

LEATHER RESEARCH INDUSTRY GET-TOGETHER (LERIG) 2012



The path that the Leather Industry needs to traverse during the 12th Five year Plan period!



A Report on the Annual Event held during 27-29 January 2012 in CSIR-CLRI

CSIR-CLRI in association with **Council for Leather Exports** supported by the various Leather and Leather Products Trade Bodies and Associations, its CSIR Network Partners, Institutions and Universities for Leather and in co-operation with the Indian Leather Industry organized the 46th Leather Research Industry Get-together (LERIG) at CSIR-CLRI from 27th to 29th January 2012. LERIG 2012 enabled the Indian Leather Industry prepare for the future challenges in terms of Technology preparedness, growth, competitiveness and increased share in the global trade in the Twelfth Plan period.

LERIG 2012 deliberated on the issues to be addressed to evolve a strategic Industry-Institution network for planning forward in the Twelfth Plan period and had sessions dedicated to:

- Leather Technology and Environment
- Leather Creativity & Design Innovation
- HRD for Change and Innovation

LERIG 2012 was very vibrant and evoked an overwhelming response from the members of the Indian leather Sector, the various trade bodies and the Institutions involved in the leather arena. A detailed Session wise coverage of the excitement at LERIG 2012 is recounted below:

PRESS MEET on 27th January 2012

The Press Meet was chaired by **Prof Dr AB Mandal, Director, CSIR-CLRI** in active partnership with **Shri PR Aqeel Ahmed, Chairman (Southern Region), Council for Leather Exports**, **Shri Ali Ahmed Khan, Executive Director, Council for Leather Exports**, and representatives from the various associations and trade bodies.

Prof Dr AB Mandal, Director, CSIR-CLRI in his introductory remarks stressed on the importance of LERIG and briefly gave an overview of the various sessions and the speakers invited to deliver presentations. He outlined CSIR-CLRI's Technology preparedness for the 12th Plan and said that LERIG 2012 would also deliberate on this and bring out a road map for the Leather Industry to traverse in the 12th Plan period and underline the role to be played by the Institutions.



Shri PR Aqeel Ahmed, Chairman (Southern Region), Council for Leather Exports in his brief remarks spoke on the relevance of technology to meet the current needs of the industry and said that LERIG 2012 was the ideal platform to feature presentations from academy, research and industry, thus providing to the participants an insight into technologies available for adoption in the 12th plan period. He opined that it is the correct time to offer valuable insight to the path that the leather industry needs to traverse during the 12th five year plan period.

The media then interacted with the distinguished experts about various issues related to the development and growth of the leather sector in India. The interaction was very lively and elicited useful information and food for thought.

MEMORIAL LECTURES on 27th January 2012

Two memorial Lectures namely the “**Prof BM Das Memorial Lecture**” and the “**Prof Y Nayudamma Memorial Lecture**” were held on 27th January 2012. Both these Lectures were CHAIRED by Dr G Thyagarajan, Former Director, CSIR/CLRI and presided over by Prof. Dr. AB Mandal, Director, CSIR-CLRI.

Prof BM Das Memorial Lecture:

Dr G Thyagarajan gave a brief background of the important roles played by Prof BM Das and Prof Y Nayudamma in shaping the Institute and introduced the distinguished speakers **Dr Dietrich Kebschull, Chairman of the IGEP Foundation, who delivered the Prof BM Das Memorial Lecture** and **Dr Baldev Raj, President, INAE who delivered the Prof Y Nayudamma Memorial Lecture.**



Dr Kebschull spoke on **“Emerging Challenges for the Indian Leather Industry: a Global Perspective”** wherein he enumerated the Macro-Economic challenges for the Leather Industry vis-à-vis the Global Leather Trade and outlined the steps that need to be taken to overcome these challenges.

Prof Y Nayudamma Memorial Lecture:

Dr Baldev Raj made a presentation on **“ETHICS, ENERGY AND EQUITY”** wherein he stressed that adequate energy, clean environment, nutritious food, clean water, comfortable home, security in terms of law and order, freedom of speech and actions, opportunities for realizing objectives of life commensurate with individual capability, robust gross domestic product of the country, etc. are the indices of a good nation.

INAUGURATION OF LERIG 2012 on 28th January 2012



LERIG 2012 was inaugurated on 28th January 2012 by **Dr K Rosaiah, His Excellency The Governor of Tamil Nadu** by lighting the traditional lamp.

Dr S Devadoss, Director, National Institute of Fashion Technology (NIFT), Chennai then presented a Shawl and an Angavastram to His Excellency.

Shri PR Aqeel Ahmed, Chairman (Southern Region), Council for Leather Exports (CLE) then presented a Floral Bouquet to His Excellency.



Prof. Dr AB Mandal, Director, CSIR-CLRI then welcomed the distinguished dignitaries on the dais by presenting them with floral bouquets.

In his Welcome address, Prof Dr AB Mandal, Director, CIR-CLRI thanked His Excellency for sparing his valuable time and gracing the occasion. He also welcomed the distinguished Guests of Honour and the attendees at the Inaugural function.



