

REPORT LEATHER AND ALLIED INDUSTRIES OF INDIA

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REPORT ON THE Leather & Allied Industries of India



DIRECTORATE OF COMMERCIAL PUBLICITY, MINISTRY OF
COMMERCE, GOVERNMENT OF INDIA, NEW DELHI

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We, the members of the Committee appointed ~~by the~~¹⁹⁶⁵ Ministry of Commerce, Government of India, vide letter No. 25/1/65-Exp. dated the 22nd January 1965 to review the progress of the tanning and leather industries and to recommend long term export policy, hereby, submit to the Government of India a report on leather and allied industries of India in nine chapters :—

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(SANJOY SEN)

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*President, Calcutta Hides and
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CHAPTER I

CONSTITUTION OF THE COMMITTEE

1.1 The Govt. of India, Ministry of Commerce have set up a Committee *vide* letter No. 25/1/65-Exp. dated the 22nd January, 65 to review the progress of the Tanning & Leather Industries. The terms of reference of the Committee are as follows :—

- (1) to review the progress of the Tanning & Leather Industry.
- (2) to assess the production of raw skins and hides and recommend future methods of more precise statistical information.
- (3) to promote development of Tanning & Leather Finishing industry in the different regions of the country.
- (4) to recommend a long—term export policy in the context of world market and trends in international trade, specifically competition from substitute products.

1.2 The composition of the Committee is as follows :

1. Dr. Y. Nayudamma, Director, Central Leather Research Institute, Adyar, Madras. *Chairman*
2. Shri T. Abdul Wahid, M. P., 19, Vepery High Road, Madras. *Member*
3. Shri Sanjoy Sen, M/s. National Tannery Co. Ltd., Mercantile Building, Lall Bazar St., Calcutta. *Member*
4. The President, Maharashtra Hides & Skins Merchants Association, 246-1, Dharavi Road, Bombay-17. *Member*
5. The President, Calcutta Hide & Skin Shippers, Association, Royal Exchange, Calcutta-1. *Member*
6. Shri M. J. Jamal Moideen, M. P., Chairman, Leather Export Promotion Council, Vepery High Road, Madras. *Member*

7. Shri R. P. S. Verma, Chief Research Officer, Office of the Economic Adviser to the Govt. of India, Ministry of Industry & Supply, New Delhi. *Member*
8. Shri K. Srinivasan, Deputy Secretary, Ministry of Commerce, New Delhi. *Member*
9. Shri L. G. Mirchandani, Deputy Secretary, Ministry of Industry & Supply, New Delhi. *Member*
10. Shri R. A. Bhote, Senior Marketing Officer, Dte. of Marketing & Inspection, New Secretariat Building, Nagpur. *Member*
11. Shri P. N. Chowdhury, Scientist, Council of Scientific & Industrial Research, Rafi Marg, New Delhi. *Member-Joint Secretary.*
12. Shri R. Thanjan, Development Officer, D.G.T.D. (Leather), Udyog Bhavan, New Delhi. *Member-Secretary.*

1.3 The Committee held meetings at Madras, Calcutta, Bombay and Delhi to formulate a programme for development of Tanning & Leather Industries during the Fourth Five Year Plan. We thank the staff members of the Central Leather Research Institute, Madras, for considerable assistance rendered to the Committee. The Committee acknowledges the active co-operation extended by Dr. S. K. Barat, Scientist, Central Leather Research Institute, Madras, for drawing up the plan for the development of Animal By-Products Industries. We would, specifically, like to mention the good work done by Sri P. S. Venkatachalam, Sri K. Seshagiri Rao and Sri N. Lakshminarayanan. Thanks are also due to Sri S. Nagarajan (S.S.I), Madras. We place on record our deep appreciation of the work done by Sri P. N. Chowdhury in his capacity as Member-Joint Secretary and Mr. R. P. S. Verma for the data on *Indian Leather Industry in International perspective*. They had to shoulder heavy responsibility in preparing the background notes and in assisting the Committee in its work in the finalisation of the Report. The Member-Secretary in spite of his many pre-occupations devoted time and energy in the work of the Committee and in the finalisation of the Report. We greatly appreciate the cooperation received from the Chairman and Members of the Committee. We also thank the members of the different organisations, institutions, industry and trade etc. who have taken pains to assist the Committee by furnishing detailed replies to the questionnaires and for their valuable suggestions. Acknowledgements for the published materials used by the Committee have already been incorporated in the background note under Chapter VII.

CHAPTER II

APPROACH TO THE PROBLEM

2.1 This Chapter emphasises on :

- (A) The approach adopted by the Committee in developing this report ;
- (B) Procedures adopted by the Committee in furtherance of its deliberations.

2.2 **Basic problems of the Leather, Footwear and Leather Goods Industries :**

The leather industry is as old as man, and yet, it continues to be young and faces many and varied problems of development. These problems may be grouped under the following heads :—

- (A) Resources—Mobilisation & Utilisation
- (B) Organisational Structure
- (C) Social
- (D) Technical
- (E) Marketing
- (F) Internal consumption
- (G) Finance and Management
- (H) Exports

Basic Approach :

2.3 The terms of reference laid down for the Committee are very broad-based and encompass more or less the analysis of the above set of problems. The Committee is required to present broad recommendations concerning each of the above problems. The Committee from the very outset was guided in its deliberations by a totality in approach in relation to the different aspects of the industry. This over-all point of view has been taken into account in tackling different segments of inter-related areas for techno-economic progress of these industries. For example, the export programme was built up only under the detailed assessment of such economic variables as internal production, domestic consumption and maintenance and developmental import requirements. While considering the regional development of the industry the Committee took into cognizance the question of balancing the existing industrial capacity in selected areas of the country *viz-a-viz* the need for its development in the newer areas. Similar approach was followed in other spheres also.

2.4 Though it is true that confusion of thought arising from divergence of opinions and interests on important issues persisted in the past and are still persisting, yet the Committee felt that the major drawback in the situation stems not so much from the absence of appropriate recommendations but from the lack of

co-ordinated measures in the large areas of implementation. Hence, the Committee from its initial position was guided by the context of practical difficulties regarding the implementation of its recommendations. Accordingly, it has, in its report earmarked the area of responsibility for different governmental and semi-governmental agencies in relation to the recommendations made.

Procedures and Limiting Factors :

2.5 The Committee took into account the already available background materials in the form of reports, research papers, notes and recommendations by various committees, individual research workers and different organisations in arriving at its final conclusions. It must be admitted that the Committee's work has been facilitated largely due to these background materials but nevertheless, its deliberations were hindered, to a significant extent, by the absence of appropriate statistical basis for leather and allied industries. As a result it has to depend many a time on the judgments and guesses of individual members of the Committee and, thereby, its recommendations suffer from these limitations.

2.6 It is well-known that the knowledge regarding the developments in the foreign market for leather and allied items is not perfect at the moment. A comprehensive programme for export of leather and allied items can be constructed only on the basis of information in details about the trends in foreign market changes. In the absence of adequate materials on these aspects, the Committee was forced to build up a skeleton working guide-lines on export and it is suggested that its recommendations should be understood in this light.

2.7 In order to arrive at some concrete formulations on the pattern of future growth of industries the Committee made arrangements for consulting the traders, industrialists, and technical experts in different regions of the country. It designed an elaborate questionnaire and circulated it to nearly 300 informants belonging to different sectors of the industry, trade and government and semi-government organisations. It must be said that, although, the Committee has received some response from interested individuals and organisations in different areas of the country, much has yet to be desired regarding a wider response from a larger section of the traders and industrialists. The Committee has received back 20% of the questionnaires circulated and thus has been benefited by the opinion of a minority section of the informants to whom the questionnaires have been sent.

2.8 A few background notes were prepared by the Committee to initiate and guide discussions. The background notes reviewed the progress of the industry, pinpointed the major problems facing them, charted the areas where recommendations had already been made and raised some fundamental questions to be answered by the Committee. Deliberations were conducted on the basis of these notes and the areas for additional recommendations were located.

CHAPTER III

INDIAN LEATHER AND FOOTWEAR INDUSTRY IN INTERNATIONAL PERSPECTIVE —PROSPECTS OF

3.1 Raw Hides & Skins :

3.1.1 India was a well known exporter of hides and skins before the outbreak of Second World War. During the war exports dwindled. The partition of the Sub-continent in 1947 left India with a net deficit in raw hides and substantially reduced exportable surplus in respect of raw skins. Export of hides continues to be banned and export of skins is increasingly restricted both to meet the increasing domestic requirements and for raising the exports structure from raw to the manufactured stage.

3.1.2 India possesses the largest cattle population in the world. Percentage of collection of hides and skins to the cattle population in the country is, however, much lower compared to that in other countries. The position in respect of skins is somewhat better. Of the cattle population, India obtains only 12% of hides as compared to 49% in respect of France, 44% of U.S.S.R., 37% of U. S. A. and 33% of New Zealand. Of the total of goat and sheep population, U. S. A. obtains as much as 52% of skins, New Zealand 47% and the share of U. K. and India is only 34%. In the background of low availability of hides in India due to peculiar socio-economic conditions and their increasing domestic requirements, it is no wonder that India does not occupy any important place in the world export of hides and skins as shown below :—

Raw Hides & Skins

(£ million)

<i>Developed Countries</i>	1962	1963	1964
		(Provisional)	
U.S.A.	29.6	26.6	33.0
Australia	26.3	31.6	34.6
New Zealand	12.3	12.1	15.4
France	10.5	10.3	10.2
West Germany	8.5	8.4	8.5
South Africa	7.9	8.6	8.6
<i>Developing Countries</i>			
Argentina	32.7	27.9	20.2
India	7.5	8.2	6.4
Pakistan	4.3	3.9	..
Uruguay	5.1	5.5	4.5
East Africa	4.0	3.7	3.5
Nigeria	3.7	4.2	..

3.1.3 It may be safe to presume that world trade in raw hides and skins which increased by about 6% per annum between 1953-55 and 1959-61 continues to maintain at least the same trend if not a rising curve in recent years. The rapid expansion in live-stock number in developed countries particularly Western Europe and sharp increase in the consumption of leather manufactures are the contributory factors. The major portion of exports of developed countries is traded among themselves, whereas, the bulk of consignment of raw hides and skins from the developing countries is marketed to developed countries. Among the developed countries, U. S. A., Australia, New Zealand, France, West Germany and South Africa are the major exporters of raw hides and skins to the world market. U. S. A. and E. E. C. are the major producers of cattle hides while Australia and New Zealand are the principal suppliers of sheep and lamb skins to the world market. Among the developing countries, India is the largest producer of goat skins ; Argentina and Brazil are the major producers of cattle hides and Argentina and Uruguay of sheep skins. Among the centrally planned countries China (mainland) is world's main source of pig skins while the U. S. S. R. is an important producer of cattle hides, calf and sheep skins. The following statistics briefly indicate the world export of hides and skins by broad groupings:

Value of World Exports of Hides and Skins—Raw

	(£ million)	
	1953-55	1959-61
	Average	Average
World	573	845
Of which		
Developed countries	324	521
Developing countries	215	271
Centrally planned countries	35	53
(a) U.S.S.R. & E. Europe	35	49
(b) China (mainland)	N.A.	4

3.1.4 India continues to maintain her top position in the world as an exporter of skins. The disturbing feature, however, is that other developed countries, of late, have made more rapid progress in this direction. The development of tanning industry in other developing countries will further create problems with regard to the promotion of Indian leather. The following statistics illustrate the growth of export trade in raw skins in some of the major producing countries :

Volume of Exports of Raw Goats and Kid Skins

							(Tons)		
							1961	1962	1963
India	.	.	.	.	.	.	10167	13172	12544
Pakistan	.	.	.	.	.	.	6321	6094	4650
Nigeria	.	.	.	.	.	.	2562	2652	2400
E. Africa	.	.	.	.	.	.	2092	2426	2192
Turkey	.	.	.	.	.	.	2444	2084	2468
S. Africa	.	.	.	.	.	.	1507	1354	2194
Argentina	.	.	.	.	.	.	N.A.	994	1492
Greece	.	.	.	.	.	.	1081	1324	1153

N.A. = Not available.

Prospects :

3.1.5 World demand for raw hides and skins is quite strong. Our inability to increase the exportable surplus in these items restricts the scope for further expansion in these lines. As already mentioned, we are a net importer of hides. With the increasing domestic requirements and to meet our export obligations, perhaps increasing imports of hides may be necessary to have a stabilising influence on price within the country. Exports of skins, bulk of which consist of goat skins, are under quota which is being progressively reduced for accentuating the export of tanned and finished skins. The same policies are likely to be followed in the Fourth Plan.

3.2 Leather :

3.2.1 India's position in respect of leather tanned or undressed is unique in the world markets especially in the U. K. Indian exports of hides and skins tanned is largely traded by the trade name of East India kips. Indian hides are thinner and smaller in size and are, therefore, called kips, having been found more suitable for leather shoe-uppers, lining, etc. The development of a well organised tanning industry in India primarily to cater to the needs of the leather industry in the U. K. has given an advantageous position and her contribution to the export trade in leather is larger than any other single country in the world. The following figures indicate that though India continues to lead in leather trade, other countries are also catching up. The competition has become stiffer in recent years especially from the developed countries.

Exports of leather from important countries

	(£ million)		
	1961	1962	1963
Australia	3.1	2.8	2.7
Canada	3.9	3.8	3.1
India	19.5	16.9	18.9
U.K.	18.2	18.2	19.1
Belgium	4.2	4.4	4.6
France	21.0	21.8	23.1
Italy	3.0	4.9	6.2
Netherlands	6.3	6.5	6.7
West Germany	13.7	13.6	13.9
U.S.A.	16.4	12.0	14.6

Till very recently U. K. and U. S. A. were the main markets for our tanned leather exports. In recent years, however, with the growth of our general trade with the East European countries, U. S. S. R. being the main partner, leather exports to that group of countries have assumed considerable importance. Japan, West Germany, France and Italy have also figured of late prominently as customers of Indian leather. It has been observed that the share of India in the imports of leather of the U. K., France, West Germany, U. S. A. and Japan is quite significant. Though the size of direct imports into a number of other countries is small, yet, there is every reason to believe that a part of East Indian Leather exports to the U. K. is being re-exported indirectly to a number of other countries in the form of finished leather. This may be seen from the estimated value of leather exports from various countries. In 1963 exports from U. K. were over £ 19 million, France £ 23 million, West Germany £ 13 million, U. S. A. £ 15 million, etc. Among the developing countries, Pakistan, Morocco, Uruguay and Kenya are some of the countries with whom India has to face competition which is likely to become stiffer in the years to come. In the U. K. market which takes nearly half of our leather exports, India's main competitors are the U. S. A., Pakistan and Nigeria. Imports of leather into the E. E. C. countries are mostly from the member countries and in addition India has to face competition from the more advanced countries such as the U. K. and the U. S. A. Detailed statistics regarding China's exports to these countries are, however, not available. Indications are that competition is quite stiff.

3.2.2 Prospects :

The prospects of Indian leather in world markets cannot be said to be very bright ; but it is quite encouraging. The standard of living of the people everywhere especially in the Asian and African countries is bound to increase and with that demands for leather goods will simultaneously grow. The wage rate in India has been increasing ; but they are still lower than those in many other countries. This advantage should be fully explored. There is rising demand in world markets and exports can substantially be increased. We have, however, to make our leather competitive both in the quality required by the foreign importers and the price which is being charged by other producers. High tariffs in certain countries such as the U. S. A. on the import of Indian leather has been retarding the growth of our export trade. It has to be emphasised that Indian leather is not in the finished form ; it is only a raw material for the leather industries in those markets. Leather imports from India as such should be exempted from duty or reduced to the minimum level. Free of duty treatment offered by the E. E. C. countries among themselves should be applicable for E. I. Kip leather as it is only in a semi-manufactured stage meant for further processing. It is hoped that with the obligations shown by the developed countries under the World Trade Conference, imports from the developing countries in which they are the main producers and exporters would receive preferential treatment. This will enable India to increase her exports of leather.

3.3 Leather goods :

3.3.1 World trade in leather goods is expanding very rapidly and there is every reason to hope that with the higher standard of living envisaged by the Asian and African countries the world demand for leather goods will continue to show a rising trend. Till recently India used to import leather goods of any quality. The restrictions on imports coupled with the growth of the leather industry enabled us to make a start in exporting leather goods. The value of exports of leather goods is small at present ; but this group of commodities offers ample opportunities for augmenting our foreign exchange earnings. It needs to be stressed that the price and quality have to be matching with other countries, to effect sizeable increase in exports. Substantial increases in export earnings have been anticipated in the Fourth Plan from this item.

3.3.2 There is, however, a new and somewhat disturbing trend in some markets for the development of substitutes for leather goods. Competition from substitutes is likely to grow and has to be faced by the leather industry. It is therefore necessary to find out new uses, publicise the goods qualities of leather, mixing leather with other fabrics and to find out new markets and to develop and produce goods which are required in changing and fashionable societies. It has to be noted that India has to face stiff competition from the developed countries in case of leather goods as they have well established leather industry and have entered in the world market much earlier. If exports from India have to make a headway, it has to be subsidised.

3.4 Footwear :

3.4.1 Exports of leather footwear is a new line which has developed in recent years. Nearly 80% of footwear production is turned out by widely disposed small scale and cottage units. The possibilities of substantial increases in our exports of leather footwear to the Western countries and to the U. S. A. are limited because of the price and quality factors. There is, however, ample opportunity for the growth in our export of footwear to East European countries. If exports of footwear have to be taken seriously a few public or private enterprises have to be set up mainly for exports to adhere to the international quality standards and the price has to be reasonable.

3.5 Export Promotion Measures :

The Government have taken several steps to promote the exports of leather and leather goods. Export Promotion Councils have been set up at Madras and Kanpur. The Council at Madras among its various functions administers a voluntary quality control scheme to check that the leather exported is not below the specified limit. Import entitlements against leather and leather goods exports are also granted for the import of raw materials, chemicals and machinery. Institutional framework has been laid and it is upto the exporter and the manufacturers to take advantage and to increase the export earnings of the industry. Larger scope however, exists in our neighbouring countries of Asia and Africa. These markets have not been tapped as yet and if concerted efforts are made from now to develop trade within them, there is every possibility of a substantial increase in our exports of leather and leather goods.

N.B.—The Statistics for International Trade in hides, skins, leather and footwear are appended.

Source : U.N.O. Trade Statistics.

Value of Exports of Hides and Skins from Important Countries

(£ Million)

	1961	1962	1963
Australia	23.3	26.3	31.6
Canada	6.0	5.0	4.5
E. Africa	4.2	4.0	3.8
India	6.1	7.5	8.2
New Zealand	12.0	12.3	12.1
Nigeria	4.0	3.7	..
Pakistan	4.6	4.3	3.6
U.K.	3.8	4.3	3.7
Denmark	3.6	3.6	3.1
Sweden	3.5	3.1	3.4
Switzerland	3.1	2.9	2.6
Belgium	2.9	3.4	3.2
France	10.8	10.5	10.3
Italy	6.2	5.8	4.9
Netherlands	7.5	7.0	6.9
W. Germany	7.5	8.5	8.5
Greece	3.9	3.7	4.1
South Africa	7.3	7.8	8.5
Argentina	28.2	32.7	27.5
Uruguay	5.2	5.1	5.2
U.S.A.	30.8	29.6	26.8

I—(i) Value of Imports of Hides and Skins into Important Countries

(£ Million)

	1961	1962	1963
<i>Countries</i>			
Canada	4.1	3.7	2.6
U.K.	19.1	16.5	17.4
Sweden	4.9	5.5	5.6
U.S.A.	23.0	23.7	22.5
Japan	20.8	22.5	23.7
<i>E.C.M.</i>			
Belgium	4.9	5.8	5.4
France	32.3	32.6	38.5
Italy	27.6	28.4	29.7
Netherlands	10.5	9.0	8.3
W. Germany	30.9	27.2	21.6

II—(b) *Volume of Imports of Sheep Skins and Lamb Skins into*

(Tons)

<i>Source</i>	1961	1962	1963	<i>Source</i>	1961	1962	1963
<i>U.K.</i>				<i>U.S.A.</i>			
Australia .	6893	5800	5889	Australia .	179	357	
New Zealand .	4765	5148	4920	New Zealand .	17164	15521	
S. Africa .	4769	4794	4156	Iran .	4422	4702	
U.S.A. .	2580	4794	3221	Turkey .	1589	970	
Argentina .	847	1198	905	Brazil .	861	724	
Ethiopia .	940	857	1108	Argentina .	192	463	
TOTAL	24675	24760	26241	TOTAL	27179		
<i>Italy</i>				<i>W. Germany</i>			
Australia .	9271	11533	10008		992	1296	1712
New Zealand .	1480	1105	1159		1097	1200	11550
E. Africa .	690	1046	803		128	121	208
U.K. .	445	568	854		1122	1058	1303
Argentina .	2406	2721	2541		325	317	583
Greece .	1095	900	809		470	1458	1136
Iran .	1367	1580	2107		235	127	60
Ireland .	474	35	..		1546	1029	1284
Lebanon .	1502	1506	1975		46	12	49
S. Africa .	2740	2293	2519		679	740	1175
Turkey .	1051	1766	1929		70	260	168
TOTAL	30642	34786	35127		12730	11746	13558
<i>France</i>							
Australia .	57409	52266	56516				
New Zealand .	3233	4480	4510				
Algeria .	35715	2377	3700				
Argentina .	10089	12823	11637				
S. Africa .	5536	4965	3704				
Uruguay .	6266	4701	6010				
TOTAL	91264	86456	91865				

Volume of Exports of Sheep and Lamb Skins from Important Countries
(’000 Tons)

<i>Source</i>	1961	1962	1963
Australia	82.2	91.6	87.8
New Zealand	33.1	33.8	34.9
South Africa	18.6	17.1	16.4
Argentina	17.6	23.5	17.9
Uruguay	10.1	9.0	9.5
U.K.	5.2	5.6	5.2
Greece	5.4	4.4	5.3
U.S.A.	6.0	5.3	6.9
Turkey	4.7	3.9	4.2
TOTAL	182.9	184.2	186.8

II—(i) Volume of Imports of Sheep and Lamb Skins into Important Countries
(’000 Tons)

	1961	1962	1963
U.K.	24.7	24.8	26.2
France	91.3	36.4	91.8
Italy	30.7	34.7	35.1
W. Germany	12.8	11.7	13.6
Spain	2.8	7.9	9.7
U.S.A.	27.7	26.3	24.7
Netherlands	7.3	5.7	6.4
Belgium	9.6	10.1	9.9
Sweden	4.4	4.5	4.8
TOTAL	211.3	212.1	222.2

III—Volume of Exports of Calf Skins and Kips from Important Countries
(’000 Tons)

	1961	1962	1963
Australia	3.8	3.6	4.3
Canada	3.2	2.7	2.9
New Zealand	2.0	3.0	2.8
France	9.0	8.2	11.5
Netherlands	3.8	4.7	6.0
West Germany	2.0	2.8	4.5
Argentina	1.8	4.1	4.8
Poland	2.1	2.0	N.A.
Switzerland	3.8	4.0	4.2
U.S.A.	11.9	9.2	8.1
TOTAL	51.5	52.3	60.0

III—(i) *Volume of Imports of Calf Skins and Kips into Important Countries*

	(‘000 Tons)		
	1961	1962	1963
Canada	2·0	1·3	1·1
U.K.	4·7	3·6	4·1
France	2·7	3·3	3·6
Italy	8·1	6·8	10·9
West Germany	10·7	11·2	9·1
Japan	8·9	10·6	11·7
Spain	0·7	6·3	4·2
U.S.A.	7·2	8·2	10·8
TOTAL	48·1	56·1	60·8

III—(ii) *Volume of Calf Skins and Kips into*

	(Tons)		
	1961	1962	1963
(a) Japan			
Australia	2584	3488	3343
Canada		762	1086
New Zealand	324	432	601
Italy	411	962	1091
Netherlands	31	42	439
West Germany	17	62	503
Switzerland	180	188	403
U.S.A.	4187	4113	3557
Argentina	47	80	65
TOTAL	8922	10607	11674
(b) U.K.			
Australia	245	229	143
Canada	192	58	123
New Zealand	286	327	321
Irish Republic	173	110	202
France	1252	684	914
Italy	174	157	91
Netherlands	756	550	593
Denmark	556	659	811
Sweden	18	126	147
U.S.A.	324	176	123
TOTAL	4718	3561	4066

	1961	1962	1963	1961	1962	1963
(c) <i>West Germany</i>				(d) <i>Italy</i>		
Belgium . . .	143	330	471	129	78	164
France . . .	2247	2584	1925	539	426	1721
Italy . . .	1700	1587	947	118	68	121
Netherlands .	1143	1324	1230	468	418	359
W. Germany .	..	..	..			
TOTAL EEC .	5233	5825	4573	1254	990	2365
Australia . . .	71	52	36	401	332	503
Canada . . .	207	191	25	206	52	82
E. Africa . . .	..	..	..	974	566	848
New Zealand .	515	682	388	459	528	623
Argentina . . .	..	..	..	502	835	1243
Austria . . .	N.A.	377	676	..	12	63
Denmark . . .	391	581	460	45	100	21
Poland . . .	280	486	402	1045	518	683
S. Africa . . .	41	61	..	512	649	640
U.S.A. . . .	1854	1084	431	1112	682	1180
Switzerland .	969	1278	965	587	253	432
TOTAL . . .	10697	11246	9122	8079	6797	10889
(e) <i>U.S.A. ('000 pieces)</i>						
Canada . . .	303	345	394			
France . . .	420	241	447			
Italy . . .	12	150	119			
Netherlands .	86	136	188			
W. Germany .	112	131	263			
Poland . . .	78	102	105			
Switzerland .	102	144	128			
TOTAL . . .	1425	1447	1912			

III—(ii) *Volume of Exports of Cattle Hides from Important Countries*

('000 Tons)

	1961	1962	1963
Australia	21·6	32·6	40·9
Canada	29·6	24·1	27·4
New Zealand	14·5	18·6	21·0
East Africa	14·6	13·8	12·5
U.K.	18·0	10·4	11·4
Belgium	13·7	17·5	20·8
France	36·5	35·8	36·3
Italy	10·7	10·7	9·8
Netherlands	29·8	29·2	35·0
West Germany	31·3	40·2	47·5
Argentina	164·7	214·7	192·7
Denmark	10·0	11·3	13·0
South Africa	22·9	21·4	24·5
U.S.A.	204·8	190·7	213·5
Uruguay	16·5	21·4	20·4
TOTAL	679·7	739·0	782·4

IV—*Volume of Imports of Cattle Hides into Important Countries*

Canada	20·8	18·5	18·1
India	4·2	4·1	5·5
U.K.	40·3	31·4	31·3
Belgium	9·4	17·8	17·8
France	17·2	19·1	22·1
Italy	75·0	86·8	97·1
Netherlands	51·8	46·6	49·8
W. Germany	91·3	83·6	75·8
Spain	12·6	20·8	24·9
Sweden	12·6	15·9	17·9
Yugoslavia	21·0	20·3	22·1
Czechoslovakia	40·4	41·3	36·4
Poland	35·7	37·1	30·7
Japan	113·4	115·8	129·2

Volume of Imports of Cattle Hides into

		('000 Tons)		
<i>Source</i>		1961	1962	1963
(a) <i>U.K.</i>				
Canada		1700	119	196
Australia		253	264	1451
East Africa		3599	2800	1855
New Zealand		1205	940	856
Italy		3405	2489	2332
Netherlands		3386	2758	2546
West Germany		2509	2500	2165
Argentina		5570	3169	1833
Denmark		3714	5325	5257
Sweden		1709	2738	3176
Ethiopia		1403	1425	928
U.S.A.		1796	802	1318
TOTAL		40330	31400	31320
(b) <i>Netherlands</i>				
Belgium		10223	9319	11500
France		3405	2142	1057
Italy		23	69	280
West Germany		7119	8749	9938
TOTAL E. E. C.		20770	20270	22775
Canada		2068	776	1148
Nigeria		1089	1054	1003
U.K.		3938	4493	2995
Argentina		10167	9685	10112
		2525	1892	2128
U.S.A		7126	3728	5774
TOTAL		51773	46551	49848

<i>Source</i>					1961	1962	1963
(c) Italy							
Belgium	.	.	.	.	411	547	1172
France	.	.	.	.	14951	16657	16423
Italy	.	.	.	.	..	..	..
Netherlands	.	.	.	.	5367	6460	8307
West Germany	.	.	.	.	6804	10712	13702
TOTAL E.E.C.					27533	34376	39604
Australia					523	963	1809
Canada					852	283	375
East Africa					2707	2546	2272
New Zealand					3477	5673	8162
Nigeria					2998	2315	1776
Argentina					9413	13296	13640
Ethiopia					2949	2890	2513
South Africa					7440	9144	7811
U.S.A.					7779	5140	6791
Uruguay					740	721	1889
TOTAL					75005	86779	97185
(d) West Germany							
Belgium	.	.	.	.	2604	4634	5702
France	.	.	.	.	7814	5164	4410
Italy	.	.	.	.	910	1181	1610
Netherlands	.	.	.	.	6324	6779	7453
West Germany	.	.	.	.	..	..	..
TOTAL E.E.C.					17652	18758	..
Australia					1741	3252	3650
Canada					5743	4881	2839
East Africa					583	1054	N.A.
New Zealand					2335	2693	2261
Nigeria					..	..	..
Argentina					20363	19221	18372
Ethiopia					..	..	..
South Africa					2045	709	N.A.
U.S.A.					23175	15230	12885
Uruguay					4638	3860	2348
TOTAL					91296	83559	75850

<i>Source</i>	1961	1962	1963
<i>(e) Japan</i>			
Australia	18472	20616	23455
Canada	4191	2810	2339
New Zealand	1674	2080	3254
U.S.A.	88114	86794	98096
Thailand	1478	1110	364
Italy	33	69	300
Argentina	458	374	239
TOTAL	113414	115816	129132

V—Volume of Exports of Goat Skins from Important Countries

		(Tons)	
India	10167	13172	12544
East Africa	2092	2426	2192
Nigeria	2552	2652	2400
Pakistan	6321	6094	4650
Turkey	2444	2084	2468
South Africa	1507	1354	2194
Argentina	N.A.	994	1492
Greece	1081	1324	1153

V—(i) Imports of Goat Skins into Important Countries

India	410	892	1092
U.K.	2544	2392	2889
France	2169	2464	3009
Italy	7881	5710	7846
West Germany	5107	3859	3110
Sweden	1635	1829	1800
U.S.A.	10890	11374	11546

V—(ii) Imports of Goats and Skins into

(a) U.K.

