Prof. B M Das Memorial Lecture
62nd Foundation Day Celebration
INDIAN LEATHER TECHNOLOGISTS' ASSOCIATION
14th August 2012, Kolkata

CSIR-CLRI presentation on
“My Name is Fashion Studio &
My Leather Industry is striding with confidence”
Floral tributes were paid to the portrait of Late Prof BM Das by members of ILTA and members of the Indian Leather Industry.
In his Welcome Address, Mr Arnab Jha, President, ILTA introduced Late Prof BM Das as the “Father of Leather Technology” who was the first Director of CSIR-CLRI and also the first President of ILTA and paid rich encomiums to Late Prof BM Das.

He traced the history and activities of the Indian Leather Technologists Association.

The Indian Leather Technologists’ Association (ILTA) was founded by Late Prof. B. M. Das, the originator of Das-Stiasnay theory and father of Indian Leather Science on 14th August’ 1950.

The primary objectives of the oldest Leather Technologists’ Association which celebrated its Diamond Jubilee year in the 2010 are:

To bring all concerned with the broad spectrum of the leather industry under one umbrella.

To organize seminar, symposium, workshop in order to create information, knowledge and latest development for the benefit of all concerned. To offer a common platform for all to interact with each other in order to understand each other’s problems and prospects.

To publish monthly journal as a supplement to those above objectives. The monthly journal of ILTA is known as journal of Indian Leather Technologists’ Association and is the most widely circulated technical journal concerning leather technology.

To publish text books for the benefit of students at various levels of study, for the researchers and industry.
To have interface between urban and rural sector.
To assist Planning Commission, various Government Institutions, Ministry and autonomous bodies to formulate appropriate policies acceptable and adaptable to the industry.

To organize practical training and to provide skilled manpower and to motivate good students for study.

To conduct activities related to the growth of the export of leather and leather goods from India. ILTA also organizes Prof. B. M. Das Memorial Lecture every year during the Foundation Day Celebrations on 14th August and Sanjoy Sen Memorial Lecture on 14th January, the birthday of our Late President for several decades. Many reputed scientists, industrialists and educationists have delivered these prestigious lectures. Foreign dignitaries during their visits to India have addressed the members of ILTA at various times.

He said that ILTA is the Member Society of IULTCS (International Union of Leather Technologists & Chemists Societies) which is a 115 years old organization. The International Congress of this union is held in different locations of the world once in two years. In its 115 years history, for the first time the Congress was held in January 1999 outside the developed countries and that too in India at CLRI, Chennai. Indian Leather Technologists Association organized the Congress under the able leadership and guidance of Late Sanjoy Sen, the then President of ILTA and IULTCS and Dr. T. Ramasami, the then Vice-President of ILTA and Director, CLRI, Chennai.

He proudly announced that 2017 IULTCS Congress is scheduled to be held in India again and was optimistic that yet again CSIR-CLRI and ILTA will endeavour to keep LEATHER TECHNOLOGY, LEATHER TECHNOLOGISTS and the country’s flag flying high.
Mr Susanta Mallick, General Secretary, ILTA announced the various Awards.

He also further said that “ILTA awards Prof. B. M. Das Memorial, Sanjoy Sen Memorial and J. M. Dey Memorial Medals to the top rankers at the University graduate and post graduate levels. J. Sinha Roy Memorial Award for the author of the best contribution for the entire year published in the monthly journal of the Indian Leather Technologists’ Association (JILTA).

The award winners were: Ms Sahiti, Ms Priyadarshini, Ms Dimple and Dr Shampa.

Customized ‘coffee mugs’ commemoration Late prof BM das was released. These carried the bust of Late Prof BM Das and the occasion which was the 62nd Foundation Day of ILTA on one side; while the other side had the logo of CSIR-CLRI with the title of the lecture imprinted.

In picture (From L to R): Mr Susanta Mallick, Mr Md Sadiq, Mr Asit Kanungo, Mr Arnab Jha, Mrs Antara Kumar, Mr Tapan Nandi
Mr Susanta Mallick, General Secretary, ILTA released the ‘first copy’ of the Prof BM Das Lecture titled “My Name is Fashion Studio and My Leather Industry is striding with confidence” to Mr Tapan Nandi, Regional Chairman (ER), CLE in the august presence of Mr Arnab Jha, President, ILTA and members of ILTA, members of the Leather Industry and Students had gathered in good numbers.
Mr Tapan Nandi, Regional Chairman (ER), who is also the Life member of ILTA said that he was awe inspired by the gathering of the Industry Members, ILTA Members and Students.