He said that, the 46th edition of LERIG 2012, with “12” as its THEME, is important for the Leather Sector in India as it paves the way for the development of a technology supported 12th plan for the sector.

Dr Mandal emphasized that CSIR-CLRI was overwhelmed by the spontaneous support from the Industry in not only shaping the Agenda for LERIG 2012 but for also actively helping in the conduct of the event. He also warmly thanked the Consortium of Sponsors from the leather industry who had been very magnanimous in their support to LERIG 2012.



Dr KV Raghavan, Chairman, Research Council, CSIR-CLRI spoke about the close industry – institution link and briefly highlighted the some of the milestones of CSIR-CLRI in the areas of Fashion Forecasting through the MODEUROP initiative, Zero Liquid Discharge (ZLD) and the modernization of the CAD Centre for footwear applications. He spoke about incentivizing Clean Technology programmes through R&D – Government – industry synergy and advocated the setting up of Clean Technology Missions for transforming laboratory innovations into commercial technologies.

Shri M Mohamed Hashim, Doyen of the Indian Leather Industry spoke with passion about his association with CSIR-CLRI and especially with LERIG which had discussed and debated on many issues of relevance and benefit to the Indian Leather Sector. He touched upon the Environmental issues being tackled so effectively by the Industry in Tamil Nadu with the active support of CSIR-CLRI. He spoke on the need for formulation of clean technology initiatives for leather sector through brainstorming with industry on priority areas. He expressed his happiness at the Content of the LERIG 2012 Sessions and thanked CSIR-CLRI for so actively involving the industry in this Event.

Shri M Rafeeque Ahmed, Chairman, Council for Leather Exports said that the leather Industry had grown impressively by 27% despite recessionary trends and the Eurozone crisis. He said that India had great opportunity to be the most preferred sourcing destination but it had to augment its capacities. He complimented the Government of India for setting up the Mega leather clusters which would help build up capacities.

Shri Rafeeque Ahmed lauded the efforts of Shri PR Aqeel Ahmed, Chairman (Southern Region), Council for Leather Exports for his initiatives in setting up “Greenfield” production centres in Tamil Nadu and also informed that CLE was establishing a Sector Skill Council in collaboration with the National Skill development Council under the leadership of Shri Habib Hussain.

He congratulated CSIR-CLRI for all the technical help rendered to the industry especially the alternative strategies it devised for pollution control. He said that the structure and topics drawn up for LERIG 2012 was very interesting and was sure that the outcome of the deliberations would form the basis for the 12th plan Road Map for the Leather Industry in India.

Dr G Thyagarajan, former Director, CSIR/CLRI described LERIG as an example of “Show and Tell.” He complimented CSIR-CLRI for the Industry-Institute handholding and also for its Technology trajectory which had helped the industry always stay a step ahead. He suggested that the research Council of CSIR-CLRI should incorporate programmes that studied the efficacy and use of new technologies like Nanotechnology in the area of Leather. He wished LERIG 2012 all success.



The **LERIG 2012 COMPENDIUM: Proceedings and Presentations at LERIG 2012** was then released by His Excellency and the first copy was received by Shri Rajeev Lakhara, Managing Director, Footwear Design and Development Institute, Noida.

His Excellency then distributed the **MODEUROP Awards** and the **Educational Awards** to the deserving prize winners.



In his **Chief Guest's address**, His Excellency expressed his pleasure to be at CLRI for the Inauguration of the 46th Leather Research Industry Get-together (LERIG) 2012. He said that from its inception in 1948, CLRI has maintained a strong academy-research-industry network which was indeed an example to emulate.



He said that he was particularly delighted at the synergy between the Leather Industry and its the Trade Bodies like CLE, ITPO, IFLMEA, ISF and other leading associations as well as the synergy between the Institutions like CLRI, FDDI, NIFT, NID, CFTI – all gathered together for the cause of LEATHER. Their presence in such large numbers was ample testimony of the “Team Spirit” and this augured well for the sustained growth and progress of the Indian Leather Industry, he opined.

His Excellency complimented CSIR-CLRI, her synergy partners and stake-holders and the Organizers of LERIG 2012 for so aptly deciding to deliberate on the 12th plan priorities and steer the course of the Indian leather Sector through the 12th Plan period. He also said that he was truly impressed with the topics being discussed over the next two days and was sure that LERIG 2012 would be meaningful and beneficial to all the stakeholders in the Leather fraternity.



Prof Dr AB Mandal, Director, CSIR-CLRI then read the Citation of the memento presented to His Excellency and **Dr Mebrahtu Meles, Program Director, ECBP, Ethiopia** then presented the memento to His Excellency.



Shri D Chandramouli then proposed a Vote of Thanks. He expressed his gratitude to His Excellency for gracing the occasion and adding value to the event. He also thanked the synergy partners and stake holders of LERIG 2012 for their support.

The **Design Awards** instituted by the CLE and the **AL Mudaliar Oratorical Awards** were presented prior to the commencement of the first Session on ‘Leather Technology and Environment’ by the distinguished Guests of Honour.

SESSION I: Leather Technology and Environment on 28 January 2012

This session was chaired by Dr KV Raghavan, Chairman, Research Council, CSIR-CLRI.