India	377	345	211
Kenya	..	..	439
Tanganyika	609	610	507
Uganda	..	..	30
New Zealand	16	70	33
Nigeria	871	822	999
Pakistan	582	397	480
TOTAL	2544	2392	2889

<i>Source</i>						1961	1962	1963
(b) U.S.A.								
India	.	.	.	.	.	3006	3445	3635
Nigeria	.	.	.	.	.	1617	1216	2554
Pakistan	.	.	.	.	.	2531	2197	2091
Iran	.	.	.	.	.	726	1111	952
Ethiopia	.	.	.	.	.	549	411	1093
Brazil	.	.	.	.	.	1114	1036	2077
Indonesia	.	.	.	.	.	N.A.	89	464
TOTAL						13240	11374	14773
<i>Italy</i>								
East Africa	.	.	.	.	.	858	480	517
India	.	.	.	.	.	276	140	75
Saudi Arabia	.	.	.	.	.	217	278	236
Pakistan	.	.	.	.	.	306	614	680
Lebanon	.	.	.	.	.	792	405	592
Turkey	.	.	.	.	.	685	410	467
China	.	.	.	.	.	N.A.	100	2144
Ethiopia	.	.	.	.	.	529	402	202
Somalia	.	.	.	.	.	406	341	242
South Africa	.	.	.	.	.	353	481	505
TOTAL						7881	5710	7846
<i>West Germany</i>								
India	.	.	.	.	.	771	744	532
East Africa	.	.	.	.	.	276	313	224
Pakistan	.	.	.	.	.	1246	1142	761
Iran	.	.	.	.	.	667	74	136
Indonesia	.	.	.	.	.	268	334	96
Greece	.	.	.	.	.	317	131	342
Spain	.	.	.	.	.	277	91	91
TOTAL						5107	3859	3110

Value of Exports of Leather from Important Countries
(£Millio)

<i>Source</i>	1961	1962	1963
Australia	3.1	2.8	2.7
Canada	3.9	3.8	3.1
India	10.5	16.9	18.9
U.K.	18.2	18.2	19.1
Belgium	4.2	4.4	4.6
France	21.0	21.8	23.1
Italy	3.0	4.9	6.2
Netherlands	6.3	6.5	6.7
West Germany	13.7	13.6	13.9
U.S.A.	16.4	12.0	14.6

Value of Imports of Leather into Important Countries
(£Million)

<i>Source</i>	1961	1962	1963
Canada	3.6	3.8	4.0
U.K.	22.8	19.3	20.2
Belgium	6.8	5.9	7.0
France	5.3	6.1	7.7
Italy	6.7	6.2	8.6
Netherlands	5.9	5.1	6.6
West Germany	22.4	22.8	23.1
U.S.A.	13.4	17.0	17.2
Sweden	3.8	4.0	4.5
Switzerland	5.8	5.7	6.6

Import of Leather into
(Qty. in metric tons)

<i>Source</i>	1961	1962	1963
(a) U.K.			
U.S.A.	1644	531	963
Canada	964	676	721
France	1677	1205	1321
West Germany	774	551	368
Australia	1922	1579	1835
Nigeria	292	346	381
India	14286	12319	11885
Pakistan	1479	1601	1187
TOTAL	28652	24042	24723

<i>Source</i>	1961	1962	1963
(b) West Germany			
U.S.A	1501	960	819
Belgium Lux	688	903	1003
France	3267	4178	4213
Italy	558	759	1224
Netherlands	1866	2372	2587
U.K.	1614	1699	1704
India	2701	1913	1914
Austria	89	658	462
TOTAL	13405	13442	15731
(c) Italy			
U.S.A.	170	91	313
France	826	804	945
West Germany	922	801	778
U.K.	477	417	705
Yugoslavia	196	312	353
India	253	322	721
TOTAL	3964	4692	6421
(d) Switzerland			
France	1435	474	534
W. Germany	1226	1152	1330
Italy	234	217	282
U.K.	276	299	375
Austria	131	138	217
U.S.A.	543	473	502
TOTAL	3434	3214	3704
(e) France			
U.S.A.	480	478	554
West Germany	513	559	850
U.K.	284	551	529
Morocco	496	628	562
India	870	958	933
TOTAL	3832	4383	5444

Imports of Leather Bovine (nos. entered into)

Qty. = tonne

<i>Source</i>	<i>U.K.</i>		<i>Source</i>	<i>W. Germany</i>	
	1962	1963		1962	1963
U.S.A.	204	683	Belgium-Lux	608	667
Ireland	1674	2898	France	1239	954
Australia	245	1655	Italy	374	646
India	8588	8178	Netherlands	1826	2090
Pakistan	945	908	U.K.	711	792
Canada	292	618	Austria	322	406
TOTAL	13014	16630	TOTAL	6018	6562

<i>Source</i>	<i>Italy</i>	
	1962	1963
Argentina	..	666
France	128	138
W. Germany	61	64
U.K.	74	152
Pakistan	440	320
TOTAL	862	1726

<i>Source</i>	<i>Switzerland</i>		<i>Source</i>	<i>France</i>	
	1962	1963		1962	1963
U.S.A.	236	214	U.S.A.	191	134
W. Germany	737	760	W. Germany	138	323
Italy	126	173	U.K.	382	352
Austria	120	200	Madagascar	343	231
Netherlands	127	125			
U.K.	86	120			
TOTAL	1745	1894	TOTAL	1493	1894

Exports of Footwear from important countries

(Value '000 dollars)

	1961	1962	1963
Italy	125128	141728	165944
France	50046	53046	58582
U.K.	36765	35107	36068
Switzerland	13901	14281	N.A.
Austria	5530	6268	N.A.
Japan	62291	84579	65674
India	4970	5561	3169
Hongkong	18482	N.A.	25608
W. Germany	17005	18497	24781
Yugoslavia	9294	12042	20609

Imports of Footwear into important countries

Value '000 dollars

<i>Source</i>	1961	1962	1963
U.S.A.	125858	133995	129269
Canada	20674	20199	18781
U.K.	54672	49205	54762
W. Germany	46484	62107	73372
Belgium-Lux	17710	18970	23665
Netherlands	13553	16751	22007
Sweden	19671	20024	24911
Switzerland	13650	14281	N.A.

VII—Imports of Footwear into

Qty. = '000 Pairs

	1961	1962	1963		1961	1962	1963
(a) <i>U.S.A</i>				(b) <i>Canada</i>			
Italy	11268	15308	19815	Italy	731	1047	1357
France	1286	2059	1609	France	82	153	83
U.K.	2004	2658	2330	U.K.	1869	1730	1274
Spain	604	1061	1083	Czechoslovakia	1192	1213	1205
Japan	83150	144768	100098	Japan	13798	11817	12588
India	653	933	1053	India	472	443	440
Hongkong	2949	6715	4289	Hongkong	2113	3328	3639
Belgium	837	1453	1270	U.S.A.	887	697	
Switzerland	319	379	313				
Canada		1560	1409				
TOTAL	106532	181053	138874	TOTAL	21680	21573	22423

Qty. = '000 Pairs

	1961	1962	1963		1961	1962	1963
(c) <i>U.K.</i>				(d) <i>W. Germany</i>			
Italy	. 6275	5746	N.A.	France	. 2115	3123	3829
France	. 2889	2370	N.A.	Italy	. 3742	5177	7206
Belgium	. 1210	1245	N.A.	Netherlands	. 191	923	1024
Switzerland	. 324	207	N.A.	U.K.	. 223	231	293
Ireland	. 1161	910	N.A.	Austria	. 553	780	563
Yugoslavia	. 259	206	N.A.	Switzerland	. 319	333	434
Czechoslovakia	. 661	679	N.A.	Yugoslavia	. 174	797	1465
India	. 997	1194	N.A.	Japan	. 843	1377	1351
Hongkong	. 18413	16122	N.A.	Hongkong	. 919	1328	1371
TOTAL	. 35652	32456	N.A.	TOTAL	. 11616	16032	19232

(e) <i>Sweden</i>				(f) <i>Belgium-Lux</i>			
W. Germany	. N.A.	N.A.	696	Italy	. 879	N.A.	1566
Italy	. N.A.	N.A.	2521	Netherlands	. 1295	N.A.	1282
U.K.	. N.A.	N.A.	201	W. Germany	. 519	N.A.	508
Switzerland	. N.A.	N.A.	118	Switzerland	. 72	N.A.	58
Czechoslovakia	. N.A.	N.A.	326	Czechoslovakia	821	N.A.	753
				East Germany	262	N.A.	165
TOTAL	. N.A.	N.A.	7239	TOTAL	. 5893	N.A.	7064

CHAPTER IV
GUIDE LINES FOR THE FOURTH PLAN FOR THE
DEVELOPMENT OF INDIAN LEATHER, LEATHER
GOODS & FOOTWEAR AND ABATTOIR
BYE-PRODUCTS INDUSTRIES

SECTION A : LEATHER

4.1.0 Goatskins :

4.1.1 Statistics :

4.1.1.1 Availability :

(Figures in million pieces)

	1964-65	1966-67	1970-71
Indigeneous	34.06	34.93	41.00
Imported	0.65	0.55	0.50
TOTAL	34.71	35.48	41.50
4.1.1.2 Consumption pattern in millions :			
Export	30.64	30.94	34.15
Indigenous	4.07	4.54	7.35
TOTAL	34.71	35.48	41.50
4.1.1.3 Production pattern as envisaged for Export :			
Raw Skins	10.93	9.54	4.40
Pickled & Chrome Blue	4.23	4.50	9.00
E.I. Tanned	14.92	15.50	17.75
Glazed Kid	0.26	1.00	2.00
Finished leather	0.30	0.40	1.00
TOTAL	30.64	30.94	34.15
<i>Domestic use</i>			
Village Tanning	2.00	2.00	1.80
Finished leathers of various types	0.80	1.00	5.00
Glazed Kid	0.15	0.15	0.40
Veg. tanned Leather (inclusive of E.I. tanned)	1.12	1.39	0.15
TOTAL	4.07	4.94	7.35

NOTE 1.—The availability figures are based on statistical data which are at best tentative and as such the targets drawn as based on current trends and past performance are only indicative. This remark applies to all items like sheep, cows and buffaloes as well.

NOTE 2.—The figures for pickled, chrome Blue, E. I. goats are expected to overlap considerably and it is therefore advisable to take the totality of the picture into consideration.

NOTE 3.—Against the classification 'finished leather of various types' provision has been made for 0.5 million goatskin upper pieces which will reach a figure of 4.0 million in 1970-71 based on the idea that they may be used in place of cow hides. Otherwise they may be shown under vegetable tanned leathers.

4.1.2 Consumption Pattern :

Consumption pattern has been set to show a progressive increase over the period as there is an increasing demand from abroad for goat skin leathers. The internal consumption of goat skin leather is also expected to increase as goat skins may have to be used in greater quantities to substitute cow hide upper in order to avoid import of cattle hides. The consumption pattern has been based on the availability potential of goat skins in the years to come.

4.1.3 Production Pattern :

Production pattern set envisages a gradual decrease in the export of raw goat skins, an increase in the production and export of pickled and chrome blue goat skins and an appreciable increase in the export of E.I. goats. Provision has also been made for an immediate rise in glazed kid production as there is currently a great demand abroad for this type of leather. As indicated above, provision has also been made for the production of goat upper leather.

4.1.4 Finished goat skin leathers for export :

Finished goat skin leathers that are being exported presently consist mainly of suedes, anilines and moroccos, apart from glazed kids. These are made from East India tanned goat skins. Though, the export under this head is small at the moment, the performance is bound to improve in the next plan period, as there is a steady and growing demand for these items from countries abroad. The phasing has been done keeping in mind the steady increase in the demand.

4.1.5 Finished goat leathers for domestic consumption :

A limited quantity of goat skin finished leather is consumed in our country. These consist of suedes, chamois, linings and fancy types. These have been shown to progressively increase in the Fourth Plan period as internal demand for such items is bound to go up with the rise in the standard of living of the people. The production of fancy leathers is considered adequate to meet the export needs of leather goods manufacturers. As already explained, provision has been made for the manufacture of goat upper leather in case it is planned to meet the likely upper leather shortage from this source.

4.1.6 Village requirements :

Tannage of goat skin at the village level is expected to show a reduction in the years to come for more than one reason. In view of the current great demand for raw goat skin, the villagers have difficulty in getting sufficient number of goat skins for local tanning.

Moreover, the villager, as he becomes educated regarding the potential value of goat skin, is expected to divert goat skins to better organised units rather than process them into products that have a lower economic value. It has, therefore, been shown that the village consumption will drop from a figure of 2 million pieces to 1.8 million at the end of the Plan period.

4.1.7 Ways and Means :

Ways and means of achieving the targets have also been studied as this will help to form a better picture of foreign exchange requirements to meet the demand for import of chemicals and machinery needed for fulfilling the targets. As there is considerable idle capacity in the industry very little of capital investment on land and buildings is considered necessary. The investment required, in terms of both blocked and working capital, machinery needed, power, steam and water requirements as well as the chemicals needed have all been worked out and indicated in annexures I, II and III. It must be emphasised that these are only broadly indicative and are not meant as schemes for setting up of units etc. The actual details on the size of the minimum economic unit, whether it should be in the small scale, or organised sector, whether the unit should be run on two shifts or one shift are all factors that have to be gone into by an expert technical committee and decided.

4.1.8 In determining the needs of the industry, the present interest shown by tanners in mechanising their units even for the existing production has been taken into consideration. A leeway has also been allowed for import of spare parts for the existing machines.

4.1.9 Cognizance has been taken of the fact that 90% of the industry is situated in the small scale sector and production targets in the next plan are expected to be met by units of this sector. It is for consideration whether large units in the organised sector should not be allowed to take care of the entire additional production, as their productivity will be higher and the foreign exchange requirements by way of machinery will be lower. For the same reasons the products will also prove more competitive in the international market. Alternately, common facility centres situated in strategic areas will help in making the small scale units more viable.

4.2.0 Sheepskins :

4.2.1 Statistics :

4.2.1 1. Availability :

(Figures in million pieces)

	1964-65	1966-67	1970-71
Indigenous	17.43	17.50	18.60
Imports	0.74	0.58	0.50
TOTAL	18.17	18.08	19.10

4.2.1.2 Consumption pattern :

(Figures in million pieces)

<i>Source</i>	1964-65	1966-67	1970-71
Exports	13.69	13.73	14.58
Domestic	4.48	4.35	4.52
TOTAL .	18.17	18.08	19.10

4.2.1.3 Production pattern :

Raw skins	0.04	0.04	0.04
E. I. tanned	13.54	13.54	13.54
Finished Leathers	0.11	0.15	1.00
Domestic consumption	4.48	4.35	45.2
TOTAL .	18.17	18.08	19.1

4.2.2 No major changes are visualised in the availability consumption and production patterns of sheepskins as indicated by the above figures. An increase of about 5% in availability is anticipated due to an increase in the sheep population. Imports may go down gradually consistent with the present import policy of the Government. But, it is necessary to examine the possibility of earning more foreign exchange by importing woollysheep skins which can be dewooled and processed into finished leathers. The export of wool and leathers that will naturally have a higher value will thus augment our foreign exchange earnings. The consumption and production patterns are also anticipated to remain more or less static.

4.2.3 The export of finished leathers, however, is shown to increase appreciably, as there is growing demand for upper leather, suede, gloving, grain and garment etc. by the foreign buyers. These are essentially made from E.I. sheep.

4.2.4 As it is felt that there are enough facilities already available with E.I. tanners who are experimenting with export of finished leathers to take up production and achieve the targets without any investment of blocked capital, only working capital is required.

4.3.0 Cow Hides :**4.3.1 Statistics :****4.3.1.1 Availability :**

(Figures in million pieces)

	1964-65	1966-67	1970-71
Domestic	17.80	18.00	19.73
Import	0.96	1.00	1.08
TOTAL	1.00	18.7†	20.81

4.3.1.2 Consumption pattern :

Exports	2.76	3.10	4.25
Domestic	16.00	15.90	16.56
TOTAL	18.76	19.00	20.81

4.3.1.3 Production Pattern :

E.I. tanned	2.17	2.10	1.75
Chrome upper	0.59	0.80	1.50
Chrome crust	..	0.20	1.00
Domestic consumption	16.00	15.90	16.56
TOTAL	18.76	19.00	20.81

4.3.2 Domestic Consumption :

Details of domestic consumption pattern are not available. The additional targets for the Fourth Plan are 38 million sq. ft. of upper and 9 million sq. ft of lining leathers. To meet these targets, additional import of cow hides would be necessary. Lining leather is required for western type of footwear. Taking that cow hides average an area of 16 sq. feet, the requirement of hides will be 2.38 millions in number. Of these 0.56 millions have been provided for as shown in the table above (4.3.1.2). This means that an additional quantity of 1.82 million cow hides has to be imported in 1970-71 to meet the upper leather requirements in that particular year. Alternately, to minimise import of cattle hides, a provision has already been made in the goat skin production schedule to divert 4 00 million pieces of goat skins for this purpose (4.1.1.3). This is expected to yield about 2.00 million sq. feet of upper taking that one skin on an average will yield 5 sq. feet in area. In addition

0.3 million of glazed kids will also be made available. Taking that one skin will measure on an average 3.5 sq. feet, these will yield 1.05 million sq. feet more of upper. The total area of 21 million sq. ft. thus released will be equal to upper produced by 1.3 million hides. The balance of 0.50 millions of hides can be obtained by diverting 0.36 million buffalo hides as shown in (4.4.1.4).

4.3.3 Export of finished upper :

Export of chrome upper is targeted as 1.5 million hides as against the present 0.6 million. The phasing has been done to accommodate a gradual increase.

4.3.4 Export of Crust—Consortium with finishing facilities abroad :

Export in the form of crust is also envisaged and its production is expected to reach a target of 1.0 million in 1970-71. There is demand for such a type of product abroad. A consortium with or without foreign collaboration is visualised to be set up for this production. The phasing has been done such that the production will progress gradually until it reaches the scheduled target of 1.0 million pieces in 1970-71.

4.3.5 E. I. Kip industry :

The trend in the export of kips is on the decrease and is expected to go down further. In 1970-71 it is expected to reach the figure of 1.75 as against the present figure of 2.27 (1963-64).

4.4.0 Buffalo Hides :

4.4.1 Statistics :

4.4.1.1 Availability :

The position regarding the availability of buffalo hides will be as follows :—

(Figures in million pieces)

	1964-65	1966-67	1970-71
Domestic	6.18	6.50	7.15
Imports	0.34	0.34	0.35
TOTAL	6.52	6.84	7.50
4.4.1.2 Consumption Pattern :			
Exports	1.11	1.11	1.11
Domestic	5.41	5.73	6.39
TOTAL	6.52	6.84	7.50

4.4.1.3 Additional production (footwear requirements) in the Fourth Plan over that of 65-66 :

Source	1961	1962	1963
Sole Leather not available		0.06	0.30
Insole leather		0.02	0.10
TOTAL		0.08	0.40

4.4.1.4 Excess buffalo hides for utilisation :

Expected increase in buffalo hides in 1970-71	0.82
Hides utilised (4.4.1.3)	0.40
Balance	0.42

4.4.2 The balance of additional lining can be readily met by the vegetable tanning industry in the country. As there is already a provision for the manufacture of goat lining leathers (0.35 million pieces) the actual requirement for lining will be only 0.20 million goat or sheepskins (vide 4.4.2.1 for finished leathers of various types). Surplus buffalo hides can also be split and both the grains and the flesh splits can be met as linings.

4.4.3 Insoles :

The insole requirements have been computed to be 2.00 million lbs. in the year 1970-71. Taking that one light weight hide will yield 20 lbs. 0.10 million hides are considered sufficient for this purpose.

4.4.4 E.I. Buff :

Production and export of E.I. buff hides are expected to maintain the same level during this plan also.

4.5.0 Targets for Export of Reptile Skins

4.5.1 Exports

(In lakhs of rupees)

	1964-65	1966-67	1970-71
(1) Raw Reptile skins	63.39	52.82	31.69
(2) Tanned Reptile skins	95.68	113.79	150.00
TOTAL	159.07	166.61	181.69

4.5.2 Imports :

(In lakhs of rupees)

	1964-65	1966-67	1970-71
(1) Raw Reptile skins	2.74	4.06	6.69
NET EXPORT	156.33	162.55	175.00

4.5.3 Judging by past performance the fixing of—target—for production in 1970-71 in terms of value as 15.0 million rupees for tanned reptile Skins appears justified. It is anticipated that exports of finished skins will take the place of export of raw skins in the years to come. Import of raw skins is expected to show an upward trend, as the quantum of exports of finished skins has been shown to increase appreciably. Serious consideration should be given to the idea of setting up crocodile farms to augment raw resources.

4.6.0 Unutilised Capacity in the Field of Tanning of Hides :

These are based on the data provided by the report of Central Small Industries Organisation 1959.

	Un-utilised capacity existing tanning in- dustry (in millions of hides)
1. Organised vegetable tanning units	1.60
2. Chrome tanning units	0.68
3. E.I. Kip industry's idle capacity	4.67
The present production for exports is only 2/3rds of the 8.165 millions exported in 1959 when the Central Small Industries Organisation reported the idle capacity as 30%. Recalculating on this basis the idle capacity works out to 6.221 million hides. However, allowing that 25% of this has been utilised for production to meet total demands, the above figure has been arrived at.	
4. Capacity available by reduction of exports as visualised in 1970-71.	0.52
Total idle capacity in millions of hides	7.47

NOTE.—It should, however, be emphasised that modernisation of the existing units is very much necessary for meeting the competitive foreign demands. The idle capacity is to be taken only in regard to land and buildings and not the machinery.

4.7.0. Additional Machinery, Men, Materials and Money Required for 4th Plan :

4.7.1. Additional Personnel :

1. Supervisors	583
2. Mistries	553
3. Skilled workers	2432
4. Unskilled workers	6367

4.7.2 Additional Machinery

Name	Nos. required
1. Fleshing	163
2. Scudding	163
3. Setting	156
4. Staking	242
5. Buffing	172
6. Shaving	230
7. Glazing	165
8. Samming	111
9. Ironing	13
10. Hydraulic Press	38
11. Measuring	42
12. Splitting	101
13. Lightning Buffing	70
14. Drying cabinets	34

NOTE 1. These machines will cover not only the additional requirements but existing production requirements, such as replacements.

NOTE 2. The prices of the machines are for those that are most modern such as hydraulically or pneumatically operated machines.

NOTE 3. These are broad requirements worked out on the basis that the additional units will be essentially situated in the small sector as the existing industry is based mainly on small units. However, if, large scale unit are going to be set up or expanded, the requirements of machinery will, correspondingly, be less.

NOTE 4. If these machines are obtained from rupee payment countries the foreign exchange requirements will be 1/2 or 2/3 of the value.

