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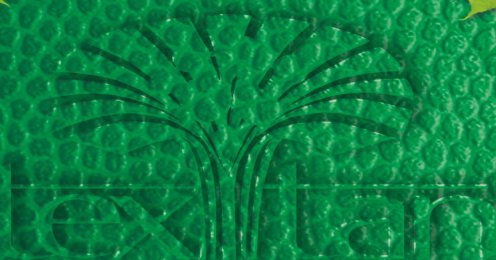
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Indian Leather

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The recently concluded major Italian International fairs dedicated to Leather, Footwear, Fashion and Accessories, held in Fieramilano (Rho), in Milan, closed with excellent results and drew a huge number of visitors from the trade and industry. The 96th edition of the MICAM MILANO, a leading international exhibition presenting collections, that highlight the quality, innovation in footwear fashion was held in conjunction with MIPEL and TheOneMilano from **17-20 September 2023**, preceded by Home Fashions & Jewel Exhibition from 15-18 September.

The fairs revealed an increasing demand on the part of foreign buyers providing the importance of exports in strengthening the recovery of the industries presented at these events. As per the reports, **42,273** trade visitors from **129** countries visited these fairs which show an increase of **21%** when compared to the September 2022 edition. The final figures show growing numbers of visitors from Spain, France and Germany; as regards non-Eu countries, a long awaited comeback of China. Over 2000 brands presented their collections for the coming season, marked by strong commitment to research and innovation, quality and a keen awareness of sustainability.

The **102nd** edition of LINEAPELLE, the most important exhibition dedicated to the global fashion, luxury and design industry, and the **Fall/Winter 2024-2025** season, ran concurrently with SIMAC Tanning Tech 2023-the International event with the most qualified offer of machinery and technology for the tanning, footwear and leather goods industry held from **19-21 September, 2023**, welcomed **28,000** trade visitors from over **109** countries. The Fairs provided a good opportunity for the visitors to meet and discuss the current topics for the industry, from sustainability to artificial intelligence, from new production technologies to the future of retail.

The positive outcome of all these events, and the enthusiasm generated among the trade people reflects favourable conditions in the world market. It is hoped that it would be improved in the coming months.



106th Annual General Body Meeting of AISHTMA

The All India Skin and Hide Tanners and Merchants Association held its 106th Annual General Body Meeting for the year 2022-23 at its office on 31st August 2023. Find below the speech delivered by the President, AISHTMA, Dr. M. Rafeeqe Ahmed at the meeting.

Dear Members,

It is a great pleasure for me to extend a warm and cordial welcome on the occasion of the 106th Annual General Body Meeting of our Association.

This year under report, your Association conducted Four Executive Committee Meetings apart from other Urgent and Special Meetings which required immediate attention, with Common Effluent Treatment Plants (CETPs) & other Regional Associations.

The Indian leather industry has been one of the Country's oldest and largest industries, contributing significantly to the country's economy. The Indian leather industry is valued at \$17 billion and employees over 4 million people. It accounts for 12.9% of the world's leather production and is the third-largest exporter of leather and leather products globally, after China and Italy. The industry comprises various segments, such as tanning, footwear, leather goods, and accessories, among others. The Indian leather industry's main export destinations are the USA, Germany, UK, Italy, and France. However, the Indian leather industry also faces several challenges, such as lack of modernization, low productivity, and high environmental impact. The tanning industry, in particular, has been criticized for its

high water usage and pollution levels. The Indian leather industry also faces intense competition from other countries, such as China, which has a larger scale of production and lower costs.



The Indian leather industry has several strengths, such as the availability of raw materials, skilled labour, and a large domestic market. India has a large population with a growing middle class, which is driving demand for leather products. The government has taken several initiatives to support the leather industry, such as the establishment of the Indian Leather Development Programme (ILDP) and the Leather Sector Skill Council (LSSC). These initiatives aim to improve the quality of leather products, increase exports, and provide training to the workforce.

However, the government can play a vital role in supporting the Indian leather industry by providing incentives, subsidies, and policies that promote sustainability and international trade. The industry also needs to address the issues of labour laws, skilled labour shortage, and competition from other countries. By addressing these challenges and focusing on growth opportunities, the Indian leather industry can become a global leader in the leather industry and contribute significantly to the country's economy.

According to a report, Revenue of the Indian leather apparel and accessories sector is expected to decline 7-8 per cent during the financial year 2023-24 (April-March), attributable to a slowdown in consumer demand in Europe and the US, As much as 85-90 per cent of the production by the Indian leather apparel and accessories industry is exported. Europe and North America account for 75 per cent of this. According to the rating agency, the expected fall in revenue is seen despite benefits that may emanate from a depreciating rupee. The depreciating rupee typically helps the export-oriented industry in getting higher realisation. Though domestic demand for the leather apparels and accessories segment remains resilient, the overall sectoral revenue is seen declining in the medium term."

Now turning to the export performance for the year 2022-2023. The export of Leather, Leather Product & Footwear for 2022-2023 touched Rs.4,21,987.58 MN against Rs.3,63,269.10 MN in 2021-2022, growth of 7.94%. The State already tops in leather exports with 42% of leather, footwear and allied products shipped out of India being manufactured in Tamil Nadu.

Category	(Value in Million Rs.)			(Value in Million US\$)		
	APR-MAR 2021-2022	APR-MAR 2022-2023	% variation	APR-MAR 2021-2022	APR-MAR 2022-2023	% Variation
Finished Leather	33,997.24	34,575.55	1.70%	456.10	430.93	-5.52%
Leather Footwear	1,52,626.42	1,90,760.08	24.98%	2,047.08	2,377.23	16.13%
Footwear Components	18,622.25	23,289.14	25.06%	249.87	289.81	15.98%
Leather Garments	25,488.03	28,336.22	11.17%	342.38	353.07	3.12%
Leather Goods	95,962.23	1,04,364.53	8.76%	1,287.06	1,301.34	1.11%
Saddlery & Harness	20,575.55	17,783.91	-13.57%	276.10	222.17	-19.53%
Non-Leather Footwear	15,997.38	22,878.15	43.01%	214.11	284.98	33.10%
TOTAL	3,63,269.10	4,21,987.58	16.16%	4,872.70	5,259.53	7.94%

(Source: CLE)

Let me remind you that we have huge Indian domestic market. The future is the local market and the whole World is looking at India which has a great future. With Central Leather Research Institute (CLRI) and other institutes we can build our industry to gain new heights. However, I admit that the Industry has been facing unprecedented crisis for the last few months with every sector of the industry like tanning, footwear, garment sector etc., facing the brunt, apart from multi-fold increase in cost of production. I would like to deal on this subject in full detail after my formal inaugural speech.

AISHTMA arranged a meeting with CSIR-CLRI inviting Dr. K.J. Sreeram, Director to address our Executive Committee Members and make a presentation on the subject **"Technology Road Map for Leather Industry"**. The Director's presentation includes Technology

Road map, re-defining tanning, team up with machines etc., Apart from the Executive Committee, Members of the Regional Tanners Associations also attended the meeting.

On behalf of our Association, I would like to appreciate and thank the Government of India for having formulated various schemes like Indian Footwear, Leather Accessories & Development Programme (IFLADP) under which all the Common Effluent Treatment Plants (CETPs) undertook various up-gradation projects which enabled the CETPs to obtain consents for their full designed consented capacities. The Government of India has announced further New Schemes in continuation of IFLADP for the next five-year term for the period 2021-2026 with an outlay of Rs. 1700 crores for the industry.

We also appreciate and thank Government of Tamil Nadu for their continued support for the development of our Industry, especially to our Honourable Chief Minister Thiru M. K. Stalin for his continued efforts.

Friends, we have lost our Vice-President Janab V. P. Naimur Rahman Saheb, who passed away on 28.03.2023 after a brief illness rendering yeomen services to the association for a period of 28 years.

Our Senior Executive Committee Member Janab Dr. Nathersa Mohammed Sayeed Saheb, who expired on 07.06.2023 after a short illness rendering yeomen services to the association for a period of 28 years.

Our past Advisor & Administrative Officer Thiru R. Shunmugham, IAS (Retd.), who expired on 14.06.2023 have been rendering yeomen services to the association for a period of 24 years.

All of them were dedicated & committed to their task and contributed immensely to the industry and community. May Allah bless them with Magfirath and their soul rest in peace. Ameen.

Friends and esteemed members of the Association, I would like to thank our Hon. Secretary, Mr. M. Faiyaz Ahmed, who took personal care in administrative responsibilities of our association and Mr. N. Imtiaz Ahmed, Hon. Jt. Secretary who always stand in front to solve the problems of the association. I also thank Mr. R. Ramesh Prasad, Hon. Treasurer for taking care of pollution matters at various levels. I also thank our Honourable Vice-President Janab M. Mohamed Hashim Saheb for his guidance and all the Executive Committee Members and you all for the help cooperation rendered to me in managing the total affair of the association.

I also thank entire staff of the association for their hard and efficient work. Before, I conclude I wish you all a very successful year of business in the future.

With the brief introduction I now throw open the meeting to take up the proceedings as per the agenda.

Jai Hind!

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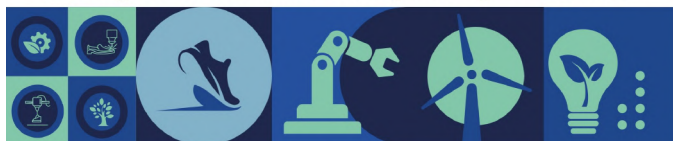
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The 21ST International Technical Footwear Congress UITIC closed with positive data.

Companies must innovate to become sustainable, fully embracing the digital transformation that is the key enabler for this change. This is the main message from the UITIC Congress



The Congress opened, following the UITIC tradition, with one day of factory visits on Tuesday September 19th. This was structured in

three parallel programs among which participants chose their preferred one. The options included visiting shoe factories producing high quality lady shoes and using modern manufacturing technologies, learning the best practices in the supply chain with examples in the area of materials, adhesives, leather tanning and component production. For the first time a tour included also an innovation park (Kilometro Rosso) and a technology transfer hub on industry 4.0 (MADE). All tours were sold out and were very much appreciated by the participants.