In his **Lead lecture** titled “**Leather Technology and Environment**”, **Shri A Sahasranaman, Vice-Chairman, CEMCOT**, highlighted the challenges faced in the waste treatment and management of the solid and liquid waste generated by tanning process. He also highlighted the various Pollutant Discharge Standards prescribed by the various Pollution Control Boards.

Advocating that improved Technology was the way forward he to deal with mounting cost of waste treatment, he complimented CSIR- CLRI for constantly looking for ways of introducing new technologies at different stages which could reduce both volume and pollution intensity of waste water.

In conclusion, he spoke briefly about the Zero Liquid Discharge systems and strongly stressed that there may be initial hiccups but if the objective is clear and the technology provider is confident, there is no reason why the industry cannot move ahead in this direction.



Dr NK Chandrababu, Chief Scientist and Head, CSIR-CLRI Leather Process Division in his presentation titled **“Achieving sustainability of ZLD through the adoption of In-process Control Measures”** said that it is clear that the options relating to in-process control measures have not been given due importance. The requirement to comply with ZLD through RO based technologies has weaned away the tanneries which have experimented/implemented in-process control measures including salt-free and salt-less curing methods. On the whole, there has been over-dependence on end-of-pipe treatment options without the incorporation of in-process control measures in the current approaches to comply with ZLD norm.

He emphasized that the main focus of in-process control measures aimed at ZLD should be on TDS reduction measures aimed at reduced discharge of salinity in the effluent and Reduction in Volume of waste water generated in Processing. He stressed that achieving near-zero discharge through recycling schemes by suitable treatment of sectional waste streams can be tried through the ZLD Process developed by CSIR-CLRI) and also highlighted various options and outlined an integrated strategic approach.

Dr C Muralidharan, Senior Principal Scientist and Head, EXCEL Laboratory, CSIR-CLRI talked about the **“Salt Free Zero Emission Chrome Tanning Process”** which was a successful technology developed by CSIR-CLRI. He said that large quantities of chromium and TDS in process liquors pose problems for recycle and reuse resulting in economic & environmental constraints and the technology developed generates TDS less than one-Fifth of conventional system, through regulated hydrolysis of chromium tanning salts and insitu-neutralisation of the acidity. The process liquor at the end of tanning contains minimum levels of chromium and hence can be reused for subsequent batch without any chemical treatment. Because of the high reactivity the method affords 25% reduced chromium input compared to conventional process.

Highlighting the salient features of the system, Dr Muralidharan said that it led to Near zero emission of chromium in tanning effluents, 25% saving in chromium input, Suitable for all substrates and all types of chrome tanning salts, Reduced process duration and that no acidification is needed for this tanning methodology and hence the process is absolutely salt and mineral acid free (Pickle- free). In short, the technology had provided a long lasting scientific solution to an environmental concern with substantial economic benefits.



Shri Sayeed Ahmed Pakkar, Partner, Pakkar Leather Exports in his presentation on the “Salt Free Zero Emission Chrome Tanning Process” said that he was surprised with the results of the implementation of this technology in his tannery. He listed out the advantages of using this technology as being Easy to use and simple to control; does not require special and expensive chemicals; eradicates the use of salt; eradicates the use of Sulphuric Acid; Reduces the usage of Chrome; the process was economical and increased the savings and profits and most importantly it earned the respect of the buyers and enhance the Brand Image of the company.

The presentation of **Dr G Sekaran, Chief Scientist and Head, Environment Technology Division, CSIR-CLRI** on **“WEALTH FROM SOLIDWASTE”** was to illustrate the probable value added products that can be recovered from the solid waste discharged from leather industry. He spoke in detail about the derivation of the following ‘Value Added Products’ from leather industry waste:

- Keratin hydrolysate from animal hair
- Acid protease and alkaline protease from animal fleshing
- Animal Fleshing as fish meal

- Animal fleshing as raw material for the production of bio-organic manure
- Animal fleshing for biogas recovery.
- Biodiesel, Bio ethanol, bio hydrogen, Biomethane from tannery solid waste:
- Tanned leather for the production of fuel gas
- Separation of edible grade salt from evaporated residue of R.O reject

Dr Sekaran, in his talk opined that solid wastes and wastewater generated as downstream products during Leather Processing needed to be treated. The solid wastes constitute carbon , hydrogen , nitrogen and sulphur. The intensive research carried out on the solid waste generated by leather industry would end up with the production of value added products with huge returns . Hence, management of solid wastes either in isolation or in clusters may yield a substantial return to the tanners besides the final product.



Dr KV Raghavan, Chairman, Research Council, CSIR-CLRI in his keynote presentation titled **"INCENTIVIZING CLEAN TECHNOLOGY TRANSFER AND DIFFUSION IN INDIAN LEATHER SECTOR"** enumerated the typical clean technologies for indian leather industry and identified the high priority areas. He advocated the incentivizing of Clean Technology programmes through R&D, Government and industry synergy through the establishment of a Clean Technology implementation fund.

Dr Raghavan also suggested the introduction of a Tradable Permit System in CETPs and the implementation of a Clean Technology Missions for transforming laboratory innovations into commercial technologies.