4.7.3. Additional requirements of materials :

A. Electricity in mega watts	83524·0
B. Low pressure steam in metric tons	30164·0
C. Water in millions of gallons	2566·0
D. <i>Chemicals :</i>	

Name	Quantity in metric tons
1. Soaking Agent	848·76
2. Bleaching powder	56·70
3. Sodium Sulphide, fused	4295·24
4. Lime	19346·33
5. Ammonium Sulphate	2277·00
6. Common salt	8108·62
7. Bate	630·19
8. Acetic Acid	22·51
9. Sulphuric acid	1719·71
10. Hypo	670·40
11. Basic Chromium Sulphate	7786·25
12. Sodium sulphide	288·80
13. Sodium formate	931·80
14. Anioic dye	270·23
15. Formic acid	145·58
16. Gambier	257·00
17. Sulphated Sperm/Neatsfoot oil	336·74
18. Neutral oil, groundnut type	1636·92
19. Preservative, Preventol type	100·00
20. Pretanning type, syntan	883·50
21. Bleaching syntan	227·10
22. Wattle Extract	19338·50
23. Myrobalam nuts, crushed	14181·25
24. Neutral Syntan	1472·00

Name	Quantity in metric tons
25. Sulphated codfish oil	1177.60
26. Cod or fish oil	658.925
27. Cationic fatliquor	297.22
28. Oxalic acid	179.60
29. Magnesium sulphate(Epsom salt)	367.05
30. Quebracho Extract	75.12
31. Sodium Bicarbonate	483.85
32. Sodium Bisulphide	210.00
33. Speciality dyestuff	17.53
34. Ammonia	5.01
35. Caustic Soda	20.475
36. Ammonium Chloride	4.68
37. Soap	2.34
38. China clay	4.675
39. Wheat flour	4.675
40. Shower proffing agent	14.10
41. Pigment paste	992.34
42. Glucose	210.00
43. Casein	143.64
44. Glazing binder	0.95
45. Borax	36.21
46. TRO	478.89
47. Glycerine	46.77
48. Resin emulsion	757.00
49. Lacquer emulsion	18.90
50. Formaldehyde(40%)	1700.56
51. Shellac	1.36

4.7.4 Money-Additional requirements :

Additional capital requirements for the entire period are shown in detail below :

Type	Blocked capital (in millions of rupees)	Working capital	Total
Glazed kid	..	4.536	4.536
Pickled goats	0.483	1.662	2.145
Chrome 'Blue' goats	2.668	6.844	9.512
E.I. Goats	4.578	11.136	15.714
Finished goat leathers for export	..	1.711	1.711
Finished goat leathers for internal consumption	..	1.167	1.167
Finished sheep leather for export	..	3.103	3.103
Chrome upper for export	4.907	6.678	11.585
Retan crust for export	9.467	6.760	16.227
Sole and insole leathers	..	4.752	4.752
Chrome Retan for domestic consumption	29.180	18.037	47.217
TOTAL (IN MILLIONS)	51.283	66.386	117.669

The figure of Rs. 117.669 million represents the total additional investment spread over the entire period. This is only indicative and may vary depending on the size of the units, whether they are going to be in the organised sector as in the small scale sector.

To arrive at a meaningful relationship between investment and output, figures for some of the exported items are presented below :

Relationship between investment and gross additional output for the entire period

(In millions of rupees)

Item	Additional investment	Total gross output
Glazed kid	4.536	52.08
Chrome Blue	9.512	52.00
Govt. finished leathers	1.711	14.40
Sheep finished leathers	3.103	21.00
Chrome Retan crust	16.227	60.00
Chrome upper	11.585	72.50
TOTAL	46.674	271.98

In working out the above figures the following assumptions have been made :

- (i) No block investment on land and building is necessary taking into consideration the present idle capacity existing in the industry.
- (ii) The block investment shown represents practically the capital required for machinery.
- (iii) The figure for working capital has been arrived at on the basis that turn-over in the leather industry will be four times in an year.
- (iv) These figures are only indicative and may vary depending on the size of the units, whether they are going to be in the small scale sector or organised sector.

4.7.4.1 Additional foreign exchange requirements for the Fourth Plan are indicated as follows :—

Description	Foreign exchange required in millions of rupees	Remarks
Machinery	$18.38 + 12.25 = 30.63$	(24.50)
Tanning materials and chemicals	$46.10 - 20.002 = 26.10$	
Raw hides	40.00	

The figure for machinery has been computed on the basis that half the number of machines are to be imported from West European countries and the rest from rupee payment nations. If, however, all the machines are imported from the latter area, it will effect a saving of 6.13 million rupees (*vide* figure shown in brackets). It is anticipated that approx. 5-6 millions will be required for modernisation and replacements of the existing units of machinery in the industry.

A saving of another 4.5 million rupees in exchange required for machinery can be effected if the Fourth Plan production is left in the hands of a few big units in the organised sector rather than distributed among a number of units in the small scale sector. This will mean an increase in investment by way of capital required for land and building, though, no foreign exchange is required for this purpose.

A saving of nearly 20.00 millions required for chemicals and tanning materials is envisaged as it is expected that indigenous auxiliaries industry will gear itself to meet a good portion of the chemicals requirements.

As pointed out in 4.3.1.1 to meet upper leather requirements of the 4th Plan, cow hides costing 66.46 million rupees by way of foreign exchange will have to be imported unless the need is partially or wholly met from indigenous sources.

SECTION B : FOOTWEAR AND LEATHER GOODS AND LEATHER MANUFACTURES DURING IV PLAN PERIOD

4.8.1 Leather Footwear :

4.8.1.1 The target for production of footwear in 1970-71 will be 500 million pairs. Of this 300 million pairs will be exclusively of rubber, canvas etc. while 200 million pairs are to be with leather uppers. In 1965-66 it is envisaged to produce 153 million pairs with leather uppers. The break-up of production of leather footwear is as under :

	1965-66 (million pairs)	1970-71 (million pairs)
Organised Sector	13.5	20.5
Small scale and cottage sectors	139.5	179.5

4.8.1.2 The target can be reached as under :—

4.8.1.2.1 *Organised Sector* : An expansion of 2 million pairs in the existing units. Setting up of 5 units with a production capacity of 1 million pairs per year for each unit. The block capital requirement for each unit is Rs. 25 lakhs and working capital Rs. 50 lakhs.

4.8.1.2.2 *Small Scale and cottage sectors* : The small-scale sector *i.e.*, semi-mechanised units will account for an increase of 15 million pairs of footwear. Existing small scale units can increase their production by 3 million pairs and new units have to be sponsored for the production of 12 million pairs as under :—

(a) 80 units with a capacity of 120,000 pairs per year (for 2 shifts). The block capital for each unit will be Rs. 3 lakhs.

(b) 45 units with a production capacity of 45,000 pairs per year (for 2 shifts). The block capital for each unit will be Rs. 1 lakh.

4.8.1.2.3 The other 25 million pairs will have to be produced mainly in cottage units manufacturing chappals *i.e.*, regional type of footwear.

4.8.1.2.4 Requirements of sole leather, upper leather and lining leather are shown in Annexures 'A' and 'B'.

4.8.1.2.5 Phasing out of increased footwear production :

	(Million pairs)				
	66-67	67-68	68-69	69-70	70-71
Organised sector . . .	0.5	1.0	2.5	1.5	1.5
*Small scale sector . . .	2.0	2.0	3.0	4.0	4.0
Cottage sector . . .	5.0	5.0	5.0	5.0	5.0

*Small scale units should be mechanised enabling them to become more viable.

NOTE.—Village cobblers are expected to have a full time job. They will be supplied with improved tools.

Financial implications

	(Rs. in lakhs)	
	Block capital	working capital
Organised sector . . .	125	350
Small-scale Sector . . .	330	830
Cottage Sector . . .	50	200
	505	1,380

ANNEXURE A
SOLE LEATHER

	1965-66			1970-71		
	Western type Pcs	Indigenous type Pcs	Total Pcs	Western type Pcs	Indigenous type Pcs	Total Pcs
(1) Shoe Production						
(a) Large scale	9,300,000	4,200,000	13,500,000	14,500,000	6,000,000	20,500,000
(b) Small scale & cottage sector	33,450,000	106,050,000	139,500,000	46,950,000	132,550,000	179,500,000
TOTAL	42,750,000	110,250,000	153,000,000	61,450,000	138,550,000	200,000,000
(2) % of Production of Rubber Sole						
(a) Large scale	20%	40%		40%	60%	
(b) Small scale	10%	20%		25%	30%	
(3) Shoe Production with leathersoles						
(a) Large scale	7,440,000	2,520,000	9,960,000	8,700,000	2,400,000	11,100,000
(b) Small scale	30,105,000	84,840,000	114,945,000	35,212,500	92,785,000	127,997,500
TOTAL	37,545,000	87,360,000	124,905,000	43,912,500	95,185,000	139,097,500
(4) Consumption of sole leather						
(a) Large scale	0.80 lb	0.80 lb		0.80 lb	0.80 lb	
(b) Small & cottage sector	0.60 lb	0.50 lb		0.60 lb	0.50 lb	
(5) Total consumption in lbs.						
(a) Large scale	5,952,000	2,016,000	7,968,000	6,960,000	1,920,000	8,880,000
(b) Small & Cottage sector	18,063,000	42,420,000	60,483,000	21,127,500	46,392,500	67,520,000
TOTAL	24,015,000	44,436,000	68,451,000	28,087,500	48,312,500	76,400,000
(6) Sole leather in No. of hides (1 buff = 25 lbs.)	691,020	Nos. 1,797,000	Nos. 2,758,020	Nos. 1,123,500	Nos. 1,932,500	Nos. 3,056,000

Insole material for rubber sole shoes @ 2 oz./pair = 2,192,200 lbs.

ANNEXURE B
UPPER LEATHER

	1965-66			1970-71		
	Western type pairs	Indian type pairs	Total pairs	Western type pairs	Indian type pairs	Total pairs
(1) Shoe Production						
(a) Large scale . . .	9,300,000	4,200,000	13,500,000	14,500,000	6,000,000	20,500,000
(b) Small scale & cottage	33,450,000	106,050,000	139,500,000	46,950,000	132,550,000	79,500,000
TOTAL . . .	42,750,000	110,250,000	153,000,000	61,450,000	138,550,000	100,000,000
(2) Sq. ft. per pair						
(a) Large scale . . .	1.38 sq. ft.	0.40 sq. ft.		1.38 sq. ft.	0.40 sq. ft.	
(b) Small scale . . .	1.38 sq. ft.	0.40 sq. ft.		1.38 sq. ft.	0.40 sq. ft.	
(3) Total sq. ft.						
(a) Large scale . . .	12,834,000	1,680,000	14,514,000	20,010,000	2,400,000	
(b) Small scale . . .	46,161,000	42,420,000	88,581,000	64,791,000	53,020,000	
TOTAL . . .	58,995,000	44,100,000	103,095,000	85,801,000	55,420,000	141,221,000
(4) Total cow hides (hide=16 sq. ft.) . .	3,687,187	2,756,250	6,443,437	5,362,562	3,463,750	8,826,312

*Lining : 30% of western type shoes have leather lining.
@0.50 sq. ft.—(9,217,500 sq. ft.).*

SECTION C : LEATHER GOODS

4.9 No reliable data are available about the present day Leather Goods production. A tenfold increase is envisaged in the Fourth Plan. This increased production is to be obtained by setting up modern mechanised units assisting the existing industry to modernise as far as possible and making full use of the available skill 10-20 small units with a block capital of Rs. 1-5 lakh should be set up. With a good industrial design cell and with a good master cutter, purchasing materials in the bulk, cutting the components according to the design, supplying the cut components to the women at home for stitching or pasting should be the pattern. These should be collected and checked for quality control. The designs should be functionally western and artistically eastern.

Leather Goods Machinery (Minimum requirement)

1. Skiving machine.
2. Strap cutting machine.
3. Glueing machine.
4. Band knife splitter.
5. Clicking machine.
6. Dies.
7. Paper cutting machine.
8. Edge folding machine.
9. Folding machine for han
10. Scudding machines.

Goods for internal market will be mainly from Raxine and plastics, as these materials will be available in plenty and at cheap rates compared with leather.

Against the present availability of 2000 tons of PVC sheet and 8 million metres of leather cloth (Rexine) in 1970-71, 6,120 tons of PVC sheeting and 23.6 million metres of leather cloth are expected to be made available.

Design Cells of the Central Small Scale Industries Organisation, Central Leather Research Institute and the National Industrial Design Institute, Ahmedabad, will have to work in unison in developing sophisticated designs.

Immediate action has to be taken for the development of fittings for the leather goods industry.

SECTION D : LEATHER MANUFACTURES

4.10 It is rather difficult to spell out the various items which will go into this category. But for guidance the following items will form the core—

- (a) Leather belting.
- (b) Pickers.
- (c) Picking bands.
- (d) Saddlery & harness.
- (e) Cycle saddles.

4.10.1 *Leather Belting* : The estimated demand in 1965-66 is about 350 tons against an expected production of 150 tons, even though it is reported that enough units have been licensed to cover the requirements. This will only mean that at best we can expect a full production of 350 tons of leather belting in 1970-71. There is a probability that these leather beltings could be exported to Middle East, African countries. We are likely to use more and more of 'V' and rubber beltings. (52,300 heavy hides for 350 tons).

4.10.2 *Pickers* : Total demand at the end of the Third Five Year Plan is 50,000 gross/year equivalent to 25,000 hides. It is felt that there may not be any appreciable increase in demand as the present tendency is to go in for automatic looms using leather pickers.

4.10.3 *Picking bands* : Estimated demand by the end of the Third Five Year Plan is 1,000,000 lbs. i.e. 67,000 heavy hides.

10% increase in production for export may be thought of.

4.10.4 *Cycle saddle tops* : A production of 3 million cycles in 1970-71 is envisaged. Assuming that 50% of the cycles have leather tops, 1.5 million cycle tops will be required as original fitting. As replacement 0.2 million pieces can be planned, i.e., 1.7 million pieces of cycle saddles are required for internal consumption (though the cycles exported will be accounted for under this category).

4.10.5 Industrial gloves may also have some goods export market. About 1 million pieces costing about Rs. 3 million can be expected to be exported.

4.10.6 General Approach for the Development of the Industry:

- (a) Finished leather and footwear industry may be set up side by side as far as possible.
- (b) Existing uneconomic units will have to be taken over immediately before attempting new units.

- (c) New units should be set up in a decentralised way.
- (d) Wherever possible Functional Industrial Estates for finished leather and footwear industry are to be set up. As the percentage of footwear with rubber soling material is likely to predominate, these Functional Industrial Estates may have Direct Vulcanising Process equipment as common facility services.

Functional industrial estates may also have developed plots depending on the local requirements.

- (e) As far as possible, the new units are to be set up in private sector but where the private sector is shy, the Government will have to set up these units either as co-partner or as individual owners.
- (f) An up-to-date Design Cell for footwear and leather goods is to set up.
- (g) Development of units manufacturing cut components for export orders may be explored.

SECTION E : ABATTOIR BY-PRODUCTS

A Scheme for Immediate Improvement of Slaughtering Facilities in Calcutta, Bombay, Madras and Delhi.

4.11.1 Introduction :

There is a great demand in foreign countries for meat, meat products and other items of animal origin obtainable from slaughter houses, particularly if these are properly processed, sterilised and hermetically sealed. Such canned animal products are acceptable even to U.S.A. and U.K., if supplied from approved slaughter houses. There is a good market for frozen meat in Middle East and Far East countries because the method of slaughtering adopted in India is acceptable to them.

4.11.2 Scope :

Most of the valuable by-products like gust, oesophagus, bladder, blood, glands, useless meat, horns and hooves are wasted to a large extent. The total value of such loss is estimated at Rs. 254 lakhs per annum. According to the estimates made by the Directorate of Agricultural Marketing and Inspection, the existing wastage of some of the principal byproducts from slaughter houses in the country is of the following order :

- (a) *Guts*.—About 90-100% of large intestines of cattle and buffaloes; 80% of small intestines of buffaloes and 10-15% of intestines of sheep and goats are not utilised. The total wastage is valued at Rs. 35 lakhs.

- (b) *Oesophagus*.—60-70% of oesophagus of cattle and buffaloes worth nearly Rs. 1.6 lakhs is simply thrown away and wasted.
- (c) *Bladder*.—Bladders of all animals are generally thrown away although a small quantity obtained from cattle and buffaloes exported for making sausages.
- (d) *Blood*.—As no proper arrangements exist for the collection of blood, most of it goes waste. It is estimated that about 64% of the blood produced in the slaughter houses is wasted. Wastage through blood alone is evaluated at Rs. 78.6 lakhs.
- (e) *Glands*.—Edible ones are generally sold along with meat for human consumption. Glands such as thyroid, parathyroid and pituitary particularly valuable for the manufacture of glandular products for medicinal purposes, are, generally, not put to proper use. Pancreas which is a valuable gland for the manufacture of insulin is generally allowed to go waste. Ovaries obtained from all the animals and testes from cattle and buffaloes are wasted and only nominal quantities are utilized. Gland wastes are worth Rs. 5-6 lakhs a year.
- (f) *Useless meat*.—The major portion worth about Rs. 35 lakhs is allowed to go waste and only 40% is used as animal feed for dogs and cats.
- (g) *Horns and Hooves*.—About 63.5% of horns from cattle, buffaloes and goats valued at about Rs. 65 lakhs is wasted. About 66% of hooves from cattles, buffis, sheep, goats and pigs valued at Rs. 35 lakhs is also wasted.

The following gives an idea of the value of some of the by-products which may be salvaged from our slaughter houses:—

Name of the by-product	Value in lakhs of rupees
Fat.	224.75
Guts	185.64
Oesophagus	18.86
Blood	122.79
Glands	603.86
Useless meat	58.16
Tail stumps	9.42
Horns and hoofs	152.19
TOTAL .	1375.68

Our annual production of guts alone is estimated at about 27,000 m. tonnes. At present, only a very negligible portion (a little over 1%) of the production of casings is exported. Even then, our export of casings fetched us Foreign Exchange to the tune of Rs. 121 lakhs in 1963-64.

4.11.3 Bottlenecks :

However, due to the substandard condition of slaughter houses existing in India and for lack of suitable arrangement for ante and post-mortem inspection in our slaughter houses, none of these products are acceptable as such to the Western countries.

Besides the substandard conditions in our slaughter houses, the biggest handicap in promoting our export trade of animal products is the lack of proper animal certification service in the country. In the 3rd Five Year Plan, there was a scheme for setting up of a Central Animal Quarantine and Certification Service in India but it still remains unimplemented. Similarly, the scheme for the modernisation of slaughter houses for which funds have already been allotted remains hitherto unutilised.

4.11.4 A Workable Suggestion :

Pending the proposed improvement and modernisation of slaughter houses in the 3rd and 4th Plans for which ample funds have been provided by the Ministry of Food and Agriculture, a number of preliminary steps may be taken immediately without much of capital investment which will go a long way in making our slaughter house by-products acceptable to the Western countries. A modest beginning should be made with the slaughter houses in Calcutta, Bombay, Delhi and Madras. A small Corporation under Expert guidance should be set up to work out a Pilot Scheme covering these slaughter houses so that—

- (1) minimum sanitary and hygienic practices may be enforced in handling and storing of carcasses and their by-products;
- (2) adequate inspection of animals prior to slaughter and certification of the carcasses and their by-products are ensured;
- (3) ample washing facilities with clean water may be provided in slaughter houses;
- (4) provision of adequate cold storage facilities and cleaning and preliminary curing of some of the by-products may be made; and
- (5) a suitable testing laboratory under trained veterinary staff is set up.

4.11.5 Immediate Benefits :

The following immediate benefits will accrue to the country if the above pilot scheme is implemented:—

- (1) Export of meat and meat products will be greatly encouraged.
- (2) Other slaughter house by-products will be acceptable to many of the developed countries and, therefore, their export will be boosted up.
- (3) Many of the valuable slaughter house by-products hitherto going waste will be salvaged and economically utilised.
- (4) Considerable employment opportunities will be created since the jobs concerned with the processing of these by-products are essentially labour-intensive in nature, and
- (5) Facilities will be created for the development of a number of new processing industries under the small-scale sector and the scope of the Indian Pharmaceutical industry will be greatly expanded, leading to significant curtailment of imports.

THE SCHEME

4.11.6 The Scheme envisages no elaborate construction programme, but aims at necessary alterations and modifications in the existing structure of the slaughter houses so that—

- (1) minimum standard for construction, layout and equipment may be ensured;
- (2) maintenance of hygienic and sanitary conditions for handling of meat and by-products may be made possible;
- (3) adequate facilities for meat inspection and other carcass by-products are provided;
- (4) minimum lairage and refrigerated cooling accommodation are provided;
- (5) humane treatment and killing of animals are enforced; and
- (6) by-products are salvaged before the materials have lost the condition and value for processing.

Each of the slaughter houses should have a minimum output of not less than 300 cattle, 3,000 sheep and goats and 300 pigs.

ESTIMATES FOR EACH UNIT

4.11.7 Non-Recurring:—

	Rs. in lakhs
1. Alterations and modifications of existing of structure for better lighting, ventilation and for making the walls, floors and fittings impermeable.	5.0
2. Lairage and refrigerated cooling accommodation	2.5
3. Provision of carcass hoist, blood rails and other ancillary equipments in the slaughter hall	2.5
4. Refrigerated vans & vehicles	1.5
5. Misc. by-products processing & rendering equipments	3.5
TOTAL	15.00

(Out of this, a token foreign exchange component of Rs. 10,000 may be provided.)

TECHNICAL PERSONNEL REQUIRED FOR EACH UNIT

4.11.8 10 Veterinary Officers and 10 Public Health Inspectors will have to be seconded to each unit.

Additional recurring expenses on this should be provided as Rs. 2 lakhs.

The total expenditure envisaged under the scheme, therefore, comes to :

	Rs. in lakhs
Non-recurring	15
Recurring	2
TOTAL	17

(Out of this the Foreign Exchange Component is Rs. 10,000.)

INCOME AND FOREIGN EXCHANGE EARNINGS

4.11.9 A net estimated annual return of 20% on the investment may be guaranteed when the scheme works in full swing, earning a foreign exchange of at least 10%.

TARGETS

Tentative targets for export and production of some of the principal slaughter house by-products

4.11.10 With the improvement in slaughtering facilities and the ante and post-mortem Inspection Services at our principal slaughter houses, export of animal products may be boosted up to a very significant extent. Targets in regard to the export of meat and meat products and animal casings have been fixed for the 4th Plan period envisaging a cent per cent increase.

The following are the tentative targets fixed for export of some of the principal slaughter house products.

(Qty. in m. tonnes)		(Value in million rupees)					
		1963-64		1966-67		1970-71	
		Qty.	Value	Qty.	Value	Qty.	Value
1. Meat & Meat products	65,000	32.5	..	..	..	1,30,000	65.00
1964-65							
2. Animal casings*	370	10.7	..	..	..	1,037	30.00
3. Raw wool	11,955	76.1	..	..	..	20,000	120.00
4. Goat hair	3,119	7.9	..	..	..	3,896	9.8
5. Bones, bone grist etc.	71,322	27.5	..	..	..	1,06,983	41.3
6. Horns and hooves	2,230	1.6	..	..	..	4,460	3.3
7. Pig bristles, hog bristles etc.	178	13.8	..	..	..	259	20.00

NOTE.—*Our annual production of guts from small intestines is 27,000 m. tonnes. We exported only a little over 1% of this production in 1963-64, i.e., 200 m. tonnes of animal casings valued at 45 lakhs of rupees and 198 m. tonnes of sheep castings valued at 76 lakhs of rupees were exported. Estimating a cent percent increase, we will be having 500 m. tonnes of each for export valued at 3 crores of rupees.

The following production targets at the end of the Plan period are fixed for slaughter house by-products, hither-to-going waste:—

1. Blood in the form of blood meal	1,000 m. tonnes
2. Useless meat in the form of meat meal*	5,000 „
3. Horns and hooves	25,000 „
4. Hormones and glandular products@	
(a) Adrenaline	20 Kg.
(b) Pituitary	10 „
(c) Progesterone & analogues including Methyl testosterone	100 „

5. Enzymes :

(a) Pepsin	20 m. tonnes
(b) Pancreatin	15 „
(c) Fungal amylase	15 „

*To be used in the manufacture of stock feed, the present demand for which is estimated to be 50,000 m. tonnes per annum.

@At present such products worth about 1 crore of rupees are being imported.

4.12 Riders :

The success of the Plan will depend upon—

- (1) Well-defined and stable policy of the Government for the 5 year period and the determined and consistent efforts of the industry.
- (2) The availability of foreign exchange for importing machinery and materials.
- (3) Setting up of new or modernising the existing footwear/leather goods units.
- (4) The idle capacity of the leather industry is taken only for its land and building facilities. Introduction of newer machinery and newer productivity methods are essential for competing in the world markets.
- (5) The setting up of an upto-date product-oriented design cell for footwear/leather goods backed by good market research in countries abroad.
- (6) Development of auxiliary industry in the country.
- (7) Modernisation of existing slaughter houses or setting up of new ones for better utilisation of bye-products and improvement of hide quality.
- (8) The data available for both raw hides and skins and footwear production are unreliable. The figures given in this plan are at best guide lines and only indicative of the relative trends.
- (9) As reliable data are not available for total inputs and outputs for the 3rd Five Year Plan, only additional requirements for men, materials and money for the 4th Plan are indicated.
- (10) The targets set and projections made for the coming years are at best tentative and based on the current trend of thinking and pattern of trade. Any unexpected variations in the international markets would naturally have a repercussion on the plan's progress. An year to year assessment and revision of the target is suggested.
- (11) It is expected that world trade conference decision to give preferential tariffs treatment to imports from developing countries would come into effect.

CHAPTER V

SUMMARY OF RECOMMENDATIONS AND SUGGESTIONS MADE BY THE COMMITTEE

5.1 The Committee during its deliberations have gone through the recommendations already made by various committees, Councils etc., and have reiterated some of the relevant ones in connection with the programme of development suggested. In addition to this, suggestions made by industry and trade, organisations, institutions etc. have also been taken into consideration while making the following recommendations by the Committee :

5.2 Raw Hides & Skins :

Necessary facilities may be provided for setting up of crocodile and alligator farms for increasing supply of these skins.

ACTION : MINISTRY OF FOOD AND AGRICULTURE

5.3 Bye-products :

(1) A Bye-product Utilisation Corporation should be set up. This corporation should operate 3 slaughter houses as a pilot study. New slaughter houses may also be set up or the existing ones be modernised with a view to fully utilise all carcass bye-products to save imports and to earn foreign exchange. These slaughter houses shall also act as model for hide flaying, curing, grading and proper distribution of hides and skins and also introduce modern methods of trim and supply. This Corporation may be set up purely for export promotion under the Government of India.

ACTION : MINISTRY OF FOOD AND AGRICULTURE

(2) When this pilot study works well the same may be extended to other areas.

ACTION : MINISTRY OF FOOD AND AGRICULTURE

5.4 Tanning materials

(1) Since myrobalan nuts produced in the country are not being fully collected, incentives may be provided to the primary collectors to increase the availability of myrobalan nuts for exports.

ACTION : MINISTRY OF FOOD AND AGRICULTURE AND
MINISTRY OF COMMERCE

(2) It would be desirable to include a compulsory clause in all the contracts making it obligatory on the part of various forest contractors to remove tanning barks and nuts before the wood is sold.

ACTION : CENTRAL BOARD OF FORESTRY AND I. G. FOREST.

(3) Since there is sufficient demand for basic chrome salt for tanning purposes, entrepreneurs may take up the manufacture of chrome tanning salts.

ACTION : MINISTRY OF INDUSTRY

5.5 Auxiliaries, Chemicals, Grindaries etc.

(1) Units for the manufacture of leather auxiliaries, fat liquors, bates, pigment finishes, syntans etc. should be set up.