On the following day more than a hundred congress attendees had a chance of visiting SIMAC / TANNING TECH as part of the conference program; they could enjoy a guided tour of the exhibition to have hands on contact with the most important technology offered by the exhibitors.



The Congress was opened on September 21st at the NH Congress Centre in Assago (Milano) by the official addresses of Yves Morin, president UITIC, Maria Vittoria Brustia, President ASSOMAC, Giovanna Ceolini, President ASSOCALZATURIFICI and Carmen Arias Castellano, Secretary General CEC. 4 Sessions, two panels, 24 speakers, 12 panel contributors, 17 booths in the innovation

showcase where research centres and institutions from all over the world presented their work. These are the numbers of a successful edition that was attended by more than 250 delegates from 22 countries and which had its most important social moment at the Gala Dinner in the beautiful Castle of Vigevano. During the dinner UITIC awarded its recognition to three distinguished members of the footwear community: Fortunato Federico from Portugal in the managerial category, Ricardo Jaime Guerra from Mexico in the technological one and Emiliano Bozzato from Italy for his scientific merits. This was also the occasion to celebrate the 50th anniversary of the association that was established in 1972.

The presentations in the four sessions covered in great details a wide range of topics related to new products and materials, the digital transformation of products and processes, the role of the workers in the scope of Industry 5.0, finally providing examples of sustainability success stories; in the panel discussion the main topics of innovation and sustainability were discussed in further details by a panel of experts. Two very enriching and rewarding days that were concluded by the renewal of the association Executive Committee: Yves Morin, after 13 years of service as President, stepped back from his position and Sergio Dulio took over as new president of UITIC. His first and foremost task being the organization of the 22nd Congress that was officially announced to take place in Shanghai in 2025.

The Congress has once again been hosted in Italy thanks to the collaboration between the promoter UITIC and Assomac association, in synergy with Messe Frankfurt and Assocalzaturifici.

The success of the Congress is also thanks to the support of:

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World Footwear Congress: one month to go!

The European Footwear Confederation (CEC) and the Footwear Industrialist Association of Türkiye (TASD) are ready to welcome you all at the 7th edition of the World Footwear Congress, that will be held on the 8th and 9th of November 2023 in Istanbul.

Never as today, it is imperative for the worldwide footwear sector to *reshape its future*. Only a few years have passed since the 2019 Congress edition in Naples, but we are now living in a completely different world. The global challenges due to the Covid-19 pandemic, uncertainty, high inflation and the geopolitical instability to name a few, have exacerbated the already existent pressure on our sector, under scrutiny of both legislators and consumers.

More than ever, unity is strength. We cannot miss this unique opportunity to meet physically in Türkiye, one of the leading powers in the global footwear value chain, and more precisely in Istanbul, the historical bridge between East and West, to exchange best practices, to debate on common solutions and to learn from each other for the sustainable development of a resilient footwear industry. In particular, this year, the Congress will focus on three main pillars: business solutions for informed consumers, sustainability and circularity, and attractiveness of the sector for the future workforce.

You are still in time to book your ticket! In Istanbul, you will have the opportunity not only to listen to the contribution of world leading entrepreneurs and experts, but also to engage in the several networking moments foreseen between the sessions and during the social activities. Last but not least, the experience will include the visit of two companies based in Türkiye, and the possibility to arrange business meetings in line with your specific needs.

While the organisers are finalising the last details to ensure you the warmest welcome, we invite you to have a look to the programme, the speakers and useful logistic information on the WFC website www.wfc2023istanbul.com/en/.

We look forward to meeting you all in Istanbul! *Görüşürüz!*



WWF Joins as a Partner for Deforestation-Free Call to Action

World Wildlife Fund (WWF) will join as partner of the Deforestation-Free Call to Action for Leather, alongside Textile Exchange and Leather Working Group (LWG).

The Deforestation-Free Call to Action for Leather is a cross-sector initiative that calls on brands and retailers to commit to sourcing all their bovine leather from deforestation-free supply chains by 2030 or earlier. Its intent is to provide a clear roadmap for brands towards sourcing from deforestation/conversion free supply chains and providing tools and guidance to support them along the way. WWF has previously had an active role as part of the NGO advisory group, along with National Wildlife Federation (NWF), and the Accountability Framework initiative (AFi), offering valuable input into the workplan and tool development.

In a progressive step for the Call to Action, WWF in its new role as partner will work actively with signatories towards developing deforestation/conversion free supply chains. That will include offering signatories further in-depth expert guidance, supporting collaborative approaches and helping them to set meaningful expectations on their journey towards helping to galvanize efforts toward ending the deforestation and conversion of natural ecosystems linked to cattle farming.

WWF joins as a partner in the Deforestation-Free Call to Action

The World Wildlife Fund (WWF) will join as a partner in the Deforestation-Free Call to Action for Leather, alongside the Textile Exchange and Leather Working Group (LWG).

The Deforestation-Free Call to Action for Leather is a cross-party initiative calling on brands and retailers to commit to sourcing all their

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In a progressive step for the Call to Action, WWF in its new role as a partner will actively work with signatories to develop supply chains free from both deforestation and conversion. This will include, for signatories, further in-depth guidance, support for collaborative approaches, help to create meaningful expectations in their journey in order to stimulate efforts to end deforestation and the conversion of natural ecosystems related to livestock farming.

(source: leatherinsiders)



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Digest of Leather News
ESTD: 1967



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INDIAN LEATHER takes part in International Leather Fairs held in India and copies are distributed to the participants and distinguished visitors of the fair, thus reaching the cream of the industry and trade.

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Shoes & Leather Guangzhou 2023 concluded successfully

- The event provided visitors with a comprehensive overview of the market

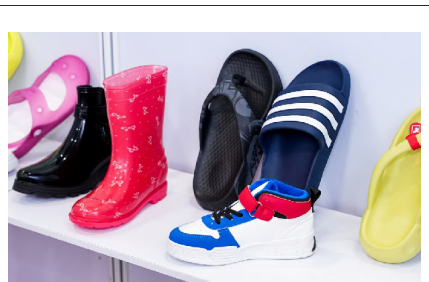
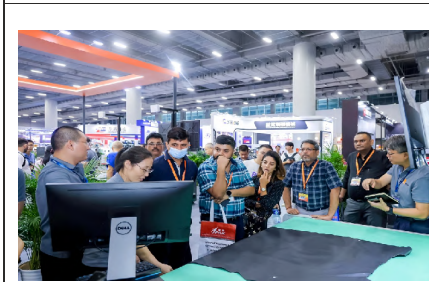
The 31st edition of the International Exhibition of Shoes & Leather Industry-Guangzhou, organised by Top Repute Co Ltd, at the China Import and Export Fair Complex Area D, on 4-6



September, 2023 concluded with positive results. The fair held in an exhibition area of 25,000 sq mtrs, housed 480 exhibitors from 13 countries and regions, such as, Bangladesh, Germany, Italy, Iceland, India, Indonesia, Portugal, Turkey, Taiwan, the United Kingdom, Vietnam and homeland China. The fair stands as a pivotal platform for the machinery of footwear and leather machinery, leather, chemicals and shoe materials.



The 3-day event drew a total of 16,822 visitors from over 52 countries and regions. The fair showcased separate halls for machinery and materials, presenting a wide range of exhibits to cater to the comprehensive preferences of exhibitors and visitors.





CONCURRENT EVENTS



The 12th edition of the International Footwear Design Competition, organized by the Confederation of International Footwear Conference (CIFA), was sponsored and co-organized by Top Repute Co. Ltd. Since 2008, IFDC has been introducing multinational designers' concepts, while also offering opportunities for young designers to connect with manufacturers. The event also aimed to promote the importance of original product design, fine production skills, and

quality to build unique branding. A total of 84 entries were received from 7 countries and regions, including Beijing, India, Indonesia, Malaysia, Philippines, Taiwan and Thailand. The winning entries were announced and awarded during the Opening Dinner Banquet and displayed during the exhibition. The juror committee consisted of 8 renowned professionals, including international designers, trend experts, footwear consultants, lecturers, and representatives of global footwear associations.

DESIGN WALK







DESIGN WALK is a non-profit platform sponsored by renowned shoe manufacturers, federations, and international footwear associations. It showcases stylish footwear, leather products, and accessories, while sharing new creativity and inspiration to positively impact the industry.



SEMINARS

Professional speakers from the shoes and leather industry were invited to share the latest news on technology advancement and trends in research and design.

	
<p>Assessing Comfort and Fit in Footwear by Vivien HSIEH - SATRA Asian Business Manager and Lily LI - SATRA China Deputy Technical Manager</p>	
	
<p>Latest Innovative Materials for the Shoes and Leather Industry by Dr. MIAO Jianying - Technical Manager, Nano and Advanced Materials Institute</p>	<p>Emerging Trends and Prospects in Footwear Research and Design by Zhonghua CAO - Guangzhou Lu Pu Mdt InfoTech Ltd</p>
	
<p>A view of the participants</p>	

Shoes & Leather Guangzhou 2024 Guangzhou will be organized on 3-5 June 2024

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LINEAPELLE

102 LINEAPELLE (19-21 Sep 2023, Fieramilano)

- **A FORMIDABLE EDITION OF LINEAPELLE CAME TO AN END**
- **TRADE FAIR attendance UP 25%:**

A vital edition of LINEAPELLE builds stimulating opportunities for style comparison and business networking by welcoming professional operators from 109 countries and celebrating the strong return of Asian buyers

The 102 edition of LINEAPELLE (the most important exhibition dedicated to the global fashion, luxury, and design industry) consolidates its international leadership by positioning itself as an authentic beacon in the context of a complex economic phase characterised by a widespread slowdown and a limited possibility of defining production and commercial programmes.