The Technical Presentations were then followed by “**EXPERT TALK**” from **Shri M Mohamed Hashim**, Doyen of the Indian leather industry, **Shri OK Kaul**, Executive Director, TATA International Ltd., **Shri T RAfeeq Ahmed**, Chairman, T Abdul Wahid & Co., **Shri PM Yousuf**, Managing Director, Hijaz Leathers and **Shri R Kumaresan**, Head, Leather Business, Clariant Chemicals (India).

They brought into sharp focus the initiatives being taken by the industry in the area of Environmental Management and also highlighted the gaps that need to be addressed to attain the desired levels of environmental norms fixed by the Pollution Control Boards. They expressed their happiness at the relevance of the Session and complimented the quality of content, suggestions and the various measures advocated by the Speakers in this Session. They assured the wholehearted support of the industry in all initiatives that would promote environmental sustainability.

Perspectives for the Leather Sector and Issues Identified for the 12th Five year plan period:

Environment is identified as one of the major challenges of the 12th Five Year Plan and LERIG 2012 highlighted priority areas of Research to ensure Environment Protection. The focus of research would be to resolve Environmental Issues for the sustainable growth of the Leather Sector.

Some of the key areas highlighted were:

- Implementation of Environmental Management measures in Tanneries/CETPs;
- Technology Upgradation and Modernization of Tanneries and
- Solid Waste utilization scheme.

SESSION II: Practical Demonstration on 28 January 2012

This was an eagerly attended session which featured presentations and ‘Practical Demonstrations’ from various Chemical companies who displayed their latest range of chemicals and finishes, Institutions displaying their surface innovations, Designs and softwares and their latest Technological developments.

This Session was chaired by Shri K Srinivasan, Convenor, Finished Leather Panel, Council for Leather Exports in close conjunction with Shri CS Gnanasekaran, President, ALFA, Shri CR Mohan, Secretary, LCMA and Shri Praveen Tatia, Secretary, LCDA and was Presided over by Prof. Dr. AB Mandal, Director, CSIR-CLRI.

This Session featured the following presentations and Demonstrations :

Demonstration of Innovative Texture Developments and Surface Modifications	Leather Design Department of NIFT, Chennai.
X-Tan wet white process based on Polycarbamoylsulfonate	Lanxess India
Demonstration of Leather upgradation techniques	Sellam Chemicals
Range of Chemicals from Zschimmer & Schwarz GmbH & co kg”,Germany” and Langro Chemie Theo Lang GmbH”,Germany.	Kanna Chemie (P) Ltd.
Demonstration of Leather Articles and Colours	Chenitan Color Chem Pvt Ltd
Leather Finishing and Footwear Finishing Chemicals	Saba Group
Range of New Leathers	Stahl India Ltd.
Leather Chemicals	Sree Abirami Colours
Demonstration of New Leathers & Chemicals	Fine Chem

<p>Unique designs and combo materials based on ethnic North-East motifs</p>	<p>Shri K Karthikeyan, Scientist CLAD Department, CSIR-CLRI</p>
<p>Bio-refinery pilot plant for the sequential production of bio-diesel, bio-ethanol, bio-hydrogen and bio-methane from organic liquid and solid wastes to attain ZLD/ZSD</p>	<p>Dr.P.Shanmugam Principal Scientist Environmental Engineering Department CSIR-CLRI</p>
<p>Automated software for managing consumables and chemicals in a Tannery.</p>	<p>Smt Malathy Jawahar, Senior Scientist, Leather Process Division, CSIR-CLRI & Shri S Nithyanantha Vasagam, Scientist, Economics Research Laboratory, CSIR-CLRI</p>
<p>Kolhapuri Footwear</p>	<p>Shri S Mathivanan Senior Principal Scientist SDDC, CSIR-CLRI</p>





This Session was very vibrant and interactive. The participants were very happy with the quality and content of the presentations and demonstrations in this Session and were effusive in their praise for the quality of this Session which they felt was very informative and useful to the Industry members.

SESSION III: Leather Creativity and Design Innovation on 29 January 2012



This Session was **Chaired by Shri PR Aqeel Ahmed, Chairman (Southern Region), Council for Leather Exports** and **Co-Chaired by Shri N Shafeeq Ahmed, Chairman, Indian Finished Leather Manufacturers and Exporters Association (IFLMEA) and Dr S Devadoss, Director, National Institute of Fashion Technology, (NIFT), Chennai.**



Shri PR Aqeel Ahmed in his opening remarks expressed his pleasure to be at LERIG amidst such distinguished luminaries. He said that India has the talent to provide designs based on their creativity skills and in this connection complimented NIFT for their excellent effort in training skilled designers. Citing Lee lococca, he said that 'Fashion always comes back ', he said that Leather creativity covers materials and fabrics and new materials are the only source to bring fashionable products to the consumer. He also recommended that a 'National Design Award' for the Leather Sector be instituted.

He complimented CSIR-CLRI for its role in helping the Indian Leather Sector and said that LERIG 2012 was an excellent platform for the Industry and Institutes to come together and plan the course of action for us to undertake in the 12th Plan period and achieve the targets set.