ACTION : MINISTRY OF INDUSTRY

(2) The manufacture of frames and other accessories in India for leather goods manufacture may be encouraged.

ACTION : MINISTRY OF INDUSTRY

(3) Facilities should be given to the manufacturers and/or exporters of pickled and chrome blue goat skins, particularly the new comers in the field by making available to them promptly and on easy instalment basis essential tanning machines and chemicals which may be kept in ready stock by S.T.C. or other approved importers.

ACTION : MINISTRY OF COMMERCE

5.6 Leather & Leather Goods :

(1) Tanning units and flaying centres should be allowed to be set up in various parts of the country only after the entrepreneurs have made a techno-economic survey and it is proved that it is feasible for setting up of such units/centres.

**ACTION : KHADI & VILLAGE INDUSTRIES COMMISSION D.C.
(SSI) AND D.G.T.D.**

(2) Six medium sized well-equipped units of total capacity of about 10 million pairs per annum may be set up to produce leather footwear for exports.

ACTION : MINISTRY OF COMMERCE AND MINISTRY OF INDUSTRY

(3) Indian entrepreneurs may be encouraged to set up finishing establishments in countries abroad to import crust leather and for finishing them.

ACTION : MINISTRY OF COMMERCE

(4) It is advisable to set up Service Centres and Functional Industrial Estates for leather goods and footwear.

ACTION : STATE GOVERNMENTS

(5) Entrepreneurs promoting exports executed schemes should be encouraged.

ACTION : MINISTRY OF COMMERCE

(6) The demand for coloured leather should be developed in the internal markets and then only the factories would be in a position to manufacture coloured leathers specially required for export purposes at lower prices.

ACTION : MINISTRY OF INDUSTRY

(7) Production and sales of cut components should be encouraged.

ACTION : TRADE AND INDUSTRY

5.7 Imports and exports :

(1) The exporters of pickled goat skins may be allowed to import various chemicals (to be decided by the Govt.) upto 5% and machinery upto 10% of the f.o.b. value of exports.

ACTION : MINISTRY OF COMMERCE

(2) 10% regulatory import duty on raw hides and skins be withdrawn as in the case of fish imports as these are perishable items.

ACTION : MINISTRY OF COMMERCE AND MINISTRY OF FINANCE

(3) A scheme may be worked out by the Export Promotion Councils concerned for surrendering incentives for tax credit certificates.

**ACTION : LEATHER EXPORT PROMOTION COUNCIL, MADRAS,
EXPORT COUNCIL FOR FINISHED LEATHER & LEATHER
MANUFACTURES, KANPUR**

(4) Provisions should be made for option-tax credit certificate or incentive according to the need of the exporters.

ACTION : MINISTRY OF COMMERCE

(5) Present policy not to export sheep skins in raw and pickled should continue.

ACTION : MINISTRY OF COMMERCE

(6) U.S.S.R. may be persuaded to purchase more of pickled and chrome tanned blue goat skins rather than the raw goat skins along with the rejections as is being done by Czechoslovakia.

ACTION : MINISTRY OF COMMERCE

5.8 Financial, technical and managerial aspects :

(1) Leather & Allied Industries Co-operatives should be provided with necessary technical and managerial help.

ACTION : MINISTRY OF INDUSTRY

(2) E.E.C., U.K. and U.S.A. could be considered as area where profitable collaboration could be had in the leather field.

ACTION : MINISTRY OF INDUSTRY

(3) Separate investment house may be set up for organising small scale sector and marketing its products.

ACTION : D.C., SSI

(4) Productivity at all levels should be improved.

ACTION : PRODUCTIVITY COUNCIL AND INDUSTRY

(5) Difficulties are being experienced by small scale units in getting credit facilities and over draft facilities. State Governments, Reserve Bank of India and other Scheduled Banks may give liberal help in this regard.

ACTION : STATE GOVERNMENTS, RESERVE BANK OF INDIA
AND OTHER SCHEDULED BANKS

(6) A design cell may be set up to help the small scale industries to have new designs for footwear and leather goods. :

ACTION : AHMEDABAD DESIGN INSTITUTE, CENTRAL
LEATHER RESEARCH INSTITUTE & DEVELOPMENT
COMMISSIONER, S.S.I.

(7) Paucity of skilled labour is experienced by Leather Goods Industries. Government to be requested to pay stipend to trainees in Leather Goods Industries upto Rs. 45 or 50% whichever is less and other 50% be paid by the employers themselves.

ACTION : D.C., S.S.I.

(8) Because of the stringent finances, importers of various raw materials and chemicals are finding it difficult to deposit 25% of the value of the import licence. If possible, this may be waived in the case of Leather Industry (since waived).

ACTION : MINISTRY OF FINANCE

(9) The Leather Export Promotion Councils at Madras and Kanpur may be entrusted for keeping buffer stocks of imported materials and for proper distribution among the exporters.

ACTION : MINISTRY OF COMMERCE AND EXPORT PROMOTION
COUNCILS

(10) Technical Consultancy Service should be set up to assist manufacturers for internal and external marketing.

ACTION : MINISTRY OF COMMERCE

(11) A co-ordinating Agency to channelise properly the 'know-how' developed by the various institutions may be set up.

ACTION : C.S.I.R.

(12) A separate Marketing Corporation may be set up for footwear and other leather goods mainly for helping the Cottage and Small Scale Industries Sectors.

ACTION : MINISTRY OF COMMERCE

(13) It is realised that import licences for machinery under the Export Promotion Scheme are not being fully utilised at present. In view of the rapid development programme for the Leather Industry these licences may be made transferable to the Actual Users.

ACTION : MINISTRY OF COMMERCE

5.9 General :

(1) The scheme for an assessment of the availability of raw hides and skins may be tested in the first instance by I.C.A.R. or by joint venture with C.L.R.I. and Agricultural Marketing Adviser. Once the methodology is tested and accepted further survey should be conducted according to this agreed methodology by Agricultural Marketing Adviser who is having a network for the purpose.

ACTION : I.C.A.R., C.L.R.I. AND AGRICULTURAL MARKETING ADVISER

(2) Literature Survey Report (Nayudamma and Chowdhury) presented to the Committee may be published by the authors after any amendments in the larger interests of the Industry.

ACTION : DR. Y. NAYUDAMMA, SHRI P. N. CHOWDHURY AND SHRI N. LAKSHMINARAYAN

(3) I.S.I. be requested to make suitable I.S.I. standards for raw hides and skins within 6 to 12 months.

(4) Standardisation of the Leather Footwear and other leather goods may be explored.

ACTION : I.S.I.

(5) A study may be made by the Central Leather Research Institute to reassess :

- (i) the cow as an economic unit in agriculture ; and
- (ii) Gosamvardhanas as contracted to modern animal husbandary method.

ACTION : C.L.R.I.

(6) Regarding any difficulties with regard to export promotion schemes the exporters should take up the matter through Export Promotion Councils.

ACTION : EXPORTERS

(7) In trade agreements the leather items should be clearly mentioned to avoid ambiguity with regard to classification of these items.

ACTION : MINISTRY OF COMMERCE

(8) Both Small-scale and organised sectors may be encouraged to contribute for greater exports.

ACTION : MINISTRY OF COMMERCE

(9) Sufficient publicity may be given to the Small-scale Industry in regard to the various facilities offered by the Government and other Agencies for developing the industry.

ACTION : D.C., S.S.I.

(10) Necessary action should be taken to improve display (exhibition) publicity for Indian Leather products since it is inadequate at present.

ACTION : MINISTRY OF COMMERCE

(11) The Chablani Committee Report and Saraiya Committee Report may be implemented.

ACTION : MINISTRY OF COMMERCE

(12) The Industry should organise tanners associations and bodies to form themselves into one Federation so that they could represent to the Government for taking speedy action on matters pertaining to the Industry.

ACTION : MINISTRY OF INDUSTRY

CHAPTER VI

A SCHEME FOR AN ALL-INDIA SURVEY ON THE AVAILABILITY OF HIDES & SKINS

6.1 The Need of a Survey :

(1) The future growth pattern of leather and allied industries suiting to the consumption needs of Indian people and the export commitment of these industries can be planned only on the basis of reliable statistics pertaining to the quantum of supply for hides and skins within the country. The variables that determine the changes in the rate of growth of this quantum over the years are manifold and complex. There is a long-felt demand for undertaking a continuous study of the problem.

(2) Any measure designed for the improvement of the quality of hides and skins should be based on information on the variation throughout the country of the existing methods of flaying, preservation, grading, classification and modes of transport of hides and skins.

(3) In order to achieve optimum utilisation of the scarce supply specially of hides, the planners and the industrialists must know about the proportion of different types of hides (heavy, medium and light) available in the country and their suitability of being used for different end-products (Industrial leathers, Chrome leathers and sole leathers, etc.).

(4) Any proposal for bettering the existing collection system of hides and skins at Panchayat, district, State and All India level can be mooted only on the basis of adequate information regarding such categories as price-spread between primary producer of hides and skins and the tanner and the relationship of different elements within the market channel.

(5) The Survey results may provide a basis for a continuous estimation of hides and skins in their qualitative and quantitative aspects.

6.2 Identification of the Problem :

The problems relating to the assessment of the supply conditions for hides and skins have been stressed in Background note II; the review of different procedures of estimation which were followed in the past has been presented and a broad methodology

has been developed through discussions. Now, the issue centres round pinpointing the following problems of arriving at proper assessment :

- (a) The problem is not only to know the quantity of the hides and skins supply at a point of time but to find out a basis for continuous estimation over a period.
- (b) The problem is to take into account the clandestine slaughter of cows and assess the impact of loss arising therefrom.
- (c) The problem is to identify the statistical frame for the survey—whether direct enumeration of hides and skins is possible or indirect method of basing the estimation of supply data for hides on livestock as statistical frame (for 'fallen' hides) and their life-span data. Expectation of life varies over different regions and over periods. If the indirect method is followed, the really crucial variable to be studied is the details about life-span. Average mortality rates, though, present an overall picture, may fail to answer questions like what is the proportion of calfskins/katta and kattai in an assortment of, say, 100 hides. So, the incidence of mortality among the youngsters, middle-aged and old animals may have to be observed in a more detailed fashion.
- (d) Another connected issue is to decide about proper sampling units—the livestock owners, the butchers, the flayers, the slaughter houses, the raw hide traders, livestock officials may form the structure of respondents suiting to the varying needs of the Survey questionnaires.

6.3 Nature of the Survey :

The following items will be taken up for consideration in the Survey :—

- (i) Survey methods which will suggest the way out for continuous estimation.
- (ii) Production of hides and skins—seasonal and trend factors and structure of the supply; fallen and slaughtered hides and skins—weight ranges etc.
- (iii) Imports and Exports—seasonal, trend and other factors affecting those fluctuations.
- (iv) Domestic demand—private, industrial and military requirements.
- (v) Conditions of Flaying and Curing.
- (vi) Price structure—its fluctuations and factors affecting those fluctuations.
- (vii) Market structures—primary producers (Chammar and Butchers) and distributors and market mechanisms—different layers of exporters.

- (viii) Quality and grading—pre-mortem and post-mortem defects—age, breed and sex—different methods of classification and grading.
- (ix) Storage and transportation—methods and cost of transportation—road and rail transport—packing methods etc.
- (x) Recommendations.

6.4 Survey Procedure :

- (i) *Mode*—Survey will be of interview type to be conducted by roving investigations, canvassing different questionnaires.
- (ii) The whole country will be divided into four zones—North East, West and South. Each zone will consist of three or more States which again will be classified into suitable urban and rural areas. Two different survey methods will be followed corresponding to the varying problems of survey in urban and rural areas.
- (iii) A pilot survey may be necessary for deciding appropriate sampling design, finalising the questionnaires and training the investigators. The pilot survey should be completed within a month with a team of three investigators.
- (iv) The organisation of the Survey Team may be indicated as below:—
 - I. *Officer Incharge* entrusted with the planning, execution and analysis of the survey and its report writing One
 - II. *Supervisors* entrusted with general guidance of the field staff and organising the tabulation and analysis Five
 - III. *Tabulators* will be required to scrutinise and compile the data primarily processed by machines (as the volume of data will be very large, it is desirable to undertake *machine tabulation* in the interest of speed, accuracy and economy). Two
 - IV. *Primary investigators* entrusted with the collection of primary and secondary data. Twenty
- (v) The Central Leather Research Institute will be responsible for the overall organisation of the Survey.

(vi) Time Schedule for the Scheme :

A. Pilot Survey & Planning		2 months
B. Execution of the field Work		8 months
C. Scrutiny, tabulation & analysis		4 months
D. Report writing		2 months
Overall Period required		<u>16 months</u>

(vii) Cost Structure of the Scheme :

(A) Salary :	Rs.
(a) Allowances for the Officer Incharge @300 p.m. for 16 months. The salary of the Officer Incharge will be borne by the organisation which may lend his services for the purpose.	4,800·00
(b) Pay of the Supervisors (5) for 8 months @Rs. 500·00 p.m.	20,000·00
(c) Pay of Investigators (20) for 8 months @Rs. 200·00 p.m. (consolidated)	32,000·00
(d) Pay of the Tabulators (2) for 4 months @Rs. 200·00 p.m.	1,600·00
B. Cost of Machine Tabulation	20,000·00
C. Travelling Allowances for the Field Staff	42,000·00
D. Stationery & Contingency	10,000·00
Total Cost of the Scheme A, B, C & D	<u>1,30,400·00</u>

CHAPTER VII
BACKGROUND NOTES AND APPENDICES

Contents

- Part I** **A Progress Review.**
- Part II** **Problems posed and Solutions Suggested.**
- Part III** **A long Term Leather Export Programme.**
- Part IV** **Recommendations for the recovery of wastes & by-products from slaughter houses and dead animals & contains Statistics.**
- Part V** **Questionnaire on the problems of Leather Industry and on the future pattern of its development and its exports.**
- Part VI** **List of References.**

PART I

INDIAN LEATHER INDUSTRY

A PROGRESS REVIEW

1. Importance of the Industry :

The leather industry is one of the important industries of India. Owing to the wide distribution of its production units throughout rural and urban India, the size and significance of the industry is not readily appreciated. The industry derives its importance in the Indian economy due to the following:—

- (a) The industry provides full and part-time employment to a large number of people. According to the National Income Committee Report, the total number of persons engaged in this industry in 1951 had been estimated at 0.763 millions which worked out to 6.6% of the total labour force employed in all small enterprises. The Committee estimated the total earnings of the persons engaged in this industry at Rs. 600 millions. The present employment position and the value added to gross national output might have increased sizeably during the last decade following the rise in the production of hides and skins and the general tempo of progress provided by the implementation of development plans. As early as in 1931, the total 'chammar' and 'mochi' population was estimated at 16.5 million. But, presumably a large part of this population was not actually engaged in leather trade and industry.
- (b) The hides and skins trade and leather industries have been earning a sizeable foreign exchange. Hides and skins trade, and leather and allied industries were credited in 1963-64 with a foreign exchange amounting to Rs. 396 million and this group of commodities ranks fifth in our exports (earning 5 to 6 per cent of the total export earnings of India).
- (c) It is recognized that the footwear is a daily necessity for providing health and comfort. Leather Industry is now meeting the domestic demand of footwear to an extent of about 100 million pairs (1961). With the growth of India's population and the rise in the standard of living under the impact of the development plans, the production programme of footwear has to be increased four-fold to provide if only one pair of shoes per Indian.

- (d) The major section of the people engaged in Industry in the primary and rural levels and as working force in the organised sector is largely drawn from the depressed classes. Any measure for the development of this Industry will result in the socio-economic benefits accruing to them.
- (e) The leather industry is fed by by-products and generates further by-products in its production processes. Any development of this Industry will thus add more wealth from waste utilisation and is very significant from the point of view of national economic development.
- (f) India is the single largest live stock holder in the world and utilisation of the hides and carcass by-products is a necessity apart from its economic value.
- (g) Leather plays an important role not only in times of peace but more so to meet defence needs and
- (h) The leather industry is amenable for development on a labour intensive basis providing gainful employment to a number of people.

2. Progress of the leather industry :

Historical background :

The Leather Industry of India is, doubtless making enough progress, though not spectacular, during the last 50 years and more particularly in the post-independence period. The general economic indicators of progress of an industry may be categorised as:—

- (a) Rise in the level of machanisation and modernization; consumption of chemicals etc.
- (b) Improvement in the average size of an operational unit. (small industries growing into medium size and the latter turning to be large size);
- (c) Improvement in the organisation, channels of supply and quality and quantum of raw materials.
- (d) Diversification of production;
- (e) Increased quantum and quality of end-products leading to greater addition to Gross National Product;
- (f) Changes in the export structure with an increasing emphasis on the export of processed products from raw materials.

With this background, the general progress of the Industry may be reviewed in two parts, viz., (a) Progress in the pre-independence period; and (b) Progress in the post-independence period.

3. Pre-independence period :

The growth of the Industry during this period was largely attributable to the demand conditions created by two world wars and not much due to State patronage or through the organised efforts

of the entrepreneurs. It is, however, true that owing to social prejudices attached to trade and industry, the private Indian enterprise was reluctant to take up this trade on large-scale and this gap was largely filled in by the State (by setting up the Harness and Saddlery Factory at Kanpur in 1887), and foreign enterprise in the initial period. In the thirties, few Indian entrepreneurs, however, entered the field. Though, the Indian leather industry possesses a very ancient tradition, the production on modern lines was commenced much later compared to that in the West and the trial and error period of elementary technology was left to the foreign countries.

Prior to the first world war, India was primarily exporting raw hides and skins and it was reported that a strong group of German merchants thwarted all attempts of indigenous production. The first world war created favourable conditions for the internal production with the stoppage of raw material exports. The figures given below indicate the trend of exports of raw hides, pre and post first world war :

Export of Raw Hides pre-and post 1st World War

Item	Pre-War		Post-War	
	1912-13		1920-21	
	Quantity (Tons)	Value (Rs.)	Quantity (Tons)	Value (Rs.)
Raw cow hides	41560	59546310	14063	16243478
Raw Buff hides	17252	18991065	3307	263807 0

Now, not only the export of raw hides was banned but, India imports sizeable quantity of it to meet internal needs. In the sphere of the export of E.I. tanned hides and skins, there was a lull in the postwar period followed by a sizeable increase from the year 1928-29. The export statistics of E.I. tanned leather presented below give the trend of exports and show the remarkable recovery after the post-war depression.

Export of E. I. Leathers

Item	1912-13		1920-21		1928-29	
	Quantity (Tons)	Value Rs. (Million)	Quantity (Tons)	Value Rs. (Million)	Quantity (Tons)	Value Rs. (Million)
Cow hides	10771	19.2 (1780)	3513	9.8 (2973)	13695	36.3 (2652)
Buffalo	850	1.2 (1387)	271	0.5 (1938)	1401	3.0 (2116)
Goat skins	3087	13.1 (4237)	824	7.3 (8900)	3659	25.4 (6949)
Sheep skins	3017	11.6 (3863)	1823	12.6 (6951)	3305	20.4 (6171)

(a) Value in Million Rupees.

(b) Figures in parenthesis indicate the unit price per ton in Rs.

The Second World War provided a boost to the Industry and resulted in the change of the whole of the import pattern. The sizeable import of footwear and other finished leather products experienced a fall as can be seen from the following statement :

Table showing the trends of imports of footwear

Year	Pairs (Quantity)	Value (Rs)
1913-14	1976000	6866000
1930-31	273000	1195000
1939-40	273000	733000
1942-43	20000	181000
1944-45	1000	14000

The import of footwear during the last decade is also negligible but its export experienced a considerable increase touching a peak of 3 million pairs valued at Rs. 29·3 millions in 1963-64.

4. Post-Independence period :

The expected depression after Second World War arising from the dislocation and cessation of foreign outlets and fall in domestic and State demands, was considerably averted after the inauguration of development plans. The plans necessitated and, thereby, facilitated the increase in the production of footwear, industrial leathers, cycle tops, etc. Governmental restrictions on imports of finished leathers provided the industry with necessary sheltered home market. During the last decade, domestic demand must have gone up caused by population rise and increased level of living. The purchase programme by the Director-General of Supplies and Disposals, provided a substantial impetus to the producers. The other factors which helped for the promotion of the Industry are—

- (a) The favourable political climate existing with East European countries notably, with Soviet Union, led India to grow stable foreign markets in raw goat skins and footwear.
- (b) General scarcity conditions in the international leather market, leading to a continuous upward demand.
- (c) Decreased dependence on London Auction.
- (d) Creation of a parallel market in West Germany as in London.
- (e) Increasing interest of Western European countries, like Germany, for our semi-processed products and the creation of new markets, thereby.

5. Parameters for Progress :

A study of the economic variables like production, consumption, export and employment, technological innovation, application and productivity; progressive policy, decision making—state and the industry—should indicate the progress of any industry. Such a study is detailed below :

5.1 Production Trends :

As the statistical particulars regarding the major sectors of production of leather and allied products, viz., cottage and small scale, are not available in full, the progress may have to be gauged more with reference to the production trends in organised sector, both in quantity and variety, the developments in the export front, and changes in import pattern of raw materials and tanning agents, etc.

The estimated demands for raw hides by the various sectors of the industry are reported below (Agricultural Marketing Board Report):—

	Nos. in million	Percentage
Village artisans for making ropes etc. without tanning	1.14	4.2
Village tanners	9.41	39.0
E.I. tanners	9.56	39.6
Small-scale chrome tanners	1.42	5.9
Modern organised tanners	2.73	11.3
TOTAL	24.14	100.0
Indian production	22.86	
Imported	1.28	

Production of Vegetable Tanned Hides :

There are 32 scheduled units in the country, producing vegetable tanned hides and their annual average production data during the plan periods are given below :

(Million pieces)

First Five Year Plan	Second Five Year Plan	Third Five Year Plan
1.51	2.18	30.8

SOURCE : Monthly Production of Selected Industries.

The annual installed capacity of these scheduled units is 4.68 million cow hides. Though, the production is increasing, it is reported that they are working well below their installed capacities due to shortage of raw hides and other hindances. In addition to the organised tanneries, there are about 500 small-scale vegetable tanners in South India, producing E.I. tanned hides and skins. They process annually 8 to 9 million hides and 20—22 million skins. The production details as available from a report (unpublished) prepared by the National Small Industries Organisation are given below:—

(Nos. in millions)

Items	1955	1956	1957	1958	1959
Hides	8.532	9.564	7.977	6.357	10.079
Skins	25.136	33.834	25.991	23.159	29.667

Chrome Leather Production :

There are at present 12 scheduled units producing chrome tanned hides and their annual average production during the plan period is given below:—

(Million Pieces)

1st Plan	II Plan	III Plan (estimated)
0.71	0.70	0.90

SOURCE : Monthly Production of Selected Industries.

There are about 250 small-scale factories in and around Calcutta producing about 1 to 1.5 million pieces of chrome hides a year. Accurate production details are not available for them.

The chrome tanning units also work well below the installed capacities and the main reason is said to be the shortage of hides.

The recent trend is to export goat skins and cow hides in blue chrome state, reliable data for which are not available.

Production of Pickers, Picking Bands, Leather Belting :

The production of these items in the year 1952 and the last year of the First and Second Plan periods and the first year of the Third Plan Period are given below:—

Year	Pickers (Gross)	Picking (Bands)	Leather (Belting)
1952	15383	..	..
1956	27261	544010 (lbs)	118152 (lbs)
1961	9600	217704 (kgs)	152736 (kgs)
1962	16320	218868 (kgs)	164244 (kgs)

SOURCE : Monthly Production of Selected Industries.

The volume of production bands picking for and belting leather has been increasing sizeably over these years.

Footwear :

Production of footwear by the organised sector has been registering considerable rise which may be observed from the production particulars provided for the last years of First and Second Plan Periods and also for the year 1963 :

Year	Western type (million pairs)	Indian type (million pairs)
1956	3.62	2.91
1961	6.22	4.41
1963	8.29	5.19

SOURCE : Monthly Production of Selected Industries.

The production trends in unorganised sector of the leather and footwear industries which account for the tanning of more than 10 million pieces of hides and of more than 100 million pairs of footwear respectively, are not exactly known, though, it is assumed that a similar increased tempo obtaining in the organised sector is maintained in the unorganised sector also.

5.2 Standardisation :

Indian Standards Institution has already formulated standard specifications for more than 21 items of leather, leather footwear and manufacturers since 1956. The Agricultural Marketing Board have set up standards for raw hides for hair and wool. The Leather Export Promotion Council, Madras, has a voluntary quality control scheme for the export of E.I. Tanned leathers. The extent of application of these standards however has yet to be assessed.

5.3 Consumption :

The consumption pattern, of leather and leather goods, including footwear in India, has not been studied so far, in detail. As per one estimate, the total amount spent in India in the year 1949-50 on footwear was Rs. 1250 millions. Assuming that 1/3rd of this amount was spent on non-leather footwear, expenditure on leather footwear amounted to about Rs. 830 millions. In order to build up meaningful targets for footwear under different plans and mobilise leather and footwear industries for their fulfilment systematic studies on the trends and pattern of consumption of footwear and leather goods in all their ramifications should be attempted.

5.4 Imports :

As contrasted to the picture obtained in earlier times as exporter of raw hides and skins, and importer of finished leathers and leather goods, India, today, is importing raw hides, leather auxiliaries and exporting leathers, finished leathers and leather goods.

This progress is reflected in the following table :—

Trends in the Imports of Raw hides, tanned hides & skins and tanning materials

Sl. No.	Items	1957		1959		1961-62		1963-64	
		Qty. in '000 kgs	Value in million Rs.	Qty. in '000 kgs	Value in million Rs.	Qty. in '000 kgs	Value in million Rs.	Qty. in '000 kgs	Value in million Rs.
1	Total of Raw hides .	4,990.9	7.21	7,581.7	13.41	8,169.2	19.09	13,356.0	26.73
2	Total tanned hides .	271.9	0.52	46.0	0.10	52.3	0.09	33.5	0.06
3	Total Finished Leather .	780.4	0.33	690.1	0.22	834.8	0.54	1,828.0	0.64
4	Total Leather Goods .	..	0.06	..	0.05	..	0.01	..	0.05
5	Total Leather Manufactures	..	7.24	..	3.52	..	0.89	..	0.10
6	Total Footwear (Quantity in '000 pairs)	1.4	0.04	0.8	0.02	3.2	0.04	0.1	0.01
7	TANNING MATERIALS								
(i)	Gallatannic acid .	24.3	0.11	39.3	0.37	13.54	0.14	4.62	0.05
(ii)	Gambier Extract .	2.5	0.01	268.9	0.59	192.83	0.27	18.77	0.03
(iii)	Quebracoho .	3.8	0.01	57.9	0.08	100.09	0.09	128.27	0.14
(iv)	Wattle Extract .	9,692.9	9.55	11,488.0	9.41	13,711.21	9.95	15,254.75	12.41
(v)	Wattle Bark .	5,945.6	2.92	7,614.8	3.48	7,140.54	2.90	5,652.19	2.51
(vi)	Other tanning substances	1,283.6	2.79	393.8	0.44	292.94	0.41	68.62	0.15
(vii)	Other tanning extracts	307.4	0.32	376.5	0.39	819.66	0.65	1,325.17	1.28
(viii)	Synthetic tanning materials .	810.9	0.83	612.9	0.95	913.84	1.46	721.94	1.22
	Total value of tanning materials .		16.54		15.71		15.87		17.79
	Grand Total in value .		31.94		33.03		36.53		45.38

SOURCE : "Monthly Statistics of Foreign Trade of India".