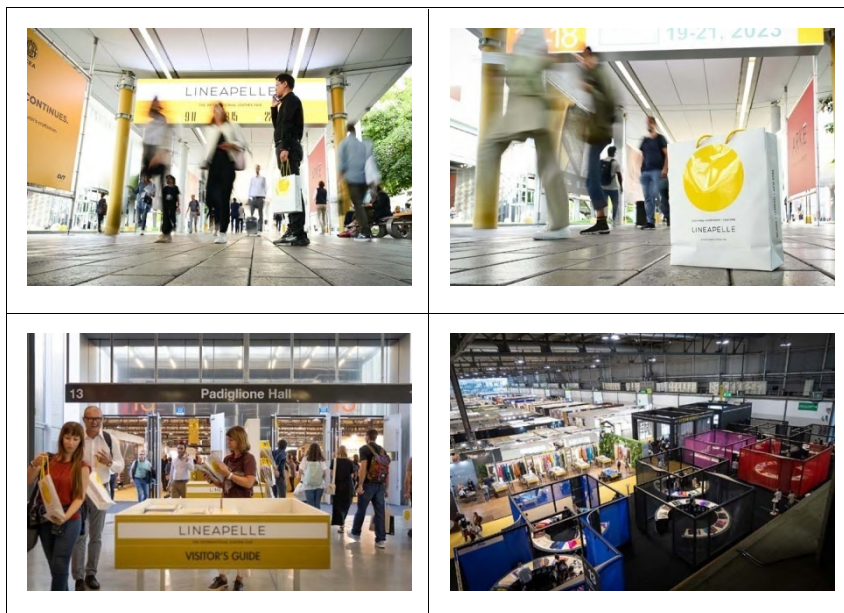
LINEAPELLE 102 (dedicated to the Fall-Winter 2024-2025 season) hosted 1,330 exhibitors and welcomed a 25% increase in the number of professional operators compared to the September 2022 edition: +26% Italian visitors, +22% those from abroad, arriving from 109 countries, with a particular dynamism of those from France and China, Japan and South Korea, confirming the reassuring return of Asian buyers to the fair.

"All the exhibition sectors at LINEAPELLE 102," commented President Gianni Russo, "showed remarkable vitality. Creativity and the ability to involve and stimulate the various operators were the strong points of a show whose international leadership cannot be questioned and is even stronger after this edition".

LINEAPELLE 102 reaffirmed the value of the exhibition synergy with Simac Tanning Tech (the international event with the most qualified offer of machinery and technology for the tanning, footwear, and leather goods industries) held concurrently at Fiera Milano Rho. A synergy that involved, in total, over 28,000 visitors.

"The international attendance of visitors," explains Maria Vittoria Brustia, president of Simac Tanning Tech, "and the attention of technology manufacturers towards process organisation and digitalisation confirm a significant change of pace towards a sustainable transition. We are certain that this path, shared by all operators in the sector, will soon generate satisfying results'.

The next edition of LINEAPELLE, number 103 (Spring-Summer 2025 season), will take place from 20 to 22 February 2024, again in the Fiera Milano Rho premises.



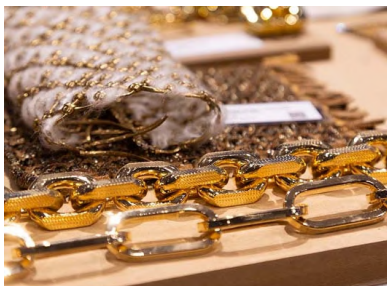
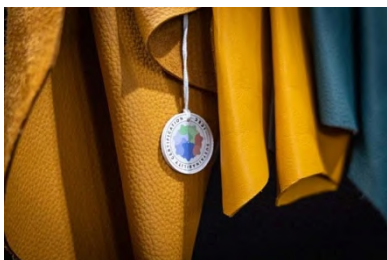
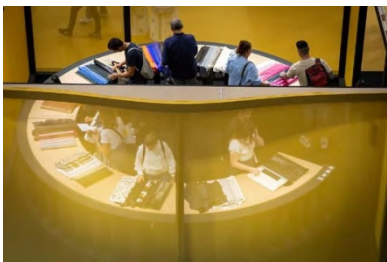




Photo courtesy : Lineapple

Simac Tanning Tech 2023

The dynamism of Simac Tanning Tech instills courage in the sector and launches new proposals in terms of process organization and digitalisation towards a sustainable transition.

The turnout data is very positive: over 6,500 certified attendances approximately 40% foreign

20 international delegations supported by ITA-Agenzia

+37% of visitors compared to the last edition

+14% of exhibitors, brands and institutions compared to the last edition

Milan, 22 September 2023 - The final attendance data, with over 6,500 certified presences between operators and delegations of which approximately 60% Italian visitors and 40% foreign visitors and therefore +37% of visitors and +14% of exhibitors compared to last year, reward the commitment and will to innovate of the 320 exhibitors, brands and institutions present at Simac Tanning Tech and confirm a recovery of the fair at pre-covid levels.

The numbers confirm the positive trend, starting from those of the exhibiting companies present on the 15 thousand square meters of the fair. Italy above all, but also Turkey, France, Germany, Portugal, Brazil, Mexico, Spain, Tunisia and the great return of Asian countries among the 96 nations of origin of the visitors.

It is not just a question of numbers: a very significant and qualified turnout visiting the historic pavilions 14 and 18, to which must be added the one attracted by the other Milanese fairs which met again this year at Rho Fiera and which made Milan the centre of the fashion supply chain. Precisely the synergy of the combined fairs was driving

and decisive for the success of the event, together with the innovations and application services presented by the multi-sector reality which shared the objective of giving life to productive ecosystems in the name of sustainable transition.



"The international presence of visitors and the attention of technology producers towards the organization of processes and digitalisation – proudly states the President of Simac Tanning Tech Maria Vittoria Brustia – confirm a significant change towards a sustainable transition. We are certain that this path shared by all operators in the sector will soon generate satisfactory results. Furthermore, I would like to take this opportunity to thank ITA-Agenzia, which has allowed us to strengthen the incoming program of visitors and delegations from abroad".

Thanks to the consolidated collaboration with ITA-Agenzia, the Simac Tanning Tech fair benefited from the presence of 18 international delegations from Argentina, Brazil, Colombia, Ethiopia, India, Indonesia, England, Iran, Mexico, Pakistan, Paraguay, Poland, Romania, South Africa, Tunisia, Turkey, Uzbekistan and Vietnam with around 100 buyers, institutional delegates and foreign press, a significant part of which was also present at the 21st International Congress of footwear technicians UITIC, held from 19 to 22 September between Milan and Vigevano.

Simac Tanning Tech reiterated the value of the exhibition synergy with Lineapelle (the most important exhibition reserved for the global fashion, luxury and design supply chain), held in conjunction with Fiera Milano Rho.

"A fair which, despite the complexities of the market, demonstrated the great vitality of the exhibition sectors - commented the CEO of LINEAPELLE Fulvia Bacchi - Creativity, ability to involve and stimulate the various operators were the strong points of a fair, whose international leadership cannot be questioned."

The fiftieth edition of Simac Tanning Tech is scheduled from 17 to 19 September 2024, at Fiera Milano Rho.



Versatile machines are the future – Starlux SV

The **Starlux SV** is a special ironing and/or embossing machine recently added to **Bergi S.p.A.**'s wide range of machinery.

It is equipped with the well-established automatic roller changing system with the "revolver" device, but the real feature that makes it unique is the built-in "Vario" system, which allows you to vary the geometry of the machine.

The 'Vario' system allows you to change the angle of contact between the leather and the operative roller and, depending on the angle chosen, the leather can remain in contact with the roller for less or more time. Depending on the time for which the leather remains in contact with the operative roller, different results will be obtained, for example, a longer contact time allows a more homogeneous ironing while keeping the leather soft, all while decreasing the working pressure.

This machine, thanks to the combination of its **special functions** with the 'Vario' system, lends itself very well in terms of versatility.

Leaving aside for a moment the applications of the 'Vario' system, this machine has the possibility of ironing leathers both by pressure and thickness. Thickness ironing is done thanks to the motorised operating roller that follows the direction of the leather, making the process much gentler; in this way, soft leathers are not compacted while maintaining their characteristics intact and, more generally, thickness ironing allows only the surface of the leather to be stressed.

The **special feature of the Starlux SV** is the possibility of using all of the above characteristics at the same time, thus deciding at the same time, for example, to work with a longer contact time while setting the thickness mode. The customer thus has at his disposal a machine that allows him a wide range of different processing and to respond adequately to market demands.



European workshop on accidents/injuries at the workplace

On September 19, 2023, on the premises of Lineapelle, the international leather fair in Milan, the European social partners for the tanning and leather sector, COTANCE and industriAll European Trade Union, held a European workshop titled *Workplace Safety in European Tanneries: State of Play*.

The workshop, developed as part of the EU-funded social dialogue project “Towards Zero Adverse Impact of the European Leather Industry – GREEN DEAL LEATHER”, brought together national social partners, including the employers, *Acexpiel (ES)*, *APIC (PT)*, *FFTM (FR)*, *FVTBSL (AT)*, *MKSZ (HU)*, *UNIC (IT)*, *VDL (DE)* and trade union representatives from Italy (*UILTEC*, *Femca-Cisl* and *Filctem-Cgil*) and Spain (*CCOO* and *UGT FICA*), as well as many interested stakeholders.



The event was opened by **Mr. Manuel Rios, President of COTANCE**, who said:

“Our common ambition is to drive positive change in the global leather industry by “leading by example”. The present report pulls together all sector-specific information on tannery workplace accidents in Europe for better understanding them and drawing lessons for improved workplace safety in tanneries.”

COTANCE's Secretary General, Gustavo Gonzalez-Quijano, explained the context, objectives and

rationale of the *Green Deal Leather* project, emphasising: *"Since COTANCE started the Social Sectoral Dialogue with its Trade Union counterparts some 25 years ago, workers' health and safety has always been at the top of our agenda. We understand that this concern ought to be the first priority when it comes to implementing Due Diligence in leather supply chains, as any accident at the workplace is irremediably a failure, with adverse consequences, above all, for the victim, but also for the employer."*

With 1102 accidents in 2021, the incidence of accidents at work in European tanneries is 3,2%. This figure includes accidents on the way to or from the workplace. Serious accidents are rare, most are wounds (49%), including superficial cuts concerning mainly the upper limbs (47%) with half involving hands (23%). From 2019 to 2021 accidents have decreased by 16% (both female and males).