Shri N Shafeeq Ahmed said that LERIG 2012 was very well structured and the "Take Home" from LERIG would be very useful. He traced the Changing needs of the market which had evolved from Mass market to Fashion based to Lifestyle based and now to 'user based.' He emphasized that 24x7 R&D was essential for increasing the value from raw materials and suggested that CSIR-CLRI and IFLMEA could jointly work together and establish a 'fashion based incubator for leather processing.'

Shri Motilal Sethi, President, ILGA in his **Expert Talk** highlighted that In a globalising economy, versatility in design and concept are key to the business. He said that India needs to aim to be a leading influencer of global design and must have a focused multi-pronged strategy to enhance the quality and spread of Indian designs and to increase India's share in the world economy through this major value addition. The vision to be in the vanguard of global fashion and Design Innovation should employ a collaborative approach to leverage the strengths of the international & national institutions and industry, and develop an integrated nexus of Design - Technology - Market Linkage.

The way forward would be to adopt a holistic approach in developing design capability for leather and leather products by integrating the components of Design & Innovation, Technology Fusion, Market Intelligence, Business Incubation and IPR creation, he said. According to Shri Sethi, Research - Academia -



Industry synergy is a prime driver of Innovation. The best example of this is LERIG, where we have a meeting of minds of the above TROIKA.

He complimented CSIR-CLRI for the apt Theme for LERIG 2012 and suggested that the Final Report of LERIG 2012 should be sent to the Planning Commission for their reference.

Dr S Devadoss, Director, NIFT, Chennai opined that LERIG would prepare the Industry for the Challenges ahead. He said that the Creative process in thinking is essential as it would lead to Innovation which was the key to success. He complimented the Government for floating several schemes for the benefit of the industry and said that the Ministry of Commerce is also setting up Design Institutes on the lines of NIFT to develop more designers.

Dr Devadoss underlined the importance of Surface Embellishments in enhancing the value proposition of leather and suggested that NIFT and CSIR-CLRI could harness their strengths in this area. Synergy between Institutes would strengthen the Indian leather Sector, he concluded.

Shri K Srinivasan, Convenor, Finished Leather panel, CLE said that LERIG was truly an Event for the Industry and by the Industry in association with CSIR-CLRI and that he was truly blessed to be associated with this Event. In his Expert Talk, he said that the Indian Leather industry harnesses a huge potential and the world recognizes us as an industry that is creative and capable of producing high-quality products. The success that the industry has enjoyed has been largely due to its growth as a consequence of customer satisfaction, combined with a conviction to excel and deliver quality outputs, he opined.

Shri Srinivasan complimented CSIR-CLRI for its role as a Lead partner in this endeavour of 'fashion forecasting' for leather and in tandem with the Indian Leather Industry have been successful in placing India in the GLOBAL FASHION Map for leather. The mantra of the Indian Leather industry is to be positive and contemporarily in tune with the latest in fashion globally, he concluded.

Shri SV Kumar, Vice President, ISF in his Expert talk said that it had been a very enriching experience for him to imbibe the knowledge, views and experiences of the Experts, Technologists and Consultants who have spoken so eloquently during the deliberations at LERIG 2012. It has truly been an Experience to savour, he said. Taking an example of the Footwear Sector, he said that for it to become Innovation driven a careful strategy had to be worked out to leverage innovation into to creation of new market space whilst retaining the advantages India had with its with low expertise costs and talent base in footwear.

Shri Kumar emphasized that we must "Do things Differently from the past" like Innovation-led manufacturing, innovation clusters; new strategic partnerships for value creation and market positioning and we must change our mindset to achieve this. He concluded by saying that Technology and Human Resource Initiatives are a MUST and this is where platforms such as LERIG give us the opportunity to interface with Institutions like CSIR-CLRI, FDDI, NIFT, NID, CFTi etc. to synergise both Technology and HR initiatives.

Mr Tim Amos, Managing Director, Stahl India Limited in his presentation on "**High End Leather Processing**" defined High End Leather as one, which has some special characteristics, which differentiates it from competitors leathers and which means we can sell it for a higher price. He also touched upon High Performance leathers especially Automotive leather, Leather for Aircraft / Boats, Quality Leather goods and High Performance lining.

Mr Amos said that Fashion leathers are a great way to upgrade leathers, and add real value to our leather or article and Upgradation of Leather was also very useful in hiding the defects in Colour or Grain quality.

Dr Raghava Rao, Senior Principal Scientist, CSIR-CLRI in his presentation on the same subject highlighted the proposed CSIR-CLRI Initiatives in this area during the 12th Five Year plan period. To achieve the targets set he said that the Industry would have to increase its productivity and go for value addition. The consumer today was Fashion and Quality Conscious, he said and CSIR-CLRI had identified the development of Smart leather with potential applications in Space Suits, Military Suits, Self healing therapeutic Suits etc. as the way forward. He concluded by saying that Value enhancement through innovative technologies would be the focus of the CSIR-CLRI 12th Five Year Plan.

Shri PV Gopalakrishna Bachi, Convenor, Leather Footwear Panel, CLE shared his experiences in "Brands and the Customer" very passionately and demonstrated his close involvement in Retail Brand building in the Indian Market. He said that Market success comes from the understanding of customer reverberation and a brand echoes the sentiments of the customer. It creates trust, dependability, understanding and care. In Leather, all these parameters are associated to the quality of the leather, achievable through echnological excellence and innovativeness, he said.