On a nostalgic note he said that he had come as a ‘student’ at this platform as much as he was a “Teacher” at many other platforms.

He concluded his special remarks saying “Long live ILTA.”

Mr Arnab Jha, President, ILTA introduced the speaker to the gathering.

He said that MD SADIQ, Scientist, CSIR-CLRI Shoe Design & Development Centre, India is a distinguished Leather Technologist with specialization in Footwear Science and Engineering in which he holds a Master’s degree. His focus has been on Footwear Styling and Design; R & D in Trend Forecasting, Colours and Texture development. He has also innovated in HRD activities with accent on Shoe Design Education and Training. He has also excelled in Planning for the Indian Leather sector in the area of design, trends and global competitiveness.

His signature contribution has been in enabling the ‘Travel of India in fashion forecasting for LEATHER’ - an R&D initiative for garnering global leadership. He helped India gain a foothold in the prestigious MODEUROP Colour Club.

Prof BM Das Memorial Lecture on the occasion of the 62nd Foundation Day of ILTA was delivered by Mr Md Sadiq of CSIR-CLRI

Acknowledgements: Reference to inputs from Council for Leather Exports; Reference to MODEUROP, reference to article by Mr A Sahasranaman, Managing Director, CEMCOT is acknowledged.

In a very interesting presentation which had the audience completely enraptured, Mr Sadiq traced the Genesis, Growth and the Metamorphosis of the CSIR-CLRI India Fashion Studio. He spoke about the origins of the Studio in 1993 and how the studio had played the role of a ‘Resourcing Partner’ and how
over a period of time it had been transformed into an “a leading design school of the East’ with quality Designers being trained and placed in the footwear industry worldwide.

The presentation also traced the expansion of the studio as it moved into the domain of ‘Fashion Forecasting’ and its metamorphosis into a ‘Fashion Designer’ with the establishment of an online portal – www.shoedesignclub.com which transformed into www.indiadesignclub.com as the activities of the studio widened and the horizon expanded. Mr Sadiq highlighted some of the recent activities of the studio as setting up ‘India TREND PAVILIONS’, ‘THEME PAVILIONS’ at various INTERNATIONAL FAIRS and also ‘CONCEPTUALIZING EXHIBITIONS.’ Rounding off this segment, he said that the “Feather in the CAP” is that the studio activities now include advising on ‘RETAILING’ and to ‘TOP IT ALL’ ‘DESIGNING in the 3D WAY!’

Mr Sadiq then gave an overview of the Potentials and Prospects of the Indian Leather industry and gave statistics showing the growth of India’s Export of leather & leather products, at a CAGR of 5.87% in the last 5 years. He also gave a detailed statistical highlight of all segments of the leather industry and enunciated the reasons as to why India was a global player of standing in this area which according to him was Raw material adequacy, Best Tanning expertise, Available skilled workforce, Rapid increase in domestic consumption, Increasing capacity of the production units, World class institutional support for designing & testing, Changing product-mix in favor of comfort & Ladies shoes, from men and formal shoes and Long experience in EU & USA. Mr Sadiq then illustrated the points made by him through a film on the Indian Leather Industry titled “I-Potential.” He highlighted as to how India was shining at successive MODEUROP Roundtables.

He then traced the Development of the Indian Leather Industry in chronological order.

Indian Leather Industry - Reflections

- The Council for Leather Exports (CLE) has a unique place. Its relationship with the industry it serves is deep rooted. CLE had always been a step ahead of the industry and guided the industry in its path of growth, diversification and modernisation
Likewise, CSIR-CLRI’s research has generally been directed towards addressing specific technological challenges confronting the industry from time to time.

50’s - 60’s: Way back in the 1950’s and 1960’s, the leather industry of the country was in the cottage sector, producing either pickled/wet blue or vegetable tanned leather, adopting crude methods of tanning. The industry had a virtual aversion for technology, with more than 90% of the industry being in the hands of men with very limited education. It took a good deal of convincing the tanners by ‘show-how’ to turn their attention towards simple technologies like using drums instead of pits for tanning. Likewise, use of basic equipment for various tanning operations such as unhairing, fleshing, liming and deliming, etc., was introduced to the tanners. CLRI’s model tannery was a great source of education for the cottage and small tanners in those years.