The workshop provided an exceptional forum for the exchange of information and best practices concerning the reporting and communication of health and safety risks across the leather supply chain, as well as their management within tanneries.

Judith Kirston-Darling, Deputy General Secretary of industriAll-Europe said:

“Quality social dialogue is essential to ensure a safe tanning and leather sector in Europe. We encourage all employers to produce relevant data on occupational health and safety issues and to work closely with workers and their representatives at site level to ensure that all workers are properly trained and that adequate health and safety measures are fully respected by both sides. By working together in an open and positive manner, we can eliminate accidents in the workplace and keep workers safe.”

ONE YEAR IN THE LEATHER TRACEABILITY INITIATIVE

COTANCE takes stock of one year of activities in its alignment initiative of leather traceability certification schemes holding a Networking Drink on the first day of the Lineapelle Fair.

It was at the 2022 September edition of Lineapelle, a few months before the EU was adopting the so called “EU Deforestation Regulation” (EUDR), that COTANCE, the body representing European tanners, launched its call to leather certification bodies to come together for aligning their incipient traceability schemes for facilitating mutual and official recognition.

COTANCE's call on prominent certification bodies active in traceability was favourably echoed by ICEC, LWG, SLF, OEKO-TEX®, as well as Textile Exchange who agreed to hammering out **common minimum essential elements of traceability and evidence of verification to be present in a scheme** by engaging in monthly encounters under a COTANCE lead.

The success of the initiative grew rapidly triggering the interest of CEN Standardisation experts from UNIC (Italy), FILK (Germany) and AQC (Switzerland), NGOs such as the World Wildlife Fund (WWF), the National Wildlife Federation (NWF), the Global Roundtable for Sustainable Beef (GRSB), as well as IGOs such as UNECE and UNIDO.

The group expanded further with leather sector organisations such as CICB/CSCB (Brazil), LHCA (US) and AQC (Switzerland).

All undersigned or are in the process of signing the Terms of Reference that guide the activities of this “alliance” that ended up with the name of **LEATHER TRACEABILITY CLUSTER (LTC)**.



COTANCE celebrates the first anniversary of this successful initiative, taking stock of its progress and looking into the tasks that are ahead. This Networking event marks a significant milestone, with Lineapelle playing a welcome role as a sponsor and supporter of the COTANCE initiative.

After a first phase where the LTC expanded its membership to reach critical mass, members have been advancing by setting up Sub-Groups. There are currently 2 active Sub-Groups, one on “Certification” and a second one on “Standardisation”. A third Sub-Group is in the making addressing “Transparency & Data Privacy Issues”. A forth Sub-Group focussing on “Deforestation” should also soon be set up for translating the specific requirements set by the EUDR into CEN-Standard specifications.

Although good progress has been achieved in the alignment of terms and processes, as well as in the preparation of the New Work Item (NWI) to be submitted to CEN TC 289 “Leather”, which is currently chaired by the COTANCE Secretary General, the task ahead for leather traceability certification schemes is still paramount and time is running short. Indeed, the EUDR, which obliges any cattle hide, skin or leather to be sold on the EU market to be free from Deforestation, i.e. not having been obtained from animals raised and/or kept on land deforested after 31st December 2020, will be applied in 2025. Cattle, whose hides/skins will arrive on the market in 2025, are being born these days and will need to be fully traceable.

Participants of the Networking event were busy exchanging on the LLTC results and the challenges ahead.

COTANCE's Secretary General, Gustavo Gonzalez-Quijano, expressed his excitement about the collaboration, saying, "COTANCE is proud to be at the origin of this important initiative that aims to increase the efficiency of certification bodies in developing

leather traceability and bring considerable savings for all the links in the leather value chain, as it enables convergence and mutual recognition. The spirit of cooperation demonstrated by all members of the Leather Traceability Cluster (LTC) is remarkable and a vivid example of how collaboration and competition can and must co-exist when it comes to overcome common challenges."

"LINEAPELLE is pleased to support the positive impact of the LTC in the leather industry, and this Networking event exemplifies our dedication to supporting initiatives that embody the value of industry collaboration," stated Fulvia Bacchi, CEO di Lineapelle. "Lineapelle is the meeting place of the leather industry; we are happy that COTANCE takes advantage of Lineapelle for organising important sector activities and we encourage others to do so as well."

COTANCE President, Manel Rios (INPELSA, Spain) underscores: "Traceability of leather back to the animal is a tremendous challenge for our industry, as the hides and skins that tanners transform into leather are not made on purpose. We have tried for decades to obtain information on the origin of our raw materials with little to no results. Now that compulsory legislation demands it, we need practical solutions and tools for our SMEs by 2025. Time is running!"



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Leather upgrading machine at Simac Tanning Tech

Nanopress together with Tannery Projects, designed a new type of trough- feed embossing machine to upgrade low selection leathers by embossing it in the crust stage with a natural haircell.

The natural haircell design on the embossing roller is an exact copy of a high quality selected hide, this application technology on the roller is not done by laser or traditional etching systems.

The design on the embossing roller is applied by a special Nanotechnology, which is the only technology that can copy the natural haircell pattern from any high quality skin or hide.

For more information contact : commerciale@tanneryprojects.com

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Global suppliers and manufacturers ready for APLF's return to Hong Kong in March 2024

The meeting place for the global leather industry, APLF, will finally make its long-awaited return to its headquarters at the Hong Kong Convention and Exhibition Center (HKCEC) from March 19 to 21, 2024. Despite a hiatus of Five years since the last APLF event took place in Hong Kong in 2019, there are promising economic signs and indicators from Asia's leather sector that the APLF could help revitalize industrial trade. The economic background will be described later, but one factor that has encouraged and strengthened the leather and manufacturing sector is the results recorded at the recent China Leather Expo (ACLE) in Shanghai.

This event attracted more than 28,000 buyers mainly from China but also from Southeast Asia and other international destinations. With more than 1,000 exhibitors benefiting from a strong flow of visitors, ACLE surpassed its all-time visitor record by 20% compared to 2019.

This illustrates the need for the leather and manufacturing sectors for a professional trading platform where they can negotiate, find new suppliers and network with colleagues and peers. The volume of professional buyers and the optimistic atmosphere observed during ACLE should bode well for APLF in March 2024.

Strategic Changes in the Design of the 2024 Fair

For APLF 2024 there will be significant changes to the design of the fair, which was planned for the 2020 event but was forced to cancel.

The leather fair, which until now was on Level 1 of Halls 1A – 1E, will move to Level 3 of the Exhibition Center. Fairs that are currently in

Level 3 will move to Level 1: these fairs are Fashion Access and Materials+.

The additional exhibition space on level 3 will offer more prime stand locations to current APLF Leather exhibitors. The configuration will also offer an opportunity for organizers to re-segment and regroup product zones and thus facilitate buyers' navigation through the fair according to their sourcing purposes, in particular for sustainable materials.

The second reason is that moving Materials+ and Fashion Access to Tier 1 will fundamentally change the fairs from a focus on leather to a group of fashion-oriented fairs that will attract not only leather buyers but also new fashion and interior designers from the Generations Y and Z, reconnecting them all to the leather supply chain.

Back on track

The impact on travel and in-person business during the pandemic is now behind us and APLF will resume its mission of serving the global leather and fashion industries accompanied by its sister events, Materials+ and Fashion Access, consolidating the 3-in-1 format. the last years.

The international character and prestige of APLF can be gauged by the fact that key leather-related organizations meet during the fair. These organizations include the International Tanners' Association (ICT), the International Council of Hides, Skins and Hides Traders' Associations (ICHSLTA), the International Union of Leather Technicians and Chemists' Societies (IULTCS), the World Leather Coordinating Committee (GLCC), as well as national associations such as the Leather and Hide Council of America (LHCA) and campaigns such as Leather Naturally.

The international importance of the event for the leather industry is reflected in the global mix of participants at the show. So far, the following national pavilions have confirmed their participation in APLF Leather; Australia, Brazil (Assintecal, CICB), China, France (SGCP, FFTM), India, Italy (ASSOMAC, UNIC), Japan, Korea, Pakistan, Taiwan, Türkiye and the United States.

The pavilions that will be joined by individual exhibitors are Spain, Germany, Mexico, Portugal and Thailand.

Economic context

Growth forecasts released by the OECD and IMF indicate solid growth in Asia compared to lackluster, near-recessionary, economic conditions in the United States and Europe. High interest rates and inflationary pressures in the West are hurting demand for non-essential consumer goods, while the opposite is true in India, the ASEAN bloc, Japan, Korea and, most importantly, China.

China's exports have fallen this year due to weaker demand from the United States and Europe, but the government has already begun taking stimulus measures to encourage its huge population to spend more. These measures include a new president of the Bank of China and new policies such as interest rate cuts and a stimulus program aimed at promoting demand in the automotive sector.

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- **First half of the year closed with good results.**
- **Recorded increased turnover (+7.4%) and exports (+10.2% in value in the first 5 months) grew in the first half of the year, but the slowdown is already underway. Production and export volume declined.**
- **A closer look at the report reveals that, in the first 5 months of the year, Italian footwear exports stood at 87.9 million pairs, including purely sales operations: 6.4 million fewer pairs compared to January-May 2022 (-6.8%). The average price per pair increased to 62.47 euros, i.e. +18.2%.**

Giovanna Ceolini, Chair of Assocalzaturifici: “The widely expected slowdown materialised in the second quarter of the current year. The strong rebound of 2021 – after the slump caused by the lockdowns – and the continuation of recovery during 2022 were followed by a marked deceleration, despite a promising start to 2023 for most economic variables”

Despite some shadows, the first half of 2023 closed on a positive note for the Italian footwear industry, recording growth in turnover (+7.4%) and exports (+10.2% in value in the first 5 months). However, volume suffered: -6.8% for exports and -5.7% for production (according to the ISTAT industrial production index). Household spending came to a halt in May and June, after remaining rather stagnant throughout the first half of the year (-1.2% in value and -3.4% in volume). This, in summary, is the picture drawn by the Confindustria Moda Research Centre for Assocalzaturifici just days

before MICAM Milano, the international footwear fair that took place at Fiera Milano (Rho) from 17to 20 September 2023.