(Director General of Commercial Intelligence and Statistics, Calcutta.)

5.5 Exports :

The surplus skins and hides available in the country continue to find foreign outlets mostly in the form of raw and tanned form. The only significant development during the last 15 years is the sizeable increase in the footwear exports and in the year 1963-64 it touched the all-time peak of about 3 million pairs. The export pattern with marginal fluctuations remained largely the same in the volume. Out of the total exports amount to about Rs. 390 million, the value of finished leather, leather manufacturers and footwear worked out only to Rs. 47.2 million. The real index of progress is the progress of the exports of above items. It may be relevant here to mention that the value of the imports of raw hides and skins, tanning materials, etc. during the year 1963-64 was Rs. 42.2 million.

In conclusion, it is, however, to be appreciated that though the export trade structure remained unaffected, yet exchange earning showed slight increasing trends in spite of the growing internal demands, created by the development plans both in the domestic and industrial sectors. The real National Income of India based on 1948-49 prices rose by 54.6% during 14 years *i.e.*, from 1948-49 to 1962-63. The income so generated mostly went to meet the consumption expenditure. The leather and leather goods industries might have enjoyed a favourable market condition in the domestic market and how far the favourable conditions created was utilised is a matter for deeper and detailed analysis.

A general review of the leather industry indicates that there is a rising trend in its production schedule. However, it is a matter for intensified study whether this rise is uniformly distributed over different sectors and the increase was to the extent expected and whether the favourable industrial and demand climates created by the development plans have been fully utilised by the industry. It may be stressed that targets fixed during the first and second plan periods have been achieved in respect of footwear and skins production, though the hide production fell short of the target.

6.0 State and the Leather Industry :

The Leather Industry has received Governmental assistance and attention to a greater measure from the implementation of the development plans. The Industry was accorded a special treatment due to the following:—

- (a) Its good performance in the export field;
- (b) The predominance of small and cottage scale units of production and the Government's policy of encouraging them;
- (c) The importance of the industry in the defence of the country (Supply of suitable winter boots etc. for the army).

Till India gained Independence, the export of raw hides and skins was allowed freely and no restriction was imposed on the imports of leather manufactures. The nascent footwear industry in the thirties struggled hard to compete with the imported Japanese and western shoes. The Second World War greatly helped the indigenous producers by the stoppage of imports and the expanded export markets.

6.1 Policies :

The policies pursued by Government during the post Independence period were aimed at two main objectives:—

- (a) Promotion of internal production and
- (b) Increased export of finished leathers, footwear and leather goods instead of raw hides and skins.

As a protective measure to help the infant Indian industries, heavy import duties were imposed on the manufactured leather products even to the extent of 100% *ad valorem*. The export of goat skins was restricted by quota system whereas the exports of raw hides and sheep skins were virtually banned. A Special Export Promotion Scheme was introduced and this helped the exporters to increase their production by utilising the import entitlements. In the bilateral trade agreements, leather and footwear leather goods were included by the Government of India in many cases. The above narrated were the broad general measures undertaken by the Government. Some of the specific measures such as according priority in the rail movement, concessions in sales tax, and freight charges, provision of storage facilities for leather and leather goods in State and Central Warehouses and the notification of the Tanning Industry as an Essential Industry etc. levying of excise duty of 10% *ad valorem* on the footwear produced by bigger units (now withdrawn) so as to give a price advantage to small and cottage sectors are worth mentioning. Similarly, credit facilities and other measures to improve the stability and cushioning factors have helped the industry.

6.2 Institutional Arrangements :

Though there was an official unit under the Development Wing for a long time to look after the industry, the first attempt to get the views of the various leather interests found expression in the formation of a panel for the leather goods industry in December 1958. The panel, later on developed into a Development Council for leather and leather goods. The various institutional and other arrangements made so far by the State for the development of the leather industry are dealt with briefly in the following pages. They are further classified as those that are exclusively meant for the development of the leather industry and the others having leather and allied industries as one of the items in their programme.

IV. *National Small Industries Corporation*.—This Corporation has been helping in the modernisation of units by supplying imported and locally available machines on hire-purchase system to the small scale sector. The Export Cell of this Organisation, it is reported, has so far arranged for the export of footwear made by the small scale sector, valued at Rs. 4 crores. Now the State Trading Corporation has taken up this work.

V. *State Trading Corporation*.—This Organisation has also recently come into the picture particularly in regard to the import-exports connected with East European Countries.

VI. *State Governments*.—(a) Almost all the State Governments had enacted legislation viz., "State Aid to Industries Acts" even prior to thirties. The Acts provide for the supply of loans and subsidies to the development of small and big industries. Rate of interest generally ranges between 3 to 5 per cent and the loans can be repaid in easy instalments spread over a long period. The details of the impact of these assistances under this head have yet to be obtained in respect of the leather industry.

(b) The responsibility for development of the small scale and cottage industries is vested with the State Government. Accordingly, some State Governments have established Industrial Estates, and the leather and leather goods industries also figure in such States. The Madras Government have recently established an Industrial Estate exclusively for the leather goods industry. The Pilot Project for the footwear production at Agra under the U.P. Government is another example of State's useful role.

(c) The State Governments have also one or more of the following :

- (i) Leather Experts.
- (ii) Advisory Committees.
- (iii) Leather Boards.
- (iv) State Khadi & Village Industries Board

to look after the development and progress of the leather industry in the State.

VII. The other agencies such as State Bank of India and State Industrial Finance Corporations to provide financial assistance to the organised sector of the industry. Few other organisations and departments such as Community Development Project Administration, Tribal Welfare Department, Harijan Welfare Board, Central Social Welfare Board, Handicrafts Board, Akhil Bharat Sarva Sewa Sangh, Ministry of Food and Agriculture and Kasturi Bai Seva Mandir are connected partly with the development of the leather industry. Their exact role and contribution have yet to be assessed.

VIII. The Director General of Supplies and Disposals purchase considerable quantity of leather products for the use of the different States. As per the Directory of Indian Leather Technologists Association (1960-61), the purchase made by the above office exceeds Rs. 10 million per annum.

The above account goes to show that Indian Government is not only fully alive to the needs of the industry but has gone out of the way to assist the industry.

Whether so many different units of the Government are necessary, whether they are complimentary and their work fully co-ordinated, whether it is possible to take quick decisions in such a set up and whether the industry is tossed like a shuttlecock, between decisions or indecisions of the various agencies, whether the assistance offered by various agencies is reaching the proper quarters and whether the industry is taking full advantage of these facilities have to be assessed. Such a critical assessment will help to formulate better plans, programmes to serve the industry better. But it has to be acknowledged the industry has been benefited.

7. Research, innovation and development, and Technical Training :

A good parameter for progress is to determine the rediness with which industry absorbs the latest technical know-how to produce goods of better quality, higher yields with lower costs to increase the efficiency and the tempo of development. Any development programme or progress is thus closely linked with research and utilization of research.

Recognizing research and progress are synonymous and recognizing the absence of large scale industrial combines to finance research and training institutions, the Government of India has established a number of Institutes which are detailed below :

7.1 Central Leather Research Institute, Madras (CLRI) :

This is one in the chain of National Laboratories under the aegis of the Council of Scientific and Industrial Research. Its objects are—

- (a) to conduct fundamental and applied research,
- (b) to develop technical know-how and know-why,
- (c) to disseminate the know-how to the industry and
- (d) to train technical personnel.

This Institute attempts to keep in close touch with the industry and its problems through its extension activities and also with other organisations connected with the industry both in India and abroad. It also trains personnel at Managerial research level with the

6.2.1 Arrangements exclusively for Leather Industry :

(a) *Leather Development Councils.*—The Leather Development Councils both the first and the reconstituted one have studied the various problems connected with the industry, such as shortage of raw materials both in quantum and quality, prevalence of idle capacities in the existing units, the areas where modernisation is urgently required, the need for the formulation of suitable import and export policies, and the proper marketing and distribution arrangements required in India and abroad. The Council helped a good deal to understand the problems of the industry in proper perspectives and the various reports of the sub-committees served as an addition to the inadequate details available about the industry which may be of aid in the planning and formation of policies in this sphere.

6.2.1 (b) (i) *Leather Export Promotion Council, Madras.*—
(ii) Leather Export Promotion Council for finished leather, leather manufactures and leather goods including footwear, Kanpur.

The Leather Export Promotion Council, at Madras was established in 1956 and its main functions are to advise the Government, local authorities, and public bodies regarding the measures in operation that require improvement and the new measures necessary for export promotion. The Council is to arrange for market surveys abroad through export agencies, send trade delegations to make on-the-spot studies of the foreign markets and participate in the renowned World Fairs. The Council has evolved a scheme for voluntary quality control for E.I. tanned leathers. The Special Exports Promotion Scheme is being implemented under the aegis of this Council.

6.2.1 (c) The second Council was started at the end of 1963. The Council had participated in the recent Paris Leather Fair. The Council has a vast field to cover in the promotion of finished leather and leather goods exports.

Sports goods Export Promotion Council—which attends to the problems of all sports goods exports—also cover the leather sports good like football, cricket ball, and other sports goods.

6.2.1 (d) *Research and Training Centres.*—Recognising the imperative need for modern technical know-how and trained personnel, the Government of India has set up a number of organisations like Central Leather Research Institute, Regional Training Institutes etc. This subject will be dealt with separately. Similarly training centres in flaying are run by Ministry of Food and Agriculture; Khadi and Village Industries Commission, Veterinary Colleges, etc.

6.2.2 Agencies that cover leather as a part of their programmes:

I. *Khadi and Village Industries Commission*.—This Commission is vested with planning, organisation, and programming for the development of a number of village industries including leather. It has been doing yeoman work for rehabilitation and reconstruction of village leather industry which accounts for the production between 50 to 60% of leather and leather goods. The main features of this scheme are—

- (a) setting up of flaying and carcass recovery centres;
- (b) establishment of village model tanneries;
- (c) running of training-cum-Production centres;
- (d) organisation of Tanning co-operatives;
- (e) maintenance of marketing depots.

At the end of 1961-62, 243 flaying centres, 199 tanneries, and 47 marketing depots were working under the control of the Commission. The loans and grants given by the Commission till 1961-62 are given below:

	1960-61	1961-62	(In lakh Rs.) Total loans and grants given upto 1961-62
Loans	37.40	39.28	155.65
Grants	33.23	26.20	146.11
	70.63	65.48	301.76

II. *Central Small Industries Organisation (CSIO)*.—(a) The small Industries Service Institutes (SISI) are set up in each State under this organisation to disseminate technical know-how and make available servicing facilities, hire purchase credits for machinery, consultancy services by running some model centres. This department also arranges for training of technicians, undertaking Refresher courses, for industrial and management personnel, techno-economic surveys on the tanning, footwear and leather goods industries in the All India and regional level.

(b) C.S.I.O. has also set up Central Footwear Training Centre at Madras and Precision Shoe Last Factory at Agra to assist the footwear industry.

III. *Small Industries Extension Training Institutes (SIET)*.—Another organisation under CSIO is to train both the officers of the Government and managers of the industry in the extension techniques—application of the appropriate technology to the small-scale industry.

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- (d) to train technical personnel.

This Institute attempts to keep in close touch with the industry and its problems through its extension activities and also with other organisations connected with the industry both in India and abroad. It also trains personnel at Managerial research level with the

co-operation of the University of Madras. A number of foreign countries are also taking advantage of the research and training facilities available at C.L.R.I. The C.S.I.R. also offers fellowships, research schemes, etc. in the University Research Departments for fundamental research in the field of leather.

7.2 Training :

Institutes at Jullundur, Gwalior, Kanpur, Agra, Bombay and Madras impart training only at the foreman level offering diploma and Certificate courses in leather and leather goods manufacture.

7.3 College of Leather Technology, Calcutta :

Apart from C.L.R.I., this is the only college that offers degree course in leather technology.

7.4 Practical training facilities in leather manufacture are offered by S.I.S. Institutes and C.L.R.I.

7.5 Central Footwear Training Centre, Madras (CFTC) :

This centre under C.S.I.O. offers courses in the foreman and managerial level.

7.6 Training in Flaying and Tanning :

- (1) F.A.O. Centre at Bakshi-ka-Talab, Lucknow
- (2) One to be set up soon at Vijayawada
(1 and 2 run by the Ministry of Agriculture)
- (3) Goseva Charmalaya, Nalwadi (Wardha), Kora Kendra, Borville, Akhil Bharat Sarva Seva Sangh and many other small centres run by the Khadi Commission.
- (4) Veterinary Colleges—all these offer training in flaying and carcass utilisation and some also offer training in and tanning leather goods and footwear.
- (5) Community Development Centres, Social Welfare Board and Handicrafts Board also offer training in leather and leather goods for short periods.
- (6) Leather craft training is also offered in art schools and basic training schools.

This account should give a fair indication that the industry is being well served both with research, technical know-how and technical personnel. At least, the facilities are made fully available. What is more important however is how far the industry is

able to absorb the men and the knowledge. It is this—the rate and quantum of absorption of technical men and technical knowhow that determines the progress of the industry. This needs a through assessment. But it can be definitely stated that the age-old industry is awakened to the need of science and technology and greater use is made of research, and trained personnel in the recent years.

7·7 Technical Training :

With regard to technical training, a seminar was run by the Central Leather Research Institute in 1963 and a reference is invited to the publication arising out of it—Education in Leather Technology.

8·0 Other Indications of Progress :

Apart from the Organisations set up by the Government to promote the growth of the industry, the industry by itself has made rapid advances. This is reflected in the following :

8·1 Collaboration with Foreign Manufacturers :

8·2 Setting up their Own Offices Abroad :

8·3 Participation in International Exhibitions :

8·4 Forming Newer Organisations Like :

- (a) Indian Leather Technologists, Associations, Calcutta.
- (b) Indian Hides and Skins Improvement Society, Madras.
- (c) Leather Goods Manufacturers' Association, Bombay.

8·5 Promoting Technical Journals :

- 1. The Tanner
- 2. J.I.L.T.A.
- 3. Leather Science
- 4. Footwear India
- 5. Leathers

PART II

INDIAN LEATHER INDUSTRY

PROBLEMS POSED AND SOLUTIONS SUGGESTED

The leather industry is as old as man and yet continues to be young and faces many and varied problems—some old and chronic and some new and complicated. These problems may be grouped under the following heads :—

- A. Resource Mobilization and Utilization
- B. Organisation
- C. Social
- D. Technical
- E. Marketing
- F. Internal Consumption
- G. Exports
- H. Finance

Each of these is discussed critically in the following pages.

A. Resource Mobilization and Utilization :

Indian Leather Industry has a unique position in the world for its natural resources. Raw hides and skins, vegetable and mineral tanning agents, oils and other auxiliaries are indigenously available. What is needed is proper mobilization and utilization of these valuable resources.

1. Raw Hides and Skins :

1.1 *Mobilization*.—Under this head, the problems of production, collection, preparation for market, transport and storage may be considered.

1.1.1 *Production*.— There are many estimates regarding availability of hides and skins. The names of the agencies together with their estimates are given below :—

(In millions)				
Agency	Year	Hides	Skins	Total
Directorate of Marketing & Inspection.	1951	18·9	36·8	55·7
F.A.O.	1951	..	..	57·8
Min. of Commerce & 'Ind. .	1951	..	..	64·4
Planning Commission . .	1958	23	46·7	69·7
C.S.I.O.	1959	25·4	50·0	75·4
Directorate of Marketing .	1961	23·3	..	..

The above statement clearly indicates the absence of reliable data and the need for developing proper techniques of assessment.

1.1.2 Reliable Techniques for Estimation of Production of Raw Hides and skins and suitable statistical base for Future Planning :

Comprehensive and precise data on the production, preservation, market and price structures and other conditions relating to the supply will help in building up policy formulations for the following aspects of the industrial programming of leather industry :—

(a) The formulation of appropriate measures for the improvement of the quality standard of raw hides demand a continuous supply of appropriate information on the existing practices of flaying, preservation, grading and classification, mode of transport of hides in different parts of the country.

(b) In order to achieve optimum utilization of the scarce supply, the planners must know the proportions of different types of hides (heavy, medium and light) available in the country and suitable for different end-products (industrial leathers, chrome leather, sole leathers, etc.)

(c) The distinction between total supply and marketable surplus should not be lost sight of in the case of hides. Various factors like incentives to primary producers, better transport and suitable market structure are the determinants of the marketable surplus. Any proposal for building up suitable collection organisation at Panchayat, State or All India level can be mooted only on the basis of adequate information regarding such categories as price spread between primary producer and the tanner, relationship between a beopari and an Arhadar and their respective bargaining powers.

(d) Moreover, the future overall growth pattern of industry suiting to the consumption needs of Indian people and the demand from external market, may only be planned ahead only on the basis of expected rate of growth in the supply of hides and skins. So, in this case, statistics on the availability as such, will help in the planning of targets for different types of leather and on this basis, it may be possible to programme for other secondary inputs like machinery equipment, tanning materials and other auxiliaries. As a matter of fact, building up of suitable statistical basis may be considered as the pivotal plank for programming the leather industry as a whole.

1.1.3 A Historical Study of Different Methods of Assessment :

It is desirable that various recommendations which have been made on the subject of availability of hides and skins in India may be summarised briefly. It is only on the basis of our experience

gained through the past recommendations that we may be able to suggest a blue-print for the construction of an adequate statistical system in this respect.

(a) The Indian Munition Board favoured method for estimating the annual production of raw hides on the basis of export performance for the early 1920's. According to their formula twice the quantity of hides exported in raw form was assumed as the internal production. But the method is arbitrary.

(b) In 1929, the Imperial Institute of Veterinary Research estimated the annual production of raw hides on the assumption that the average life span of cattle would vary between 4 and 6 years depending upon the incidence of mortality caused by natural calamities like floods, draughts and famines. According to this procedure, the production figure of hides would be arrived at by dividing cattle population by the average life span of cattle. But this system does not take into account the hides obtained by slaughter. Also, with improved conditions, the average life of the animal will go up. According to 1961 report, the annual production of hides to the total bovine population in the country works out to be 10.3 per cent. First of all, there should be correct figures for livestock population. India is claimed to possess 180 million cattle and 50 million buffaloes (1961).

(c) The Hides Cess Enquiry Committee in 1928-29 endorsed the view of the Imperial Institute of Veterinary Research regarding the average life span of cattle and also the method of estimating the production of hides on the basis of average life period. It may be noted that neither the Hides Cess Enquiry Committee nor the Directorate of Marketing and Inspection (which attempted some studies in later years) suggested any measures for conducting systematic field surveys for obtaining data pertaining to the availability and other supply conditions of hides and skins in India.

(d) State-wise production figures on raw hides are estimated by the Directorate of Marketing and Inspection, Ministry of Food and Agriculture, Government of India for the year 1948 on the basis of the Animal Census Report, variations in mortality and slaughter rates prevailing in different States. The procedure adopted in estimating the production of fallen hides in Western Indian States were collected from those who had a right of annual contracts for collection of raw hides and similar other agencies. In Mysore State, statistics of fallen hides were compiled from the cattle mortality report, whereas, in Madras State the estimate was based on the findings of Hides Cess Committee. Production of fallen hides in Madhya Pradesh was computed on the basis of records maintained on cattle mortality.

For estimating the production of slaughtered hides in urban areas the records maintained by municipal slaughter houses are the sources of information. Regarding the production of slaughtered hides in rural areas it was estimated on the basis of enquiries made

from hide merchants in different regions in respect of arrivals of slaughtered hides to the markets. The above procedure followed by the Directorate of Marketing and Inspection is considered as a definite improvement over the previous methods where the regional variations in the cattle mortality rate were not taken into account. A closer examination of this procedure would reveal that there is a predominant reliance on the cattle mortality records maintained by the Revenue Officers. It is well known that these records are not properly maintained, and as such, the estimation lacks the desired precision. However, this report has been very useful in providing basic data (though somewhat crude in nature) and the following table collected from the recent report will present a broad picture of the availability of cattle hides in India in 1961 —

TABLE No. 5
Production of Indian Hides in 1961

Type	Annual production			Percentage to total Indian production	No. of animals (lakhs) in 1961	Percentage of hides to animal population
	Fallen (lakh)	Slaughtered (lakh)	Total (lakh)			
Kips . . .	166.19	7.45	173.64	74.5	1758.4	9.9
Percentage .	95.7	4.3	100.00	..	..	..
Buff-hides . .	52.38	6.94	59.32	25.5	511.5	11.6
Percentage .	88.3	11.7	100.0	..	..	..
Total . . .	218.57	14.39	232.96	100.0	2269.9	10.3
Percentage .	93.8	6.2	100.0	..	..	..

The total production of hides in India is thus estimated at 23.3 million pieces of which cow comprise 74.5% and buffalo hides 25.5%, the proportion of fallen and slaughtered hides being 95.7 and 4.3% for cow and 88.3 and 11.7% for buffalo. The annual production of hides to the total population of bovines thus works out to be 10.3%.

The production of hides depends upon the cattle population. It is reported (Agricultural Market Report) that in 1961, the cattle (including Buffalo) population is 226.99 million—a 14.3% increase over 1951. This is probably due to better control over ravages of famine, floods, diseases etc.

The Central Small Industries Organisation (C.S.I.O) presented some statistics for hides supply. The C.S.I.O. estimated a production of 25·37 million hides in 1959 but this report does not give any source or methodology for arriving at this figure.

(e) In spite of the various limitations the Agricultural Marketing Report has served well as a guiding statistical frame for policy formulations. This should have served well for future programming also but for the shift in the basic socio-economic perspectives in Indian economy in general and leather industry in particular.

During the last 10—15 years, there have been considerable changes in the industry such as—

- (i) the price structure of hides.
- (ii) introduction of ban on cow slaughter reducing the quantity and quality of hides.
- (iii) Better care of the animal resulting in a higher average life span—increasing population—but less food and less production of hides and poorer quality.
- (iv) More hides tanned in the village and less filtering to the regular markets.
- (v) greater imports of hides.
- (vi) Some losses due to sentiments—died cow being buried in some areas, refusal to salvage the dead cow etc.

It is imperative, therefore, to have a critical and continuous survey on the supply position of hide in India.

(f) *Skins*.—Fortunately, the position in regard to skin (goat skin, sheep skin, reptile and others) is somewhat easier. This is because nearly 80% of the goat and sheep skins is arriving from slaughtered animals and there is no restriction on the slaughter of goat and sheep in any part of the country. The internal market for tanned and finished skins is very limited and nearly 85% of the entire availability (domestic production plus import) is meant for foreign market. Moreover, as the urban population in India consumes 45% of the total goats and sheep slaughtered and as the slaughterings are done in organised slaughter house, information pertaining to supply conditions of skins are readily available and its degree of precision is higher. The main problem is to obtain information for the slaughtered goat skins in the rural areas and for those pertaining to dead goat and sheep.

Statistics regarding the production of raw skins previous to 1935 are not available. However, estimates formed by some experts before the first survey was taken in hand by the marketing staff, give the annual production of goat and sheep skins as about 26 million pieces. During the first marketing survey (1935-36) special efforts were made to estimate the figures of production in the various

states separately. Considering India as a whole, it is estimated by the Directorate of Marketing and Inspection on the basis of livestock census 1951 that there are about 47.3 millions of goat and 38.8 millions of sheep (1951). From these, the approximate yearly production of goat and sheep skins are estimated as 21.3 million pieces and 15.5 million pieces respectively.

The production of fallen skins is directly related to the total population of goats and sheep in India. The Report on the Marketing of Skins in India (1955) states that records of deaths of these animals are kept nowhere and only a rough estimate could be made to ascertain the number of skins produced, through local enquiries. The information on estimates of fallen skins (of the above report) was acquired largely through enquiries from shepherds, village patwaries and the staff of the revenue and veterinary departments in the various States. The survey revealed that in Bilaspur, Delhi, Tripura and West Bengal, the number of skins produced from dead animals is negligibly small. But in Bombay, Pepsu, Himachal Pradesh, Saurashtra and Uttar Pradesh, production of fallen skins is as high as 15% and over of the sheep and the goat population. Other areas of high production of dead skins are Ajmer, Bhopal and Rajasthan.

As regards information on slaughtered skins, it is pointed out by the report that records showing the number of animals of each kind that are slaughtered daily are maintained in the slaughter houses (urban) and the production of slaughtered skins in the urban areas quoted by the report have been mostly compiled from such records. The production figures of skins in the villages, however, had to be estimated by making enquiries at selected village centres and through discussion with skin merchants. The import of skins to the extent of about 10% of the total quantity augments internal production.

(g) The above analysis shows that for estimating the production of raw skins it is not sufficient to know the figures for goat and sheep population. Figures for 80% of supply from slaughtered are to be obtained from butchers. The life span data for those used for breeding purposes and those which die of diseases will be necessary to determine the quantum of skins from fallen animals. The internal demand for tanned and finished skin has shown signs of definite and continuous upward trend. This is reflected by an almost stagnant position regarding the quantity of skins exported during the last decade. The emphasis has recently been laid on the production of more and more pickled, tanned and finished skins and restrictions are being imposed on the export of raw skins to promote the scope of their greater processing at home. We had experienced how lack of data on the availability of goat skins of different size specifications baffled some of the attempts in administering the restriction proposals. The economic importance of by-products like wool, hair and intestines has grown recently in domestic and external markets. The export pattern of skins trade is undergoing slowly the

much desired transformation, *i. e.*, switch-over from raw to tanned and from tanned to finished and semi-finished leather and leather goods and at this juncture, further investigations on the supply conditions for skins will be much helpful to the industry, Government and the Planners.

1.1.4 The Need for an All India Survey for Hides and Skins :

The above account clearly demands a systematic study and all India survey for hides and skins. The broad objective of such a survey may be laid down as :

(a) The survey results will provide a basis for continuous estimation of data relating to the availability of hides and skins in their qualitative and quantitative aspects. Conclusions that will be reached will help in the planning for better and fuller utilisation of these basic raw materials for leather industry. It has already been indicated that planning for other secondary inputs like tanning machinery, auxiliaries on the one hand and the programming for the production of footwear and leather goods can only be taken up in the context of such a countrywide detailed study;

(b) The survey will aid in the investigation of the existing practices of flaying and preservation of hides and skins, identify the present limitation occurring therein and assess the effects of ameliorative measures already taken by various organisations engaged in this field and evolve suggestions for further improvements in the existing practices;

(c) It is reported that the prices of raw hides specially, those belonging to better categories have gone up to a great extent recently. The survey may, therefore, investigate into the factors operating behind such price rises and suggest measures for arresting them. The present market structure of hides and skins has been subjected to criticisms from industrial interests and governmental agencies. The survey may go into the appraisal of the situation and make suitable recommendations in this area.

