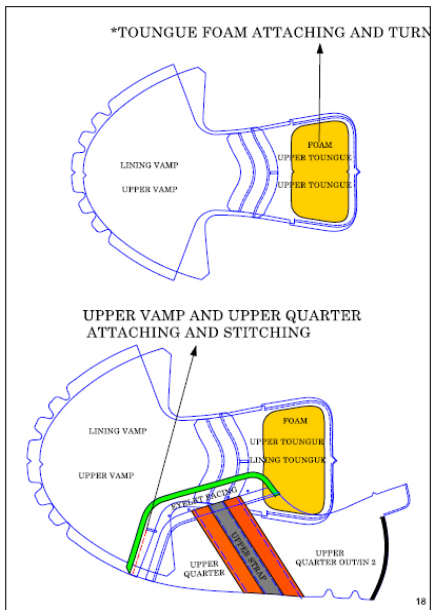
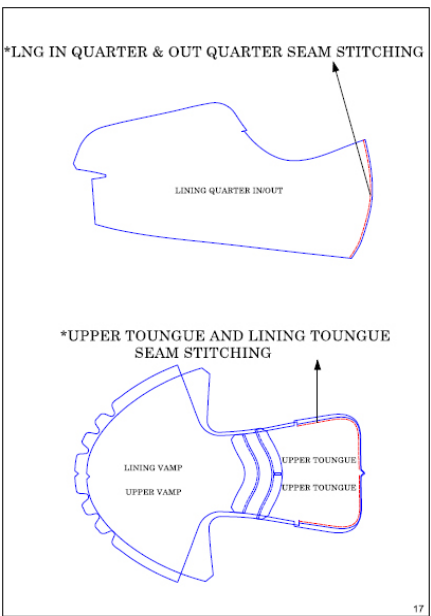
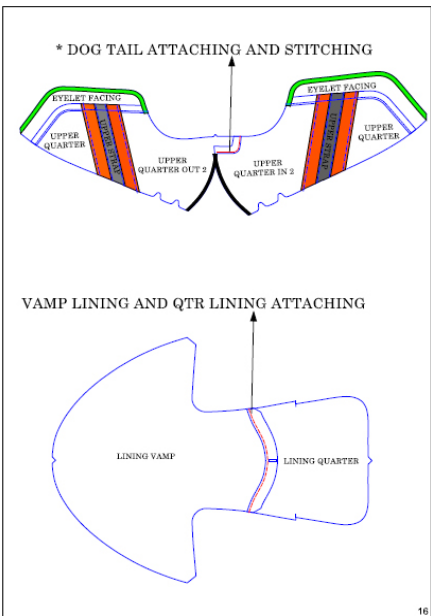
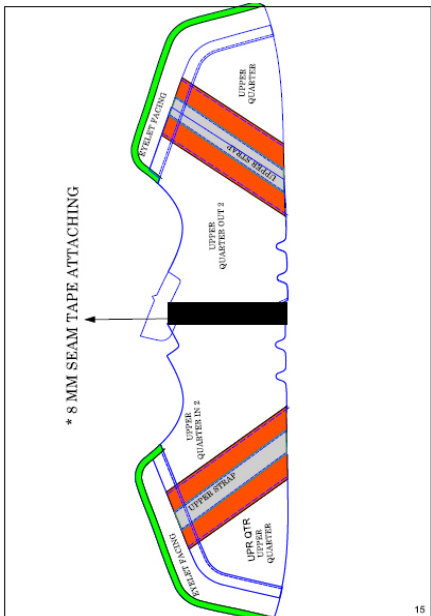
QUARTER IN 2

TOE PUFF

STIFFENER

5



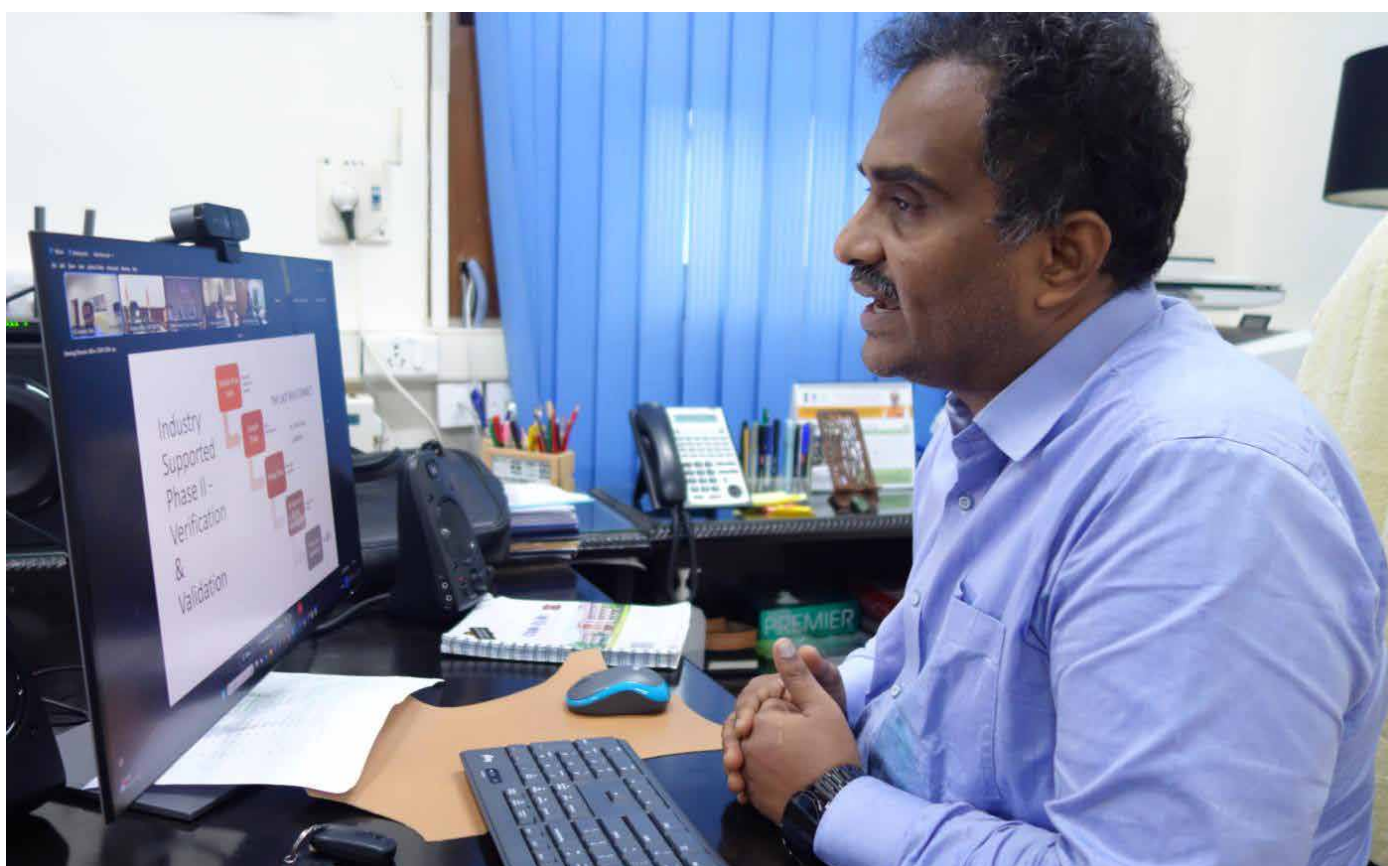


BENEFITS of using GDM

By intelligently linking and networking information quality is achieved and productivity is increased.

Analysis of Foot Measurement Data & Recommendations for the Indian Foot (Shoe) Sizing System

sponsored by
Department of Promotion of Industry & Internal Trade (DPIIT), GOI
 for
Bureau of Indian Standards
 to aid in revision of
IS 1638 (1969): Sizes and Fitting of Footwear
 carried out by
CSIR-Central Leather Research Institute



In his opening remarks during the presentation at the third meeting of the Monitoring Committee of DPIIT held on 12th July 2023 (virtually) and chaired by Shri Rajesh Kumar Singh, IAS and in the august presence of Shri Rajeev Singh Thakur, IAS, Additional Secretary, DPIIT; Shri Raman Sood, Director, leather & Footwear Section and Shri Anurag, Young Professional, Leather & Footwear

Section; Dr KJ Sreeram, Director, CSIR-CLRI said that “FOOT MEASUREMENT SURVEYS commenced from the second half of the 20th century. Fore runners were USSR, GDR, Hungary and UK. These countries used smaller sample size, manual or old technologies for measurement. The outcome was used for shoe fitting with limited applications in design and manufacture of footwear.”

Dr Sreeram added that “IS 1638: 1969” Indian Standard (First Revision) was adopted by the Indian Standards Institution on 15 December 1969, after the draft finalized by the Footwear Sectional Committee had been approved by the Chemical

Division Council. This standard was originally published in 1960 subsequent to which various developments in this field have taken place. This standard has been revised to meet the present need of export trade and internal market. In the present standard various measurements for making last in five fittings for adults' last and four fittings for others in English size scale generally used for footwear have been given, in place of three fittings, given in the original standard. Further, for the guidance of the manufacturers and exporters, standard tables for measurements in Paris Point size scale in five fittings for men's last and four fittings for others have also been added. The categories of sizes have also been modified. It is hoped that the footwear industry which is presently following English sizes will progressively switch over to centimeter scale sizes or any other system towards rational metric sizes. The Sectional Committee further took note of the birth of Euro point' as a possible solution in the future for size standardization on the metric system, but decided not to prescribe the system in this specification in view of this being still in developmental stage.

He went on to present the background of the present study stating that the proportion (i.e. shape) of feet of the Indian population differs considerably from what is built in European and North American shoe lasts owing to ethnic difference and wearing of open type footwear. Indian feet are flatter with the

forepart - ball and waist part are wider and lower than in European feet. Indian feet have shorter forepart. The distance of ballpoints from the heel part is relatively larger than in European feet. As a consequence, Footwear made on European shoe lasts do not fit on Indian feet. Specially designed shoe lasts are required for footwear for Indians to provide comfort and durability.

Dr Sreeram explained that the present project was carried out in four stages:

Stage I (October 2020 to August 2021):

Procurement/ Synergy Partner Agreements / NSSO sampling design.

- Equipment specification drafting
- Procurement as per GTE
- Iterative discussion with NSSO
- Finalization of districts, plan to collect 1,01,880 measurements in the age group of 4 -55 – India divided into 5 zones for measurement
- Identification, MOU with synergy partners, partnership with district coordinates

Stage II (September 2021 to November 2021):

Installation, training and distribution of scanners.

- Scanner installation
- Training
- Shipment to partners and locations
- Barcoding and GPS driven identification strategies

Stage III (December 2021 to March 2022):

Filed work, 103,262 samples, 79 locations

- Data collection in schools, colleges, industries, offices etc.
- Primary data verification

Stage IV (September 2022 to March 2023):