According to Assocalzaturifici Chair Giovanna Ceolini: “The widely expected slowdown finally materialised in the second quarter of the current year. The strong rebound of 2021 – after the slump caused by the lockdowns – and the continuation of recovery during 2022 – albeit at an understandably slower pace, as business levels returned to normal – were followed by a marked deceleration, after a promising start to 2023 for most economic variables.

In the April-May period, after double-digit increases in the previous months, exports, which have always been the sector’s driving force, showed rather stable values (+1%) and a setback in volume (-14.9%). All the main export destinations recorded increases in value in the first 5 months.

France continues to rank first among the main destinations for Italian footwear (up by 19.6% in value and down by 2.9% in volume), followed by Germany (up by 8.4% in value and down by 15.5% in volume), Spain and the Netherlands, which showed an “interesting growth in both volume and value”. In the UK, the trend remains negative, as, in the 5M2023, exports fell by 2.6% in value and by 13.8% in volume, on a comparable basis to the same period of the previous year.

However, “the rebound in Russia and Ukraine is worth noting”, up by 37% and 56% in value, respectively, “although it should be borne in mind that the comparison period includes months when the outbreak of the war had caused sales to plummet in the two markets involved”.

Despite the recent concerns over the slowdown in the national economy, very encouraging signs have come so far from China (+20.4% in volume and +43.4% in value), where the average price – by far the highest among the main outlet markets for Italian footwear – clearly shows that these figures are linked above all to the performance of the large luxury brands, in a market that is not easy to penetrate for companies with their own brand.

Ceolini continues: “The rebound in Russia and Ukraine is worth noting (+37% and +56% in value, respectively), although it should be borne in mind that the comparison period includes months when the outbreak of the war had caused sales to plummet in the two markets involved. Despite the rebound in 2022, current levels are very close (+1.2%) to those of the first 5 months of 2021, already strongly affected by the pandemic before the war. Finally, the balance of trade, driven by foreign sales, touched 2.5 billion euros (+14.2%) in the first 5 months”.

On the domestic consumption front, according to the Fashion Consumer Panel of Sita Ricerca for Assocalzaturifici, after a start to the year marked by recovery, household spending on footwear decreased sharply in the following three months, especially in May and June. Overall, the second quarter of the year saw a decrease of -9.8% in terms of pairs and -7.9% in value, cancelling out the progress of the previous months and bringing the total figure for the first 6 months into negative territory.

Finally, expectations remain very cautious for the second half of the year, given the general climate of uncertainty and the weakness of many economies worldwide. On average, for the first time since the post-pandemic recovery, operators in the sample expect turnover in the third quarter to be down on the same period last year (-2.8%).

Brazilian Footwear exports reach more than US\$900 million until September

- **Numbers are 16% lower, in volume, than those recorded in the same period in 2022**

According to the latest data prepared by the Brazilian Association of Footwear Industries (Abicalçados), between January and September, 90.63 million pairs were exported, which generated US\$ 907.17 million, lower results both in volume (-16%) and in values (-8.4%) compared to the same period last year. The monthly cut for September points to exports of 8.36 million pairs and US\$84 million, drops of 19% and 23.2%, respectively, compared to month nine of 2022. In comparison with the first nine months of the pre -pandemic, in 2019, the sector remains positive at 6.1% in volume and 23.7%.

The executive president of Abicalçados, Haroldo Ferreira, highlights that, unfortunately, the drop in shipments was already “mapped” by the sector. “Footwear exports have been falling since the beginning of the year due to macroeconomic factors and also because the base from last year is very strong, so there is nothing new. Last year, it's worth remembering, we had the best result in 12 years in footwear exports. In 2023, factors such as China's strong return to the market, after strict Covid Zero policies that delayed its production, the normalization of freight prices, the slowdown in the world economy, especially that of our main destination (United States) and high inflation have harmed our performance”, he assesses. According to the executive, in the coming months the drop should be smaller, as the base for the last months of 2022 is weaker. “Abicalçados estimates that we will end the year with an approximate 9% drop in shipments,” he predicts.

Overtaking the United States as the main destination for Brazilian footwear exports, between January and September, Argentina imported 11.8 million pairs for US\$ 185.36 million, a drop of 11.7% in volume and an increase of 27.6 % in revenue, in comparison with the corresponding period of 2022. "Argentina, despite all its problems, such as payment delays and the serious internal economic crisis, is a fundamental market for Brazilian footwear", assesses Ferreira.

The second destination, with a significant drop in its imports of yellow-green footwear, is the United States. Facing an inflationary crisis, North American consumers have been consuming fewer shoes. Furthermore, Brazil, which has a market share of 1% in that market, has been losing positions to the Asian countries. Between January and September, 7.9 million pairs were shipped there, for which US\$174 million were paid, a drop of 48.4% in volume and 35.7% in revenue compared to records from the same period in 2022.

In third place among national footwear destinations, France appeared, where 2.23 million pairs were shipped for US\$42 million, a drop of 57.8% in volume and 14% in revenue in relation to the same last year's range.

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ECHA receives more than 5600 comments on PFAS restriction proposal

More than 4400 organisations, companies and individuals submitted comments and information on the proposal to restrict per- and polyfluoroalkyl substances (PFAS) in the European Economic Area.

At the end of the consultation on 25 September, ECHA had received more than 5600 comments from more than 4400 organisations, companies and individuals.

The comments will be checked by ECHA's scientific committees for Risk Assessment (RAC) and Socio-Economic Analysis (SEAC), and those providing relevant evidence-based information will be considered in the opinion making process.

The five countries who prepared the initial proposal will also review the consultation input and may update their initial proposal based on it.

Many comments submitted during the consultation are already published on ECHA's website. Information indicated as confidential by the consultant is not made public. Comments received very close to the deadline are currently being processed and will be published shortly.

Next steps

RAC and SEAC are evaluating the proposed restriction and considering the relevant information received through the consultation. The committees develop their independent, scientific opinions over a series of meetings, where draft opinions are discussed. Attention is given to all aspects and impacted sectors.

ECHA will deliver the final opinions to the European Commission in the shortest possible timeframe, while ensuring proper scrutiny by the scientific committees. Once the committees adopt their opinions, they will be communicated to the public.

The Commission, together with the EU Member States, will decide on the restriction.

Background

The restriction proposal was prepared by authorities in Denmark, Germany, the Netherlands, Norway and Sweden. It was submitted to ECHA on 13 January 2023. It aims to reduce PFAS emissions into the environment and make products and processes safer for people. The six-month consultation ran from 22 March to 25 September 2023.

The European Chemicals Agency (ECHA) is an Agency of the European Union implementing EU chemical regulations. ECHA, together with its partners, work for the safe use of chemicals.

<http://echa.europa.eu/>

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Stahl awarded with platinum EcoVadis rating



This is awarded to the top 1% of companies assessed by EcoVadis

Stahl demonstrates progress on ESG ambitions with second consecutive platinum EcoVadis rating

Stahl has been awarded a Platinum rating by the sustainability rating agency EcoVadis for the second consecutive year. For the 2023 EcoVadis assessment, Stahl's rating increased by three points compared to its 2022 score, reflecting the company's improved performance in the area of labour and human rights.

EcoVadis is a globally recognised, evidence-based rating platform that assesses the performance of more than 75,000 organisations against key sustainability criteria across four categories: Environment, Labour & Human Rights, Ethics and Sustainable Procurement. For the 2023 EcoVadis assessment, Stahl received an overall score of 80 out of 100, up from 77 in 2022. This score indicates an advanced level of sustainability maturity and ensures that Stahl retains its Platinum rating. This is awarded to the top 1% of companies assessed by EcoVadis. Stahl achieved its first Platinum rating in 2022, having undergone its first EcoVadis assessment in 2015.

Ingrid Weijer, ESG Performance Manager at Stahl: "We are proud to have maintained our Platinum EcoVadis rating for the second year in a row. This score reflects Stahl's ongoing commitment to transparency and the new policies and initiatives that were introduced over the past 12 months. But we are not perfect, and the EcoVadis

evaluation criteria are becoming more demanding, so we will continue to work to improve our performance into next year.”

Progress in the Labour & Human Rights category

The 2023 EcoVadis assessment revealed the progress Stahl is making in the Labour & Human Rights category, where Stahl scored 90 out of a possible 100 points. This reflects the company's recent work to improve its health and safety management systems. In particular, the majority of Stahl's global manufacturing sites are now ISO 45001 certified and more than 94% are ISO 14001 certified. Stahl has also taken steps to improve its approach to employee career development and well-being. These include the creation of an individual career plan for all employees and the introduction of a new company-wide employee satisfaction survey.

Stahl moves forward with 2030 ESG ambitions

Stahl has set a 2030 target to maintain its EcoVadis Platinum rating by working closely with its value chain partners to help them reduce their impact. In 2022, 83% of Stahl's total spend on raw materials was sourced from EcoVadis-rated suppliers.

