A totally traditional industry few decades back, the leather and leather based industry has transformed itself into a vibrant, modern and forward looking one in this rather short period…
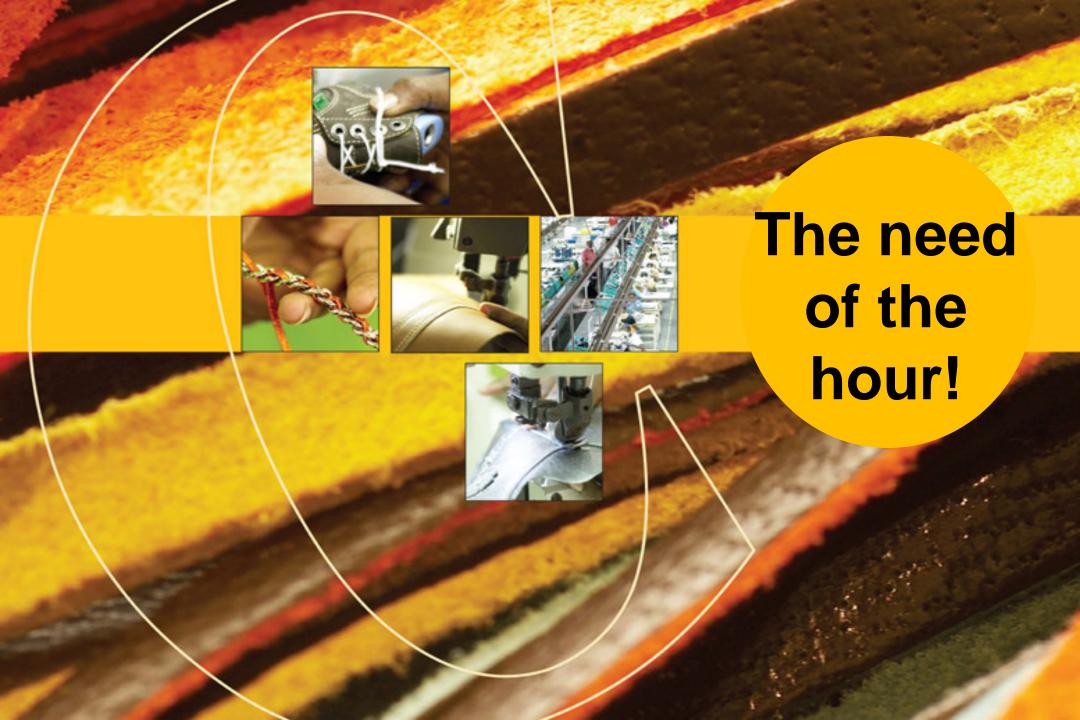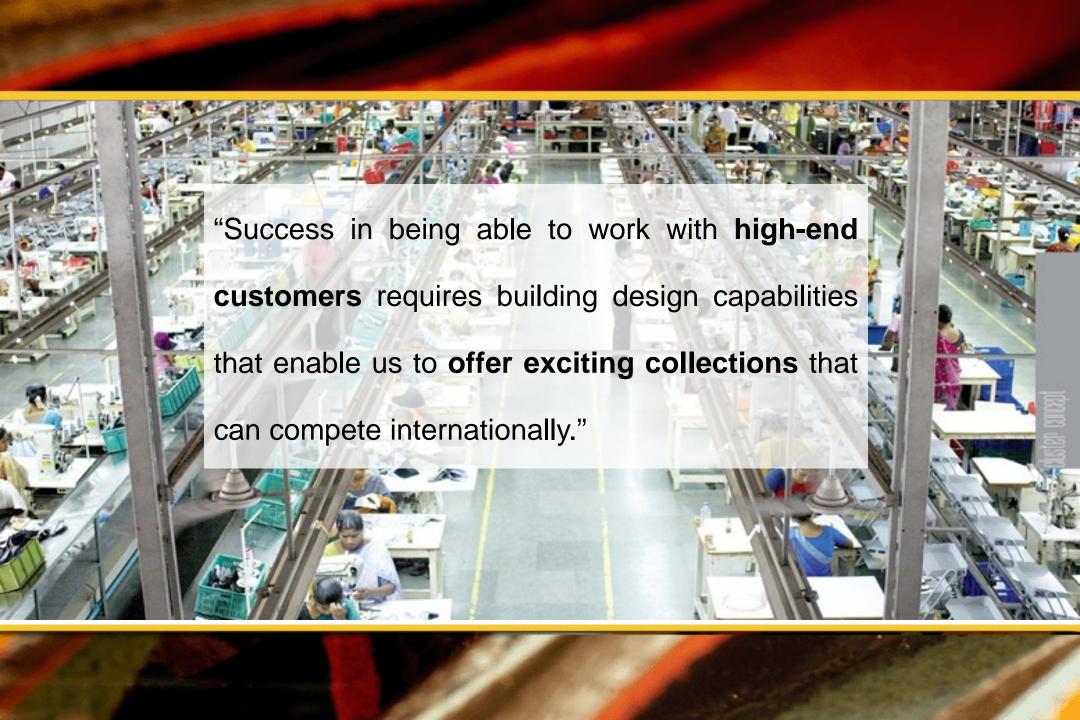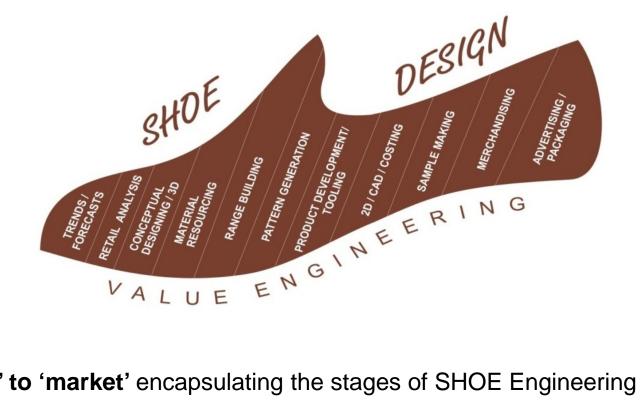
Let us witness the growth!