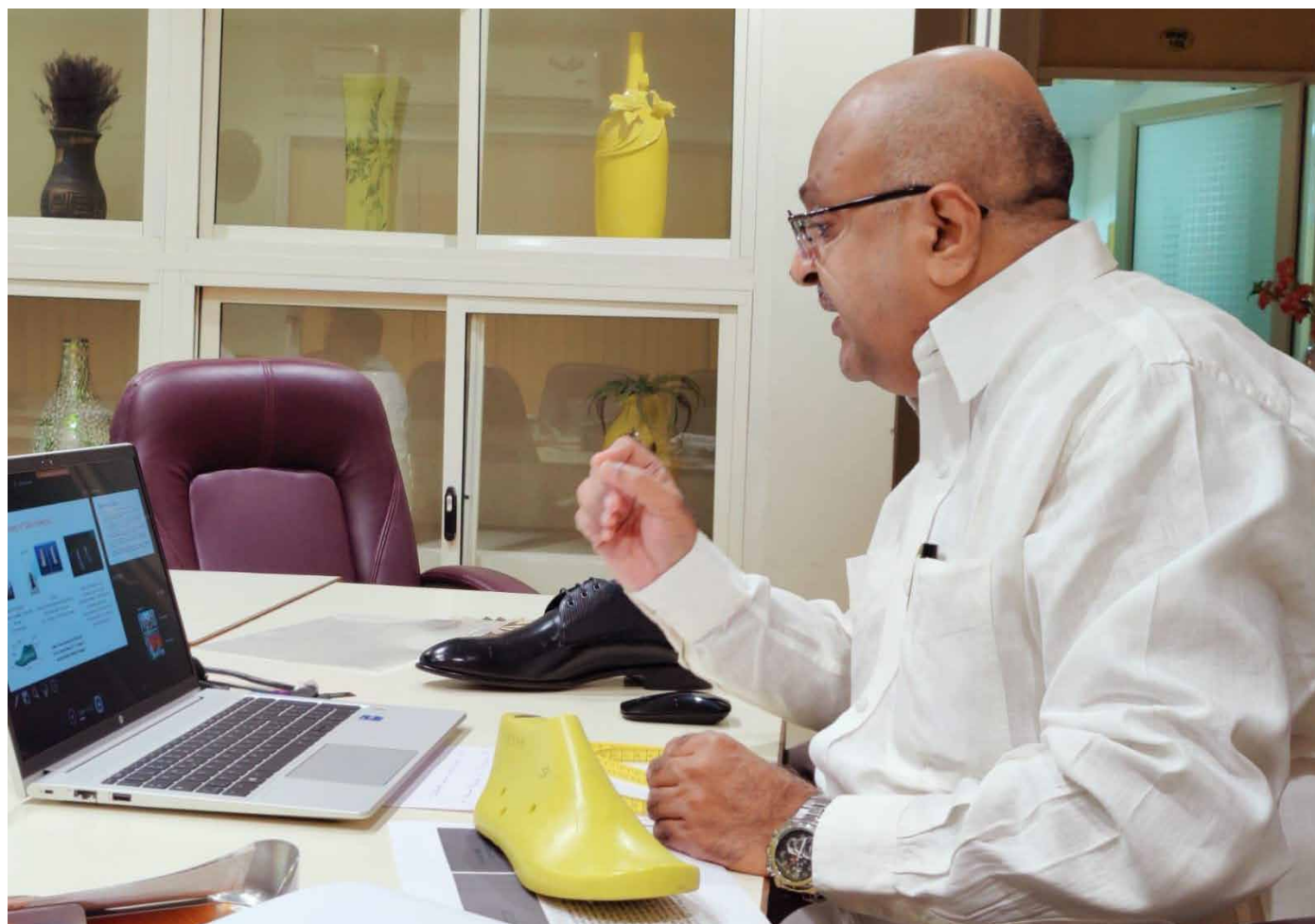
Stake-holder meetings, interaction with BIS, Revision of Report

- Data analysis
- Third-party verification
- Determination of equivalence with other standards
- Report Submission
- Stakeholder discussion
- Revision and re-submission of the revised report

The Nation is waiting!

Shri Md Sadiq, Chief Scientist & Project Leader of the Indian Footwear Sizing Project was invited to make the technical presentation. Sadiq said, “To collect foot dimension of 1,01,880 persons from 79 locations PAN India spread over five zones – North, Gangetic Basin, North East, West and South zone, we had deployed 29 teams simultaneously in all these 79 locations, 26 scanners were used for this purpose, each team had 4 members, we have roped in 15 synergy partners from institutions like Central Footwear Training Institute (CFTI) both Chennai and Agra, Government College of Engineering and Leather Technology (GCELT), Kolkata, Muzaffarpur Institute of Technology, CSIR own sister laboratories and CLRI’s extension centre spread over the country in the process of foot scanning.”

We have planned and measured the dimensions in five groups, therefore, Children, Girls, Boys, Women and Men and detailed on how the measurements were taken with the help of the 3D Foot Scanner. We had also collected personal information of people such as height, weight, birth year, all of these were barcoded, he said. Foot scan collected each day approximately 60 to 80 measurements per scanner per day and uploaded to the FTP server the same day. This means that the information, from various locations would be received in CLRI, Chennai, the information stored on the same day.



Sadiq then drew comparisons of foot length and ball girth of male and female in each of the five zones.

“Although we will present our survey conclusion in the subsequent slides, this information enables us to visually compare the foot length and the ball girth as it can be seen from the dotted lines, that, in almost all the five zones, growth of the female feet peaks at the age 11 whereas in case of boys/men’s growth continuous till the age of 15/16.”

Recommendations for the Size Groups

Code*	Denomination*	Age [year]*	Remark*
I**	Infants	0-1	Newborn children still not standing on their feet. They may wear footwear made of textiles <i>not</i> produced by the shoe industry.
II***	Babies	1-3	Children starting to stand on their feet. They require footwear that support the development of gait.
III	Small children	4-6	Before going to schools.
IV	Children	7-11	Children of school age.
V	Girls	12-13	Female teenagers with growing feet.
VI	Boys	12-14	Male teenagers with growing feet.
VII	Women	14	Adult females.
VIII	Men	15	Adult males.

Our first recommendation from this study is to have 8 size groups. We have not included infants and babies in our study, said the Project Leader. He drew attention to statistics that there were eight groups, Age 4 to 6, group III which is before going to school. Age 7 to 11, group IV, children of school age. Group V & VI for boys and girls which is very tricky, at this the growth varies with gender and age. Group VII is for adult female and the age of 14 and group VIII is for adult female on the age of 15.

In the mathematical and statistical analysis of the data the 29 dimensions had been taken from each foot, during the statistical analysis, the main measurements, that determine

the Indian Footwear sizing system included, are weight, height, foot length, foot breath, ball girth, Instep girth and heel girth. Basic statistics such as mean, median, standard deviation and range played significant role.

The increment in length for French sizing, another name is the European sizing system is 6.66 mm. This means that, if my shoe size in the EU measurement is 42 and your shoe is 43, then the difference in length between our shoe is 6.66 mm. In the English / American sizing system the difference in length between size 8 and size 9 is 8.46mm. whereas in our recommendation the Mondo point sizing system the difference between the two sizes is 5 mm.

Shri Sadiq went on to present the most crucial statistics that enables us to determine the foot length, the length of shoe last, toe allowance based on the design and shape and to develop the bottom insole pattern. In short, the Indian Footwear Sizing System is shoe last size is derived by adding 5mm to the foot length.

While speaking on the length coverage, he explained that, “very interestingly to cover 95% of the population we need to make 13 sizes in the men’s group in the English sizing system. Whereas to cover 85% of the populations we need to make 10 sizes in the men group in the English sizing system. In the French sizing system, we need to make 7 sizes, whereas in the Mondo point on Indian footwear sizing system, 8 sizes to cover the same 85% population. A very important statement is been made to clarify with members of Indian footwear manufacture is that they need to make only 8 size system unlike 10 size in the English sizing system.

The Bureau of Indian Standards (BIS) desired that CLRI provide the equivalence to the European and English/ American sizing and CLRI have worked to provide the equivalence with other sizing system followed internationally, which is given in final and terminal report.

It is important to introduce different widths such as narrow, medium or regular and wide. Different widths will play major role in the Indian Footwear sizing System. The manufacture may choose to develop either three different or five different width based on his customer profile.

Sadiq reiterated that the Nation is waiting to see shoe lasts and Footwear introduced in the Indian Domestic market that would carry the following branding:

VIII - MEN
8T Mondopoint 255 M



Project Team @ HUB



Project Team @ HUB (In picture, L to R): Shri PVinoth Kumar, Shri R Sathiyaraj, Dr D Suresh Kumar, Shri K Dayalan and Shri Md Sadiq with copies of the TERMINAL REPORT on Indian Footwear Sizing System

OBSERVATIONS OF RELEVANCE

- Anthropometric characteristics
- Morphology of toe part, main foot measurements (length, ball girth, distribution) significantly different from Europe and North America
- Zone-to-zone variations within India are negligible
- There is no need to produce footwear of different proportions and sizes for different regions of the country
- Average growth rate of children's feet (age 4 – 11) is 6.6 mm (or 1 French point)
- Foot length of Indian adult is shorter than European or North American of the same age
- Women are 10-15 mm (1.5 – 2 French point or 1-2 English size) shorter
- Men this is 15-20 mm (2-3 French points or 2-2 ½ English points) shorter

RECOMMENDATIONS

- For India best-fit footwear for mass retail products should be marked with length size (in units) and width (in code)
- A healthy Indian foot calls for the production and retail sale of shoes in more than one width/fit
- This can be restricted to certain types/ categories to minimize tooling and production costs
- Fit and comfort of footwear are proportional to the availability of footwear in varied width
- 1 width – 50% population has comfort
- 3 widths – 70% population has comfort
- 5 widths – 90% population has comfort
- This study suggests that footwear should be available in 5 widths

VERIFICATION & VALIDATION

In conclusion, Dr KJ Sreeram, Director, CSIR-CLRI proposed a Industry Supported Phase II - Verification & Validation as the last mile connect.

The Director summed up stating that “Perhaps for the first time in the World an exercise of this magnitude has been taken up to ensure appropriate fit and comfort from footwear for Indian population.”

Report on CURTAIN RAISER “Spring Summer 2025 season”

WHEN WORDS COME OUT OF THE HEART, THEY ENTER THE HEART!

Colour Meetings of MODEUROP is slated for 11-12 October 2023 in Munich and that of FASHION TREND POOL is slated for 25-26 October 2023 in Pirmasens.



In picture (l to r): Dr (Smt) G Saraswathy, Principal Scientist, CSIR-CLRI; Dr P Thanikaivelan, Chief Scientist, CSIR-CLRI, Dr SN Jaisankar, Chief Scientist, CSIR-CLRI; Mr Muhammad Yavar Dhala, Vice President, Indian Shoe Federation & Managing Director, FORWARD Group; Shri K Dayalan, CSIR-CLRI; Shri R Sathiyaraj, CSIR-CLRI; Shri P Vinoth Kumar, CSIR-CLRI; Dr D Suresh Kumar, CSIR-CLRI & Md Sadiq, CSIR-CLRI



Mr Yavar Dhala, Vice President, Indian Shoe Federation and Managing Director mesmerizes Team CLRI & the Members of the Indian Leather & Leather products Fraternity with his fine thoughts this morning (20th July 2023) as he raised the Curtains on the tendencies in leathers and colours for the Spring Summer 2025 season in the august presence of:

- Dr SN Jaisankar, Chief Scientist
- Dr P Thanikaivelan, Chief Scientist &
- Dr (Smt) G Saraswathy, Principal Scientist & Team Design and Fashion Studio



Said Mr Dhala: Quote “Dear CLRI Team, it’s absolutely a pleasure to come back to the CSIR-CLRI Design and Fashion Studio after a long gap. I think I probably was here before the pandemic. And now to see this environment with so much of brightness, exuberance, it is absolutely a rewarding experience. Thank you so much for inviting me for the Spring Summer 25 curtain raiser. I gather from you just now that this is the 59th edition, which means this has been going on for 29 years. And I can’t believe how quickly time has flown by because I remember Dr.T R calling me to his office along with you 29 years ago to put together some colors for the first edition of the MODEUROPE Congress. So, I remember as if it happened yesterday or last week when I came to the CLRI. “So, it’s been a fantastic journey.”



We as a business have tremendously benefited by participating and getting involved. We have been up to date with colors and textures with many of the fashion brands that we catered to in the past and currently continue to do so. I can only say that for those tanneries and tanners who have not yet dived into this, please do so. The benefits are immeasurable. And you feel that you're ahead of the game and you don't have to necessarily wait for the customers to come and tell you why and why not that you have developed the new colors. You should be so far ahead of the game that they actually come to you and say, Hey, we want to go to this tanner because he's going to be up to date with the colors. So, friends, do dive in if you haven't already made the effort. And I wish the entire CLRI Team, Sadiq and all his colleagues here a wonderful 59th edition. And I pray that of the 25/ 26 slots, India gets 80-85 % of the colors, thanks to the efforts of all the participating tanners. Thank you very much.” **Unquote**



In his presentation of the MODEUROP ‘FirstView: Spring Summer 2025 season,’ Md Sadiq, CSIR-CLRI Design & Fashion Studio said that “Spring Summer 2025 is a season characterized by authenticity and hallucinatory digital visions.”