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Leather Innovations PART – II

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(continued from Sep issue)

8. CLEANER TECHNOLOGIES AT A GLANCE

CLEANER TECHNOLOGIES AT A GLANCE Table - 8A	
Category/ Process stage	Cleaner methods
EMS	A licensed or own Environmental Management System, incorporating OSH and Corporate Social Responsibility (CSR) in place
General	
Water	Strict water monitoring/control and savings measures at process, department and company level; batch washing, recycling
Energy	Usual consumption/savings measures combined with the energy from renewable sources, heat pumps, etc.
RSL	Apply the global strictest Restricted Substances and SVHC lists and avoid any limitations and risks in exports of leather and leather products
OSH	<p>Strict segregation of acidic and sulphide containing streams, H₂S monitors in place, staff trained.</p> <p>Noise, vibrations, malodour control; appropriate lighting and ventilation, sanitary facilities.</p> <p>Occupational Safety and Health measures, general and personal (Personal Protection Equipment, PPE), including rigorously implemented and observed training.</p>
Beam House	
Preservation/ Soaking	Green fleshing Biodegradable surfactants Watch for harmful pesticides

CLEANER TECHNOLOGIES AT A GLANCE Table - 8A

Liming	Hair-save liming Consider reuse of liming liquors Ex-lime splitting
Deliming	Low- or ammonium-free deliming (CO ₂) deliming
Bating	Low- or ammonium-free bating agents
Tanyard	
Pickling and (chrome) tanning	<ul style="list-style-type: none"> • Low-salt pickling Consider pre-tanning (wet white tanning) • One or a combination of better chrome management systems • optimization of process parameters • high exhaustion • direct recycling of spent bath • reuse after chrome recovery Use of acceptable fungicides
Wet Finishing	
Retanning	Use of acceptable retanning agents (phenol- and formaldehyde-free) Use of low salt retanning agents' High exhaustion rate Careful selection of auxiliary agents
Dyeing	Avoidance of banned dyes Use of dedusted dyes High exhaustion rate Careful selection of auxiliary agents
Fatliquoring	Strict avoidance of halogenated (AOX) products High exhaustion rate Careful selection of auxiliary agents
Finishing	
Coating	Control of airborne particles/dust Use of water-based finishing systems Avoidance of harmful cross-linkers Avoidance of pigments containing banned/restricted metals Coating by advanced spraying equipment (airless, HVLP guns, scrubbers); curtain and roller coating
Solid Waste	
Consequent segregation of different waste categories, innovative approach in utilization and safe disposal	

CLEANER TECHNOLOGIES AT A GLANCE Table - 8A

Effluent treatment

On-site pre-treatment and full scale (biological) on- or off-site treatment;
compliance with local discharge norms

Source : Table - 8 A. The framework for sustainable leather manufacture, Second edition. Jakov Buljan, Ivan Kraf. 2019 by the United Nations Industrial Development Organization.

9. Waste to Wealth: A Model needed for the Leather Industry Table – 9A

Types of Wastes	Current Utilization	Value Addition
Raw hide/skins/ trimmings	Industrial gelatin	Pharmaceutical grade gelatin
Fleshings	Glue manufacture	Bio-diesel and fertilizers
Hair/wool	Textile Industry	Keratin based shampoo
Split	Split Suedes	High split finish leather
Shaving dust	Leather boards	Separation of protein for applications as filters
Tannery sludge	Landfill	High compressive bricks making
Auto spray waste	Incineration	Water based paints
Buffing dust	Buffing dust Leather /boards/landfill/ incineration	Generation of Bio-gas energy from buffing

Source : Table - 9 A. Indian Leather Industry: perspective and strategies, EXPORT-IMPORT BANK OF INDIA, November 2015 WORKING PAPER NO. 46

10. A Rationalized Leather Process for Wet-end: Pre tanning - Integrated Post-tanning System ¹⁰

- The conventional leather process is related to huge consumption of water, chemicals and time. To alleviate these problems, a new process for tanning and post-tanning was developed. In this process, bated pelt was directly pre-tanned with a melamine resin. Then, the pre-tanned pelts were split and shaved.
- As for post-tanning, several operations including, chroming, retanning, dyeing and fatliquoring were effectively integrated in the same one bath: a moderate quantity of dyes and fatliquors were employed firstly; then a chrome agent was added into the same bath; when the chromium absorbed almost completely, the bath pH was raised and the retanning and filling materials were added; at last, some fatliquors were employed to obtain the high oil content leather.
- Comprehensive analysis of leather properties, environmental and economic benefits were carried out for the conventional and the experimental process. The results indicate that the functional properties of the experimental leathers had no significant difference to the leathers from conventional process, but there is a considerable reduction in cost of leather production in the modified process.
- Furthermore, the new process results in remarkable reduction in pollution parameters such as BOD load, COD load, TSS and chroma by 55.04%, 58.04%, 39.42%, and 90%, respectively. Also, the consumptions for water and chemicals were reduced by 42.73% and 40.29%, respectively.

10.1 Flow chart for Conventional and Experimental Process Figure – 10A

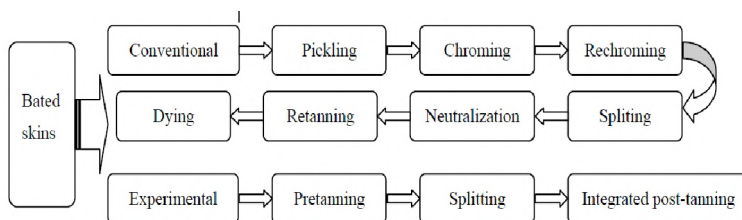


Fig. 1 Flow chart for conventional and experimental processes

10.2 Experimental Process Figure – 10 B

Tab. 1 Experimental process (E)

Process	+	%	Chemicals	T(°C)	Time(min)	Remarks
Pre-tanning		100	Water	40		The final pH should be 6.1-6.3
	+	10	Malamine resin		6×60	O/N, run for 0.5 hour
The leathers were piled for 24 h, then split and shaved to a uniform thickness (1.1-1.2mm), and weighted.						
Rehydration		200	Water	25	120	
Integrated		80	Water	25		
Post-tanning	+	1.2	Acid black dye NBK			
	+	1.5	Aluminium chloride	40	40	
	+	2.0	Basynatan AN		30	
	+	2.0	Lipoderm A1		60	
	+	6.0	C-2000		120	
	+	1.0	Relugan GTW		60	
	+	2.0	ART-1		60	
	+	1.5	Sodium bicarbonate		30	pH5.0-5.5
		100	Water			
	+	2.0	Lipoderm A1	58	60	
		3.0	PELASTOL 94S			
		3.0	PROVOL BA			
	+	0.5	Formic acid		20	pH4.0
Washing		200	Water	25	10	

- In this work, a modified process has been developed for clean leather manufacture. The leathers obtained with the experimental process hold comparable or superior functional properties than that of leathers from the conventional process.
- Also, there is a considerable reduction in the cost of leather production in the modified process. Most importantly, the new process results in remarkable reduction in pollution parameters such as BOD load, COD load, TSS and Chroma by 55.04%, 58.04%, 39.42%, and 90%, respectively.
- Also, the consumptions for water and chemicals were reduced by 42.73% and 40.29%, respectively. This is a significance achievement on current circumstance.

Source : 10. & Figures – 10 A & 10 B. A Rationalized Leather Process for Wet-end: Pre-tanning-Integrated Post-tanning System Tao Zhang¹, Wuyong Chen^{1,*}, Jie Tian¹, Guoshu Luo², Fusheng Ling² National Engineering Laboratory for Clean Technology of Leather Manufacture, Sichuan University, Chengdu 610065, P.R.China² Guangdong Shengfang Chemical Co.,Ltd, Guangdong 529162, P.R.China

11. Green Technologies for the Leather Production

11.1 Green Leather – Industry Achievements in the Past – Figure – 11 A

Green Leather – Industry Achievements in the Past

- **Wet White tanning as alternative to Chrome tanning**
- **Enzymatic Unhairing process**
- **Continuous improvement of chemical exhaustion for the beamhouse, tanning and wet end processes**
- **Complete waterborne finishing replacing solvent systems or solvent/water emulsions Replacement of hazardous substances (Nonylphenols, Phthalates, Ethylglycol, Dimethylformamide, cancerogenic azo dyes and aromatic amines, lead chromate pigments, short chain chloro paraffins)**
- **Development of Upgrading technologies for improved raw hide utilization**
- **Continuous chemical reduction in finishing (low pressure spraying, RRC technology)**

11.2 Stakeholder for the Leather – Manufacturing Process

Stakeholder for the Leather – Manufacturing Process Table – 11 B

Environment - High Yield –Low Resources-Minimizing Water quantity, Minimizing chemical Demand, Minimal chemical and water waste, Minimal leather waste, Maximizing leather yield

Economy- High Speed –Low Cost- Lowest production costs, Production speed, Highest production yield, Lowest waste, Lowest chemical and water consumption

Customer Demand-High Quality –Low Cost-Leather Quality, Lowest possible cost, Lowest possible risk (hazardous substances), Fashion, Function, Wearing comfort

11.2 Green Leather –New Ecological Demands

Green Leather – New Ecological Demands Table – 11 C

Chemicals - Green chemistry in leather chemicals

Safety-Environmentally friendly substances, reduction of hazardous substances

Waste- Updated leather production with minimized waste and resources

Raw material - Further development of the manufacturing process with maximizing theraw material

11.3 Green Leather – Examples for new achievements

Green Leather –Examples for new achievements Table – 11 D

Water/salt reduction - Process Innovation – New Wet White Tanning Technology

Chemicals - Greener Fatliquors and Retanning Agents

VOC - NMP free Finishing systems **Yield** - Modern Upgrading Technologies

11.4 Most commonly used mineral free tanning systems

Most commonly used mineral free tanning systems Table – 11 E

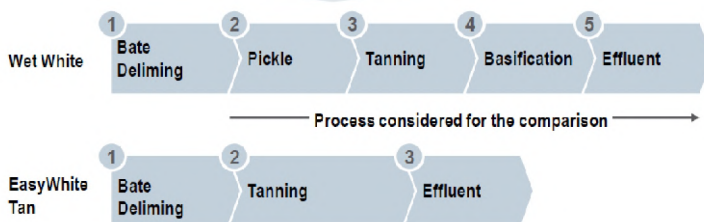
Phosphonium salts, Glutaraldehyde, Vegetable Replacement Syntans, Oxazolidine, Silicates, Oxidisable oil tannage