70’s - 80’s: The leather industry underwent a metamorphosis in the 1970’s and 1980’s. The real push came from government policy. The foreign exchange crisis faced by India following the sudden spurt in oil prices after the seven day war between Egypt and Israel in 1973 was the trigger. With a view to encourage value addition to country’s raw material wealth before its export on the one hand and to increase employment opportunities on the other, the Government of India banned export of raw hides and skins, discouraged export of semi processed leather, wet blue or vegetable tanned, and actively encouraged manufacture and export of finished leather and downstream leather products such as shoe uppers, shoes, garments and assorted leather goods. The government offered a variety of incentives to those who were ready to espouse the new policy.

Technological support: While the environment for transformation of the industry was provided by government policy, without required technological support, the industry could not have moved forward. The trade policy was liberalised selectively to encourage industries with export potential, such as leather, to grow. CLE seized the opportunity and came to the forefront to help the industry speedily convert itself into a modern forward looking sector. This is when world-class machinery from Italy was being imported into India.

Mid-80’s: The first Computer Aided Design (CAD) machine for shoe design was bought by CLRI and demonstrated to the industry as early as in 1985. When it was bought by CLRI, many thought that CLRI was perhaps way ahead of time. Soon enough the usage of this machine increased and with the training provided by CLRI, many private enterprises started buying their own CADs. Subsequently many other national institutions followed suit.

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

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

Changing Role: Though its name may suggest that India’s role is predominantly in the area of leather manufacture, over the years, consistent with changing government policy and focus, the Industry also has changed its vision and widened its scope of activities. The UNDP-assisted National Leather Development Programme, executed by the Ministry of Industry, Government of India (1992-2000) provided with the opportunity of modernising its training facilities for training operatives, supervisors, managers and designers for footwear, garment and leather goods industries.

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

While concluding his lecture, Mr. Sadiq said that there was enormous opportunity for a ‘LEATHER TECHNOLOGIST’ to help and support the Leather Industry for which he called all Technologists to be Men of Steel like the Superman and come forward to help and support the Industry in its growth path.
Indian Leather Industry – Opportunities Galore

The Indian Leather Industry
- Is among the top ten foreign exchange earners for the country
- Provides employment to about 2.5 million people
- Is bestowed with an affluence of raw materials, with India endowed with 21% of world cattle & buffalo and 11% of world goat & sheep population.
- Has strong tanning base and produces 2 billion sq.ft. of leather annually, meets about 10% of the global requirement of leather.
- Is the second largest footwear producer after China, having an annual Production of 2065 million pairs.
- Is the second largest producer of Leather Garments with an annual production capacity of 16 million pieces and the third largest exporter
- Is the fifth largest global exporter of Leather Goods & Accessories including Saddlery & Harness with an annual production capacity of 63 million pieces of leather articles, 52 million pairs of Industrial gloves & 12.50 million pieces of Harness & Saddlery items.

Indian Leather Industry – Opportunity on exports

Ever since implementation of economic liberalization programme in 1991, the Indian leather industry has witnessed significant growth, with exports increasing from US $ 1418.78 million in 1990-91 to an all-time high value US $ 4868 million in 2011-12, showing a growth of 22.68% over previous year. Value added leather products and footwear now constitute about 80% of exports from the Indian Leather Sector. The Indian Leather Sector currently exports to about 70 countries. The target of the Government of India for the leather sector to achieve an export value of USD 14 billion by 2016-17, growing at a Cumulative Annual Growth Rate of about 25%. On the whole, the Indian leather industry has very good prospects on the export front.

Support measures available for setting-up a unit in India

- **Duty Free Import of Inputs:** Certain notified inputs used in the manufacture of value added leather products and footwear are allowed for import without duty.
Indian Leather Development Programme (ILDP): The Government of India implemented the ILDP programme during the XI Five Year Plan from 2007-12 with an outlay of USD 250 million approx for overall development of the leather industry in the areas of technological upgradation and modernization, environment management and human resources development. The ILDP is proposed to be implemented during the XII Five Year Plan also during 2012-17.