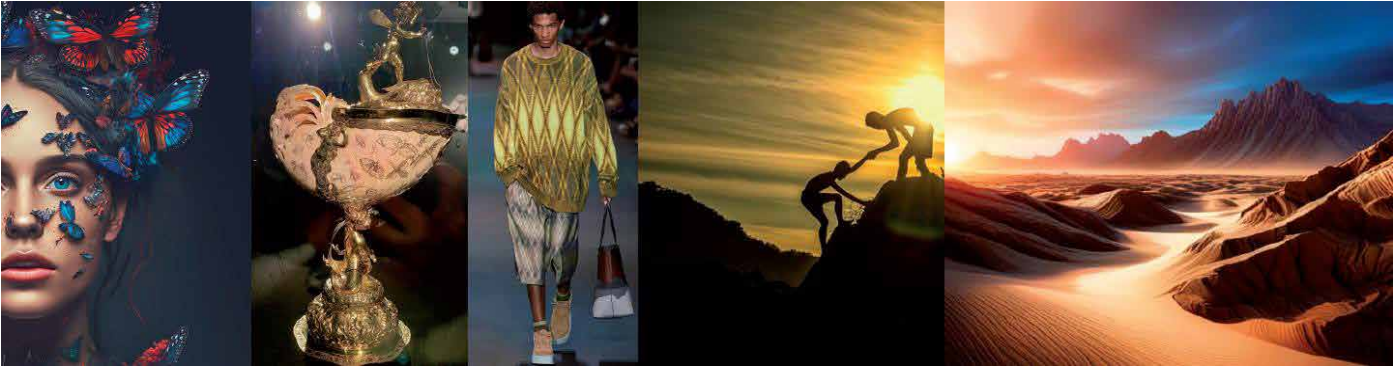
Colours & Textures were presented in three colour groups:

I. DELICATE REVOLUTION



COLOUR PALETTE	A calm palette of almost intangible summer pastels mixes with fragrant rose and apricot tones, as well as ethereal. Blues is strongly contrasted by limoncello and rounded off by matte black.
SURFACES	Nubuck - soft shimmering metallics - super soft nappa - iridescent coatings - silky hand feel - smooth perfection

2.AUTHENTIC REVOLUTION



COLOUR PALETTE	Natural nuances, from olive to noisette or dark tree bark, are enriched by slightly distorted primary colors. Bright coral acts as a highlight and offers a new perspective on color combinations.
SURFACES	Strong grained leathers – scaled animal pattern – raw & vintage finishes – natural patina – braided & woven

3.AUGMENTED ILLUSION



COLOUR PALETTE	Exciting new shades from intense aqua turquoise over radiant orange to bright iced green tea marry up with summer darks And create a new colour dimension with clear white as anchor point and accelerator.
SURFACES	High glossy lacquers – liquid foils – innovative hand feel – sleek grain less surfaces – high-performance leathers



“DESIGN & FASHION STUDIO
to celebrate 30 Years on 7th August 2023”



Dear Sadiq

Overwhelmed by your and your teams welcome this morning

It's good to be back at the CSIR-CLRI Design & Fashion Studio after a gap of over three years or more.

Your facility looks stunning, vibrant and enchanting, full of positive vibrations. Interactions this morning with your learned colleagues and fellow Scientists and I am keen to have a discussion/ deliberation with the Director and his Team about creating a hand-held foot sizing app using one's smart phone. The need is limitless and it's a gold mine waiting to be unearthed

I would be delighted if you would facilitate the meeting at the very earliest so that I can stand and shout about the need that will improve the on-line business for brands such as AZYRRHA and many others.

Thank you

Yavar Dhala

CLRI Report on:

Work Package 4: Design Innovation and Intelligent Manufacturing of Footwear

Work Element 4.1: Design and Fabrication of Next-Gen Footwear Products

From 'leap frogging' to pole vaulting' in Indian Leather and Footwear Design, Technology & Research:

New Aesthetics for Footwear & Leather Products Design & Fashion

Govt of India accords ‘in principle’ approvals for establishment of 4 greenfield Mega Leather, Footwear & Accessories Clusters under IFLDP 2021-26

The Government of India is implementing the Central Sector Scheme Indian Footwear and Leather Development Programme (IFLDP) with an outlay of Rs.1700 Crores for 5 years period 2021-2026. 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 is being implemented via the online portal National Single Window System (NSWS).

One of the sub-schemes of the IFLDP is Mega Leather, Footwear & Accessories Cluster Development (MLFACD) which aims at creation of 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 the establishment of greenfield or brownfield Mega Leather, Footwear & Accessories Clusters (MLFAC) in

the country. 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 of GOI assistance 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). The project proponent SPV will have to bring in the land for the project at its cost. The National Productivity Council (NPC) is the Project Management Consultant (PMC) for this sub-scheme.

Based on the appraisal undertaken by the National Productivity Council, the DPIIT, Govt of India has accorded ‘in-principle’ approval to the following 4 preliminary proposals for setting up of Mega Leather, Footwear & Accessories Clusters (Meeting Reference: 12.06.2023)

State	Location	Project Proponent	Land Extent (Acres)
Tamil Nadu	Panapakkam, Ranipet District	State Industries Promotion Corporation of Tamil Nadu Ltd (SIPCOT)	300.00
Maharashtra	Ratwad Industrial Area, Raigad District	Maharashtra Industrial Development Corporation (MIDC)	151.00
Bihar	Village Mahuwal, Muzaffarpur District	Bihar Industrial Development Authority (BIADA)	62.17
Madhya Pradesh	Sitapur Phase II, Industrial Area, Morena District	Madhya Pradesh Industrial Development Corporation (MPIDC)	157.37

As industry body, the Council for Leather Exports (CLE) is coordinating with the concerned department of the 4 State Governments, National Productivity Council and other stakeholder agencies, with the broad objective of formulation and preparation of Detailed Project Reports and its submission to the Govt of India, within 6 months of the ‘in-principal approval’ as per the guidelines of the MLFACD sub-scheme.



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CLE organizes Industry Outreach Events / Webinars on IFLDP every Wednesday at 11.30 am, via virtual mode.

Integrated Development of Leather Sector (IDLS) Scheme is one of the sub-schemes of “Indian Footwear & Leather Development Programme (IFLDP) 2021-26”. The scheme proposes to incentivize investment and manufacturing by providing backend investment grant/subsidy for modernization, capacity expansion, technology up gradation 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 up gradation on or after 01.01.2020 are eligible for assistance. Assistance would be provided @ 30% of the cost of Plant and machinery to MSME units and 20% to other units, subject to a ceiling of Rs.15 crores per unit across all product segments. 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 per unit across all product segments. Additional 5% financial assistance would be provided for the domestically manufactured plant and machinery. The applications seeking grant have to be filed in the online portal National Single Window System (NSWS).

In order to provide guidance on the scheme guidelines of IDLS Scheme, procedures, documents required to be uploaded etc and to

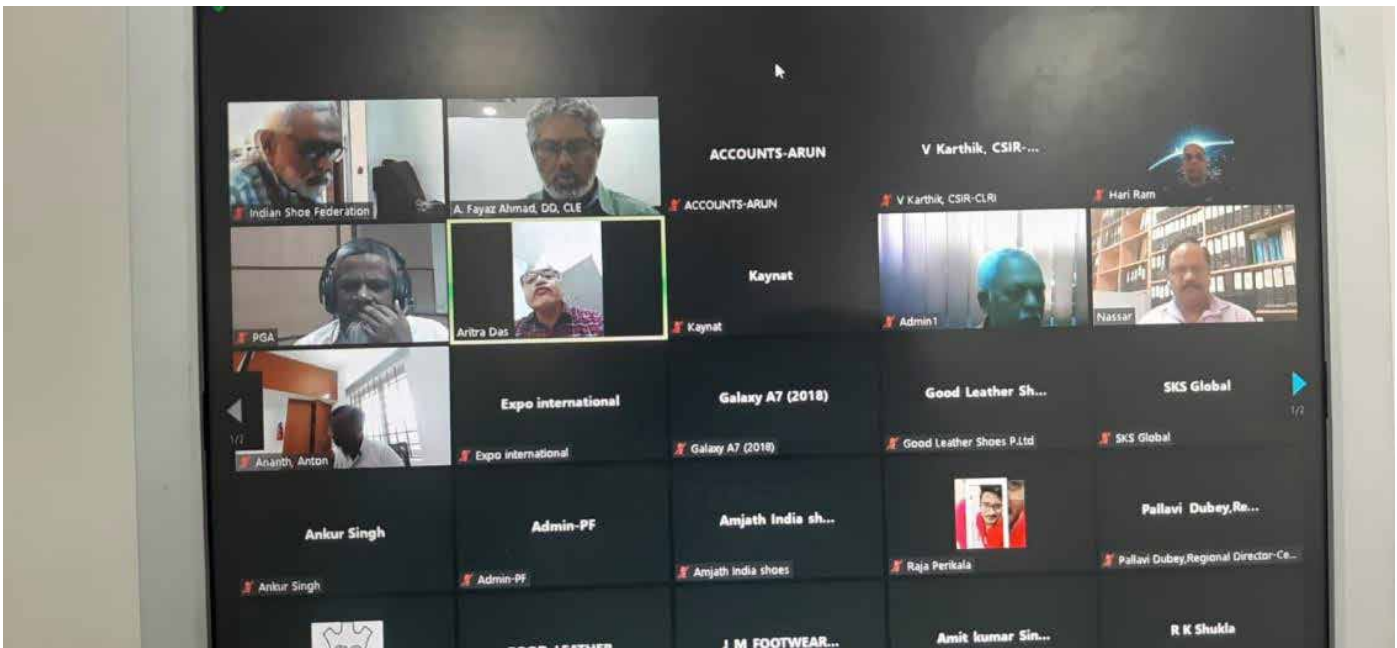
give briefing on the application submission process in the online portal National Single Window System, the Council for Leather Exports (CLE) is organizing Weekly Webinar for IFLDP, every Wednesday @ 11.30am via virtual mode. The 1st Webinar was held on 01.06.2022 and from then onwards, every Wednesday, this event is held at 11.30am virtually, and so far, 44 webinars were held till 19.07.2023. These Webinars are participated by CLE and Project Implementation Units (PIUs) Footwear Design & Development Institute (FDDI) & CSIR-Central Leather Research Institute (CLRI). Several Industry Associations viz., Confederation of Indian Footwear Industries (CIFI), Indian Shoe Federation (ISF), Indian Footwear & Leather Manufacturers Exporters Association (IFLMEA), Indian Footwear Components Manufacturers Association (IFCOMA) are extending their support to the CLE awareness campaign by sending the CLE circulars every week to their members requesting them to attend, and besides officials of these Associations also participates in these Industry Outreach events.

A total of 295 manufacturing units have so far attended the Weekly outreach event / webinars organized from June 2022 (from 01.06.2022) to July 2023 (till 19.07.2023) (Total 44 Webinars). The 295 Participating Units were from Southern Region (98 units), from North Region (102 units), from Central Region (49 units), from Eastern Region (34 units) and from Western Region (12 units).

In addition, there were several repeat participants (135 units) who attended the subsequent editions of the weekly webinars to get more information and / or to get queries clarified by the PIUs FDDI & CSIR-CLRI and CLE.

The CLE Open House Meetings were conducted by Shri A. Fayaz Ahmad, Deputy Director, CLE, and joined by officials from PIUs namely, Shri Aritra Das, Senior Consultant, FDDI and Dr K Srinivasan, Principal Scientist, CSIR-CLRI. In these webinars, the scheme guidelines, procedures, application submission process in the NSWS online portal and documents to be uploaded in the application etc were explained. From 15.12.2022 onwards, the Weekly Webinars are being conducted for the applications already submitted in the online portal under IDLS sub-scheme, which have been taken up by the PIUs FDDI and CLRI for appraisal and queries have been raised in the online portal for correction of the applications by the applicants. Through these Webinars, it is proposed to handhold the units for correct resubmission of the applications in the portal as per the queries pointed out by the PIUs. The queries of the industry representatives are addressed in these Webinars.

Webinar on IDLS Sub-Scheme under IFLDP held on 12.07.2023



Shri A. Fayaz Ahmad, Deputy Director, CLE, Shri Aritra Das, Senior Consultant, FDDI & Dr. K. Srinivasan, Principal Scientist, CLRI interacting with the participants in the weekly webinar on 12.07.2023



Shri A. Fayaz Ahmad, Deputy Director, CLE, Shri Aritra Das, Senior Consultant, FDDI answering the participants queries.



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CLE participation in 99th Expo Riva Schuh Fair, Garda, Italy, June 17-20, 2023

A report by Shri. R.K Shukla, Assistant Director, CLE and Shri Santosh Pandey, Regional Director, CLE



Expo Riva Schuh is the most important international trade fair dedicated to the world of volume footwear, always combining business, relaxation, and fashion. It is scheduled at the beginning of the winter season in January and the summer season in June.

The international footwear market makes a stop in Riva del Garda to present the latest fashion collections. Expo Riva Schuh is today's leading international exhibition for volume production footwear at a mid-range price point. It is Europe's most important event for this market segment, and ExpoRiva Schuh is a meeting place for international

business: an event where companies and buyers from around the world meet and interact.

Expo Riva Schuh has always placed business first, through the strength of its role as a European crossroads for commercial exchange for the volume footwear sector.

This results in statistics that have made Expo Riva Schuh the leading fair in this product category, both at the national and international level. There are companies from Italy and Europe, as well as the increasingly important presence of companies from India, China, and Brazil—the world leaders in footwear production.