11.5 Easy White Tan & Wet White Comparison Figure – 11 F

EasyWhite Tan & Wet White comparison



Wet White					EasyWhite Tan				
Process	%	Chemical	Time min	Offer in Kg	Process	%	Chemical	Time min	Offer in Kg
Pickle	40	Water		8000	Tanning	30	Water		6000
	7	Salt	15	1400		10	Granofin F-90 liq	430	2000
Add	1	Formic Acid 85%	45	200					
Add	0.6	Sulphuric Acid 98%	120	120					
Tanning	2.7	Glutaraldehyde (25%)	430	540					
Basifit	0.3	Sodium Bicarbonate	20	60					
Add	0.3	Sodium Bicarbonate	20	60					
Add	0.2	Sodium Bicarbonate	50	40					
Add	0.2	Sodium Bicarbonate	50	40					
Add	3	Phenol Syntan p.	60	600					
Total			390	3060	Total			430	2000



Granofin Easy F-90

- EasyWhite Tan. Increasing demand for chrome-free Leather.
- Environment perspective -Increasing ecological demand. Environmental awareness

- Production perspective-Process simplification, Cost reduction, Operator safety Less scope for processing errors

11.6 Retanning Agents – Ecological Update

Retanning Agents – Ecological Update Table – 11 G		
Synthanes	Aromatic base (Phenol, Naphthalene, cresol etc.) with sulphonate or hydroxy function Formaldehyde condensation	Residual content of Formaldehyde and Phenol of both < 50 ppm Resins
Resins	Urea-Formaldehyde Dicyandiamide-Formaldehyde Melamine-Formaldehyde	Residual content of Formaldehyde< 50 ppm
Polymeric	Polyacrylic acid Combination and copolymerisation with natural substances	Incorporation of renewable (and biodegradable) raw materials Tergotan PMB

11.7 Fatliquors – Ecological Update

Fatliquors –Ecological Update Table – 11 H		
Natural	Sulfated or sulfited natural oils (castor, neatsfoot, soya)	Long term experience in using natural oils Recovered natural oils Synthetic
Synthetic	Alkylsulfosuccinates Quaternary amines as cationic fatliquors	Use of by-products as raw materials Higher exhaustion, lower COD values for the waste water
Polymeric	Polymeric succinates and sulfosuccinates	Reuse of synthesis waste as raw materials Higher exhaustion, lower COD values for the waste water Tergotan PO-60

11.8 Topcoats – Highest performance without NMP

NMP-free Finishing NMP – N-methyl pyrrolidone	
Topcoats – Highest performance without NMP Table – 11- I	
Application	Application process parameters (Flow, viscosity)
Fastness	Wear properties, Ageing resistance Soilability, Squeaking behaviour
Aesthetics and haptics	Cracked grain, Matt / Gloss grade Depth of black, Feel

11.9 MP-free Finishing - Summary

NMP-free products and finishing systems available with the same performance. Long-term usability of NMP-related substances is questionable. Reduction in NMP is not sufficient to meet car and furniture manufacturers' specifications Elimination of NMP succeeded with concomitant sustainable VOC reduction By VOC reduction and NMP Elimination sets a new ecological standard in finishing.

Source : Figure- 11 A and Tables – 11 A & 11 B & 11 C & 11 D and Figure- 11 F and Tables – 11 G & 11 H & 11 I .Green Technologies for the Leather Production 45th Leather Research Industry Get Together (LERIG) 29 January 2011

12. Eco-leather portfolio Current situation - Types of tanning. Quimser Tables – 12 A & 12 B

ECO Tanning

Quimser continues working to achieve highly biodegradable leathers. We have all heard that there is a demand for “eco-leather”, “metal-free” and “chrome-free” leathers, but what is really being sought? What is the real destination of this leather?

Also, we have another competitor: “vegan leather”, made with synthetic materials (plastic and PVC) which is gaining market share due to the fact that it is not of animal origin. It must be made quite clear that natural leather is a waste that is recycled to give new life. With regard to leather of animal origin, we observe that a transformation is being sought in order to carry out processes that are more respectful with the environment and for the health of living beings.

Taking into account that the industry is asking us for different products with different names, we have decided to make this report to define concepts, products and processes, in order to achieve biodegradable leathers.

Chrome Free

Are those that can be worked with aluminum, synthetics, aldehydes and other products that may be more or less ecological, without taking into account the biodegradability of the leather obtained or if the process causes less ecological concern. Only chromium is removed, since it is a contaminating and toxic material. Many of these products are petroleum products, with a high pollutant load.

Metal Free

Include the elimination of all metals (chromium, aluminum, zirconium...) which does not mean that these products and processes are eco-friendly or that the resulting leather is biodegradable.

Ecological

Are those that have been worked with eco-friendly products and through processes to obtain biodegradable leathers with very little or null impact on the environment. In these cases, the waste resulting does not create any problem, Leather is a waste that is recycled to give new life.

Source : ECO Tanning Quimser www.quimser.com

Tanning	Chemical	Origin	% in tanning	Price	TS (°C)	colour in tanned leather	Light fastness
WET BLUE	Chrome III	Mine	5-10	€	100	Bluish	Yes
WET WHITE	Phenol Naphthalene Aldehyde Disulphone Triazine	Petrol Chemistry	5-30	€€€	85	Whitish	Ligth
VEGETAL EXTRACTS	Mimosa Quebracho Chestnut Tara Others	Mimosa is from tree bark. Quebracho is from tree. Chestnut is from grinder seeds. Tara is from grinder seed.	8-40	€€	75-80	Brownish	No
WET GREEN	Olive extract	Olive seeds tree.	8-40	€€€	75-80	Greenish	No
WHITE MINERAL	Zirconium Titanium	Mine	8-15	€€€	80	White	Yes
ALUMINIUM	Aluminium salts	Mine	3-10	€	80-85	White to whitish	Yes
SERTAN WT	Zeolite	Mine	6-10	€	75-80	Whitish	Yes
VEGAN LEATHER	Acrylic PU PVC Polymer-Resin Other	Petrol and other	NA	€		NA	NA

Tanning	Negative points	Toxicity	Biodegradation time	Compostability	Water waste problem	ZDHC-MRSL restrictions
WET BLUE	Can produce Chrome VI.	Yes	Extremely long	Very bad	High	Yes
WET WHITE	Phenol derivatives and bisphenols. Wastewater toxic chem.	Yes	Medium	Very bad	Medium high	Yes
VEGETAL EXTRACTS	Few producers in the world. <i>Mimosa</i> bark need 6-12 years to renew. <i>Quebracho</i> tree need 60-80 years to grow	No	Medium	Excellent	High BOD	No
WET GREEN	This technology is not available for all world. There are few quantity in the market.	No	Medium	Excellent	High BOD	No
WHITE MINERAL	No	Yes	Long	Very bad	Very high	Yes
ALUMINIUM	No	No	Medium	Regular	Medium high	No
SERTAN WT	No	No	Short	Excellent	No	No
VEGAN LEATHER	PVC resins and other toxic chemicals. Microplastic.	No	Very long	Very bad	Very high	NA

12.1 SERTAN WT chromium free tanning agent¹²

- Quimser's laboratory (R+D+I) cares about finding alternatives and solutions to help the future of the sector through actions such as:
- Eliminating the use of chromium, Water saving, Wastewater with low environmental impact,
- Reducing process time (*electricity consumption*), Obtaining leathers highly biodegradable,
- Using environmentally friendly chemicals.
- For this reason, Quimser developed the SERTAN WT: A product that is more environmental-friendly and it does not generate problems in wastewater.
- The aim is to respond to the aforementioned points and provide solutions for a world that is increasingly demanding on the environment impact that the processes and the products generate in it.

Source : 12.& Tables - 12 A & 12 B. Eco-leather portfolio, Quimser www.quimser.com

12 C. Smit & Zoon - Milestones 2020- Reducing the Footprint & TOWARDS CIRCULARITY

Smit & Zoon - Milestones 2020- Reducing the Footprint & TOWARDS CIRCULARITY Table – 12 C

1. ZEOLGY, THE SUSTAINABLE TANNING CONCEPT

Objective: Creating a sustainable tanning concept and superior leather performance

**Smit & Zoon - Milestones 2020- Reducing the Footprint &
TOWARDS CIRCULARITY**

Table – 12 C

Zeology is a truly sustainable alternative to existing tanning agents. It is zeolite based and therefore chrome-free, heavy metal-free, and aldehyde-free.

It delivers both sustainability benefits and superior leather performance.

Zeo White, the Zeology-tanned leather intermediate, is unsurpassed in characteristics such as grain tightness, physical leather properties, lightfastness, and heat resistance. In addition, its bright white color enables white leather, as well as lighter and brighter colors than were ever possible before.

2. PROVIDING BIO-BASED SOLUTIONS

Objective: Valorisation of bio-based side streams

Through bio-based solutions, implementing a substantial component of the concept of the circular economy around leather chemicals and to support leather manufacturers in reducing their footprint. The current focus is on replacing petroleum-based ingredients with bio-based alternatives. These alternatives should deliver on-par or even better results and help make the leather chemical sector more sustainable, reducing CO₂ emissions from production and reducing non-degradable and toxic substances

**Smit & Zoon - Milestones 2020- Reducing the Footprint &
TOWARDS CIRCULARITY**

Table – 12 D

3. LIFE BIOPOL

Objective: Synthesis of a new class of products

LIFE Biopol's main target was the synthesis of a new class of products, named biopolymers, which represent innovative and eco-friendly alternatives to traditional petrochemical products used in the leather production process.

These biopolymers are produced using industrial low or no value side streams as raw materials, in order to enhance the circularity across different industrial sectors. These products appeared on the market in 2020 (Biopol range) supporting leather manufacturers to create leathers with a high degree of renewable ingredients.

**Smit & Zoon - Milestones 2020- Reducing the Footprint &
TOWARDS CIRCULARITY**

Table – 12 D

4. LIGNIN MODIFIED RE-TANNING AGENTS

Objective: Improving the biodegradability

Since 2019 Smit & Zoon has a patent-pending novel process to use lignins to modify re-tanning agents. The aim is to increase the renewable content and improve the biodegradability of phenolic syntans through (partial) replacement of phenol with industrial lignins by modifications of traditional phenolic syntan chemistry.

The first prototypes with this sustainable technology, made in 2020, achieved to be free from phenol and formaldehyde, increased renewability, improved biodegradability, and yielded good leather properties in comparison to traditional fossil-based phenolic syntans.