He said that Indian leather was now a **LIFESTYLE CHOICE** for the World's leading BRANDS. According to him, Leather is about sensation and as much as it pleases the eye, it also feels good and smells amazing. Leather smells of power and speed, he opined and added that BRANDS respond to this CUSTOMER need and craft the most exquisite merchandize of Leather which spells sheer class and elegance. He concluded by saying that Designer Leatherware is here to stay and India will increasingly play a BIG role in it. With the opening of the Retail Domestic market, exciting times are ahead for UNIQUE DESIGNS for BEST VALUE, he added.

Smt Shinju Mahajan, Chairperson, Leather Design, NIFT, New Delhi in her presentation "**Unique Design for Best value for Medium to Low Priced Products**" talked about how Globalization of businesses brings opportunities as well as failure. In today's volatile economy, creating superior value for users is shown as a way of achieving competitive advantage, she said.



Smt Mahajan spoke about how there is little agreement of what exactly constitutes user value and how design can contribute to its creation. The importance of design in product innovation has grown dramatically during the last few years, she opined. Traditionally, design was considered an exception reserved for luxury segments and sophisticated niche markets that could appreciate a product's aesthetic and artistic values. Now, according to her, design is becoming the synthetic expression of a range of managerial processes, including product innovation, that are innovating products by adding value through design or technology intervention. She concluded by saying how Design contributes to the Economy by giving it a human face and Design signifies Aspiration for excellence through aesthetics.

Ms Sumitra Roy, Director, TERRA Handbags, commented on awestruck she was by the sheer range of the topics being addressed in LERIG 2012 and the high level of seriousness with which the Industry and the Institutions were taking the Task of laying out a ROAD MAP for the Industry to follow during its journey through the next five years. She gave insights on how she had done **“Brand Building in the Retail Space.”**

Stressing on the Importance of a Brand, she said that a Brand is understood as the key to 'Wealth Creation' and is used as a vehicle to create demand. It is integral to the business building process; it is a wholesome experience which embodies quality assurance, product service, customer familiarity, repeat purchase and fulfillment of one's expectations. She also said that India had the right mix of factors which were conducive for taking the leather and leather Products industry in India to the next level.

Smt Shalini Sud, Professor and Head, CE Diploma, NIFT, New Delhi spoke on **“FASHION DESIGN INCUBATORS- RECENT DEVELOPMENTS & NEW OPPORTUNITIES.”** She said that the last decade has also shown dynamic trends for the leather sector in India. While on one hand every prominent luxury brand of the world is establishing their presence in targeting the Indian consumer. On the other they have been increasing their manufacturing scale in India for export to all over the world. Either ways the entire supply chain geared towards addressing the needs of this business has been compelled to address the aspirations through design in a manner that is conscious and responsible.

Smt Sud opined that Design incubation requires research, knowledge of design, skills to realize what has been visualized, consumer insights and above all willingness to allow freedom of thought and expression. Its progress cannot be measured in terms of growth and metrics but experienced in terms of value and consumer satisfaction. Design incubation cells are integral to most design lead organizations in the world LV, Cavalli, Prada etc and consist of a dynamic team drawn from across-disciplines. Boundaries are constantly challenged to be able to dream an idea and actualize it within a timeline to create products that have an ability to touch our lives and make it better. The challenge is to allow design to lead by disentangling it from control and give autonomy of actionable design to institutions and organizations including the industry to formulate new approaches to design from India, she concluded.

Shri Shahrukh Zaidi, Designer, spoke on **“Design Drivers for the Indian leather industry.”** He defined Design as that area of human experience, skill and knowledge which is concerned with man's ability to mould his environment and to suit his material and spiritual needs. He added that Design is essentially a rational, logical, sequential process intended to solve problems. He said that a perfect Design is a result of a perfect incorporation of Design Drivers namely Material, Process and System.

He said that the future economy is a Creative Economy and the Design-Technology interface will lead to 'newness' and 'modernization' and provide a higher value for all. Talking about Design as a process, he said that the Global Market players expect a 'vertical design approach' between the Buyer and manufacturer to offer a comprehensive palette of designs season after season. He concluded by saying that Design always adds value and wished that more Design Intelligence centres be set up in India and that India becomes the biggest Design Process Outsourcing hub.

Summary of Session on Leather Creativity and Design Innovation

High End Leather Processing:

The quantum jump in value addition for leather can be made possible only through novel innovations like developing smart leathers.

Unique Designs for Best Value from Medium and Low Priced Products:

In today's volatile economy, creating superior value for users is shown as a way of achieving competitive advantage.

Fashion/ Design Incubators – Recent Developments & New Opportunities

Design incubation requires research, knowledge of design, skills to realize what has been visualized. Design incubation cells are integral to most design led organizations in the world and consist of a dynamic team drawn from across-disciplines. Boundaries are constantly challenged to be able to dream.