Nature of Survey :

The following items will be considered in the survey :

- (i) Survey Methods.
- (ii) Production—seasonal and trend factors in the variation of production.
- (iii) Imports and Exports—seasonal, trend and other factors affecting those fluctuations.
- (iv) Demand Factors—private, industrial and military requirements and export.
- (v) Conditions of Flaying and Curing

- (vi) Price Structure—its fluctuations and factors affecting those fluctuations.
- (vii) Market structures—primary producers (chamars and butchers)—distributors and market mechanisms—exporters of raw skins.
- (viii) quality and grading—premortem and postmortem effects—age, breed and sex, different methods of classification, grading under agmark.
- (ix) Storage and Transportation—methods and cost of transportation—road and rail transport—packing methods and transport.
- (x) Summary and recommendations.

Survey Method :

The proposed investigation may be based first on the already collected data, past records and reports on the subject and secondly, on direct field survey. The field survey will be by interview method through questionnaire.

Appropriate sampling procedures will be adopted for selection of sampling units. Various categories of informants will be conducted in the course of survey. In order to develop a comprehensive background for the survey (specially in regard to the estimation of fallen hides) cattle owners, raw hides and skins producers (chamars and butchers) hides and skins merchants, village government officials, merchants' organizations, various governmental agencies and tanners should be contacted for eliciting appropriate information. Of course, the recognised slaughter houses in the urban and rural areas should serve as most important sources of information for slaughtered hides and skins.

As regards the frame for sampling villages latest census report and other materials of National Sample Survey should be consulted as the basis.

It may be recalled in this connection that leather Development Council in its meeting in January 1964 in Madras recommended for an all India survey and requested Central Leather Research Institute to take up the responsibility of conducting it, but, considering the complexities in the nature of the survey and wide dimensions it is having, it may not be possible for a single organisation to bear the financial burden for such a survey. CLRI may be entrusted with the technical guidance of the survey (planning, analysis and report writing) and other all India organisations like SISI, Khadi and Village Industries, Directorate of Marketing and Inspection should be associated for rendering aid in the field work. *Ad hoc* field staff may be appointed for the purpose so as to complete the survey in two years.

Conclusion :

I. Following the changes in the general economic conditions of the country and those relating to leather industry, the introduction of legislations restricting slaughters and changes in the mortality rates and old hypotheses regarding the supply conditions of hides and skins in India should be re-tested in the context of new developments.

II. It is desirable that an all-India survey on the marketing of hides and skins may be initiated on scientific basis to yield precise statistical information which will serve as basic tools for the planning of the industry.

1.1.5 Resource—Mobilization and Utilization—Raw Hides and Skins—Other Problems :

Apart from the need for a systematic study, a correct estimate of livestock population and hide production, the following factors come into play for full mobilization and utilization of raw hide resources.

- (1) Cow as an economic unit in Agriculture—need for reassessment.
- (2) Live-stocks development programme on a scientific and systematic basis.
- (3) Reconciliation of sentiment and science.
- (4) Rehabilitation/slaughter of useless cattle.
- (5) Checking the losses by the practices of driving animals across the border; playing the hide along with the meat, non-flaying of the hide, burying the dead animal etc.
- (6) Modernisation of existing slaughter houses, setting up of new ones—providing proper facilities for flaying in the villages.
- (7) Fuller utilization of carcass bye-products—Corporation may be set up for the purpose.
- (8) Better techniques for the preparation of the hide like flaying curing.
- (9) Better facilities for (a) transport (b) storage.
- (10) Grading of hides and skins—standardisation.
- (11) Price structure depending upon quality.
- (12) Introduction of the new trim system and supply of trimmed hides and unhaired pelt.
- (13) Rational and regulated distribution of hides depending upon the quality and end use.

- (14) Better Marketing methods. A Hide Corporation may be set up for dealing with 7-13.
- (15) Imports.
- (16) A radical and bold departure from tradition for collecting, curing and distribution of hides and skins.
- (17) Rigorous and intensive animal husbandry programme should be taken up.
- (18) Active co-operation and collaboration between various agencies from the village level upwards is needed.
- (19) Measures to educate the persons engaged in the industry at the level of collection of resources is desirable.

How do we go about these problems and what determined steps should be taken at this time are to be decided.

1.1.6 Other Resources :

A. Tanning Materials

A1. Mineral Tanning Agents.—all the raw materials required are fortunately available in India. Salts of chrome, aluminium and zirconium are generally used. The demand for basic chromium sulphate is increasing steadily and there appears to be a need for increased production.

As Aluminium and Zirconium salts are readily available, increased use of these materials should be popularised, for producing a wide variety of not only traditional but newer types of leathers with these tanning agents.

In a country like India, where we have a large surplus of chrome ores and less of vegetable tannins and where there will be increasing pressure on land for cultivation, it is quite logical to wean the tanners away from vegetable tanning. Chrome and chrome-vegetable combinations should be introduced more and more to husband our resources.

A2. Vegetable Tanning Materials.—Over 10 million rupees worth of vegetable tanning materials are imported every year in spite of the claim that India abounds in indigenous tanning materials. The traditional tanning materials like babul, avaram are in short supply and prices have gone up. The newer promising substitutes for wattle are not available in large quantities and are not regularly made available in the market. Myrobalan that is abundantly available is not a popular tan material.

It is suggested that :

- (1) systematic plantations for vegetable tan stuffs be raised. But the economics of raising such tan bearing plants have to be worked out to convince the Forest Departments

or it should be the policy and there should be a directive from the Government that such plantations be raised *irrespective of the economies.*

- (2) The old forest contracts be modified so to make it incumbent on the contractor felling trees to separate the tan bearing bark, leaf or fruit before the wood is sold.
- (3) The indigenous tan stuffs available in relatively smaller quantities may be blended and blended extracts made of these.
- (4) Some of the promising results obtained with myrobolan should be translated on a practical scale for its greater utilisation.

A3. Other Leather Auxiliaries.--For fat liquors, bates, water-proofing agents, bating agents, pigment finishes, lacquers, syntans, etc. to a large extent, both the raw materials and technical know-how are indigenously available—what is required is a proper policy, direction and incentives for an entrepreneur to take up their manufacture.

B. Organisational problems:
(size and strength of the units)

Problems of Scale :

Owing to the nature of the operations, physical limitations of the movements of raw materials that are available throughout the length and breadth of the country and also to the traditional reasons, the industry is still predominantly in the cottage sector judged either from the employment or capital criterion. As per the survey conducted by the CSIO(unpublished) there were 11 large scale, 753 small scale and 1,91,791 cottage tannage units in 1959. There are only 12 large scale foot-wear production units with an annual capacity in the western types of 7.37 million pairs in 1963. The bulk of the production of more than 100 million pairs is done by the small and cottage units. The cottage units due to the nature of their trade, possession of inadequate assets to serve as security and the absence of any established markets etc. could not command any institutional credit at cheap rates. They have perforce to borrow at exorbitant rates of interest and disadvantageous terms to carry out the operations. This has resulted in the increase of production costs. The profit margin, it is gathered, is very low in most cases and this is one of the reasons for the low investment level in the rural sector.

According to the policy of the Government, the small and cottage units are provided with financial and technical assistance, through various institutions. The Industry, no doubt lends itself admirably and even advantageously for the production by small units, provided little technology and managerial skills are infused. A central agency also should be established to guide and regulate the small units.

The organisation of Producers' Co-operatives at the Cottage and Small Scale level will enable the present scattered and weak units to enjoy the economics of scale and the benefits of joint purchase and sale. During the last quinquennium, there is some concerted effort on the part of the All India Khadi and Village Industries Commission to build up service and other co-operatives through the administration of Capital, managerial and technical aid programmes. Here again the need for further studies on the progress of these programmes is felt.

It may be appreciated in this connection that the development of tanning and leather industry as producers of semi-processed and fully processed leather is inextricably linked with the development of Footwear and Leather Goods Units in the country. So any programme for overcoming the problem in one segment should take into account the peculiarities existing in other segment also and in order to make a plan successful in this field a totality of approach covering all the aspects beginning from raw materials and ending with the production and distribution of Footwear and Leather Goods, has to be devised.

To sum up the whole section it may be pointed out that the problem of co-ordination is fourpronged—co-ordination should be there for a suitable regional development of the Industry and for building up a healthier relationship among different sectors (cottage, small and large) and suitable mutual adjustments among the three segments of enterprise namely Hides and Skins, Semi-finished and Finished leather—Footwear and Leather Goods—the last and the most important aspect of co-ordination veers around the issue of harmonising the different objectives namely export objective, the objective of providing leather articles for domestic consumption and the goal of generating employment; unless this multi-faced task of co-ordination is taken up at programming and implementational levels, the stresses and strains for the development will grow leading finally to antagonistic relationship within various segments and sectors.

The following suggestions have been often made in regard to organisational aspects:—

(1) An all India Leather Board be established to look after the overall interests of the industry.

(2) A co-operative apex body be set up in each State.

(3) Small units may combine to become a viable economic unit.

(4) Small units may produce only certain type of leathers and leather goods.

(5) Small units may be used as feeder units to the organised sector.

(6) The organised sector should not be allowed to expand so that small units grow.

(7) As most of the small co-operative units did not prove successful, the State may provide the technical, administrative and managerial assistance to set them right.

(8) There are too many associations, organisations and interests and a single Federation may be formed.

(9) Tanners' Associations should be encouraged to help the tanners, to obtain quality leather auxiliaries, tanning materials etc. at a fair price. Government may be requested to afford all facilities for such associations.

(10) Area development survey is necessary before planning.

(11) Effective measures should be taken for collection of dead animals to avoid large scale waste. It will be desirable to get the co-operation of Panchayat Raj institutions in implementing the programme.

(12) For healthy co-existence of the different sectors, the collection of raw hides, skins and tanning materials and supply of the same to small scale and large scale units as to be maintained but for common production programme, it should be seen that the village sector does not starve for the benefit of the larger sector for the raw material.

(13) The objective of providing ways and means of increasing employment opportunities to people connected with this trade in village by allotting a piece of land to them which will assure stability to rural economy placed on a more sound basis.

(14) The results of research should be village-oriented and appeal for work should be duty-oriented.

C. Social :

The Indian Leather Industry has remained essentially a decentralised cottage and craft based industry. The age long experience and skill could well be utilised even now for the development of the industry giving gainful employment to a large number of people in the villages.

But the age old industry has also brought with it tradition, inertia, prestige and social stigma. The people of the community long associated with it were treated as untouchables because of the bad odours associated with their work. Several measures have been introduced to remove the untouchability, legal, social and economical.

The question is how far did we achieve this object of removing the stigma ? Has the man in the village been benefited by the funds and various types of assistance offered to him ? Does this assistance reach him ? Have his working conditions improved ? If not, what do we propose to do ?

The various suggestions offered are:—

(1) Give the traditional tanner an alternate employment—are there enough jobs? Can we afford to lose the valued experience and skill for this industry? The answer may have to be found elsewhere.

(2) The industry may be pioneered by an entirely different group of people with forward looking and bold programme. This may mean to an extent robbing their livelihood and traditional rights for collecting hides and skins.

(3) Improve the economic conditions of this group which will enable this generation to remain in the industry and the future generation going to schools and colleges opt out for their professions—a gradual transition.

(4) Improve the working conditions—to remove bad odours and invest funds on it, if not on a techno-economic considerations, at least on social grounds. Whatever the course of action, it is incumbent on the community, the country and the Government to remove the social stigma and funds invested for this purpose.

(5) Mechanisation, application of modern techniques, aggressive planning and determined action by the State and the Society should solve this problem.

D. Research and Technology :

D1. Often questions are asked, 'why research?'. Is research necessary for industry and economic growth? What research? How much research? Does research pay dividends?

All research and technological activity will eventually lead to an increase in the yield of given resource, effort or towards reducing the cost of a given yield. Reduction in cost or increase in yield is exactly what the industry demands. Therefore, it is only but right technology should weave itself into the fabric of planning and programming and developing any industry.

The age-old industry like leather embeded with tradition, inertia, prestige, empirical knowledge resists any change and, yet, if it has to be kept alive and grow continuously, continuous innovation and application of science and technology is very much needed.

It is in recognition of this need for research the C.L.R.I. has been set up to serve the leather industry. Research is needed in footwear and leather goods also. For these research organisations, what is required is :

- (a) define problems
- (b) to set priorities for research
- (c) to develop appropriate technology
- (d) to organise the machinery to introduce the latest technology into the industry at all levels from planning to selling.

The Indian Government has been generous to set up a number of field service/extension centres through its various organisations. Yet much needs to be done. What is most needed today is :

- (1) scientific temper in the community.
- (2) industry's active participation in research activity.

It is reported that no tanner can be a member of the British Leather Federation unless he becomes a member of the British Leather Manufacturers' Research Association. Similarly in Germany, France, each unit of the leather industry has to pay a sum based on its production or labour employed towards technological and training activity in the country. Such a financial participation if only to a small extent makes the industrialist to ask more questions and demand more from the research institutes.

(3) Technical experts should be associated at all levels of development of the industry.

(4) Technical consultancy service should be set up to assist manufacturers for internal and external markets.

(5) Industry should sponsor research by giving research fellowships at C. L. R. I. (which are devoid of Income-tax).

(6) At present extension work is carried out by different organisations independently; there is a need to set up a coordinating agency to channelise properly the knowhow developed by the various institutions.

(7) A co-ordinated clinic of specialists in the various fields belonging to different organisations may be established for consultancy service to the tanners. This agency must also develop "Appropriate Technological practices" to suit the units.

(8) Two districts one in north and one in south may be selected initially; area survey may be conducted (if necessary) for the development of leather industry and draw up a programme. With the help of the co-ordinating agency and the clinic of specialists, the development programme should be implemented within a stipulated time.

(9) Besides demonstrating the processes the extension staff should also bring out the economics of the process and the managerial aspects. A team of experts should undertake such type of work.

(10) The necessity to employ technical personnel by the recipient of the extension services should be impressed. Only then the improved processes could be continued to be carried on usefully.

(11) There should be continuous evaluation of the extension work done by various organisations.

(12) There should be an exchange of personnel among the various organisations engaged in the extension work.

(13) More publications in regional languages are necessary for the industry to know the technological developments.

(14) Science and technology should be made very simple so that it will be understood by the village artisan.

D2. Technical Manpower:—With the slow but steady switch over to more and more finished leathers, newer methods and machinery, there is growing need for technologists and technicians.

On one side, there is a good deal of traditional skill and age-long experience; on the other, the regional institutes and C.L.R.I. are providing the required manpower. Only, as the older generation of skilled hand fleshers and scudders are going out, the younger set is not taking to it kindly and the scarcity for such labour is just showing up. To meet this exigency, the industry is waking up to the need of more and more machinery and machine men. This is in a way a happy sign.

E. Marketing Problems :

(1) The present raw material supply and distribution channels are reported to be very lengthy and it appears that there is a vast difference in the price of raw material in the level of primary producer and tanner, the essential reason being the operation of many intermediate commercial agencies. Some studies have been attempted in this field and the suggestions contained in the Master Plan for Andhra Pradesh for the improvement of the market practices are worth following.

(2) A Hide Corporation may be set up to collect, grade, distribute hides.

(3) Similarly a By-products utilisation Corporation may be set up to reclaim wealth from waste and to obtain raw hides and thereby finished products at a reduced rates to compete more favourably in world markets.

(4) There are no organised markets for some improved varieties of leather in some urban and semi-urban areas to enable the producers to take up newer lines. There is not much diversified demand grown in India at present to influence and better the production techniques.

(5) Without a sound internal or alternate market few entrepreneurs would undertake the risk of producing some improved and finished varieties for the export market alone. The growth of E.I. Tanning industry (a semi-tanning process) to a certain extent is the result of the above conditions.

(6) Another lacuna noted is the absence of any market intelligence service to help the rural producers of raw hides and skins and leather manufacturers.

(7) Intensive and continuous market research in India and abroad is needed.

(8) Persuade small scale enterprises to market their products working together as a group as is done in Sweden.

(9) Joint advertising by groups of small scale enterprises is also desirable.

(10) Assistance should be made available to small scale sector on product designing and packaging.

(11) A separate marketing corporation may be set up for footwear and leather goods.

(12) For Cottage & Small Scale sector, a marketing corporation may supply raw materials and sell their finished products.

(13) Standardisation and quality control measures should be enforced at each stage.

F. Internal Consumption :

The estimates for internal consumption for the year 1959 are given below.

	(In million pieces)			
	Cows	Bufs	Sheep	Goat
Internal consumption	6.6	4.0	3.2	1.6
Exports	8.2	0.8	13.0	11.7

SOURCE : Journal of Indian Leather Technologists' Association (1961)

The following changes have been reported since 1959, though no reliable data are readily available to indicate the correct current position :

(1) In case of E.I. kip, up to 40-50% produced is being consumed internally and the export is slowly going down.

(2) An increase in the production of upper leather for internal consumption.

(3) An increase in the internal consumption of buffalo hides.

(4) No drastic change in the internal consumption pattern for goat and sheep skins.

With the increased levels of economy, the demand for footwear and leather ware is increasing. The demand for leather is thus on the increase which may affect the export market.

Estimated requirement and targets for internal consumption and external export for the Fourth and Fifth Five Year Plans should be drawn up at this time.

F. Exports/Imports :

This subject will be dealt with in detail in the next part (Part III). The problems, bottlenecks and balanced programme for export are suggested therein.

G. Finances :

(1) *Investment.* — The figures for the capital invested in the entire leather and allied industries are not available. It is estimated that large scale units have invested over 120 million rupees. For the small scale and cottage industry, even the estimates are not available. But several state agencies and Khadi Commission invest money to help this sector as grants and loans.

(2) *Credit facilities.*—are extended to the small scale and cottage sectors by the states, Khadi Commission, State Financial Corporation, State Bank of India.

(3) The N.S.I.C. arranges for purchase of machines on hire purchase basis.

(4) Central Wholesale depots, etc. offering marketing facilities were set up by State and Central Governments, National Small Industries Corporation, State Trading Corporation, etc.

(5) Industrial corporations have been set up that get direct and indirect financial assistance.

Other Problems that Influence the Finances :

(6) Sales Tax-State/Inter-state/Central

(7) Excise Duty.

(8) Export Credit Guarantee

(9) Import Duty

(10) Drawbacks

(11) Actual User Licences

(12) Import Entitlements

(13) Import Restrictions

(14) Increase in Bank Rate

Major Bottlenecks :

The age old leather industry has inherited certain social and economic imbalances which are catalogued below :

To put these right, a variety of efforts, a concentrated and coordinated all-out efforts are needed.

To have more is one way but to get more out of what the industry has, is another equally important way.

(1) Inelastic supply position—raw material resources.

(2) Sentiments/prejudices preventing proper utilisation of resources.

(3) Low and inadequate social priority preventing capital inflow.

(4) Biological character of basic raw material inhibiting standardisation.

(5) Lack of diversity in internal demands as opposed to sophisticated demand pattern of the West.

(6) Dependence on export market—traditional character of export.

(7) Tradition as opposed to innovation—sentiment as opposed to science.

(8) Structural rigidities and widely distributed units of production.

(9) Too many organisations/associations/units/private/Government, each jealous of the other and each with its own interests as opposed to overall interests of the leather as an integrated industry.

(10) Short term policies that make the industry a bewildered shuttlecock at times.

(11) Lack of reliable statistical data to frame long range policies.

(12) Lack of economic intelligence, comparative data for leather industry in the world as a whole.

(13) Labour intensive/craft based industry as opposed to mechanisation and productivity.

Solutions Suggested :

What is needed now is selective and intensive, concentrated and combined effort—a sustained combination of all the required critical inputs into a chosen area to get worthwhile results in a reasonable time. Few examples may be mentioned :—

(1) Modernisation of slaughter houses—utilisation of by-products—cut imports—boost exports—supply good quality-hides at reasonable prices—the need for by-products utilisation corporation.

(2) Similarly a Hide Corporation to collect, cure, grade and distribute hides and skins.

(3) Select an area for intensive action taking into account all relevant economic, manpower, social—adopt that for development in the most modern way and hand over the gainfully going concern to the industry.

APPENDICES TO PART II

(A) RECOMMENDATIONS OF VARIOUS AGENCIES

1. Planning, Production, Training and General (Leather Development Council) :

The need for greater co-ordination between the Development Council and the Khadi and Village Industries Commission was felt and for this purpose, the appointment of a liaison body of the Council including representatives from Khadi and Village Industries Commission is under consideration.

In order to examine the minimum economic size of units in the tanning industry and to make a periodic review of this assessment to ensure that development is along proper lines, the Council appointed a sub-committee to examine the minimum economic sizes of units in the tanning industry.

The Council reiterated its previous recommendations that the production target for leather footwear should be kept at 140 million pairs per year by the end of the Third Five Year Plan. The Footwear Industry in all the sectors should co-operate and should be encouraged to expand in order to achieve the target recommended.

The ratio of increase of production in the large scale sector and the small scale and cottage sectors should be regulated in such a way that the existing ratio of 1:9 between the sectors is not disturbed and the position could be reviewed after every two years.

The footwear sub-committee might collect the necessary data regarding the facilities available at present for training of technical persons for the footwear industry.

The Scheme regarding common village tanning centres be forwarded to Development Commissioner (Small Scale Industries) and Khadi and Village Industries Commission and to the State Governments with the suggestion that such centres may be set up wherever possible.

The Schemes for the establishment of Glazed Kid Factory, a Leather Board Factory, Hydraulic Leather Unit, Fancy Leather Unit, Upholstery Leather Unit and Glue/Gelatine Unit be forwarded to the Development Wing for making the information available to entrepreneurs.

The Scheme regarding retanning and finishing centres be forwarded to the Development Commissioners (Small Scale Industries), Khadi and Village Industries Commission and the State Governments with the recommendation that such centres be set up at suitable places.

Regarding the publication of a publicity pamphlet it was decided by the Council that the Director, Commercial Publicity may furnish all the necessary particulars to Shri Sanjoy Sen, Convener of the Export Sub-Committee of the Development Council so that the sub-committee could look into the matter.

It was suggested in the Council that the difficulty experienced by the small scale units in the procurement of raw materials, etc. may be brought to the notice of the Development Commissioner, Small Scale Industries.

Suggestions from Shri N. N. Guha, Tanning Expert and Superintendent, Government Tanning Institute, Khar, Bombay :

To draw out a plan for the development of Industry, I believed there are no two opinions that the survey of basic raw materials and potentialities to turn them into manufactured goods is essential. The figures for the quantum of raw hides available in the country were prepared in the year 1948 and it is now hardly dependable. These figures too were not complete in the sense, they were not given categorywise, viz., below one year, below three years and above. This information is necessary specially to chrome tanners.

The development of the cottage shoe industry has to be taken in the right direction. Tanners should study the requirements of the shoe makers and arrange for cutting soles of varying flexibility and likeness and propaganda through sales technicians for introducing this to the shoe makers in a bigger way should be taken up. This is very important in the context of India as 90 per cent. of the shoe makers are small and cottage scale cobblers who would find it plain to buy the cut soles made into sizes rather than buy the whole hide. However, all these require education and it is left to the tanners to do the necessary.

In the context of India's stringent foreign exchange situation, it is relatively important to be able to utilise her own raw material. To increase productivity, a certain amount of education in the leather industry is also important. India should follow the lead set by the Western countries in automatising chrome leather production and try to become self sufficient in finished leather rather than export Rs. 30 crores semi-processed material.

2. Resources, Problems and Recommendations (Leather Development Council) :

The Council once again recommended that the imports of raw and wet salted hides and skins from all countries should be brought under Open General Licence.

The question of abolishing import duty on wattle bark and wattle extract should again be taken up with the Government.

Railway authorities may be requested to effect suitable improvements on the present day conventional wagons for the transport of raw hides and skins in consultation with the Central Leather Research Institute, Madras in order to reduce the deterioration of the quality of these materials during transit.

The Council agreed in principle that provisions for cold storage should be made available for storing raw hides and skins at important places and suggested that the problem should be considered fully by the Council at its next meeting.

In order to avoid great loss in value of hides and skins, the Council agreed that effective measures would have to be taken to prohibit the indiscriminate branding of animals by law. After the receipt of concrete proposals for taking effective measures in this regard from the Raw Hides and Skins Sub-Committee, this matter may be taken up with the Government.

Suggestion from Shri S. P. Pandit of Messers Western India Tanneries Limited, Bombay, 17 :

Shortage of Raw Hides :—Due to the abolition of cow slaughter in many States and the sever restriction on the same in others, the tanning industry is facing an acute raw hide scarcity.

We suggest the following :—

- (a) State Governments should be moved to allow slaughter of certified useless cattle in recognised slaughter houses. Thus the hides, endocrine glands, meat, blood, etc. would be recovered and would not be a total national waste as would happen if the animal were to inevitably die unattended.
- (b) Introduction of mechanical flaying in slaughter houses.
- (c) Import of hides of buffaloes, ox and cow to be permitted on O.G.L.
- (d) Prevailing rates of U.S.A. ox hides are considerably lower (40-50%) than European. The former should be allowed to be imported for mechanical leather manufacture.
- (e) Export of beef.

In these days of raw hides shortage, local bodies and gram panchayats may be put responsible, for the total and proper collection.

3. Marketing, Problems and Recommendations :

The Leather Development Council agreed that grading of hides is very important and decided to refer the matter to the Hides and Skins Sub-Committee of the Council to suggest necessary ways and means to introduce grading in the raw hide trade.

The Council came to the conclusion that one of the main problems affecting the village and cottage workers is the marketing of the products and suggested that the Footwear and Leather Goods Sub-Committee should consider this aspect thoroughly and make recommendations for solving the problem.

The Council took note of the suggestions regarding ways and means to introduce grading in the raw hide trade and decided that the raw hides and skins sub-committee should circulate their suggestions to the trade for necessary comments in the first instance.

If regular marketing facilities are assured, the quantity and quality of production of footwear in the cottage and small scale sectors would be improved considerably. The suggestions regarding the setting up of a marketing organisation is under consideration.

The suggested marketing organisation might also undertake the supply of raw materials, component parts, etc. to the cottage and small scale manufacturers. This suggestion is under consideration.

Suggestion for the establishment of a separate corporation to look after the marketing of footwear and other leather goods in the internal market be referred to the National Small Industries Corporation, the Development Commissioners (Small Scale Industries) and the Khadi and Village Industries Commission.

4. Foot-wear Problems :

A countrywide survey should be made regarding the size and fittings of feet of the people.

The Development Council unanimously approved that a target of 140 million pairs of leather footwear may be fixed during the Third Plan.

5. Vegetable Tanning Materials :

The Forest and Community Development Organisations be requested to pay special attention in raising of Babul plantations at least on one-third of the area of village fuel plantations as a part of the farm forestry programme.

The State Forest Departments be requested to consider the feasibility for evolving and introducing improved techniques in collection and production of vegetable tanning materials from various available sources in the country more particularly in the forests.

6. Research :

The Ministry of Community Development and Co-operation be approached for promoting the planting of Babul and Avaram over the field boundaries and other suitable areas in Panchayat waste lands as an extensive afforestation measure.