**Smit & Zoon - Milestones 2020- Reducing the Footprint &
TOWARDS CIRCULARITY**

Table – 12 E

5. BIOPOLYMERS BASED ON SUGAR BEET PECTINS

Objective: Creating bio-based ingredients

Working with Wageningen Food & Biobased Research, and with Royal Cosun, a processor of beet pulp, Smit & Zoon has found that pectins from sugar beet pulp are suitable as bio-based ingredients in the production of leather.

These pectins serve as substitutes for non-biodegradable polymers in chemicals for the wet-end production process. They can also influence the characteristics of finished leather, for example, its color intensity. As a direct result of our own research, Smit & Zoon has a patent application on the usage of pectin for leather processing in general.

6. OPTITAN

Objective: Minimizing the environmental impact, while optimizing leather performance

Optitan is a premium range of (re-)tanning products with the highest achievable active matter contents with no diluents. Optitan has minimized free formaldehyde and phenol

contents in the product due to upgraded chemistry

**Smit & Zoon - Milestones 2020- Reducing the Footprint &
TOWARDS CIRCULARITY
Table – 12 F**

7. PFC-FREE WATER REPELLENT LEATHER COATING

Objective: Eliminating hazardous substances from our product range

In line with our program to eliminate hazardous substances from our product range, we developed and introduced Aguastop W200, the new generation for water repellent finishing products. An interaction between material science technology and special functionalized polysiloxanes allowed us to engineer a completely PFC-free product. This improved, water-based product gives anti-soiling and protection against water in a more sustainable way.

8. RESTRICTED SUBSTANCES

Objective: All products to comply with (M)RSL

Since 2016, Smit & Zoon has its own Restricted Substances List (RSL). This is a list of substances not present in any of our products. A steering group reviews and updates the Smit & Zoon RSL annually, taking into account the following sources and criteria: Candidate List of Substances of Very High Concern (ECHA); Authorization List (Appendix XIV of REACH); List of Restrictions (Appendix XVIII of REACH); Manufacturing Restricted Substances List (MRSL of ZDHC).

The Smit & Zoon RSL remained unchanged, apart from changes in the official EU lists, which were, of course, included.

Additionally, we are proactively eliminating unwanted substances that are not (yet) on the list of restricted substances. Substances to be eliminated are selected based on their hazard and on information from the market.

**Smit & Zoon - Milestones 2020 - Reducing the Footprint &
TOWARDS CIRCULARITY
Table – 12 G**

9. OPERATIONAL EFFICIENCIES

Objective: No negative impact from Smit & Zoon production processes

In 2020 we finalized a 3-year project on “aging”. Like many chemical

Smit & Zoon - Milestones 2020 - Reducing the Footprint & TOWARDS CIRCULARITY

Table – 12 G

companies in The Netherlands, we have parts in our plants in Weesp and Amersfoort that are relatively old. The Dutch safety authorities require chemical companies to have a clear approach to controlling risks that are related to aging equipment and installations. We have made an extensive assessment of the safety, environment, and business continuity for all storage and process units. Based on this, we have set up multi-year plans for the upgrading of the maintenance programs and the replacements. The execution of the plans started in 2020. With this approach, we are confident that we can keep guaranteeing safe, compliant, and reliable operations in the interest of all stakeholders.

Projects were started to finalize that all global production plants are certified for ISO 9001 (quality management), 14001 (environmental management), and 45001 (safety management) in 2021.

Smit & Zoon - Milestones 2020- Reducing the Footprint & TOWARDS CIRCULARITY

Table – 12 H

10.PRODUCT PASSPORT

Objective: Reducing waste in the leather value chain

In 2020, we continued to inform customers about the use of the Product Passport. Even though every leather manufacturer represents a unique production process, the Product Passport continues to get positive feedback in optimizing the Wet-End production for the whole industry. Providing these detailed data to a leather manufacturer is crucial in making the right decisions around the most sustainable production, reducing waste while using most suitable chemical products..

Source : 12 C & Tables –12 C & 12 D & 12 E & 12 F & 12 G & 12 H. Smit & Zoon - Milestones 2020- Reducing the Footprint & TOWARDS CIRCULARITY. Corporate Social Responsibility Report 2020. communications@smitzoon.com

12 K. CLRI – Technology - Leather Processing, Leather Chemicals, Enzymatic Products, Environmental Technology, Health care products Figure – 12 K

Contents

S.NO	NAME OF THE TECHNOLOGY	CODE NO.
CATEGORY I - LEATHER PROCESSING TECHNOLOGIES		
1.	WATERLESS CHROME TANNING TECHNOLOGY (WCCT) ^C	LMT01
2.	PRESERVATION-CUM-UNHAIRING (PCU) PROCESS ^H	LMT02
3.	ODOR ABATEMENT SYSTEM FOR TANNERIES ^H	LMT03
4.	EO BASED ZERO WASTEWATER DISCHARGE PROCESS ^C	LMT04
5.	DRY TANNING (DISPERSING AGENT) ^C	LMT05
6.	RAPID FIBRE OPENING BY COCKTAIL OF ENZYMES ^H	LMT06
7.	CHICKEN FEET LEATHER AND LEATHER PRODUCTS ^C	LMT07
CATEGORY II - LEATHER CHEMICALS		
8.	RETANNING CUM LUBRICANT AGENT - RELUB-17 ^H	LCT01
9.	RETANNING AGENT PROTAN KH ^H	LCT02
10.	PROTEIN BASED RETANNING AGENT CROSTAN EA ^H	LCT03
11.	PROTEIN BASED RETANNING AGENT DERMATAN RT ^H	LCT04
12.	CHROME –MELAMINE SYNTAN ^C	LCT05
13.	RETANNING AGENT NANOTAN NP ^H	LCT06
14.	LIGNIN BASED RETANNING AGENT ^H	LCT07
CATEGORY III – WASTE MANAGEMENT TECHNOLOGIES		
15.	IMMOBILIZED OXIDATION REACTORS (IOR) FOR WASTEWATER TREATMENT ^C	TWM01
16.	SOLE FROM FLESHING'S WASTE ^H	TWM02
17.	SEQUENTIAL OXIC-ANOXIC BIO REACTOR (SOABR) TECHNOLOGY FOR REDUCTION OF PRIMARY CHEMICAL SLUDGE IN WASTEWATER TREATMENT ^R	TWM03
18.	SECURE LANDFILL (SLF) ^C	TWM04
19.	PREPARATION OF COMPOST FROM ANIMAL HAIR WASTE (PROCESS BASED TECHNOLOGY) ^C	TWM05
20.	CO-DIGESTION OF TANNERY SOLID WASTE FOR BIOGAS GENERATION ^C	TWM06
CATEGORY IV - LEATHER PRODUCT TECHNOLOGIES		
21.	SMART LEATHERS RESPONSIVE TO ELECTRICAL AND MAGNETIC FIELDS ^H	LPT01
22.	SIZING SYSTEM FOR CHILDREN SHOES ^H	LPT02
23.	DIABETIC FOOTWEAR ^C	LPT03
CATEGORY V - HEALTH CARE PRODUCTS		
24.	HIGH VALUE PRODUCTS FROM TRIMMING WASTE (HVP-T) ^C	HCP01
25.	COLLAGEN SHEET(WOUND CARE) ^C	HCP02
26.	AMIPROJIL-PASTE/POWDER ^H	HCP03

^C represents already commercialised, ^R represents ready for commercialisation

CSIR-CLRI Technologies are Intellectual Property (IP) Rights protected.
Efforts are made to secure appropriate IP Rights like PATENT (in India and abroad) and COPYRIGHT in respect of the new developments.

Source : Figure -12 K . CLRI – Technology - Leather Processing, Leather Chemicals, Enzymatic Products, Environmental Technology, Health care products ppbd@clri.res.in clriinfo@clri.res.in

(to be continued...)

TEX BIO New Revolutionary Enzymes

High Quality Wet Blues with Less Water & Time



TEXZYME LPS

For Achieving Total Hair Removal

Key Note

Reduction of Water

Reduction of Time

Reduction Pollution load



Indian Leather

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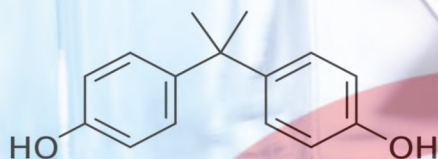
ZDHC CERTIFIED
PRODUCTS



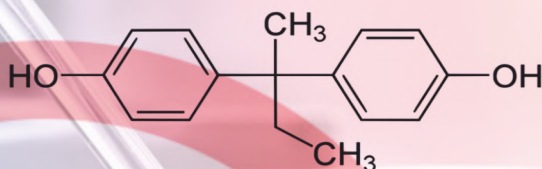
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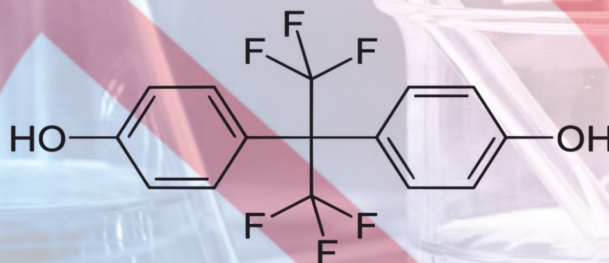
INTRODUCING OUR ZERO BISPHENOL FREE TANNING & RETANNING SYNTAN



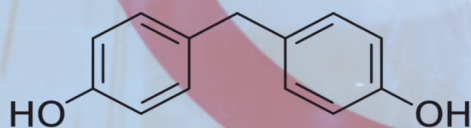
BISPHENOL A



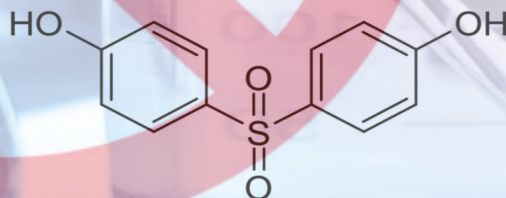
BISPHENOL B



BISPHENOL AF



BISPHENOL F



BISPHENOL S