Expo Riva Schuh and Gardabags:

Gardabags, the exhibition event dedicated to bags and accessories, further enriches the offer for buyers, responding to the growing demand from the retail sector for total look solutions with a qualified selection of bags, belts, and accessories.





Inauguration Ceremony of 99th Expo Riva Schuh Fair, Garda, Italy

The exhibition center represents the heart of an avant-garde event, the ideal crossroads for new meetings, and a great opportunity to get in touch with the most important international buyers and a variety of sourcing strategies to support positive expectations for the next six months.

Expo Riva Schuh@ 99th Edition:

- ☐ 1300 Exhibitors from 42 countries
- ☐ 250 Italian Companies
- ☐ 200 Turkish Companies
- ☐ 103 Indian Companies

Buyers’ Countries of Origin :

Expo Riva Schuh & Gardabags has a significant degree of internationality among buyers, with visitors from over 103 different countries. Official delegations of international buyers come from Northern Europe, North America, Central Asia, the Middle East, the Far East and Africa.

Inaugural Session of the Fair:

The inaugural Session was attended by the Chairman - CLE and Counsel

General – CGI, Milan along with COA Members & CLE Officials, as under :

1. Shri Sanjay Leekha, Chairman – CLE
2. Mrs.T.Ajungla Jamir, Counsel General – CGI, Milan
3. Shri Naresh Bhasin, RC- West
4. Shri Rehan Ajmal – COA Member
5. Shri R. K. Shukla Assistant Director
6. Shri Santosh Pandey, Regional Director

99th Expo Riva Schuh at a Glance

Total No. of Exhibitors	1300
No. of business Visitors	9000
Exhibition Area	25,000 Sqm
Largest participation Countries	Italy, Turkey and India
Total no. of countries participated	42
Products displayed	Men, Ladies & Children Footwear for Spring/ Summer 2023-24
Visitors	Italian and foreign organized distributors: department stores, hypermarkets, buying groups, mail orders distributors, chain stores, large organized retail, wholesalers, importers. Small chains, and Italian and foreign retailers

As part of its regular export promotion programmes, CLE organized group participation of its members in the 99th edition of the Expo Riva Schuh fair. 45 footwear manufacturing & exporting companies participated in the fair and exhibited their Spring/ Summer collection for 2023-24:

LIST OF 45 EXHIBITING COMPANIES

Hall A1, A3, B2, B3, B4, C -I and C3 = 45 stands

Sl.No	Company Name	Place	Space Sq mtrs	
1	A. S. Parkash & Bros	Mumbai	16.25	C1-F19
2	AKS Leather India Pvt Ltd	Delhi	16	C1-G20
3	Allied International	Agra	16	C3-F04
4	Amit Leather Company	Mumbai	13.5	A3-A21
5	Anam Exports	Kanpur	12.5	C1-B30
6	Avani International Pvt Ltd	Agra	13.5	C1-F16
7	Bandejia Traders	Agra	32	C3-F05
8	Bhola Footwear Exports Pvt. Ltd	Kanpur	12	B4-B19
9	Chalo Holding	Delhi	20	B3-A32
10	Council for Leather Exports	India	14	A3-B25
11	CS ahuja Overseas Private Limited	Agra	36	B4-B05
12	D and D International	Agra	25	C1-A24
13	D' Lords Footwear & Fashions Pvt Ltd	Mumbai	26	A3-B21
14	Dave Overseas	New Delhi	15	C1-E21
15	DHR Exports	Mumbai	39.5	C1-E18
16	DREAM AUTHENTIC DESIGNS	Mumbai	18	A3-A23
17	Elahi Exhim (India) Pvt Ltd	Kolkata	12	B2-A41
18	Euro India Exports	Kanpur	12.5	C1-C30
19	Feet Care	Mumbai	12	B4 B21
20	Firkee Accessories Pvt. Ltd	Mumbai	22	C3-F10
21	G G Footwear	Agra	13.75	B4-A04
22	G R Global	Agra	11.25	C1-D12
23	Hits Exports	Agra	18	B4-E06
24	I.A. Leather (I) Pvt. Ltd.	Kanpur	22.5	A1-A31
25	Indian Handicrafts	Mumbai	15.75	A3-A25
26	Indian Leather Company	Mumbai	16	A3-A28
27	Indian Leather Creations	Mumbai	16	C3-F02
28	Kundra Shoe Tech	Agra	12.5	C1-E06
29	Kwality Chappals	Kanpur	18	A1-A37
30	L Artisan Products	New Delhi	12	B4-B17
31	Osman Shariff	Kolkata	12	B2-A39
32	Prince Overseas	Agra	16	C1-A23
33	Pristino Enterprises	Jodhpur	12	A3-A26
34	R.S. Parkash Associates	Mumbai	20.25	A1-A35
35	Raj Shoes	Mumbai	20	C1-B28
36	Ram Fashions Exports Pvt Ltd	Mumbai	50	C1-B11
37	Regency Impex	Faridabad	16	C3-E12
38	Sakay Overseas	Jalandhar	28	C1-B21
39	Shumakers international	Mumbai	12	B4-F20
40	SKS Global Pvt. Ltd	Agra	12.5	C1-E04
41	Sumanglam Footwear P Ltd	Delhi	25	C1-B10
42	Swadeshi Footcare Pvt. Ltd	Kanpur	14	A3-B23
43	Torpedo Shoes Pvt Ltd	Kanpur	16	C1-A19
44	Uday Shoes Pvt. Ltd	Agra	13.5	A1-A33
45	Veerupakshi Group	Agra	20	C3-F15
46	Wagh Footwear	Mumbai	22	B4-A06

CLE Information Booth

CLE Information booth was set up at the CLE India Pavilion in Hall A3 – B25 to coordinate the participation of our exhibitors in Hall A1, A3, B2, B3, B4, C -I and C3. CLE publications were displayed at the CLE booth for the business visitors.

Business visitors visited the CLE Info booth and inquired about the Indian Leather Sector and its development, which was suitably explained to them by the CLE officials, and a set of publications were also presented to them.



Visit of Counsel General to the 99th edition of Expo Riva Schuh Garda Fair, Italy:

Her Excellency Consul General Mrs. T. Ajungla Jamir, Consul General of India, Milan visited the 99th edition of Expo Riva Schuh Fair on 17th June 2023. She attended the Inaugural Session of the Fair. After the inauguration, she visited the stands of Indian Exhibitors in different halls & interacted about their product, Design & market etc.

She attended the Inaugural Session of the Fair. After the inauguration, she visited the stands of Indian Exhibitors in different halls & interacted about their product, Design & market etc.

The Counsel General appreciated the footwear products displayed by the Indian exhibitors. She assured the support of CGI Milan to the Indian exhibitors in their export promotion activities.





Chairman – CLE, Regional Chairman West CLE & following Office Officials visited the CLE Info Booth & interacted about the fair :

1. Mr. Sanjay Leekha, Chairman – CLE
2. Mr. Naresh Bhasin, Regional Chairman – CLE, West
3. Ms. Lucy Reece - Raybould, Chief Executive Officer - British Footwear Association (BFA)
4. Mr. Roberto Vago, Managing Director - (ASSOMAC)

Conclusion:

Expo Riva Schuh Fair is the very first calendar fair and one of the important footwear fair for Indian footwear manufacturers and exporters. Moreover it caters to the volume production, so CLE should continue its participation in the fair.

The visitors / buyers footfall on day one of the fair begins with encouraging note for the most of the CLE exhibitors too. Many members informed that they got new customers also apart from their regular customers.

As per feedback forms collected from participants on the closing day of the fair have reported booking firm orders worth \$ 2.82 mn and future business generated worth \$ 202.44 mn over the four days of the fair and ended with business meetings.



Maximum participants have given the positive feedback regarding the market prospects, range of exhibits at Expo Riva and some of the exhibitors were satisfied as far as achieving their individual goals. Most of the participants have confirmed their participation for the next edition of the fair.

The next edition of Expo Riva Schuh & Garda Bags would be held in Riva Del Garda during January 13 -16, 2024.

Participation of India's Leather and Footwear Exporters in Global Sourcing Expo, Sydney, Australia 11-13th July, 2023



Inauguration of India Pavilion at Global Sourcing Expo Sydney,Australia, 11-13th July, 2023
by Shri Manish Gupta, CGI Indian High Commission, Sydney

Introduction:The Australian economy is one of the largest and most developed economies in the world. It is known for its strong performance, stability, and resilience. Australia has a mixed-market economy with a high GDP per capita and a diverse range of industries.

One of the key drivers of the Australian economy is its global trade. Australia is heavily reliant on international trade, with exports and imports playing a significant role in its economic growth. The country has a well-developed trade network and actively engages in trade agreements with various nations.

Australia is rich in natural resources, including coal, iron ore, gold, and natural gas. These resources are major contributors to Australia's exports, particularly to countries like China, Japan, and South Korea. Mining and resources industries have been

crucial in supporting the Australian economy and driving export earnings.

Australia's role as an Asian and global economic leader and partner has been established over the past three decades. Its strong financial sector, highly traded currency, and best credit ratings have contributed to its economic stability and attractiveness for international investors. While challenges such as an aging workforce and reduced consumer spending exists, however Australia has responded with government support, business investments and a focus on renewable energy. With its export led model and commitment to innovation and focus on renewable energy sources.

The Australian economy relies heavily on global trade for its economic growth and prosperity. The country's exports of natural resources, agricultural products, and services contribute significantly to its trade performance. Australia's active participation in international trade agreements further enhances its trade relationships and market access. However, external factors and global economic dynamics can influence the performance of Australia's global trade.

Table 1: Macro-economic Indicators of Australia	
Real GDP (PPP)	\$1.279 trillion (2021 est.)
Real GDP per capita	\$49,800 (2021 est.)
Exports	\$389.794 billion (2021 est.)
Imports	\$298.712 billion (2021 est.)

Australia's Global Trade in Leather & Footwear:

Australia's leather and footwear import is highly poised and is growing currently with 4.2% per annum since 2018. Leather and footwear import in Australia is worth USD 3.9 bn. in the 2022. China is the largest supplier of leather goods and footwear to Australia accounting around 44% followed by Vietnam (16.7%), Italy (11.4%), France (6.0%), Indonesia (5.8%) and India (3.3%) (please see table 2). India is 6th largest supplier of leather and footwear products to Australia and exported USD 130.1 mn. goods in the year 2022. India's exports of leather and footwear to Australia has been confined between USD 100 mn. to USD 130 mn. for last five years.

Table 2: Australia's Import of Leather & Footwear Goods (HS 41, 42, 43 & 64), USD Mn.

Rank in 2022	Exporters	2018	2019	2020	2021	2022	CAGR in % 2018-22	Share in % 2022
	World	3341.6	3297.1	2669.2	3282.3	3941.3	4.2	100.0
1	China	1721.7	1605.4	1207.0	1501.7	1750.0	0.4	44.4
2	Viet Nam	416.1	456.9	437.7	487.0	657.4	12.1	16.7
3	Italy	402.9	401.7	326.1	385.2	449.9	2.8	11.4
4	France	134.6	154.8	160.5	197.0	237.5	15.3	6.0
5	Indonesia	124.1	131.6	114.3	175.9	228.5	16.5	5.8
6	India	129.6	116.1	81.9	112.4	130.1	0.1	3.3
7	Cambodia	24.2	37.2	31.1	50.4	69.4	30.2	1.8
8	Spain	49.7	59.4	41.8	41.5	43.5	-3.2	1.1
9	Germany	30.6	24.4	24.5	27.5	41.0	7.6	1.0
10	USA	30.6	28.0	26.9	32.2	34.5	3.1	0.9
11	Brazil	27.7	26.6	20.3	28.0	31.2	3.1	0.8
12	Philippines	9.0	14.2	7.2	14.7	27.8	32.6	0.7
13	Thailand	20.0	22.1	17.2	23.1	26.3	7.0	0.7
14	Bangladesh	15.1	25.1	18.7	18.4	22.6	10.6	0.6
	Rest of the World (RoW)	206.0	193.7	153.8	187.2	191.6	-1.8	4.9

Source: Trade Map of ITC, July, 2023

Top 5 supplying countries accounted more than 84% of the total import of Australia of leather and footwear from world in 2022.

Leather and footwear product import of Australia is largely confined to leather goods (39.1%), non leather footwear (29.3%) and leather footwear (24.5%) which accounts almost 92% of the total imports from world falling under leather and footwear products (please see table 3).

Table 3: Australia's Import of Leather & Footwear Import from World, USD Mn.