Greetings from CSIR-CLRI !

What Innovation Dimension is the **INDIAN LEATHER INDUSTRY** in ?

Where do we slot the Innovation in the **INDIAN LEATHER** Industry ?

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

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

- **Leather** has emerged as a **fashion product.**

- Colour, texture and other highlights add to the fashion values of creatively designed leather products. These add significantly to the value realization from leather products.

- **"To emerge as a strong global player in the world leather trade, all efforts to take proactive measures to be ready with the fashion leathers when the fashion does emerge, is crucial."**
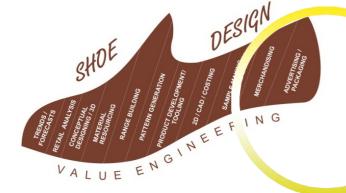
The need of the hour!

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

How can this be achieved ?

SHOE DESIGN

VALUE ENGINEERING

TRENDS / FORECASTS · RETAIL ANALYSIS · CONCEPTUAL DESIGNING / 3D · MATERIAL RESOURCING · RANGE BUILDING · PATTERN GENERATION · PRODUCT DEVELOPMENT/ TOOLING · 2D / CAD / COSTING · SAMPLE MAKING · MERCHANDISING · ADVERTISING / PACKAGING

From 'concept' to 'market' encapsulating the stages of SHOE Engineering in a value chain.

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

The time to move up the value chain has come.