It was brought to the notice of the Council that under the rules of the Council of Scientific and Industrial Research, if any industry intends to carry out its own programme of research, the Council would meet one-third of the capital expenditure of 50 per cent of the recurring expenditure, the former being subject to a maximum of Rs. 15 lakhs and the latter being subject to a maximum of Rs. 5 lakhs.

The Council appointed a Research and Technical Sub-Committee to evolve proposals for co-operative research, designs and training programmes. This Committee would examine the feasibility and desirability of setting up a co-operative research institute, its main functions, and how to raise the money required for its setting up, working, etc.

7. State and Leather Industry :

The National Small Industries Corporation might be requested to arrange the purchase and supply to smaller units upper leather for the manufacture of footwear meant for export.

Since the N.S.I.C. is already providing machinery on hire purchase, they may be asked to provide labour saving machines to group of cottage workers either on hire purchase or on subsidized basis.

The States of Assam and Kerala be requested to encourage raising of wattle plantations in their States.

Suggestion that 'the Government be moved to lift sales tax from the small scale and cottage units or societies engaged in the production of leather goods' be forwarded to the State Governments for their consideration.

Regarding the necessity for equitable distribution of orders from East European countries for the supply of leather footwear, it was suggested that the manufacturers should themselves approach the State Trading Corporation and National Small Industries Corporation direct, in the matter.

8. Export Promotion :

In order to increase our exports to U.S.A., Japan and Sweden, the Leather Development Council recommended that the Government should take such steps as may be necessary for the removal of import duty in these countries on Indian tanned hides and skins.

The Government may request the State Governments to treat the exports by small tanners through established or recognised export houses as direct exports in the matter of levying sales tax.

Regarding non-availability of good quality upper leather meant for the manufacture of shoes for export, the Council was of the opinion that if the manufacturers of footwear are prepared to pay a better price, there would not be much difficulty in obtaining good quality upper leather.

A small delegation of about four persons, should visit European countries, specially of Western Europe, with the specific purpose of finding ways and means of increasing exports of footwear.

The Council unanimously decided that the Productivity Council should again be approached for sponsoring a Productivity Team for the Leather Industry in the near future. In case it is not possible to send such a team, the Government should consider sending a small delegation of the Leather Industry to the various places in Europe and U.S.A. The Delegation would study the different productivity techniques employed in these countries, the possibilities of creating markets for Indian leather and leather goods abroad and also for increasing the existing exports.

9. Others-Miscellaneous :

It was brought to the notice of the Council that the Government of Madras have already agreed to the request of small tanners to exempt their existing tannery buildings from the purview of the Factories Act and Rules framed thereunder and to enforce the rules whenever new constructions or alterations to the existing buildings are proposed to be made.

A countrywide survey of different kinds of tanning materials should be undertaken by the State Governments as early as possible for ascertaining the extent of availability and of actual production of vegetable tanning materials in the country and the survey report should be made available within a period of two years.

The Council appointed another Sub-Committee to suggest legislative measures or otherwise for the betterment of the labour conditions and settlement of disputes.

The Council expressed the view that unless an All India Federation of Tanners which can speak on behalf of all tanners in the country is set up, it would not be possible to undertake.

Hide Collection Scheme :

The hide collection schemes were first introduced in some ex-states of Orissa. This scheme was run along with the veterinary department. The hide collection centres were organised in different parts of the State. By law, the village chowkidar was entitled to get the carcass. According to the States' rule, the cattle after death was the States' property. A cattle mortality register was maintained in each village by the village headman and as soon as any cattle died, the death was recorded in the register. The officers of the hide collection scheme regularly checked this register and could know whether any carcass or skin was spoiled or not. This gave a steady collection whereby a large amount of national money was saved and utilised for development purpose. The village chowkidar was flaying and removing the hide and skin and giving

delivery to the hide collection for which he was properly remunerated. Negligence on the part of the chowkidar or the village headman was checked by means of a small fine which kept them always alert so as not to spoil any hide or skin, to properly flay, cure and to deliver it to a States' hide godown in the area. Each hide collection centre was run by a hide collector. He was collecting hides by the help of one or two paid gumastas. The gumastas were moving from village to village every day and taking delivery of the hides or skins from the chowkidars and they were curing and drying those hides.

One Supervisor was employed to inspect and supervise the works of ten hide collectors. The supervisors were under the control of one Assistant Inspector who was in charge of one sub-division. The Assistant Inspectors were under the control of Inspectors who were guided by the Superintendent. Now, the Government tannery, Titalgarh is being fed purely by the hide collection scheme.

NOTE.—*Hide Collection Scheme in Orissa* (N. Patnaik and M. S. Mohanty) *ILTA*, Page 73, 1959.

Marketing :

As regards the organisation on the supply side, mention may be made about the Master Plan prepared for the development of the leather industry in Andhra Pradesh. According to this Plan, Raw Hides and Skins Exchange centres, Tanning units, Footwear units and Marketing units may be formed in each village or in a group of villages under the Cooperative Leather Society at the Block Level. These societies at Block level will be under the direct control of the Co-operative Societies at the district level over which the State Leather Board will function. Credit facilities will also be provided from different institutional sources to the members of the primary units. In the primary units at village level, carcasses will be purchased and flayed properly. After curing and grading, hides that are only useful for village tanning will be retained and distributed to village tanning units. Leathers tanned in village tanneries will be used for the manufacture of village footwear and other agricultural leather goods. Quality hides will be dispatched to the Block Cooperative Society where the allocation of these hides for different tannages will be done.

*Recommendations and proposals from the technical sessions for
consideration in the plenary session of the Tanners
Get-Together*

Session I

The following suggestions were put forth in the Working Paper of the Secretary of the session.

(1) The Agricultural Marketing Adviser or any other suitable agency may make a quick assessment of the availability of raw hides & skins in the country.

(2) The Forest Authorities of various States may conduct a survey regarding the availability of various vegetable tanning materials in the country under the guidance of the Inspector-General of Forests.

(3) It may be made obligatory on the part of small scale tanners and leather goods manufacturers to report their annual production and capacity to the State Directors of Industries and the Development Commissioner, Small Scale Industries for getting any assistance from the Government.

(4) The Khadi & Village Industries Commission may conduct a survey regarding capacity, production and employment in cottage sector and make it obligatory to report the production for getting any assistance from the Commission.

(5) The Leather Export Promotion Council, Madras and the Export Promotion Council for Finished Leather and Leather Manufactures, Kanpur, may make a long term export plan for the leather industry in consultation with interests concerned.

(6) Since the existing units are working well below the capacities, care should be taken to see that no new capacities are created for tanning of hides in the large scale and small scale sectors except for special reasons such as exports.

(7) Setting up of pickling and tanning units for goat skins may be encouraged.

(8) It is understood that a Panel for Leather & Leather Goods Industries is being set up by the Government shortly. This panel should co-ordinate the activities of various agencies connected with the leather industry and work out a suitable long term plan.

It was felt by the House that there should be some more time allowed for considering these proposals. A committee consisting of Shri R. Thanjañ, Development Officer, (ii) Shri K.V.S. Murthy, SISI, Bangalore, (iii) Dr. D.K. Ghosh, Khadi & Village Industries Commission and (iv) Shri K. V. Vaidyalingham, M/s. Skins and Leather Private Ltd., Coimbatore was constituted to receive and process comments on the above proposals and further proposals.

The need for having a committee for follow-up action on recommendations made and evaluation of the action taken thereon was emphasised. The need for creating proper climate for the development of the industry was stressed.

Session II

The following recommendations were formulated by the Chairman, based on the deliberations:

(1) The manufacture (and export) of finished leathers and leather goods should progressively increase.

(2) There should be greater degree of mechanisation in the manufacture of finished leathers and leather goods. As a corollary, imports of the needed machinery should be liberalised.

(3) Dressing units should be set up in U.K. by a consortium of Indian tanners for further processing of crust leathers exported.

(4) The industry should be encouraged to establish capacities in the Afro-Asian countries.

(5) A few medium size leather footwear manufacturing units may be set up in the country during the Fourth Five Year Plan for export oriented production.

(6) There should be an interchange of experts on leather goods and footwear, between the various bodies working for the leather footwear and allied industries.

(7) Excise duty should be waived in respect of small units (employing a minimum of 100 workers & 20 H.P.) manufacturing leather footwear.

(8) Lasts producing industry should be encouraged in the country.

(9) The export promotion councils may take up the question of pre-shipment inspection of the quality of the exports.

(10) Market surveys should be carried out by the Export Promotion Councils with regard to the demands abroad (and internal preferences).

(11) More industrial estates for leather goods may be started.

(12) The indigenous manufacture of leather auxiliaries should be progressively increased, with corresponding decrease in imports.

(13) Consultancy service facilities should be made available to the industry.

Session III

The foremost thought expressed in the Secretary's working paper is the need for cooperative research for the leather industry with the industry taking an active interest in the formulation and evaluation of the results of the research projects in the various institutions. The research result should be utilised without overlooking the almost instinctive knowledge of the older tanners. At present there is not much of perspective planning for the leather

industry. So research planning in parallel with industrial planning would not be possible. So until such time that cooperative research takes concrete shape, the reconstituted development body for the leather industry may constitute sub-committee or sub-committees for objectively posing research problems and utilising research projects, keeping in constant view the lines on which leather industry development policies are being finalised.

Cooperative research as between the leather industry and industries like textile is a point needing attention.

Other points made out were : (i) utilising the services of S.I.S.I.-like bodies in feeling the pulse of the industry with regard to research programme, (ii) CLRI should take up making newer innovations in addition to adaptive research, (iii) inclusion of psychological and sociological projects too in the research programme for studying the change in job preferences, (iv) industry sponsoring research by giving research fellowships at CLRI (which are devoid of Income-tax).

Session IV

1. At present extension work is carried out by different organisations independently ; there is a need to set up a coordinating agency to channelise properly the know-how developed by the various institutions.

2. A coordinated clinic of specialists in the various fields belong to different organisations may be established for consultancy service to the tanners. This agency must also develop "Appropriate Technological practices" to suit the units.

3. Two districts one in north and one in south may be selected initially ; area survey may be conducted (if necessary) for the development of leather industry and draw up a programme. With the help of the coordinating agency and the clinic of specialists, the development programme should be implemented within a stipulated time.

4. Tanners Associations should be encouraged to help the tanners, to obtain quality leather auxiliaries, tanning materials etc. at a fair price. Government may be requested to afford all facilities for such associations.

5. Besides demonstrating the processes the extension staff should also bring out the economics of the process and the managerial aspects. A team of experts should undertake such type of work.

6. The necessity to employ technical personnel by the recipient of the extension services should be impressed. Only then the improved processes could be continued to be carried on usefully.

7. There should be an exchange of personnel among the various organisations engaged in the extension work.

8. There should be continuous evaluation of the extension work done by various organisations.

9. More publications in regional languages are necessary for the industry to know the technological developments.

10. Opinion was divided in the house on the suggestion that at least a nominal charge should be levied for the extension work. This would require further consideration.

Session V

1. Area development survey is necessary before planning.
2. Effective measures should be taken for collection of dead animals to avoid large scale waste. It will be desirable to get the cooperation of Panchayat Raj institutions in implementing the programme.

3. For healthy coexistence of the different sectors the collection of raw hides, skins and tanning materials and supply of the same to small scale and large scale units has to be maintained but for common production programme it should be seen that the village sector does not starve for the benefit of the larger sector for the raw material.

4. The objective of providing ways and means of increasing employment opportunities to people connected with this trade in village by allotting a piece of land to them which will assure stability to rural economy placed on a more sound basis.

5. The results of research should be village oriented and appeal for work should be duty oriented.

6. Science and Technology should be made very simple so that it will be understood by the village artisan.

7. The working of cooperatives should be guided and assisted effectively so that the finances sanctioned are utilised with great care.

8. Starting model tanneries by allotting pits, supplying of tanning materials and procuring other servicing facilities such as technical know-how, show-how, finance and marketing are essential.

9. The social conditions of the Tanners will be considerably improved if they are persuaded to take scientific methods of carrying on this trade. It is therefore very necessary that extension agencies, give more attention to this aspect in their work by allocating special funds for the social and economic improvement of artisans.

Session VI

1. Steps should be taken to develop packaged chemicals and auxiliaries for use by village tanners.

2. A study of the processes followed by village and cottage scale tanners is necessary with a view to understand their rationale and to suggest improvements without substantial changes.

3. Fool proof and simple processes have to be worked out.

4. Regarding indigenous vegetable tanning materials, there should be a planned cultivation of these, instead of depending upon wild and natural growth as is done at present.

5. It would appear that the natural resources of the country have not been fully tapped. By giving greater attention to this aspect, we could perhaps develop auxiliaries better than those available elsewhere—possibly newer ones too.

Session VII

1. Steps should be taken for proper production, storage and distribution of fish oil and maintaining consistency in quality of the same.
2. The characteristics of used picking band, should be investigated with a view to improve the process of manufacture and evolve newer methods.
3. The use of nylon in preparation of laminated belting leather may be investigated.
4. The economics of bag tannage should be studied.

Some suggestions in regard to Co-operation and Collaboration among the Organisations serving the Leather Industry

The discussions and deliberations of the Tanners Get-together have brought out clearly : (1) lack of sufficient data on the availability of raw materials, and other factors relating to the leather industry, (2) the need for augmenting the available data by conducting fresh surveys on the above subjects.

The existing collaboration between the various organisations could be extended as follows:—

- (i) An all India raw hides & skins survey has to be conducted in all the technical and economic aspects. Since this venture is too big for any single organisation, a programme may be drawn up for conducting such a survey on the basis of collaboration between SISI's K.V.I.C., Leather Development Wing and C.L.R.I.
- (ii) In conducting a techno-economic survey on the availability and other aspects pertaining to vegetable tanning materials, the collaboration could be between the SISI's K.V.I.C., State Forest Department and C.L.R.I.
- (iii) In the field of international trade, additional data may be obtained through foreign market studies as well as commodity studies in the country. The Indian Institute of Foreign Trade, Leather Export Promotion Councils and C.L.R.I. may collaborate in this regard.
- (iv) In studying the conditions of rural tanning and footwear industries, there is scope for fruitful techno-economic analysis. Here again, K.V.I.C., and C.L.R.I., may conduct appropriate empirical surveys for evolving rural industry programme for leather & allied industries.

It is anticipated that appropriate aid from the different State Governments will be forthcoming in these efforts.

The benefits of such collaborative ventures may be reflected in less overlapping of activities, elimination of wastage of man-hours and materials and also in pooling specialised knowledge for guiding these surveys.

PART III

A LONG TERM LEATHER EXPORT PROGRAMME

1. Introduction :

Hides, skins and leathers form a traditional group of internationally traded commodities and its value estimated at Rs. 10,000 million. A distinct pattern is evident in the trade flow for these commodities in which developed countries of Europe and America not only take part as the bulk importers of raw and semi-processed items, but they are the main producers and consumers of finished leather and leather goods. The under-developed countries of Asia, Africa and Latin America feature as the suppliers of these raw and semi-processed materials. Comparatively, higher standard of living of the population in the developed countries leading to the generation of varied and sophisticated demand pattern and the consequent development of leather and leather chemical industries based on the latest technology, may explain this type of international division of labour.

As the traditional exporter of hides and skins, India ranks third in the world and fifth in Indian exports accounting for a foreign exchange earning to the tune of 396 million rupees (1963-64).

The fact that almost the whole of these valuable foreign exchange is earned from an industry which is fed from the by-products of meat industry and animal husbandry sector, and thus, generates wealth from waste, is of vital significance from the point of view of the development of Indian economy. It is an indisputable fact that, though, leather industry has developed as one of the premier export industries of the country and thus fulfilled its ever-growing commitment to the nation, yet, it must be said that given suitable lead, the export (both in quantity and value) of leather may be increased to a significant extent by introducing appropriate changes in the pattern of the whole trade. The export sector of the leather industry is not only groaning under different types of limitations, arising from foreign markets, but is subjected to internal difficulties like scarcity and high prices for quality hides and skins, its dependence on imported machinery, tanning materials, equipment and auxiliaries. The industry has to overcome such hurdles like lack of suitable credit facilities, transport bottlenecks, imperfect market structure for raw materials, organisational rigidities, taxation and other problems connected with peculiar social attitudes prevailing against it. It is proposed to analyse the present export pattern, identify the problems of building up a long term export policy and discuss the bottlenecks of growth (internal and external) of export. In developing this part of the note, attempts will be made to present, in brief, the earlier recommendations made for boosting up of Indian skins, leather and leather goods.

2. Present Pattern of Export :

Fortunately, statistics are not rare in this field and are reliable to a significant extent. Available data show that during the last decade the value of export of skins, leathers, and leather goods has been showing an overall upward trend, although the peak level which was reached in 1959 (Rs. 421.37 million) was never surpassed even in 1963-64. The export situation regarding raw skins shows a slightly declining trend in recent years because of the restrictions imposed on it. The export performance of tanned skins was really noteworthy though its position reflects certain fluctuations in between the years under review. The export of tanned skins show an increased earning to the tune of nearly Rs. 20 million in 1963-64 compared to 1959. The condition of tanned hides exports is really precarious as it betrays a continuously declining trend. In 1959, the value of exports in tanned hides stood at Rs. 98.04 million which came down to Rs. 65.63 million in 1963-64. The export of finished leather so highly desired is only marking time; though compared to 1962-63 this item earned nearly Rs. 4 million more in 1963-64, it is far behind its performance during three years ending 1961-62. The export position of leather manufactures and leather goods is somewhat encouraging, although their relative position in the total export complex is very weak. As regards footwear export, the trend for the last three years is brighter and in 1963-64 this item earned 34.44 million rupees which is more by Rs. 9 million than the all-time peak value of Rs. 26.40 million reached in 1960-61.

In the field of by-products India exports Rs. 20 million worth of bones (1963-64) and Rs. 8.58 million worth of hair and wool including goat hair.

As regards the direction of export of these commodities, it may be stated that U.K.'s relative share in terms of value in India's exports of skins and leathers has been dropping in the last five years, and U.S.A.'s intake in terms of percentage share has remained almost static. The relative contribution of E.E.C. countries varies between 16 per cent and 18 per cent only with a sharp rise in 1961-62. The most significant development in this field lies in the rapid stride in which the share of socialist countries went up during the last five years. It may be mentioned in this connection that, apart from the traditional purchase of raw skins the U.S.S.R. and some socialist countries have, in recent years, been showing increasing interest in the field of tanned skins. In 1963-64 the total purchase of tanned skins alone by socialist countries surpassed Rs. 5 million marks.

Another promising development in the export pattern is revealed by more and more export of pickled goat skins instead of raw and wet blue chrome hides and skins instead of vegetable tanned tems. Similarly the exports of morocco, clothing and gloving leathers are gaining ground.

3. Basic Objectives of a Long Term Export Programme :

Viewed in the background of a long term perspective, the basic objectives for an export programme of skins, leather and leather goods including footwear, may be formulated as (a) the volume of exports of tanned hides and skins has to be raised and their export prices have to be stabilised in the international markets, thereby maximising foreign exchange earnings, (b) a rapid switch over from the export of raw skins to tanned skins and a gradual change over from the export of tanned hides and skins to that of finished leather have to be effected in order to reap higher earning per unit of export, (c) a special stress should be laid on raising the present performances in leather footwear and leather goods export. This is desired not only because the exchange earning per unit of leather used in such exportable commodities goes up, but this amounts to the creation of relatively more volume of employment at home. Moreover, fluctuations in export market may be avoided to a great extent as the component of finished commodities go up in the total complex of raw, semi-processed, intermediate and final commodities, (d) one of the objectives of a long term export programming should be to reduce the dependence on few markets and diversify the direction of exports of skins, leather, leather goods including footwear, (e) develop newer products based on consumer research coupled with creative ability, artistic skill and technological productive methods, (f) corresponding to the implementation of above objectives, the requirements of maintenance imports should be kept at a minimum.

The export programme should be visualised in relation to the internal availability of these commodities on the one hand and their domestic consumption on the other and external demand for the different types.

4. Detailed Analysis of the Export Trends :

A detailed breakdown for different items and tracing their export performances over a period may throw some light on some of the problems of a long term planning of export in this field.

4.1 Raw Skins :

Raw goat skins is the most important item in this sub group. The pre-war (1937-38 to 1939-40), annual average for the quantity of raw skins exported from undivided India stood at 374.20 thousand C.W.T., during the war this average dropped down to 337.80 thousand C.W.T. and this quantity decreased further to still lower level of 276.80 thousand C.W.T. in 1947-48. If the factor of trade dislocation during the war is excluded, growing consumption of this raw-material by the domestic tanneries for the manufacture of E.I. tanned leather seems to be responsible for this declining trend, over the decade. In the post-independence period, the Korean war trade boom started in 1949 and continued until the middle of 1951 leading to an increase in quantum of raw

goat skins export from 198·80 thousand C.W.T. in 1948-49 to 238·00 thousand C.W.T. in 1950-51. As the boom petered out, the demand gradually declined until the rock-bottom for raw goat skin export was reached in 1953-54. The average price for raw skins continued its downward slope in 1951-52 and touched its lowest point in 1952-53. But a revival was noticed from 1954-55 both in demand and price conditions and a upward swing continued more or less unabated until recent times.

1959 is a year of abnormal rise in the world price level of hides and skins and the peak level of export in raw goat skins (243·30 thousand C.W.T.) was reached in this year. Following 1959, there is a further fall in the quantity exported until its volume of export rose to 270·00 thousand C.W.T. in 1962-63 but per unit price of raw skin has fallen in 1962-63 compared to 1959. In 1963-64, average price showed further revival compared to the earlier year.

A reference may be made in this connection to the most controversial question of the restrictions of export of raw goat skins. The quota system of exports came to be introduced in June, 1959. It appears that the major economic rationale behind these restrictions had been to introduce greater stability in the internal price structure of goat skins and to make them available in sufficient quantity to the tanning industry in India at reasonable cost so that more and more semi-processed and fully processed goat skins are exported instead of exporting it in raw condition. The controversies still continue regarding the justification for the quota system of export. Those who oppose these restrictions hold that—

- (i) these restrictions may tend to cause a fall in export earnings of the country,
- (ii) they have become instrumental in dislocating the raw skin market by lowering trade margin,
- (iii) further restrictions may mean wastage of the available raw-materials as the capacity and external demand conditions will not permit the full exploitation of the additional raw skins which will be released for internal processing consequent upon the imposition of further restrictions. On the other hand, the view point of Government and a section of the tanners may be summarised as :
 - (a) it is always profitable from the nation's point of view to export skins in tanned or finished form than in the raw.
 - (b) the policy of restriction will have an impact in releasing more capital from trade to the manufacture of tanned and finished skins and, thereby, promote the better utilisation of the surplus skins.

- (c) to enable export section of skin tanners to sell in the foreign market at competitive prices, their cost of production should not be allowed to rise beyond certain levels. It is expected that gradual restrictions leading to ultimate banning of the raw export will help in stabilising the export sector through cost reduction and thus improve our competitive strength abroad and our earnings of foreign exchange.

Of course, systematic studies are required on these aspects relating to comparative benefits that will accrue following different alternative patterns of export. In this connection, a reference may be made to a particular theoretical exercise on this point.

(1) The following points may be considered in this connection :

- (i) The export of last three years shows that the number of pieces of skin export as a whole has not toned down ; moreover, the increase in foreign exchange earnings from tanned skins has more than compensated the fall in export earning from raw skins,
- (ii) considering the period between 1957 to 1963-64, the rate of increase in the price per lb. in case of tanned skins is much higher than that in case of raw skins. In 1963-64, not only there is a phenomenal rise in the volume and value of tanned goat skins but more significantly the average unit price of tanned skins calculated per lb. touches the highest level (Rs. 9.20 per lb.) considering the developments of the last decade. Though, further empirical studies have to be undertaken on the basis of past performances in export and in the context of the developments in the importing and competitor countries, yet it must be stated as a fast approximation that the policy of gradual restrictions pursued during the last five years has helped in developing a climate in Indian tanning industry more congenial for the growth of industrial units for more and more tanning and finishing of goat skins.

4.2 Export of Pickled Skins—Goat and Sheep :

(a) *Goat Skins*.—Though reliable data are not available, it is estimated that 2.5 million goat skins were exported in 1963-64 in the pickled form. It is also reported the demand for it is ever increasing and this may soon reach a target of 5 million. This is a good sign and one step better than exporting them in the raw.

But the export of goat skins in pickled form has one disadvantage. It is quite possible to mix pickled sheep skins with goat and export as goat skins. That will tell upon the E.I. tanned sheep export.

(b) *Pickled Sheep*.—Export of pickled sheep skins is not permitted except papra skins. About 56,000 pieces of such papras are exported in the pickled form.

A section of the industry contend that export of sheep skins in the pickled form fetches better prices, greater foreign exchange and also reduce the imports as compared to E.I. tanned sheep. This contention needs a critical assessment before any change in the current policy is contemplated. There is no doubt however that E.I. tanner provides more employment to people and other auxiliary industries to develop.

(c) Export of hides in the pickled state is not permitted.

4.3 Export of Chrome Tanned Crust :

In the place of traditional vegetable crust, chrome crust is demanded by the old and new markets. The export of chrome tanned skins and hides is freely allowed.

(a) *Goat*.— It is estimated that 0.4 million goat skins were exported in the chrome blue form in 1963. The trend appears to be that more and more quantities in the blue will be lifted in future.

(b) *Chrome Sheep*.—Only a small quantity was exported in 1963-64. But there appears to be a demand for chrome tanned sheep for gloving leather manufacture abroad. This may soon materialise into a big business.

(c) *Chrome Tanned Buff and Cow*.—0.2 million rupees worth chrome tanned buffalo hides are exported in nine months upto December 1964, though there was little export in 1963-64. As regards cow, it is reported under chrome tanned not otherwise stated like upper, etc., leather worth about 6.6 million rupees has been exported for the same period.

The export of chrome tanned crust may affect the growth of finished leather industry and its quantum of export.

4.4 Export of Tanned Skins :

Three major items constitute this group, viz, tanned goat skins, tanned sheep skins and tanned reptile skins.

The quantity of goat skin exported during the last quinquennium ranged between 40 lakh cwt. to 51 lakh cwt. In 1963-64, there was an exceptional rise in the export of this particular commodity. The quantity and value of export surpassed the previous peak attained in 1961-62; but the average unit export price per cwt. remained at the same level as that operating in 1961-62, so the value appreciation in export had been registered through an increase in the quantity of export. The main importing countries of tanned goat skins are the U.K., West Germany, U.S.A., France, Italy, and Yugoslavia.

The export quantum of tanned sheep skins fluctuated between 30 to 36.8 lakhs cwt.; and all-time peak export (value and quantity) was reached in 1963-64. The previous highest export quantity achieved in 1960-61 was surpassed by 6 lakhs cwt. in this year ; but in this item the average export unit price was not restored in this year to the level of 1960-61.

As regards tanned reptile skins export, there is a spurt in the average price earned in 1963-64. It may be pointed out that in 1961-62, maximum quantity of tanned reptile skins was exported (1.73 lakh Kg.) amounting to a value of Rs. 3.02 million, but in 1963-64, the quantity exported reduced to 1.35 lakh Kg. but the value appreciated to Rs. 5.56 million; thus in this case, the value appreciation is the result of price rise and not due to an increase in the quantum of export. It is interesting to note that in 1963-64, there is a phenomenal rise in import of raw reptile skins (quantity—3.8 lakhs cwt; value—Rs. 2.0 million).