Product Category	2018	2019	2020	2021	2022	CAGR in % 2018-22	Share in % 2022
Total	3,345	3,299	2,672	3,284	3,939	4.2	100
Leather Goods	1,390	1,320	1,048	1,245	1,542	2.6	39.1
Non-Leather Footwear	857	902	758	955	1,153	7.7	29.3
Leather Footwear	850	842	659	818	965	3.2	24.5
Saddlery & Harness	55	49	51	71	84	11.2	2.1
Leather Gloves	69	67	55	67	73	1.4	1.9
Leather Garments	49	41	34	43	40	-4.5	1.0
Footwear Components	32	37	31	39	40	5.4	1.0
Finished Leather	40	36	31	41	38	-0.8	1.0
Raw Hide	3	5	5	4	3	-0.1	0.1

Source: Trade Map, ITC July, 2023

Australia imports leather goods like ladies' bags, wallets, purses, belts and accessories worth of USD 1.5 bn. annually and is largely sourced from China (46%) followed by Italy (18%), France (15%), Vietnam (5%) and India (4%). India exported around USD 58 mn. worth leather goods to Australia in the year 2022 which has increased marginally compared to the year 2021. (pls see table 4 below)

Table 4: Major Supplying Countries of Leather Goods to Australia, USD Mn.

Rank in 2022		2018	2019	2020	2021	2022	CAGR in % 2018-22	Share in % 2022
	World	1390.2	1319.6	1048.0	1244.5	1541.7	2.6	100.0
1	China	736.4	653.5	469.6	563.4	706.4	-1.0	46
2	Italy	242.8	245.8	203.6	230.3	276.0	3.3	18
3	France	125.9	146.3	153.4	187.5	226.1	15.8	15
4	Vietnam	78.2	55.7	57.3	59.0	80.0	0.6	5
5	India	63.3	54.2	38.1	49.2	58.1	-2.1	4
	RoW	143.5	164.2	125.9	155.2	195.1	8.0	13

Source: Trade Map, ITC July, 2022

after leather goods imports of non leather footwear is the second largest item in the basket of Australia. In the year 2022 Australia imported USD 1.2 bn. worth non leather footwear which was largely sourced from China (43%), Vietnam (34%) and Indonesia (11%). Exports of non-leather footwear from India was only to the tune of USD 6.8 mn.

Table 5: Major Supplying Countries of Non Leather Footwear to Australia, USD Mn.

Rank in 2022		2018	2019	2020	2021	2022	CAGR in % 2018-22	Share in % 2022
	World	856.6	902.3	758.1	955.4	1153.2	7.7	100.0
1	China	499.9	487.9	365.7	459.9	496.1	-0.2	43
2	Viet Nam	202.7	255.4	252.8	298.5	394.9	18.1	34
3	Indonesia	53.9	55.7	48.7	80.0	127.0	23.9	11
4	Cambodia	13.8	23.7	18.0	24.2	33.6	24.9	3
5	Italy	20.7	22.4	21.6	28.6	27.9	7.8	2
6	Brazil	13.8	16.4	12.2	17.3	18.0	6.8	2
7	Germany	14.2	8.8	8.0	9.7	14.5	0.4	1
8	India	5.7	5.9	4.0	4.4	6.8	4.7	1
	RoW	32.0	26.2	27.0	32.9	34.4	1.8	3

Source: Trade Map, ITC July 2023

Leather footwear is the third largest item imported in Australia accounting for around 24.5% of the total leather and footwear goods imported by the country. China (54%), Vietnam (21%), Italy (15%) and Indonesia (10%) are the major suppliers to Australia for this category of product. India accounted only 3% of the total leather footwear import of Australia from the world.

Table 6: Major Supplying Countries of Leather Footwear to Australia, USD Mn.

Rank in 2022		2018	2019	2020	2021	2022	CAGR in % 2018-22	Share in % 2022
	World	849.9	842.1	658.9	817.6	964.7	3.2	100.0
1	China	399.5	384.4	293.2	379.7	438.5	2.4	54
2	Viet Nam	127.8	139.1	118.2	120.8	170.9	7.5	21
3	Italy	110.1	102.6	79.7	99.3	120.5	2.3	15
4	Indonesia	57.9	61.4	52.5	72.6	77.9	7.7	10
5	India	26.0	23.9	14.7	22.2	26.1	0.0	3
	RoW	128.5	130.6	100.6	122.9	130.8	0.4	16

Source: Trade Map, ITC July 2023

India and Australia Saturday signed an Economic Cooperation and Trade Agreement (IndAus ECTA) which is set to provide zero-duty access to 96 per cent of India's exports to Australia including shipments from key sectors such as engineering goods, gems and jewellery, textiles, apparel and leather.

Global Sourcing Expo (GSE), Sydney, Australia:

Global Sourcing Expo, Australia is a dedicated sourcing trade show held twice in a year both at Sydney & Melbourne. This is a multi-product show that provides opportunity to exporter's exhibit products belonging to Apparels, Textile, leather, footwear, home & gift items. This helps the exporters & importers to reach out the targeted audiences. It is considered truly global wholesale sourcing show and enables exhibiting companies to directly target more than 3000 plus buyers and industry professionals belonging to various categories. Moreover, this show also focusses on sourcing seminars that are equips exhibitors and buyers with a latest insights and knowledge across fashion, colour, design trends, sustainability, marketing and supply chain.

List of Participants

Global Sourcing Expo, Sydney, Australia (July 11-13, 2023)			
S. No	Company Name	Place	Contact Executive
1	ACCESSOIRES INDIA	Gurgaon	Mr. Rajeev Chouhan, Partner / Mr. Anil Kumar Jha, GM
2	Alpha Overseas international Pvt. Ltd	Kolkata	Mr. Ashish Bansal Aggarwal, Director / Ms. Tanya Bansal, Director
3	Choudhary International	Mumbai	Mr. Shanker Ghisaram Choudhary, Director
4	Exclusive Leder Accessories	Kolkata	Mr. Sajid Akhtar, Partner / Mr. Uzayr Akhtar, Partner
5	Feather Touch Impex Pvt Ltd	Kolkata	Mr. Vivek Chowdhury, Director
6	Hijaz Kuroda Gloves Company Pvt Ltd	Chennai	Mr. Patel Mohammed Yousuf, Managing Director
7	I.K. International,	Kanpur	Mr. Fahed Islam, Partner
8	Indian Leather Company	Mumbai	Mr. Dawoodani Shamsuddin Kamaluddin, Partner
9	JUTE WONDERS UNLIMITED	New Delhi	Mr. Modi Pradeep, Proprietor / Ms. Preety Modi, Designer
10	Khimjee Hunsraj	Kolkata	Mr. Jwalant Praful Monani, General Manager / Mr. Dhruv Suraiya, Marketing Manager
11	Kim India Exim Pvt Ltd	Kolkata	Ms. Liu Mei Lin Wu, Director
12	Mirza International Ltd.	New Delhi	Mr. Faraz Mirza, President / Mr. Iqbal Fareed, Vice President
13	Nova Enterprises	Chennai	Mr. Srinivasan Anantharamakrishnan, Partner / Mr. Poothullil Rajesh Joseph, Partner
14	OPAD CREATION	Uttar Pradesh	Mr. Deepak Kumar Katiyar, Proprietor / Ms. Anu Katiyar, Proprietor
15	Saab Footwear Pvt Ltd.	Mumbai	Mr. Kevin Bonaventure Dsouza, Director
16	SAHYOG EXPORTS PVT. LTD	Mumbai	Mr. Manish Doshi, Director / Mr. Sahil Doshi, Marketing & Production Head
17	SHRI VINAYAKA CREATIONS	Kolkata	Mr. Suryadevara Pavan Kumar, Partner / Mr. Malakar Atreyee, Partner
18	Young Style Overseas	Agra	Mr. Shahroo Mohsin, Partner

In this multi-product show around 18 members of council for leather exports (CLE) participated as exhibitors of the show. They exhibited their latest collection belonging to leather goods, footwear, jackets and accessories.

India pavilion of GSE Sydney was inaugurated by Shri Manish Gupta, Consul General of India to Indian High Commission Sydney Australia on 11th July, 2023. Inauguration was attended by the exhibitors of India pavilion. After inauguration CGI Shri Manish Gupta had a brief consultative meeting with representatives of Export Promotion Councils participating in the GSE. Councils apprised them about the exhibition and its preparedness and latest collection that were being exhibited by member exporters.

CGI explained that this sourcing fair plays a pivotal role in promoting exports of leather and footwear from India in Australia by providing an indispensable platform for the industry to showcase its capabilities and products to importers & buyers. He further added that Global Sourcing Expo will serve as a meeting ground for manufacturers, exporters, buyers, and stakeholders, facilitating networking and business collaborations. He also explained that India's participation in this fair will foster "Make in India" brand visibility, augment market access, and bolster trade ties with potential partners from various parts of Australia & New Zealand. He confirmed that through these platforms, Indian leather and footwear businesses can highlight their craftsmanship, design diversity, and product quality, elevating their credibility in the Australian market. Additionally, such exhibitions and fairs facilitate the exchange of knowledge and expertise, enabling Indian exporters to stay attuned to evolving global trends and customer preferences. He further advised that

these events act as powerful catalysts in bolstering India's leather and footwear exports, enhancing its competitiveness on the global stage, and creating new avenues for sustained growth in the international market place.



Shri Manish Gupta, CGI Sydney took consultative meeting with officials of CLE, CEPC, FIEO and Texprocil at India Pavilion during the show, at ICC Sydney, 11th July, 2023

CGI also visited CLE booth and interacted with each participant of CLE who were exhibiting their latest collection at GSE Sydney. He enquired about the latest trade developments in leather and footwear sector of India and how India-Australia ECTA is helping exporters to have greater market access in Australia. Shri Atul Mishra Regional Director CLE New Delhi presented the SWOT analysis of India's Leather & Footwear exports to CGI and also gave him insight on the latest development in trade of the sector especially post covid scenario. Mr Mishra explained that the leather and footwear industry in India had been affected by the COVID-19 pandemic like many other industries the sector faced numerous challenges due to disruptions in the



CGI Shri Manish Gupta discussing the leather & Footwear sector of India with Shri Atul Kumar Mishra, Regional Director, CLE, New Delhi

global supply chain, reduced demand, and production shutdowns. Export activities were significantly impacted by travel restrictions, lockdowns, and consumer behaviour shifts. However, as COVID-19 vaccinations became more widespread and restrictions eased industry gradually rebounded. The Indian government's policies and support measures also played a crucial role in facilitating the recovery of leather and footwear exports. Increased digitalization and e-commerce adoption have also provided new avenues for reaching global markets.

Mr Mishra further explained that In the post-COVID scenario, India's leather and footwear exports have benefitted

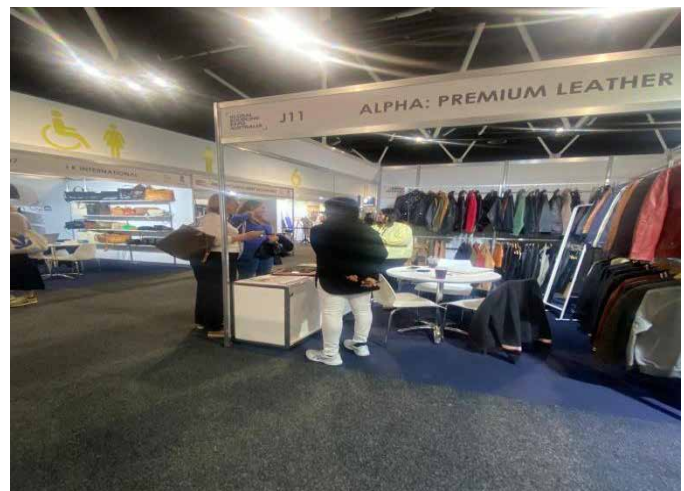
from increased emphasis on sustainability and ethical practices, as global consumers have become more conscious of environmental and social issues.

Shri Manish Gupta subsequently visited the individual stalls of exhibitors of CLE and interacted with them and discussed about their latest collection and their expectation from Australian Market.

While interaction CGI was informed by exhibitors about the leather & footwear market in Australia which is highly competitive due to the growing interest of both local based and international market players. Exhibitors informed that the key market players engaged in the leather & footwear market of Australia are competing for expanding their product portfolio with a view to establish the competitive business. In addition to this, they are also competing to produce the leather & footwear product with eco-friendly and recyclable materials. Exhibitors also conveyed that the footwear market in Australia is growing at the rate of 7.3% because of the increasing demand from athletics and sports and consumer preferences towards the fashionable products for leather goods, footwear & apparel. However, declining household spending on the discretionary products and rising financial stress among the Australians might restrain the growth of its market.