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

TRENDS / FORECASTS

RETAIL ANALYSIS

CONCEPTUAL DESIGNING / 3D

MATERIA

SHOE DESIGN

TRENDS / FORECASTS

RETAIL ANALYSIS

CONCEPTUAL DESIGNING / 3D

MATERIALING

RANGE BUILDING

PATTERN GENERATION

PRODUCT DEVELOPMENT/ TOOLING

2D / CAD / COSTING

SAMPLE MAKING

MERCHANDISING

ADVERTISING / PACKAGING

VALUE ENGINEERING

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

MERCHANDISING

ADVERTISING / PACKAGING

N G

SHOE DESIGN

TRENDS / FORECASTS

RETAIL ANALYSIS

CONCEPTUAL DESIGNING / 3D

MATERIAL RESOURCING

RANGE BUILDING

PATTERN GENERATION

PRODUCT DEVELOPMENT/ TOOLING

2D / CAD / COSTING

SAMPLE MAKING

MERCHANDISING

ADVERTISING / PACKAGING

VALUE ENGINEERING
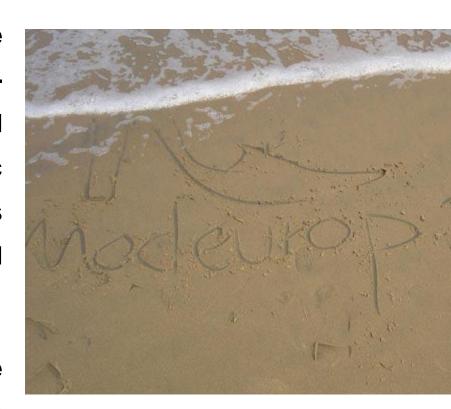
A lot of attention would have to be paid to honing 'Design' capabilities, introduce technologically advanced tools to aid in the 'design process' and to develop 'merchandizing' expertise amongst our product design teams in the footwear companies.

A CASE IN STUDY…

Travel of India in 'fashion forecasting' for leather

Travel of INDIA in 'fashion forecasting' for leather is an initiative to bring to the fore the ability of the Indian Leather Industry to take pro-active measures in fashion forecasting and design development by providing a scientific leather product development focus in the areas of colour forecasting, range building, design and retail analysis.

The outcome envisaged is to strengthen the Indian leather product design capabilities which would be reflected in product quality enhancement.

From being a mere resourcing partner in the early 90's to being able to deliver the right product for the right market and the right season, TODAY; the Indian Leather Industry has travelled a long way.

Winning Colours

Getting **one Indian colour** into the **MODEUROP Colour Card in 1994** was a matter of prestige. **Today,** we have almost **70% - 80%** of the colours chosen, featuring from Indian proposals. The challenge and opportunity today is to capitalize on the winning colours and translate them into fashion products.

What is MODEUROP ?

- **MODEUROP is an International Institution founded in 1960 in Zurich / Switzerland by the most important institutions of the leather and footwear industry.**

- **MODEUROP forecasts fashion and trends in Leathers, Colours and Materials for the International market, three seasons ahead.**

India at MODEUROP !

India is a member of MODEUROP since 1994. CLRI and CLE jointly hold the membership.

what happens in MODEurop

Results of partnership with MODEUROP

Trade Fair reviews

Top Colours

Colour Trends

Leather & Material Trends and Forecasts
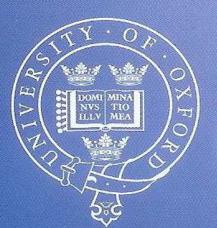
Modeurop Meeting Lineapelle
Update Colours

The **MODEUROP** initiative has been very successful in catapulting India into the foreyards of fashion.

THE UNIVERSITY OF OXFORD

Oxford University Academic Careers Study

International Migration Institute <noreply@qemailserver.com>

🛈 Follow up. Start by Monday, November 9, 2015. Due by Monday, November 9, 2015.

Sent: Mon 5/12/2014 9:48 AM

To: Md Sadiq

Dear Colleague,

The International Migration Institute (IMI) at the University of Oxford cordially invites you to participate in a **short online survey** that seeks to examine the educational and professional trajectories of academics and scientists globally.

We are contacting you as a prospective participant due to the fact that you published a journal article entitled "From Fashion Forecasting' to 'Value Engineering' for Leather & Leather Products", that is listed in the Thomson Reuter's Web of Science database in the last five years. The questionnaire should take only ten to fifteen minutes of your time and your participation will be greatly appreciated. On completion of the survey our findings will be made available to interested responders.