Perspectives for the Leather Sector and Issues Identified for the 12th Five year plan period:

1. Implement a scheme for Indian Leather Mark (branding on the lines of India Design Mark implemented by India Design Council)
2. Establish National Design Studio
3. Undertake R&D and Design & Development activities
4. Establish a *Centre of Excellence* for development of leather-like material
5. Assist the industry associations and SPVs to establish critical infrastructure facilities in the export clusters in the form of Design Studios.

SESSION IV: HRD for Change and Innovation on 29 January 2012

This Session was chaired by **Shri Habib Hussain, Chairman, NSDC and Director, AV Thomas Group.**



Shri Habib Hussain, in his preface to the session spoke on Enhancing growth, productivity and competitiveness through skill development in the leather and leather products Sector. His remarks focused on the Skills and Competitiveness Challenge; New approaches to address the gap and What the Industry could do to lead change. While India is poised for double digit growth the essential pre-requisite is the availability of skilled work force. The twin challenges of employability and availability remain and the SME's are the hardest hit by this.

There is a need for huge capacity addition to meet future demand but currently there is a quantity, quality and qualification mismatch. Further, there is a huge Incremental human resource requirement that is creating an unprecedented war for talent. Projecting the human resource requirement in India in the Leather & Leather products sector he showed that an additional 4.6 million people would be required in this sector by 2022 and he concluded by saying that the focus area for Sector Skill Council of NSDC of which he was the Chairman, was to Foster Private sector / Industry participation in skill development.



This was followed by remarks from Dr **KV Raghavan, Smt Revathi Roy, Managing Director, RR Leather Products Ltd. , Prof. Dr AB Mandal and Mr Ato Wondu Legesse, Director general, LIDI, Ethiopia**. All of them stressed that a “New approach” to addressing the skill gap required to be taken and fundamental reforms across the education system needed to be undertaken to improve overall quality / outcomes, increase retention and ensure seamless integration with vocational training.

They also advocated to significantly enhance Government-driven vocational training efforts and increase scale of Public Private Partnerships (PPP) initiatives to better utilize Government infrastructure.

Shri Mohan Sreenivas, Managing Director, Orient Express, spoke on the complexities of Manufacturing especially in the area of leather garments for Branded Customers. He said that the workers needed to be adequately trained to absorb the fast changing demands of the fashion merchandize and adapt quickly to reduce turnaround times and ensure quick production and timely delivery.

Shri MS Khaleel Lur Rahman, Managing Director, Nibras & Co., stressed on three vital points namely Designers; Managing of the Manufacturing process in the shoe industry and Avoiding wastage. He said that in India though the Designers are capable they lack exposure and therefore needed to travel extensively and study the world markets. He also underlined the fact that Subtlety in Brands is what distinguishes it from other Brands making similar products.

Speaking of range Building of Designs, he said that this should be crisp and the range should not be too large. He also added that sourcing of components and materials needs to be improved and he felt that the sourcing team should also be technically well versed to understand the nuances of the product for which they are sourcing. He concluded by saying that avoiding wastage in all aspects of manufacturing was paramount to the success of any company and must be rigidly enforced.

Dr B Chandrasekaran, Senior Principal Scientist, CSIR-CLRI in his presentation titled “ **Knowledge Sharing: a new Inter-Institutional HRD gateway**” said that the world is witnessing alignment/re-orientation in most of the manufacturing sectors. Quality and availability of existing manpower also witness change. Job turnover has been consistent in leather products sector as well. Existing skilled manpower shift their jobs for better remuneration and other benefits. Over a period of time their Per capita income also has increased which also reflects in higher cost of production in many of the developing countries.

Dr Chandrasekaran elaborated on the HR Needs for Leather and products sector and the Training Programmes and Methodology required. He said that a strategic preparation in designing curriculum, which can provide adequate human resources, any time and every time the industry demands is required. Most of the developing countries are standardizing the vocational curriculum through innovative processes and linking them with industry needs, he said. According to him, the national Institutions should play an enabling role in supporting many organized industries and other agencies by providing appropriate curriculum and technical assistance. These institutions also need to forecast the future specialisations and demand for HR needs. Product design, fashion and trend forecast are some of the areas where more efforts have to be put in. In conclusion, he said that continuous input by industry in developing newer manpower is essential for sustainability.

Shri D Saalai Maraan, Executive Director, FDDI, Chennai extensively quoting from the scriptures spoke about the fact that those who possess wisdom, possess every thing; those who have not wisdom, whatever they may possess, have nothing. He opined that Knowledge management is a conscious strategy for moving the right knowledge to the right people at the right time to assist sharing and enabling the information to be translated into action to improve the organizational performance. He spoke about the National Knowledge network of India and its Impact of Technology in Knowledge Sharing between Institutions. He concluded by stressing on the role of e-governance in Institutions and how we should use Information and Communication Technologies (ICT's) to improve equitable access to quality education.

Shri Intisar M Mohammed, Youth Committee Member, CLE and Director, SSC group addressed his presentation on “**DEVELOPING EFFECTIVE PUBLIC PRIVATE PLATFORMS FOR TALENT SEARCH**” into three parts namely first giving an overview of the Employment Scenario in our Industry, secondly dwell on “The Skills and Competitiveness Challenge” and thirdly posing the challenge as to “What the Industry could do to lead change?”