Interaction of Shri Manish Gupta, CGI Indian High Commission Sydney and Shri Sanjay K. Malukka, Trade Counsul with Indian Exhibitors of Leather & Footwear in Global Sourcing Export at ICC, Sydney, 11th July, 2023



Glimpse of Buyers Visiting to CLE Exhibitors booth in Global Sourcing Export at ICC Sydney, 11-13th July 2023

Exhibitors were concerned about the meetings and business collaboration with Fusion Retail Brands like Colorado, cinori, mollini, mountfords, Williams, etc. which are Australian wholesaler and retailer company engaged in the sale of the footwear and fashion goods. They were also looking for meeting with Betts Group which is the footwear retailer selling leather products across Australia and also sales the footwear products in both online and offline platform. They were also expecting representatives from Super Retail Group which is operating the portfolio of retail brands all over the Australia.

Australia -India Business Council (AIBC) Meeting with EPCs at Sydney:





Meeting of Australia India Business Council: Shri Inrfan Mallick, President, NSW AIBC Chapter; Shri Manish Gupta, CGI, Ms. Jodi Mackay, National Chair, Australia, Shri Atul Kumar Mishra, Regional Director, CLE, New Delhi

The Australia India Business Council (AIBC) is the leading business council, dedicated to promoting the bilateral trade and investment relationship between Australia and India. They organised B2B meeting with Indian participants on 12th July 2023 at ICC Sydney. This meeting was hosted by AIBC and was co hosted by CGI Sydney.

During the trade B2B meeting Shri Irfan Malik, President AIBC NSW chapter welcomed the dignitaries and invited them to discuss their issues and put across their views on the possible ways to increase the bilateral trade relation with Australian counterparts. While discussing Shri Manish Gupta, CGI

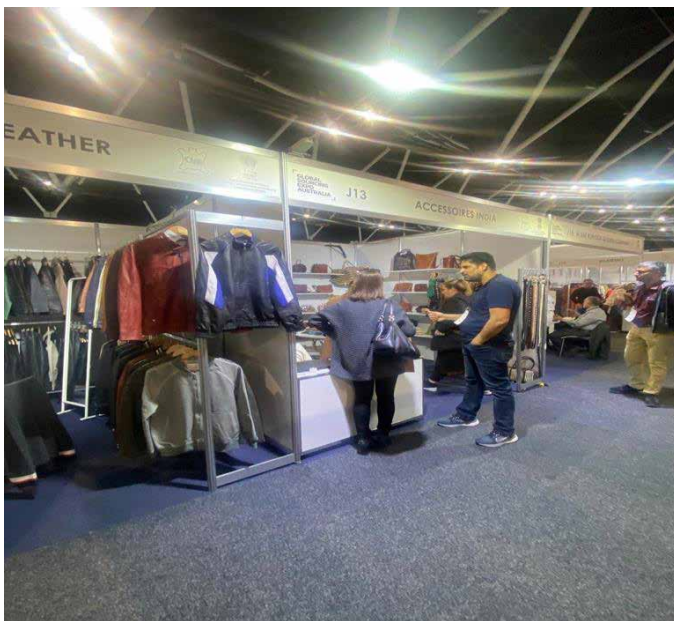
Sydney address the bilateral trade issues between India and Australia and emphasised the role of India-Australia ECTA agreement which would foster a deeper understanding and seek mutually beneficial solutions for the growth of business. He added that both nations have a long-standing trade relationship, which can be further strengthened through open dialogue and cooperation. He highlighted that engaging through talks we may address our issues of supply chain and explore avenues to diversify trade. He explained this will be vital for creating a more equitable and sustainable trade relationship between both the countries.

Ms Jodi Mackay, National Chair of AIBC was also invited to discuss the role of AIBC in enhancing market access for Indian exporters and also increasing bilateral trade relation. She was very positive about the India's development across globe and its recognition as trusted economic partner specially in the current scenario. She praised the current govt and its functioning and conveyed that this will take Australia's economic & trade relation to a newer height. She also discussed the potential for enhancing market access and reducing trade barriers which Indian exporters might be facing. She also stressed that streamline regulatory mechanisms and ensuring effective enforcement will provide the necessary assurance for companies to invest and collaborate

in each other's markets. She added that this will facilitate smoother trade flows and greater investment opportunities.

Shri Atul Kumar Mishra Regional Director CLE New Delhi was invited to talk and discuss about the potential of India's leather & footwear sector to increase the bilateral trade relations. Mr Mishra highlighted the inherent strength of the Indian

leather & Footwear industry and informed that Indian exporters are leveraging on the strengths like Rich heritage of craftsmanship, Competitive pricing, Diverse product range, Abundant raw material availability, Compliance with international standards, Growing focus on sustainability, Government support and policies, and Emphasis on customization and private labelling and continually adapting to market demands. He informed that in global export market Indian exporters are positioning themselves as reliable and preferred partners especially in 'Western developed countries' for leather and footwear products. He also conveyed that building strong relationships with importers, investing in marketing and branding, and consistently delivering high-quality products is further boosting their market access and success in all parts of the world.



View of Global Sourcing Export at International Convention Centre (ICC) Sydney



Report on Fashion Goods & Accessories Expo (Life Style Expo) Tokyo, Japan July 19-21, 2023

The Council for Leather Exports (CLE), is organizing participation of members in the Fashion Goods & Accessories Expo (Life Style Expo) Tokyo, Japan held between 19 (Wed) -21 (Fri), 2023 at Tokyo Big Sight, Japan for the first time with CLE Member companies. Around 12 Manufacturer-exporters and suppliers of footwear, footwear components finished leather, leather garments, leather goods and accessories from different parts of India will be displaying their latest range of products in this show.

India is the 2nd largest consumer of footwear with an annual consumption of about 2.6 billion pairs. Likewise, India is the 2nd largest producer of footwear. The Indian Leather Industry is bestowed with an affluence of raw materials as India is endowed with 21% of world cattle & buffalo and 11% of world goat & sheep population. Added to this are the strengths of skilled manpower, innovative technology, increasing industry compliance to international environmental standards, and the dedicated support of the allied industries. Annual availability of leathers in India is about 2.5 billion sq.Ft India accounts for 13% of world leather production of leathers,. Indian Leather trends /colors are continuously being selected at the MODEUROPE Congress.

The leather, leather products and footwear sector in India is not only

a major foreign exchange earner for the country but also a major labour oriented sector. The sector is also known for its high concentration of women employment, with women constituting 40% of the work force. The primary objective of organizing the Participation of CLE Members in the Fashion goods & Accessories Expo (Life Style Expo) Tokyo is to promote the brand image of Indian footwear and leather industry thereby establishing direct linkages between Indian manufacturers of leather and leather products and Japanese counterparts. Japan is an important market for the leather industry in India and we are eagerly looking forward to enhance our trade relationship in the years to come. Chairman, CLE take this opportunity to thank the Ministry of Commerce & Government of India for extending MAI support to CLE for organizing participation of our members in this show. Chairman-CLE has also conveyed our sincere gratitude to the Embassy of India, in Japan for extending all possible support for CLE's participation in the said fair. He is very much confident that this event will bring the business communities from Japan and India more close for a long –profitable partnership.

Japan has an industrialized global free market economy. A free market economy is a competitive economic system in which businesses compete with each other for profit and the prices of goods and services are based on supply and demand. Japan's economic system is very similar to that of the United States.

2023 LIFESTYLE Week Tokyo [July] consisted of a total of 9 categorized shows held under one roof:

- ☐ 18th GIFTEX TOKYO [July] - Gifts & Interior Expo
- ☐ 15th Baby & Kids Expo Tokyo [July]
- ☐ 14th Fashion Goods & Accessories Expo Tokyo [July]
- ☐ 14th Table & Kitchenware Expo Tokyo [July]
- ☐ 10th Health & Beauty Goods Expo Tokyo [July]
- ☐ 3rd Sustainable Goods Expo Tokyo [July]
- ☐ 2nd Good Foods Expo Tokyo [July]
- ☐ DESIGN TOKYO 2023 - 14th TOKYO DESIGN PRODUCTS FAIR
- ☐ 34th ISOT TOKYO [July] - INTERNATIONAL STATIONERY & OFFICE PRODUCTS FAIR

Japanese consumers are looking for avant-garde footwear.

The first priority for consumers in Japan is footwear design, coupled with quality. Japanese consumers are looking for avant-garde footwear, innovative

and colorful, yet accompanying the main fashion trends. Price isn't a concern. Comfort in footwear, for example, has gained dominance in Japanese market.

Specific production of leather footwear located mainly in Tokyo and Osaka has been losing strength, recording a decrease of about 33%. With the added difficulty of competing against the design and strength of European footwear, and taking into account the aging of the Japanese population, companies are migrating their production to meet this new market niche. Thus, the production of leather shoes in Japan has focused on high-comfort footwear directed the elderly, now focusing their attention on quality and comfort

Leather and Footwear in Japan

The Japanese leather industry is dominated by SMEs, producing in rather small quantities. Over 2,000 companies are registered in the Japan

Leather and Leather Goods Industries Association and the industry is only concentrated in a few locations, such as in Hyogo, Osaka and Tokyo prefecture. Beside natural leather, Japan is also producing large quantities of synthetic leather, and the development of high-quality and finely textured synthetic leather is said to have a huge potential in the luxury fashion market. Sales are currently declining, and the demographic change could further shrink the customer base in the near future. However, the promotion of "Made in Japan" leather products and the development of high-quality synthetic leather are viewed as promising solutions to secure a positive development of the sector in the future.

Japan's Import of Leather and Leather Products and India's share (2017-2022)

(Imports of Leather Footwear, F/W component, Leather Garments, Leather Goods and Saddlery & Harness & Non Leather)

Value in MN US\$

Details	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Imports	77.58.78	8088.83	8010.59	6597.28	6925.94	
India's share	71.42	65.53	59.49	45.69	64.60	77.88
% Share of India	0.92%	0.81%	0.74%	0.69%	0.93%	

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

• Import Data yet to be received for the year 2022-23

JAPAN'S IMPORT OF LEATHER & LEATHER PRODUCTS AND INDIA SHARE [2017 - 2023]

DETAILS	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Leather						
Import	140.19	131.65	101.30	69.11	89.81	
India's Export	4.82	3.75	3.08	1.59	2.54	2.91
% Share of India	3.44%	2.85%	3.04%	2.30%	2.83%	
Leather Footwear						
Import	1191.51	1249.65	1238.55	1032.93	1022.67	
India's Export	36.57	30.72	29.37	24.06	35.21	34.50
% Share of India	3.07%	2.46%	2.37%	2.33%	3.44%	
Footwear Components						
Import	239.02	239.76	218.39	163.13	153.20	
India's Export	4.62	5.51	3.96	3.07	3.66	3.94
% Share of India	1.93%	2.30%	1.81%	1.88%	2.39%	
Leather Garments						
Import	111.08	104.69	96.84	70.40	74.79	
India's Export	3.91	4.32	2.98	1.92	1.92	1.81
% Share of India	3.52%	4.13%	3.08%	2.73%	2.57%	
Leather Goods						
Import	2298.48	2457.71	2527.29	1970.07	2145.70	
India's Export	20.14	18.36	17.20	12.75	15.91	20.11

DETAILS	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
% Share of India	0.88%	0.75%	0.68%	0.65%	0.74%	
Saddlery & Harness						
Import	50.70	59.97	56.31	53.64	68.67	
India's Export	0.13	0.13	0.15	0.12	0.18	0.23
% Share of India	0.26%	0.21%	0.27%	0.22%	0.26%	
Non Leather Footwear						
Import	3727.80	3845.39	3771.90	3238.00	3371.095	
India's Export	1.24	2.75	2.75	2.19	5.18	14.38
% Share of India	0.03%	0.07%	0.07%	0.07%	0.15%	
Total						
Import	7758.78	8088.83	8010.59	6597.28	6925.94	
India's Export	71.42	65.53	59.49	45.69	64.6	77.88
% Share of India	0.92%	0.81%	0.74%	0.69%	0.93%	

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

India's export of leather & leather products to Japan has been increasing in recent years and touched US \$ 77.88 Mn in 2023.

From the above table, the India's exports to Japan has increased considerably from the year 2021-22 to 2022-23 from US \$ 64.60 to 77.88 US\$ Mn. However, Japan's total import of leather & leather product was also about US \$ 8,088.83 Mn during 2018. However, India's export of footwear to Japan was only US \$ 29.37 Mn in 2019 and India's exports of leather goods to Japan has also been increased from US \$ 12.75 Mn to US \$ 20.11 Mn in 2023. Considering the potential market for Leather Footwear, Bags, Leather Goods and Leather Garments in Japan, the Council has organized participation of Member-Exporters in the 14th edition of Life Style Fashion Goods & Accessories Expo, Tokyo, Japan, July 19-21, 2023.