Foreign Direct Investment: The entire leather sector is now de-licensed and de-reserved, paving way for expansion on modern lines with state-of-the-art machinery and equipment. 100% Foreign Direct Investment (FDI) and Joint Ventures is already permitted through the automatic route for setting up units in India. Also, 100% FDI is permitted in single brand retailing. 100% repatriation of profit and dividends is allowed if investment made in convertible foreign currency.

Mega Leather Clusters: The Government of India has notified the Mega Leather Cluster scheme as part of the Indian Leather Development Programme (ILDP) for implementation during the remaining period of 11th Plan and 12th Five Year Plan period 2012-17 with a fund allocation of USD 120 million. As per the scheme, it is proposed to develop Greenfield Mega Leather Clusters in the States having large concentration of leather units and also in states having potential for growth of the leather sector. These Mega Leather Clusters, which will have world class infrastructure and support services, will play a crucial role in enhancing capacity of the Indian leather industry in the next 5 years.

Opportunities for selling in the Indian market

The Indian retail industry is the fifth largest in the world. Comprising of organized and unorganized sectors, India retail industry is one of the fastest growing industries in India, especially over the last few years. It is expected that by 2016 modern retail industry in India will be worth US$ 175-200 billion. The Indian retail sector will continue to expand at a fast clip, with the number of malls in the country estimated at 280 in 2011-12 from the level of 190 during 2010. India has added around 5 million sq ft of retail space in 2010 and approximately 15 million sq ft of space is lined up to get operational in 2011-2012.

The domestic market for leather and leather products in India is about US $ 3500 million. However, the economic growth of India and the growing affluence of consumers will lead to the significant growth of the domestic market in India for value added leather products and footwear and the domestic market for these products are likely to double in the next five years. Thus there is immense scope for selling value added leather products and footwear.

How a ‘Leather Technologist’ can reap the opportunities?

Future Co-operation with the Industry

- ILTA & Leather Technologists can tie-up with Institutions like National Institute of Design (NID); Footwear Design and Development Institute (FDDI) and Central Leather Research Institute (CLRI) in organising short-term and long-term design programmes for students and workers of Indian leather industry.
- Design seminars can be organised by ILTA with the joint participation Council for Leather Exports (CLE) and Central Leather Research Institute (CLRI). Your initiative of monthly seminar series is inspiring!
- The Council for Leather Exports is establishing a Sector Skill Council for Leather so as to train about 2 million workforce by 2020. ILTA expertise can be utilized for development of training curriculum and trainees for the Sector.
- Design Station: To set up an all products ‘Design Station’ for design and range building of seasonal design collection; offer new design collection and work in collaboration with International Design Studios to help the Indian Leather Sector stay ahead of time and season.’ This Design Station would support all Satellite Design Innovation Centres in India.
- Leather Incubator: The mandate of ‘The Leather INCUBATOR’ is to nurture a culture of developing new leathers based on the seasonal demands, so that the designs and concepts metamorphose into newer and niftier products or services capable of being marketed and sold. The outcome is creation of a new class of world-class LEATHERS.
The Leather INCUBATOR will use primarily the experience in Leather Design & Trends from Italian Leather Designers and International Chemical Companies and with counterparts from India with expertise in the field. The Leather INCUBATOR will look forward to work with Textile Associations in bringing International Fashions faster to its members. The Leather INCUBATOR will also take membership to International Fashion Organizations.

The Leather INCUBATOR will strive to serve the members of the Indian Leather Industry through:
- User Requirements Engineering
- Contextual Inquiry and User Research
- User Interface
- Interaction Design
- Surface Design and Texture Visualization
- User Interface Design Inspection
- Design Process Audits
- Design Training
- Design Capability Building and Institutionalization
- User Experience Design Consulting

Honestly, truly, where are we headed?

- Future growth of Global Leather Industry will continue to be market driven.
- We must believe in Technology partnerships with Indian Manufacturers & Exporters for their decided advantages in the integrated developmental plan of India.
- This is the way forward!
- This presentation is about LIFE ...Your’s, Mine, OURS ... How to INNOVATE & How to come to Terms with CHALLENGES!

In conclusion, he thanked ILTA for the opportunity given and said that it was indeed a great honour and a great pleasure.

At the conclusion of Mr Sadiq’s lecture; Mr Arnab Jha, President, ILTA presented a memento and a citation to Mr Md Sadiq, CSIR-CLRI in the august presence of Mr Tapan nandi, Regional Chairman (ER), CLE and Mr Susanta Mallick, General Secretary, ILTA.