Shri Intisar spoke about the present global scenario and the target of doubling the export figures by 2013-14 the focus should be on the creation of the training infrastructure for catering to the HR needs of the operators, supervisors and the managerial level and extension of high end support services across all functional areas to enhance the global competency of the sector. He also said that special initiatives for operators level training needs to be launched to ensure adequate supply of trained manpower for carrying out shop floor level operations and measures may be created for addressing the skill gaps in the upper level of the HR Verticals and other specialized services and bringing in more qualified professionals.

He concluded by stressing that the Industry must work together to ensure that Talent Of Right Quality and Talent In Right Quantity was made available to the Leather Sector.

Shri DM Parikh, associate Senior Faculty, EDI, spoke about his experiences of BDS Market Development in the Chennai leather Cluster especially with respect to help the cluster convert existing Comparative Advantage into sustainable Competitive Advantage, with thrust on cost / productivity, compliance, and market-access related advantage.

Summary of Session on HRD for Change and Innovation

It is imperative that all the stakeholders need to join hands to realize the common goal of generating adequate HR for the leather sector.

- Expertise gained by individual organisations need to be shared and replicated for effective realization of envisaged benefits. Successful intervention by CLRI and FDDI in providing knowledge both at National and International level is an example for inter-institutional partnership for obtaining global eminence.
- Alternative approaches also have to be planned in case the country is not in a position to provide necessary manpower for this sector.
- Strategic plan includes subletting some of the preliminary preparative works to other players (located in other countries) and carrying out value addition components indigenously.

This would help the Indian leather product sector meet the global requirements and achieve our XII plan targets.

Perspectives for the Leather Sector and Issues Identified for the 12th Five year plan period:

XII Plan Initiatives:

The influx of trained manpower across all verticals is highly critical for the development of this sector. It is a fact that having a relatively well trained and educated work force is a critical element in the rapid export & domestic growth of this sector. It has been estimated that 4.6 million incremental human resource will be required till 2022 and Leather & Leather Product sector has been identified as one of the ten most important sectors of the economy which need greater thrust and special emphasis in terms of skill development initiative.

The present global scenario and the target of doubling the export figures by 2013-14 needs more focused initiatives with widened scope and area of operations in the 12th Plan period. Focus on the creation of the training infrastructure for catering the HR needs of the operators, supervisors and the managerial level and extension of high end support services across all functional areas to enhance the global competency of the sector. Special initiatives for operators level training needs to be launched to ensure adequate supply of trained manpower for carrying out shop floor level operations.

Also measures for addressing the skill gaps in the upper level of the HR Verticals and other specialized services and bringing in more qualified professionals was flagged.

CLASPING LERIG 2012

This Session was essentially a wrap up session summarizing the entire deliberations of LERIG 2012 spread over the various sessions. The session consisted of two keynote addresses: one by **Shri Ali Ahmed Khan, Executive Director, Council for leather Exports** who presented the Leather Industry perspectives & challenges vis-a-vis the 12th Five Year Plan 2012-17 and the second by **Shri D Chandramouli, Chief Scientist, CSIR-CLRI** who presented the ROLE OF INSTITUTIONS IN 12th PLAN.



Shri Ali Ahmed Khan in his presentation said that In order to achieve the export target, the industry need to grow at a CAGR of 24.03% from the year 2010-11 to 2016-17. He outlined the opportunities and the challenges faced by the industry. He suggested the following interventions:

Better Animal husbandry Measures, Brand Creation and promotion, technology upgradation and Modernization, human Resource development, Increasing the tanning Capacity, Collaboration with countries having abundant raw materials, at enterprise levels, Shift from SSI to Large Units and Development of specific Infrastructures at Clusters.

Shri D Chandramouli, said that the Primary focus of 12th Plan programs would be balanced and sustainable growth ensuring economic viability /efficiency through competitive strength, enabling social compatibility through inclusive development and developing environmental sustainability through latest technologies. He also listed out the activities as strengthening basic resource, augmenting hides and skins quality and supply, building market infrastructure for raw materials , implementation of innovative technologies, efficient product fabrication and creative designing, continuous learning systems, latest market intelligence and brand building, building capacity for testing, standards, eco-social labeling and nurturing domestic market

THANKSGIVING CEREMONY and CELEBRATING LEATHERWEEK 2012

This was the GRAND FINALE of LERIG 2012.



- It was a function for the **CELEBRATION** of the partnership and support received from various Synergy Partners and the Consortium of Sponsors who had so wholeheartedly lent their support for the planning and conduct of LERIG 2012.
- The ceremony was a befitting tribute to the generous magnanimity of our synergy partners and sponsors and it was a benevolent acknowledgement of how much their support meant to the organizers of LERIG 2012.
- They were all graciously honoured with Floral bouquets and a memento expressing our Goodwill for their support. The function was marked by an emotionally uplifting spirit of camaraderie and bonhomie.
- Balloons were then released by the dignitaries present as well as team ITPO welcoming the 27th India International Leather Fair (IILF) 2012.



This was the culmination and brought the curtains down on a vibrant, fruitful and meaningful LERIG 2012.

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