The purchasing power of a country as small as Japan is astonishingly high and the demand for garments and craze for fashion is also growing along with it. The third largest economy of the world, Japan has a population of high per capita income, there by lucrative and high investment criterion fulfilled

for many apparel retailers and the fashion industry. The country is an excellent Balance of traditional textiles and modern fashion entwined together.

It has been said, "If you succeed in Japan, you will succeed anywhere else" Japanese people are extremely conscious of product quality and delivery deadline. Even low priced product should not have any defectives. Also, delivering product on time is widely considered a basic common sense, and being late would risk the business altogether. Maintaining "quality and deadline" is a key factor to keep a good business relationship with a Japanese company.

India- Japan Relations

The friendship between India and Japan has a long history rooted in spiritual affinity and strong cultural and civilization ties. In contemporary times, among prominent Indians associated with Japan were Swami Vivekananda, Gurudev Rabindranath Tagore, JRD Tata, Netaji Subhash Chandra Bose and Judge Radha Binod Pal. The Japan-India Association was set up in 1903, and is today the oldest international friendship body in Japan. Over the years, the two countries have built upon these values and created a partnership based on both principle and pragmatism. Today, India is the largest democracy in Asia and Japan the most prosperous

Economic and Commercial Cooperation

Economic relations between India and Japan have vast potential growth, given the complementarities that exist between the two Asian economies. Japan's interest in India is increasing due to variety of reasons including India's large and growing market and its resources, especially the human resources. The India -Japan Comprehensive Economic Partnership Agreement (CEPA) that came to force in August 2011 is the most comprehensive of all such agreements concluded by India and covers not only trade in goods but also Services, Movement of Natural Persons, Investments, Intellectual Property Right, Custom Procedures and other trade related issues. The CEPA envisages abolition of tariffs over 94% of items traded between India and Japan over a period of 12 years.

The show Management offered various support services for exhibitors namely:-

- Special Promotion for overseas Exhibitors
- Various Onsite Business Support
- E-guidebook & Web Link Service

On day I of the event i.e 19th July 2023, Shri Aqeel Ahmed, Former Chairman-CLE visited the fair and interacted with the CLE – Member participants in the fair.

**List of participants for the Fashion Goods & Accessories Expo (Life Style Expo)
Tokyo, Japan, July 19-21, 2023**

S.No	Company Name	City	Product Displayed	Booth No.
1	Beeta Poly Coats Pvt Ltd	Bahadurgarh	Textile coated with PVC , Non Woven Textile coated, Coated Textile Fabric , Bag	L29-5H
2.	Bharat Enterprises	New Delhi	Leather – Bags, Wallet, Belt Garments	L29-5I
3.	Chalo Holding	NOIDA	Leather Bag, Leather Wallet	L29-5A
4.	Fusion International	Chennai	Fully Finished Leather & Fully finished leather Garments	L29-5F
5	Instinct	Gurgaon	Leather Garments	L29-5E
6.	Jarosniv Exports Pvt Ltd	Delhi	High Fashion Leather Garments and Accessories	L29-5D
7	K H Retail Stores	Chennai	Bags, Belts & Wallets	L29-6B
8.	Mirza International Ltd	Kanpur	Boots, Shoes, Formals, Sneakers, Loafers	L29-6A
9	Newage Leathers Pvt Ltd	NOIDA	Men's and Ladies Wallet, Pouches, Small Bags, Belts, Gloves, Coin Purses, etc	L29-10B
10	Pegasus Worldwide	Kolkata	Bags, Small Leather Goods	L29-5C
11	Sacchini Leather Goods	Kolkata	Mens Wallet, Womens Purse, Bags	L29-5G
12	Silver Melon Pvt Ltd	Kolkata	Mens Wallet, Womens Purse, Bags	L29-5B

Each company was provided with fully constructed stands with name board, partition walls, lighting and display accessories as per their product of display. The stands were constructed in a professional manner giving due care to accommodate all the specified need of the exhibitors. The Council for Leather Exports has co-ordinate the participation of its member-exporters and organized Council's information booth for dissemination of Indian leather industry information. CLE's publication i.e Members Directory, Exhibitors Profile Booklet and other necessary information were provided among the buyers, visitors and CEOs who visited the stall. Shri R.Selvam, IAS, Executive Director, CLE and Shri P.Dhanasekaran, Export Promotion Officer, CLE were present at CLE's

information booth during the fair and extended all sorts of co-operation towards the member-exporters and provided information relating to export promotion to the visitors at CLE Stand.

As per the CLE's invitation request, His Excellency Shri Sibi George, Ambassador of India to Japan, Embassy of India visited the CLE stand and members booth during the fair on 20th July 2023. He conveyed, his best wishes for the success of the event and advised participants for building-up of their own brands without any compromise on quality. He further stated that the significance of developing brand India image which will enable the exporters to get better value realization of their products. According to him, Japan is now considered as one of the best tourist destinations in Asia. People in large numbers from all over the world, particularly from China, visit Japan throughout the year to spend their holidays besides shopping. Thus, the demand for different fashionable items including leather and leather products are increasing day by day.

Shri Ajay Sethi Second Secretary, Embassy of India and Shri Nikilesh Giri, General Council, Consulate General of India in Kobe, Osaka has also visited the CLE India pavilion stands along with Ambassador of India to Japan. ED-CLE has warm welcomed all the EOI/CGI officials and visited all the stands together with them and obtained their views/suggestion of Indian exhibitors as well as Ambassador's view on organizing an event to promote Indian leather

industry in the future coming days. EOI has also provided the updated data base of the buyers in Japan for members who are participating in this fair.

Indian Embassy has also expressed their thanks all of us to coming all the way from India, and keeping our flag high. Ambassador has also insisting to keep coming to Japan, it will take some time to understand the system here but it's good market to capture. They assured to extend all co-operation from the Embassy for promotion of Indian Leather in Japan for the future coming days.

Sample of Some of the Key Buyers in Japan were attended / expected to attend the event is as follows:

SI No	Name of the Company
1.	MIKASA TSUSHO Ltd, Miami
2.	SAC CO Ltd, Tokyo
3	Manoro Incorporated, Tokyo
4.	Catalog House, INC, Tokyo
5.	Princess Toraya Co Ltd, Tokyo
6.	Tsukasa Matai Kogyo Co Ltd, Tokyo
7.	Libiza Co Ltd, Saitama
8.	Estar & Company Ltd, Hyogo
9	Estar & Company Ltd, Osaka
10	Arikness Japan Co Ltd, Tokyo
11	Cosmic Info Link Co Ltd, Tokyo
12	Terada Seisakusho Co Ltd, Shizuoka
13	La Jiruma Co Ltd, Kyoto
14	Natural Bag Co Ltd, Osaka
15	Koyo Orient Japan Co Ltd, Saitama
16	Kozuchi Co Ltd, Niigata
17	Kitada Trading Inc, Iwate
18	Marusan Co Ltd, Oita
19	One's worker, Kagawa
20	Orion Co Ltd, Osaka
21	Hakusan Kiko Co Ltd, Ishikawa
22	Nomadic Inc, Tokyo
23	Fukashiro Corporation, Tokyo
24	Miyoshiya, KK, Osaka
25	Fukumoto Co., Ltd, Tokyo
26	Hamano Hikaku Kogei KK, Tokyo
27	Naas Co Ltd, Tokyo
28	Halkarin's KK, Tokyo
29	Sun Bag Sakamoto Co Ltd, Tokyo
30	Ado Corporation Co. Ltd, Aichi
31	Adachi Co., Ltd, Hyogo
32	A-One K.K, Shiga
33	Grand Chario, KK, Tochigi
34	De Leather Collection
35	Shailesh Leather
36	Floreat Multi Exim
37	S& M
38	BONFOM Corporation
39	Simon Co Ltd
40	Kuraray Hong Kong Co Ltd
41	Bespoke, YK, Saitama

SI No	Name of the Company
42	Actec Co Ltd, Osaka
43	Tokyo Sincol Co Ltd, Tokyo
44	Aiwa Shokuhin Corporation, Kanagawa
45	Cony Co Ltd, Hyogo
46	Endo Luggage Co Ltd, Hyogo
47	Unofuku & Co, Hyogo
48	Sanwa Fukuromono Co Ltd, Tokyo
49	Hashimoto, K.K , Toyama
50	Fujji Nenshi & Co Ltd, Mie
51	Figo Co Ltd, Tokyo
52	Fujikowa Industry Co Ltd, Tokyo
53	Sohgoh Industry Corporation, Kagawa
54	JP Co Ltd, Tokyo
55	Tokyo Sinco Leather Co Ltd, Tokyo
56	Keimei, KK, Kanagawa
57	Marusho Co Ltd, Tokyo
58	Index Inc. Osaka
59	Kyowa Corporation, Tokyo
60	Doneed Co Ltd, Tokyo
61	Finevally Co Ltd, Osaka
62	Napolex Corporation, Tokyo
63	K.Onishi & Co Ltd, Osaka
64	Vanguard Corp, Kanagawa
65	Catalogue Consultant Co Ltd, Tokyo
66	4REAL Inc, Tokyo
67	Matsumura Industrial Co Ltd, Osaka
68	Matsuo Sangyo Co Ltd, Osaka
69	Fukushima Kagaku Industry Co Ltd, Tokyo
70	Yamaichisyhoji Co Ltd, Tokyo
71	Isamu International Co Ltd, Osaka
72	Palemo Holdings Co Ltd, Osaka
73	S M impex,
74	Sam Company Ltd
75	New World Company
76	Simon Co Ltd,
77	Lovely New York,
78	The Tragus
79	Simon Co Ltd
80	Japan Leather and Leather Goods Industries, JLIA, Tokyo

• The following is the summary of the feedback received from the CLE India Pavilion participants.

Name of the Event with Venue & Date	Fashion Goods & Accessories Expo (Life Style Expo) Tokyo, Japan July 19-21, 2023
No. of CLE India Pavilion Participants	12
Main Display products in the fair	Fashion Goods and Accessories
No of Business Meetings held with buyers	44
No of Visitors attended in the CLE India Pavilion	73
Total No. of business visitors attended the event	31,925
Details of Firm Order Booked Firm order booked in Quantity Value in US \$	300 Qty US \$ 1,800
Future Business Expected Firm orders booked in Quantity Value in US \$	12000 Qty US \$ 1,56,000
Total Business Generated Quantities Value in INR	12,300 Quantities INR 1,30,97,400/-

• As per the feedback received from the CLE India pavilion participants, majority have expressed their interest to participate again the event in Japan specifically focused for leather based fashion products fairs like Fashion World Tokyo scheduled every year in October. The Council will make all possible efforts to implement suggestion and views registered in their feedback form in the future edition of the events.



Shri R.Selvam, IAS, Executive Director welcomed the Ambassador at the CLE India Pavilion Stands



ED-CLE had discussion with the Ambassador & Shri Ajay Sethi, Second Secretary, EOI.



ED –CLE welcoming Shri Ajay Sethi, Second Secretary, Embassy of India, Japan at the CLE Booth

Visit to CLE Pavilion by His Excellency Ambassador of India along with ED-CLE



Former CLE- Chairman Shri P.R.Aqeel Ahmed visited the fair and had interaction with the CLE Member company participation in the fair



Shri P.R.Aqeel Ahmed, Former Chairman, CLE had interaction with Mr. Sachin Jadhav Sr. Manager of Reed Exhibitions ISG, Mumbai.

STANDS IN CLE PAVILION



Two-Day Industrial Engineering Program

IIT Madras, July 7 & 8, 2023, 10.00 am To 5.00 pm

As per the advice of Shri. Israr Ahmed, Regional Chairman, CLE-Southern Region, we organized an “Industrial Engineering Training Program” with both Classroom Training and onsite Individual Company Visit / hand-holding under the SIDBI MSME Cluster Intervention Program for Leather Footwear and Product Manufacturing units in association with India Institute of Technology (IITM).

The IITM is ranked among the most prestigious academic Institutions in India and one of the 8 Public Institutes of eminence and national Importance. Hence, a matter of pride for being associated with IITM.

The program was inaugurated by Shri. R. Selvam, IAS, Executive Director, Council for Leather Exports at IIT Madras on July 7, 2023 at 10.00 am in the presence of IIT Professors from the Department of Management Studies.

Shri. N. Shafeeq Ahmed, Member COA, CLE participated in the second day interaction meeting held at IIT Madras with SIDBI officials for discussing about SIDBI's support for the Leather and Leather Products Industry.

PARTICIPANTS:

We had 14 Companies participating in the Programme represented by 33 individual persons.

The Programme was held on July 7-8, 2023 (Fri-Sat) at IIT Madras, Guindy between 10.00 am to 5.00 pm.