Or copy and paste the URL below into your internet browser:
https://imiuo.eu.qualtrics.com/SE/?Q_SS=bqhl7vcLNcqKWAB_6SC5Y5TmcTFBC4t&_=1

If you have questions or concerns related to this study, please do not hesitate to contact one of us:
Dr. Sorana Toma, Research Officer, Department of International Development, University of Oxford
Tel:+44(0)1865281726 Email: sorana.toma@qeh.ox.ac.uk or researchmobility@qeh.ox.ac.uk
Dr. Mathias Czaika, Senior Research Officer, Department of International Development, University of Oxford
Tel: :+44(0)1865271533 Email: mathias.czaika@qeh.ox.ac.uk

Follow the link to opt out of future emails:
Click here to unsubscribe

Yours faithfully,
IMI Research team

- **GLOBAL COLOUR SHADE CARD** is first released in India giving a tremendous lead time over the competition.

- The potential of INDIA was recognized and it was conferred with the **Presidency of MODEUROP** recently.

- The official MODEUROP Colour Cards are now **'Made in India'** with suitable acknowledgements to the contribution of CLRI/CLE as well as to the contributing tanners; thereby enhancing the marketability of Indian Leather in International markets.

The Council for Leather Exports
www.leatherindia.org

- The Council for Leather Exports (CLE) has a unique place. Its relationship with the industry it serves is deep rooted. CLE had always been a step ahead of the industry and guided the industry in its path of growth, diversification and modernisation

CSIR-CLRI

www.clri.org

- Likewise, CSIR-CLRI's research has generally been directed towards addressing specific technological challenges confronting the industry from time to time

The BLACK & BROWN Story

50's – 60's

- Way back in the 1950's and 1960's, **the leather industry of the country was in the cottage sector,** producing either pickled/wet blue or vegetable tanned leather, adopting crude methods of tanning.

- **The industry had a virtual aversion for technology,** with more than 90% of the industry being in the hands of men with very limited education.

- It took a good deal of convincing the tanners by 'show-how' to turn their attention towards simple technologies like using drums instead of pits for tanning.

- Likewise, use of basic equipment for various tanning operations such as unhairing, fleshing, liming and deliming, etc. was introduced to the tanners. CLRI's model tannery was a great source of education for the cottage and small tanners in those years.

70's – 80's

70's – 80's

- The leather industry **underwent a metamorphosis in the 1970's and 1980's.**

- The **real push came from government policy.**

- The foreign exchange crisis faced by India following the sudden spurt in oil prices after the seven day war between Egypt and Israel in 1973 was the trigger.

- With a view to encourage **value addition to country's raw material wealth** before its export on the one hand and to increase employment opportunities on the other, the Government of India banned export of raw hides and skins, discouraged export of semi processed leather, wet blue or vegetable tanned, and actively **encouraged manufacture and export of finished leather and downstream leather products such as shoe uppers, shoes, garments and assorted leather goods.**

- The government offered a variety of incentives to those who were ready to espouse new polic

Technological support

Technological support

- While the environment for transformation of the industry was provided by government policy, without required technological support, the industry could not have moved forward.

- The trade policy was liberalised selectively to encourage industries with export potential, such as leather, to grow. CLE seized the opportunity and came to the forefront to help the industry speedily convert itself into a modern forward looking sector. **This is when world-class machinery from Italy was being imported into India.**

Mid – 80's

Mid 80's

- **Mid-80's: The first Computer Aided Design (CAD) machine for shoe design was bought by CLRI and demonstrated to the industry as early as in 1985. When it was bought by CLRI, many thought that CLRI was perhaps way ahead of time.**

- **Soon enough the usage of this machine increased and with the training provided by CLRI, many private enterprises started buying their own CADs. Subsequently many other national institutions followed suit.**

- **If, today, some strength in design and product development exists in India in leather based industries, a good deal of credit for this goes to the pioneering role played by ITALY.**

90's

- Today, the tanners in India proudly say that not a single tannery operates here without either its own treatment facility or connection to a Common Effluent Treatment Plant (CETP); due to the initiatives taken.