After discussions and Factory visits by the IITM Professors, we have designed the Industrial Engineering Programme with focus



on Productivity enhancement and Capacity Building in manufacturing units, covering the following:

- Management Practices – Functional Areas and importance to business
- Industrial Engineering - Relates to Operations and SCM
- Work Measurement – Work Study and Time study
- Productivity Measurement – Importance and Approaches (manpower utilizations)
- Total Quality Management
- Lean Practices – Just in Time manufacturing Ideas
- Layout – Functional, Cellular; and connections to Lean Manufacturing



Shri. R. Selvam, IAS, Executive Director, Council for Leather Exports addressing at Industrial Engineering Program, IIT Madras

After the two Day Training Programme, we will have Factory Visits & Consultancy by IITM Professors which will involve work measurement, quality practices, layout modifications (simulations), scheduling practices, manpower utilization etc to individual units during weekends (Friday / Saturday). This also includes online meetings (in addition to Factory visits) as deemed necessary.



IN BRIEF

Shri Mandi Krishnaiah, Assistant Director, CLE retires from services of CLE

Shri Mandi Krishnaiah, Assistant Director, CLE retired from services of Council for Leather Exports on July 31, 2023, after serving CLE for more than 38 years. Shri Krishnaiah joined CLE in April 1985 and has worked in the Membership & Services Department at CLE Head Office in Chennai for a very long period. Shri Krishnaiah was instrumental in bringing out two major publications of CLE namely Directory of Members of Council for Leather Exports and Facts and Figures of exports of leather & leather products. Shri Krishnaiah also looked after the work pertaining to elections in CLE and export award.

A facilitation event for Mr. Krishnaiah was held in CLE Head Office on July 28, 2023. Shri R. Selvam, Executive Director, CLE presided over the event and recalled the hard work and efforts put-in by Mr. Krishnaiah in all his work assignments.



CLE Visit to Jodhpur for Membership Drive on June 21-22, 2023

In order to take benefit of various financial support schemes of the Government of India and State Governments, available for the leather and footwear Sector, it is necessary that the company/unit has to be registered as a member of CLE. Being a non-member, the company loses the opportunity to avail many scheme benefits available to the Sector. In continuation to the efforts to augment the membership strength and to outreach the different cluster, Shri Atul Kumar Mishra, Regional Director – North, CLE along with CLE DRO officials Ms. Surbhi Mathur, AEPO and Ms. Ginni Chhabra, LDC visited Jodhpur on June 21-22, 2023 for dissemination of information on CLE's activities and to meet the potential members for enhancement of membership of Northern Region of Council for Leather exports.

Meeting with Shri S.L. Paliwal, Joint Director, DIC, Jodhpur on 21st June 2023:

On first day of visit CLE officials met Shri S.L. Paliwal, Joint Director, DIC, Jodhpur and explained him in detail about the Council's initiative to reach



CLE officials interacting with Shri S.L. Paliwal, Joint Director, DIC, Jodhpur

the Leather & Footwear units located in Jodhpur. Mr. Paliwal informed that mojri market is dominant in Jodhpur. Handmade printing on leather is a unique feature of mojris made in Jodhpur. There is a Jimgarh community in Jodhpur who make mojris. NIFT helps in designing mojris, give information on moulds and help the artisans in product development and designing.

He conveyed that there is a lot of potential in Jodhpur for leather and footwear sector and hence, there is a need to explore the market of Jodhpur. He gave an example of Mr. Ashok Chauhan, M/s. Mahesh Handicraft who is the top exporter of Rajasthan dealing in leather goods and has a steep growth in his business in recent years.

Regional Director – North, CLE requested Joint Director, DIC to provide a list of Leather & Footwear manufacturers so that these companies can



CLE Officials along with FDDI officials and Footwear Manufacturers at FDDI, Jodhpur

be contacted and persuaded to avail the benefits of Government of India and State Government by becoming member of CLE. In this context, Mr. Paliwal informed that DIC is organizing an event on 22nd June 2023 wherein maximum artisans as well as manufacturers will be invited and thus CLE can participate in this event in order to create awareness about CLE and schemes of Government. RD-NR, CLE thanked GM, DIC for inviting him this event and confirmed to be a part of this event.

Meeting at FDDI, Jodhpur on 21st June 2023:

CLE officials visited FDDI, Jodhpur wherein a meeting was organized with manufacturers dealing in footwear. RD-NR briefed the representatives about activities of CLE. He also highlighted the increasing demand of plastic footwear in Africa and Latin American countries. He requested the members present in the meeting to become member of CLE and avail various benefits.

Meeting with Leather & Footwear Manufacturers and Artisans of Jodhpur on 21st & 22nd June 2023:

As advised by General Manager, DIC, CLE officials visited offices & factories of various manufacturers dealing in leather and footwear products. The officials met the representatives of the companies and briefed about benefits of becoming member of Council, various recent schemes of Government of India, IDLS scheme and GIS. They were also asked to participate in Council's fairs which are organized regularly in overseas countries. The representatives were persuaded to become member of the Council and avail the benefits.

Membership Mobilization by CLE at DIC event held on 22nd June 2023:

On second day of visit CLE officials participated in DIC event to mobilize



Meeting with Mr. Dharmendra, M/s. Palak Handicrafts



Meeting with Mr. Mohan Gurjur, M/s. Gurjur Leather Craft and other artisans at office of M/s. Gurjur Leather Craft, Jodhpur



Meeting with Mr. Suraj Malwat, M/s. God Craft

members and create awareness about CLE. The DIC organized this event to create awareness about Bhimrao Ambedkar Rajasthan Dalit Adivasi Udyam Protsahan Yojana and help the applicants in knowing the procedure and filling the form. Shri Atul Kumar Mishra, Regional Director – North, CLE addressed the august gathering. In his address, he gave a presentation on Council for Leather Exports wherein he highlighted about CLE, existing membership strength, export growth and benefits and procedure of becoming member of CLE.



Shri Atul Kumar Mishra, Regional Director – North, CLE on dais along with Shri Hira Ram Meghwal, MLA-Bilara, DCC President Jodhpur Rular (Bilara), Shri Sunil Perihar, Director, RIICO, Shri Dhanraj Gunpal, Entrepreneur, Shri Dheeraj Rathore, Entrepreneur, Shri Shailendra Khatri, District Co-ordinator, Dalit Chamber of Commerce & Industry, Shri S.L. Paliwal, Joint Director, DIC, Jodhpur and Shri Mahesh, Head In charge, FDDI, Jodhpur

During interactive session, Mr. Mohan Gurjar raised two issues. Firstly, availability of leather for artisans of Jodhpur and secondly, availability of machine for printing on leather. Regional Director noted the same.

Regional Director, CLE requested the artisans and manufacturers present in the event to become member of CLE and avail the benefits offered by Government of India which will help them to grow their business.

Lastly, Regional Director thanked DIC for inviting him in this event and giving him an opportunity to interact with the artisans and manufacturers of Jodhpur.



Shri Atul Kumar Mishra, Regional Director – North, CLE addressing the august gathering during the event

Snapshots of the Event





Subsequent visit from Jodhpur, following potential companies of Jodhpur were approached to become member of CLE:

1. M/s.Virok Handicraft
2. M/s. Palak Enterprises
3. M/s. US Agency Pvt. Ltd
4. M/s. Prem Leather Handicrafts

Shri Atul Kumar Mishra, Regional Director – North, CLE and DRO CLE officials thanked the State Government officials of Rajasthan for assisting in exploring the market of Jodhpur.

IN BRIEF



TFL & Novozymes

TFL and Novozymes reaffirm strategic partnership - Both organizations have signed exclusive agreements for continued cooperation on existing enzyme solutions and joint innovations

Leading leather chemicals company TFL Ledertechnik GmbH and Novozymes A/S, a leading global biotechnology company, have reaffirmed their strategic partnership by signing exclusive agreements for continued cooperation on existing enzyme solutions and joint innovations for the leather industry.

Novozymes' leading expertise in enzyme technology research is ideally complemented by TFL's long-standing global expertise in leather process development.

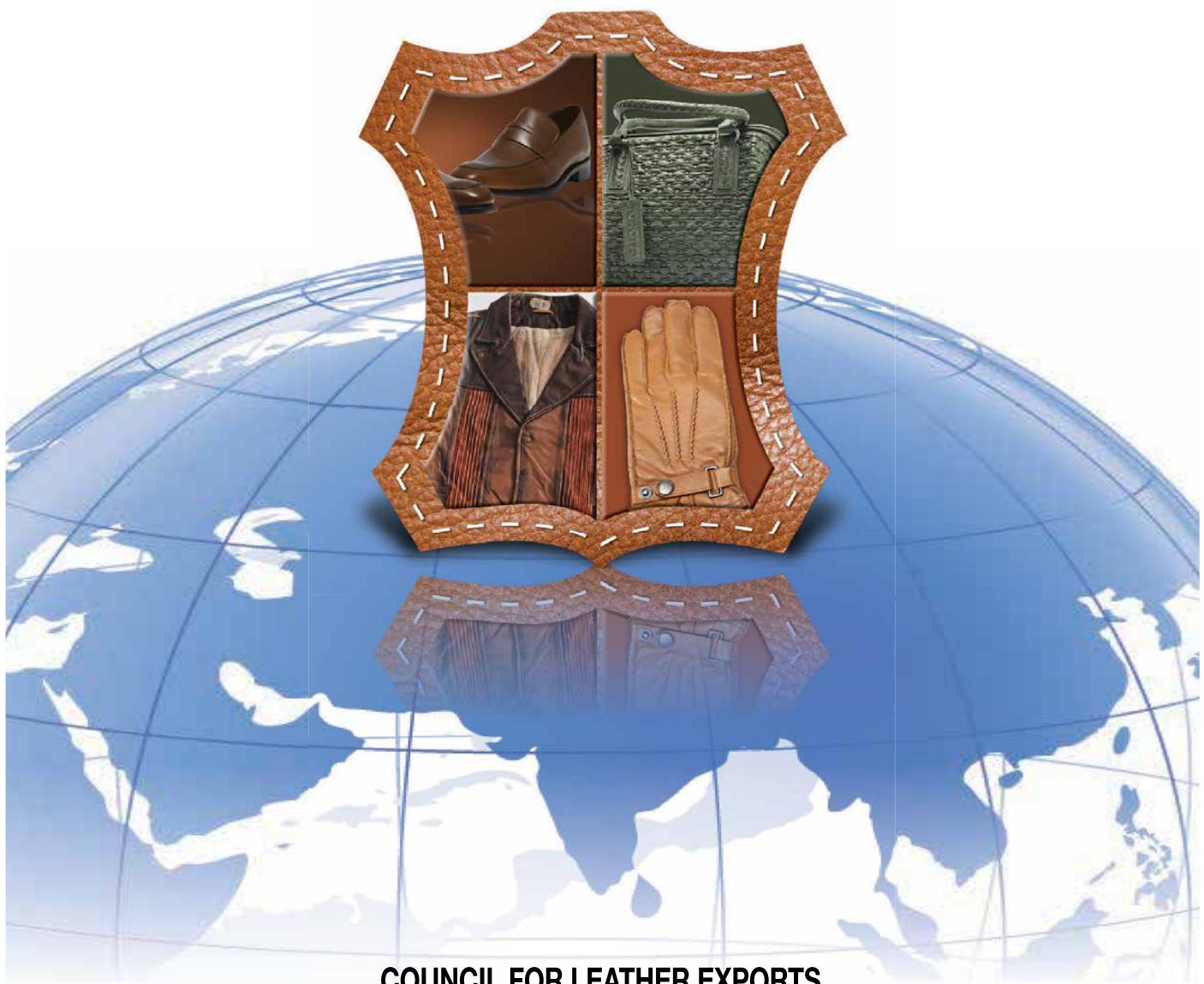
Sustainability has become one of the mega-trends - also for leather production. Enzymes offer solutions to reduce waste in the tannery and optimize the production process.

As a result of joint innovation, TFL and Novozymes have developed the Peltec X-Zyme® product range, an innovative technology that offers benefits beyond traditional enzymes used in the leather industry.

This innovative technology can significantly reduce the levels of chemicals, including hazardous chemicals, to an extent that has not previously been possible with traditional solutions. In particular, this results in remarkably improved environmental performance such as sludge volume and COD.

In addition, the jointly developed products enable a new enzymatic process that significantly improves leather quality. More information on tfl.com

INDIAN LEATHER INDUSTRY - STRIDING WITH CONFIDENCE



COUNCIL FOR LEATHER EXPORTS

(An Export Promotion Organisation sponsored by Ministry of Commerce & Industry, Govt. of India)

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