- **There is no single Tannery and Factory in INDIA that does not use Italian Machinery, Equipments or even Technicians.**

Changing Role

- **Changing Role:** Though its name may suggest that India's role is predominantly in the area of leather manufacture, over the years, consistent with changing government policy and focus, the Industry also has changed its vision and widened its scope of activities.

- The UNDP-assisted National Leather Development Programme, executed by the Ministry of Industry, Government of India (1992-2000) provided with the opportunity of modernising its training facilities for training operatives, supervisors, managers and designers for footwear, garment and leather goods industries.

- Personnel from Indian Leather Companies have secured exposure in foreign soils to new methods of training and largely from Italy.

Indian Leather Industry – Opportunities Galore

Any Development can result in success only if it is **"sustainable"**.

Indian Leather Industry offers tremendous potential for sustainable development, both on export front and in domestic market.

This is why the Leather Industry has been included as a **Focus Industry** under **"Make in India"** programme launched by **Hon'ble Prime Minister of India** in Sep 2014.

The targets for Indian leather industry under Make in India are :

- To enhance a turnover of **USD 27 billion by 2020** from the present turnover of USD 12.60 billion (including export turnover of USD 15 billion from the present USD 6.6 billion and domestic turnover of USD 12 billion from the present USD 6 billion)

- Scale availability of finished leather **from 2 billion sq. ft. to5 billion sq. ft.** to achieve above target

- Skilled manpower to go up from **2.5 million currently to 6 million in 5 years**

Chennai, INDIA

… is now the Colour Story

INDIAN
LEATHER
INDUSTRY -
STRIDING
WITH
CONFIDENCE

HONESTLY, TRULY WHERE ARE WE HEADED ?

HONESTLY, TRULY WHERE ARE WE HEADED ?

- **Future growth of Global Leather Industry** will continue to be market driven.

- **We believe in Technology partnerships** with Global majors for decided advantages in the integrated developmental plan of **design co-operation.**

- **This is** the way forward!

The Travel of India in 'fashion forecasting' for LEATHER …the journey continues!

Expression of sincere gratitude …

Mr M Rafeeque Ahmed, Chairman, Council for Leather Exports
Mr PR Aqeel Ahmed, Convenor, 19th UITIC, Regional Chairman (SR), Council for Leather Exports
Mr R Ramesh Kumar, IAS, Executive Director, Council for Leather Exports
Mrs Sunanda Santappa, Assistant Director, Council for Leather Exports & her Team
Mr MJ Jamal Md Mohideen, Assistant Director, Council for Leather Exports & his Team
Dr Girish Sahni, Director-General, CSIR
Dr C Rose, Acting Director, CSIR-Central Leather Research Institute
My colleagues Dr Das BN, Dr Gautham G, Shri K Dayalan, Shri K Jagadeesh & Smt R Saraswathi

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Dr T Ramasami, former Secretary, DST, former DG and former Director, CLRI
Mr A Sahasranaman, former Executive Director, CLE
Mr S Jawahar, Chairman, Khaalz International
Mr S Audiseshiah, former Executive Director, CLE
Mr Habib Hussain, CEO, AV Thomas Leather & Allied Products Limited
Mr K R Vijayan, Managing Director, GOOD Leather Group
Mr N Shafeeq Ahmed, Managing Director, SSC Group

Last but not least
Mr Yves Morin, Chairman, UITIC, France
Ms Francoise Nicolas, Secretary General, UITIC, France
Ms Alexandra Faivre, Assistant, UITIC
Ms Anita Revel, Assistant, UITIC

&
MODEUROP
www.modeurop.com

A "Tribute" to FUTURE FOOTWEAR FACTORY !