4.5 Export of Vegetable Tanned Hides :

The following items form the group of tanned hides export from India :

1. Buffalo hides
2. Buffalo calf skins
3. Cow hides
4. Cow calf skins
5. Kips

In the export of tanned buffalo hides, there is clear fall in the quantity and value of export in 1963-64 compared to the previous year but the export performance in 1963-64 still remained at much higher level compared to those what occurred in 1960-61 and 1961-62.

Tanned buffalo calf skin is an important item of export earning Rs. 18.11 million in terms of foreign exchange in 1963-64. There is a distinct rising trend in the quantity and value of export of this item during the last few years. Beginning from a figure of 1.5 million Kg. (value Rs. 10.17 million) exported in 1960-61 it rose to a figure of 2.1 million Kg. (value Rs. 1.81 million).

The most important item in this group is tanned cow hide earning a foreign exchange of more than 37.24 million rupees per year. However, the export figure indicates continuous downward trend in the quantity and value of export for this item. From a peak quantity amounting to 8.5 million Kg. (Rs. 51.16 million rupees value) in 1961-62 the export declined to a quantity of 6.3 million cwt. (Rs. 37.24 million rupees value) in 1963-64. This heavy decline in export earning from this major item is by far the most important component in the fall of export earning from tanned hides export as a whole.

The position of tanned cow calf skin is not as bleak as the former, though there is a slight drop in the export quantum and value for this item in 1963-64 compared to 1962-63.

Yet another disquieting feature is revealed in the export of tanned kips. During the last four years, there had been a heavy fluctuation in the export performance for this item. In 1962-63, the export of tanned kips went down to 0.17 million Kg. from 0.51 million Kg. in 1962-63; the corresponding values of export were Rs. 12.08 million and Rs. 32.11 million in respective periods.

4.6 Finished Leather Export :

By far the most important item in this group comprises of chrome upper leather (ordinary blacks and browns) being exported mainly by the Chinese tanners from Calcutta region. The main importing country of finished leather is U.K. accounting for an import to the tune of Rs. 7.82 million and next in order come Hong Kong, Malaya, Afghanistan, Singapore and U.S.A. It has already been indicated that the finished leather export is marking time, its export quantum ranges between 0.8 million Kg. to 1.3 million Kg. during the last four years. The value of export in 1963-64 of finished leather amounted to Rs. 15.71 million compared to the value of Rs. 18.38 million earned in 1960-61.

4.7 Leather Goods and Leather Manufactures :

This special group of items show a continuous increase in export earning during the last three years ; compared to 1960-61, the earning in 1963-64 exceeds by more than Rs. 0.7 million.

4.8 Leather Footwear Export :

Except for a drop in 1961-62 in the quantity and value of export, this item marks a continuous upward trend in export performance and all time highest export level was reached in 1963-64, the quantity of export being 3.01 million pairs valued at Rs. 29.33 million. U.S.S.R. is by far the most important purchasing country of leather footwears, accounting to a purchase valued at Rs. 16.00 million. The other countries in order are U.S.A., U.K., Kuwait, Saudi Arabia and Aden, importing this commodity. An analysis of the export figures for this commodity shows that the average export price per pair of footwear to U.S.S.R. stands at more than Rs. 25 per pair while the same for U.K. and some other countries ranges between Rs. 3 and Rs. 7 per pair.

Another interesting feature regarding the export of finished leather, leather manufactures and footwears is that we are exporting in a significant way to the Asian, African and Socialist countries apart from our traditional markets in U.K., U.S.A. and judging from this export pattern, it may be stated that markets of these commodities are very much diversified compared to those of tanned hides and skins.

4.9 Table Showing Structural Composition of the Total Export Complex

(Annual average for 1960-61 to 1963-64)

S.No.	Items	Value (in Rs. million)	Relative position (in %ages)
1.	Raw skins	95.42	24.75
2.	Tanned goat skins	88.04	22.80
3.	Tanned sheep skins	68.84	17.80
4.	Total of tanned skins	159.93	40.60
5.	Tanned cattle hides	55.52	14.10
6.	Tanned buffalo hides	16.59	4.28
7.	Total tanned hides	72.11	18.38
8.	Finished leather	15.69	4.06
9.	Leather manufactures	18.75	5.97
10.	Leather footwears	24.11	6.24
11.	Grand Total	386.01	100.00

The following observations may be made from the above table:—

- (1) The structural composition shows that the strength of raw, tanned, finished leather, leather goods and footwears, are 24.75%, 58.98%, 4.06%, 5.97% and 6.24% respectively.

Out of 58.98% for tanned leather, tanned skins comprise of 40.60% and the rest goes in the form of tanned hides.

- (2) It is an interesting subject to observe how far the structural composition as presented above compares with the export situation during the first and the second plan period. Such studies on structural changes over a period may show how far the efforts of the Government of India and enlightened tanners and leather manufactures of India in upgrading the vertical movement in export structure has been successful.

5.0 Prospects of Development of Exports :

Long term world movement of demand for leather is determined not only by such factors like world population growth, rise in the standard of living, spread of education and development of roads and other related socio-economic variables, but by the growing strength of leather substitutes like rubber, plastic and the like material. It may be observed that during the last 30 years ending in 1960, the world output of leather footwear rose by 107 per cent and the per capita availability increased by 66 per cent

(from 0.47 pairs to 0.78 pairs per person). Considering the rapid rise of world population and the march of economic development, a rise of footwear production at the rate of 6 per cent per annum may easily be visualised. As a matter of fact, the present boom in world market is, to a large extent, the result of U.S.S.R.'s plan to raise significantly the per capita availability of leather footwear for her population. Against this prospect, the question of inroad of leather substitutes should be counterposed ; already in U.K. 80 per cent of footwear is having rubber soles ; and the threat of corfam and other synthetic leather shoes is looming large. The problem of substitutes is not so complicated in relation to our home market because the substitutes industry has not, as yet, developed in India and moreover, the existing gap between the supply of leather for footwear and potential demand is so large in India that some degree of co-existence with substitutes may be desirable for providing cheaper footwears to Indian masses.

Though, it must be admitted that the world market for heavy leather is growing somewhat restricted, yet, the region of light leathers like shoe upper, lining, garment, gloves, case leather, and the fashionable leather articles seems to have an ever-widening world market at least in the foreseeable future. At the present moment, studies relating to the possible impacts of the inroads of substitutes, are lacking both in Western countries and in India. India's main interest lies in the field of fashion goods and light leathers, so far as international market is concerned and so market studies should be specially designed to study this aspect of the problem of export promotion.

5.2 The dependence of leather industry in U.K. and major continental countries on the supply of raw and semi-processed hides and skins from India is enormous. U. K. together with E.E.C. countries imports about 80 per cent (in value) of India's export of vegetable tanned goat and sheep skins. As the level of living in these countries moves up, the demand for leather footwear, garments, gloves and other fancy leather goods, will necessarily go up and the degree of the reliance on Indian supply will grow. This is true in spite of the alternative sources of supply from Pakistan, Australia and some other African countries, in as much as India occupies a unique position as regards volume and quality of our supply compared to these competitor countries. Of course, very little attempt has been made to assess the strength of these alternative sources of supply and it must be admitted that the development of tanning and leather industry in the backward countries will have an impact on the future export pattern of hides and skins from these countries. A long term export programme can really be meaningful if it is based on the study of the conditions of the competitor countries.

5.3 Another important factor should be noted in this connection. Almost every nation of Europe be it neutral or committed to any block, has been passing through a phase of

gigantic economic development and experiencing chronic labour shortage. A trend of rationalisation in the use of labour power is present in varying degrees in almost all the economies of Europe and this factor opens up market potentialities in these countries for simple manufacture with higher labour content from the developing countries. Moreover, in the case of tanning and leather industry, another significant development may be said to have the tendency of accentuating this basic trend. As the per capita income of the working class grows, leading to substantial change in its cultural standard, a shift in the job preference among the tannery workers in favour of work more skilled and less irksome than those obtaining in the pre-tanning and tanning operation, becomes evident. This is reflected in the increasing demand for more of wet-blue chrome leathers.

5.4 Some of the crucial issues associated with a programme of reorientation in our export pattern should be discussed. Though a few Asian countries import some amount of undressed and dressed hides and skins from India, the scope of development for market outside Europe and U.S.A. appears to be limited. Not only is the market for highly priced leathers to be found in the developed countries of Europe and America, but, also practically the struggle for world leather market is, at present confined mainly to certain developed nations, viz., England, U.S.A., France, Germany, Australia and Switzerland. One of the most important deterrents for the export of finished leathers from a developing nation to these markets is the high level of duty varying in most cases between 6 to 15% (*ad valorem*). Notwithstanding the present hurdles, India has been able to export some amount of finished leather, leather footwear and leather goods to these markets. U.K.'s import is generally near about 60% of the value of chrome upper leathers exported and 70% of the value of all finished leathers. Some other countries like Sweden and Switzerland also import finished leathers from India.

The U.K. manufactures of leather footwear depend for 50% of the total requirement of upper leathers on the imported stuff. Indian finished leathers find market in the U.K. mainly because of the relatively lower price. In fact, British leather manufacturers have almost left the field of production of ordinary black and brown upper leathers to the leather manufacturers of India, Irish Republic and a few other countries and have specialised in the production of high-class upper leathers of other shades and colours. This is an example of an economic adjustment born out of inter-dependent trade relationship between developing and developed countries. Similar avenues of cooperative trade may be opened up to release more exports from India in the form of chrome crust leathers to the developed countries where these leathers may be finished according to the fluctuating needs of the market.

5.5 E.I. tanned hide reaches the U.K. market to be finally processed by the traditional dressers as upholstery leather, case leather, and upper and lining leather. A large portion of these dressed leathers is exported by the U. K. to other countries. At present, India practically has no earning for E.I. hide leathers in the continental markets except for tanned cow calf skin and buffalo calf skin to some extent in West German market; it may be pointed out that almost 85% of the total value of such leather exported finds market in the U.K. It has already been pointed out that there had been continuous fall in the export of tanned cow hides; and failure to sell at the previous level in British market is the most important factor working behind this decline. One more important development has already been hinted, *i.e.*, British dressers are favouring the import of more and more wet-blue chrome tanned hides. This signifies a change in our export pattern which should be seriously studied. As a matter of fact, the failure of tanned hides specially tanned cow hides to preserve the previous levels of sales should be investigated with due consideration for the developments in domestic market and those in the importing countries.

The demand for the E.I. kip decreased partly because semi-chrome leather made out of it can't stand the heat in moulded shoe making. But researches have shown that E.I. kip with low moisture and oil content can withstand the heat so also E.I. tanned kip when retanned with aluminium. So certain changes are necessary in processing both in India and England.

E.I. kip for Lining-of late, greater interest is exhibited by American tanners to import lining leather made out of E.I. kip directly from India. This trend is to be encouraged.

5.6 Demand for Finished Leathers :

There is a growing demand for the export of the following finished leathers from India :

1. Glace Kid-Black/Brown
2. Clothing leather
3. Gloving leather
4. Morocco leather
5. Chamois leather

5.7 Demand for Chrome Crust :

An increasing demand is observed for goat and sheep in chrome crust from and to an extent for cow.

5.8 Demand for leatherware :

An interest is shown for :

1. Readymade leather jackets
2. Gloves readymade

3. Novel items based on traditional indigenous skill, but functionally western
4. Footwear—the demand for footwear is ever increasing particularly for fashion footwear—sandal type
5. Artistic sandal straps

6.0 Other Items of Export—Prospects :

1. *Carcass Bye-products*.—One might argue that this item has nothing to do with leather. But it does. Skin itself is a bye-product of the carcass. Full utilisation of carcass may mean better quality and cheaper raw material for tanner. Apart from that, this would mean a large export earner and import saver.

It is estimated that over 100 million rupees of import could be saved and over 250 million rupees worth of materials like Sausage casings etc. could be exported.

2. *Hair-Wool*.—If greater care and attention is paid to clean, bleach these materials, the industry would get much better export returns.

3. *Myrobalan Extract*.—India has an abundant supply of myrobalan—Its greater use in the tanning and other industries will depend upon the technological progress brought to bear upon it. The possibilities of its introduction to East European countries are to be explored. The value of export of myrobalan and its extract was Rs. 0.34 million in 1963-64 as compared to Rs. 0.52 million in 1962-63 and Rs. 0.58 in 1961-62. Thus, there is a gradual decline. The principal importers are Australia, New Zealand, Britain, Pakistan, U.S.A. and Netherlands.

4. *Leather Auxiliaries*.—Presently, India imports a number of these materials. But the country is soon going into production of a wide variety of these like Syntan, Fat liquors, Bates, Finishes.

It is considered possible to export these to East European and developing Afro-Asian countries. Bulgaria is reported to be interested in buying leather from India.

5. *Frog Skins and Shark Skins*.—There is a possibility for developing this line and export of finished skins and goods made from them.

7. Existing Bottlenecks for the Development of Export :

7.1 So long as India continues to export following the present structure, the problems of export promotion will hardly be baffling. This is because the manufacturers in the importing countries depend significantly on Indian raw materials and want them to import more or less in raw and semi-processed forms but it is not possible to enhance sufficiently export earning

from these exportable commodities by following the present export structure. This is due to the growing internal demand for leather goods including footwear coupled with inelastic supply of hides and slow rate of growth in the supply of skins, which will prevent the export of increased quantity of different items. So, the most dependable way of increasing foreign exchange earning from this score is to improve our earning per unit of export. This can only be done by :

- (a) increasing the share of semi-finished, finished leathers and leather goods in the total export complex and,
- (b) improving upon the quality of the product.

Various factors which impede the implementation of this new export programme have already been known and recommendations are not lacking in this field. What is more important in this connection is to undertake exhaustive scientific enquiries into these factors operating in various world markets through exhaustive market surveys. The following limitations may be stressed in a nutshell for the development of finished leather export market :—

- (a) Restrictive trade practices (duty, quota, taxation, etc.) practised in the importing countries.
- (b) The question of price and quality, competition from the products of highly developed leather industry in the West.
- (c) The question of prompt delivery of finished leather in the face of frequent fashion changes.
- (d) Competition with countries like Pakistan, China and other Afro-Asian territories.
- (e) Changes in consumer preferences and techniques of production.

Barring these external hurdles some of the internal problems faced by the finished leather and leather goods manufacturers within the country in relation to the implementation of new export policy should be mentioned.

- (a) The question of modernising the export units should be thought of seriously. In order to compete in foreign markets in quality and price, productivity should be much higher in the exporting units.
- (b) There should be the auxiliary industries growing concurrently with the leather industry.
- (c) The development of internal market of finished leather (specially out of skins) will serve as a cushion against fluctuations in foreign demand.

- (d) The proposal for the development of finished and semi-finished leather export is comparatively new and an element of pioneering effort and risk is involved in finding different foreign markets and competing in them successfully. The State may have to come forward more actively as sole or joint entrepreneur in organising production and sales in the vital export sector.

Export Promotion Measures :

The steps taken for promoting exports of skins, leather and leather wares are listed below:—

- (i) The export of leather and leather goods is completely de-controlled.
- (ii) Liberal import policy has been adopted in respect of raw hides and skins and tanning materials.
- (iii) In trade agreements, leather and leather goods are invariably included in the schedule of the items available for export from this country.
- (iv) Export Promotion Councils for (a) Tanned Hides and Skins and (b) Finished Leather and Leather Products have been established at Madras and Kanpur respectively.
- (v) A special Export Promotion Scheme has been evolved under which import of essential raw materials, chemicals and machinery and spare parts for modernising leather industry is permitted.
- (vi) Market surveys are being conducted through Export Promotion Councils, Indian Commercial Representatives and other specialised agencies.
- (vii) Trade delegations and sales teams are sent abroad to study the market conditions and to contract on-the-spot sales.
- (viii) Participation in the Trade Fairs and Exhibitions abroad where our leather and leather goods are displayed.
- (ix) Publication and distribution of journals, magazines brochures, folders, pamphlets, and insertion of advertisements in foreign newspapers and periodicals.
- (x) Drawback of import and excise duties is allowed on imported materials which go into the production of finished leather and leather manufactures meant for export.
- (xi) Transport facilities are extended to export traffic (*i.e.* goods meant for export).

- (xii) Liberal licensing policy is followed in respect of export oriented leather finishing units.
- (xiii) Indian Standards Institution has laid down standards for different types of leathers.
- (xiv) Export of raw hides and sheep skins (except papras) is banned.
- (xv) Export of raw goat skins is regulated by quotas which are being progressively reduced.
- (xvi) Organised efforts are being made for collection, flaying and preservation of all the hides that are indigenously available from fallen animals.

Proposals for Export Promotion :

Several valuable suggestions have been made in the recent years for export promotion and those that have come to our notice are presented below :—

1. Programme for Promotion of Leather Exports

(Dr. Y. Nayudamma and Shri P. N. Chowdary) Leather Science 1963

1. Trade pact on the basis of link-deals
2. Collaboration between private industrial interests of India and those of western countries and inter-governmental co-operation for the production of finished leathers in India.
3. Movement of Indian capital and enterprise to overseas countries : A tanning unit in India may export crust leathers out of skins and hides to its sister concern in the U.K. where these leathers are given a suitable finish corresponding to the pattern of ultimate consumer demand.
4. A Policy of a more rigorous restriction on the raw goat skins export.
5. Better utilisation of goat skins : At present, U.S.S.R. is utilising goat skins for manufacturing uppers for men's shoes. The better varieties of goat skins may be processed into E.I. or chrome crust or semi-finished form to meet the export demands and the rest processed as finished leathers to meet the increasing local demands for the shoe and leather goods industries; this may release cow hides for export.
6. Import of woolly sheep skins : The skins can be dewooled and the wool utilised for clothing industry and the raw skins of poorer quality cows be tanned and utilised for local needs thus releasing to that extent red hairy sheep

skins which when exported in the form of E.I. tanned or chrome crust will fetch better returns by way of foreign exchange.

7. Export of chrome in place of customary vegetable tanned leather.
8. Export of finished leathers in place of customary export of E. I. crust.
9. Import of splits and export of finished leathers.
10. Stepping up of export of finished leathers.
11. Production of leather auxiliaries in India.
12. Development of newer lines.
13. Production and export of knitted leather garments, gloves, caps, etc.
14. Fur exports from Kashmir.
15. Starting of a crocodile farm.
16. Export of goat and sheep hair under improved conditions.
17. Export of pig bristles.
18. Export of carcass by-products
19. Stepping up of sports goods export.
20. Greater emphasis on leather goods export.
21. Efforts for enhancing the exports of footwear.
22. Certain adjustments of central and state sales taxes.
23. Reduction of import duty on wattle bark and extract.
24. Market research as aid to export promotion.
25. Export house for small-scale industry.
26. Quality control and pre-shipment inspection.

Other Suggestions :

27. Improvement of slaughter houses and export of sausage casings.
28. Marketing and distributing organisation for raw hides and skins.
29. Glace kid for export.
30. Setting up industrial estates of leather goods for export.

31. Setting up tanneries in Afro-Asian countries by Indian enterprise.
32. Flying technical squad for solving the problems on the spot for manufacturers and customers.

II. The following recommendations were made at the tanners' get together held at the central leather research institute in January 1965 :

1. The manufacture (and export) of finished leathers and leather goods should progressively increase.
2. There should be greater degree of mechanisation in the manufacture of finished leathers and leather goods. As a corollary imports of the needed machinery should be liberalised.
3. Dressing units should be set up in U.K. by a consortium of Indian tanners for further processing of crust leathers exported.
4. The industry should be encouraged to establish capacities in the Afro-Asian countries.
5. A few medium size leather footwear manufacturing units may be set up in the country during the Fourth Five Year Plan for export oriented production.
6. There should be an interchange of experts on leather goods and footwear, among the various bodies working for the leather footwear and allied industries.
7. Excise duty should be waived in respect of small units (employing a minimum of 100 workers and 2 H.P.) manufacturing leather footwear.
8. Lasts producing industry should be encouraged in the country.
9. The Export Promotion Councils may take up the question of preshipment inspection of the quality of the exports.
10. Market surveys should be carried out by the Export Promotion Councils with regard to the demands abroad (and internal preferences).
11. More industrial estates for leather goods may be started.
12. The indigenous manufacture of leather auxiliaries should be progressively increased, with corresponding decrease in imports.
13. Consultancy service facilities should be made available to the industry.

Problems Posed :

For drawing up a clearcut long range programme and policy for leather exports, the following questions and probably more would have to be answered. A clear identification and understanding of the problem is the primary step. Various ideas and suggestions given thereon need careful scrutiny to arrive at a programme or policy. Once that is decided, an aggressive, intensified and combined effort is called for.

Against the background information presented in the preceding pages, the following questions may be asked:—

1. What to export and where to export ?

A continuous research is required to determine what country imports, what type of leatherwares from where, why and how much and for what purpose ? The production of such a list is an important step. Can we make inroads into others' markets? Can we shape the importing countries' consumers' choice ?

2. Do we have adequate marketing facilities abroad of our own? Can we use the nationals of the importing countries through established agencies both for research and sale ?

3. Can we draw up a long range programme (5-10 years) for the anticipated demands for different types of leathers and leather goods based on link deals, market research, etc. ?

4. Based on the long range programme, can a stable policy be defined for 5-10 years so that the importers/exporters are clear as to what they should do ?

5. What are the economics of exporting goat skins/sheep skins in the (a) raw (b) pickle (c) chrome crust and (d) E.I. tanned ?

What is the policy for the next 5-10 years ?

6. What are the economics of exporting cow-buff in (a) blue and (b) E. I. tanned ?

7. What are the economics of exporting E. I. tanned cow versus finished upper/lining leather ?

8. To what extent can we sell finished leathers in the world market in the next 5-10 years ?

9. To what extent link deals can be made to tie up export of more and more finished products along with semi-processed materials ?

10. Are we having a careful watch and ensuring that these agreements are kept up ?

11. What protection do we have against switch deals in the leather exports ?

12. What are the advantages and disadvantages of collaborative ventures in leather field ? What are the areas where profitable collaboration could be had with which countries ?

13. What is stopping an Indian firm or a consortium to set up a finishing establishment in countries abroad to import crust, finish with the latest equipment and materials and meet the vagaries of fashion and demand ? What incentives are needed to promote such investment abroad ?

14. Is it not in our own interests to set up joint enterprise in leather/shoe industries in Afro-Asian countries ? What incentives are needed for such investments abroad ?

15. On one side, we expect the leather industry to progress fast in the direction of finished leather and leather goods production. But incentives are given only for export-oriented production. Is it not a bottleneck for growth ?

16. Where there is a demand and where the industry is reluctant to meet the demand—what effective steps should the Government take ?

For example, today there is a great demand for Indian glaze kid—only a few firms have the necessary facilities. It is not advisable to start a new factory based on one year's demand. One or two are not able to meet the entire demand and the others appear reluctant. If the demand is not met, we lose the market to other countries. Then, what do we do ?

17. Is it advisable or necessary for the Government to set up processing centres to meet such exigencies and also to augment the industry's resources ?

18. Where there are factories with necessary machinery and facilities which are not being used, what steps should be taken ? Could the Government encourage another tanner to take it over or could the Government take over and run such factories ?

19. Is it not necessary to set up more :

- (a) leather industrial estates
- (b) servicing centres ?

20. What internal facilities are provided for improving our products in regard to :

- (a) quality
- (b) product design
- (c) introduction of handicraft and artistic skill
- (d) packaging
- (e) display/exhibition.

21. What determined steps have we taken to introduce.

- (a) quality control
- (b) preshipment inspection
- (c) timely deliveries.

22. Are the measures taken adequate for display/exhibition publicity of our products abroad ?

23. How do we stop hot house growth in the field of exports ?

24. Are we fully associating technical consultancy teams at every stage of programming, problem solving, introduction of newer products into older countries and older products into newer countries ?

25. Are the incentives offered for export adequate ?

Is it necessary to give incentives for export of raw/pickled chrome and E. I. tanned crust ?

26. What is the pattern and portion of exports to be assigned to small-scale sector ?

What are its specific needs as contrasted to large-scale sector ? What lines could be developed with advantage in this sector ? Is it necessary for a separate investment house, marketing organisation for this sector ? -

27. What are the repercussions of excise duty removal on footwear ?

28. What is the effect of the new import duty versus drawback entitlements ?

29. Have we introduced productivity methods adequately in large/small scale sectors ? What is to be done ? -

30. Should we allow actual user licences apart from those issued under export from other scheme or machinery, etc. ?

31. Do the present arrangements for export finance fully satisfy for export credit and guarantee like.

- (a) packing credit guarantee
- (b) post shipment credit guarantee
- (c) export finance guarantee
- (d) revolving foreign exchange facilities
- (e) insurance
- (f) settlement of claims
- (g) market development policies.

32. Would Chablani Committee report meet with leather industry's needs ?

33. What is the effect of the recent increased bank rate on the export programme? Is it possible to have a cheaper rate for export finance ?

34. Sales tax relief—recommendations of Sariya Committee—are they agreeable ?

35. What effect would the free ports like Kandla have on leather exports ?

36. Would special export oriented schemes like Bonded Warehouse schemes be of any advantage to leather exports ?

37. The warehouses are not being fully utilised by leather trade Why ? What steps should be taken?.

38. Are the State Bank finance facilities readily available to small sector ?

39. Does the small sector know fully the many ways of obtaining aid from various agencies ?

40. Is external collaboration possible with single or selected group of small enterprises ? What are the areas ?

41. Would it not be advisable to have a 'Promoter' scheme—an individual or group charged with total responsibility of bringing about export enterprises ?

42. In case of leather goods, requirements for frames, locks, etc., is it advisable to buy them from abroad whatever is available on a cafeteria style or could we develop our own utilising indigenous skill ?

43. Is there existing machinery for stock taking and assessment of export performance adequate ?

If only we could find proper answers to the problems posed above, it may not be difficult to draw up a comprehensive and clear cut dynamic policy and programme for Indian leather exports.

PART IV **RECOMMENDATIONS FOR THE RECOVERY OF WASTES AND BY-PRODUCTS FROM SLAUGHTER HOUSES AND DEAD ANIMALS**

FROM SURVEY AND UTILISATION OF AGRICULTURE AND INDUSTRIAL
BY-PRODUCTS AND WASTES (COMMITTEE ON NATURAL RESOURCES,
PLANNING COMMISSION, GOVT. OF INDIA, 1963 FROM P. 132)

Wastes and By-products from Slaughter Houses and Dead Animals

Sl. No.	Recommendations	Action to be taken by
A. SLAUGHTER HOUSE WASTES		
1	A special survey should be conducted regarding all licensed slaughter houses (s. h.) and detailed information should be collected on the number and present arrangements, if any, for utilising by-products, the proportion of by-products thus utilised, scope offered by individual or group of slaughter houses for economic utilisation of by-products.	I.C.A.R. & State Govts.
2	Bleeding rails should be provided in the Slaughter houses. A blood gutter may be provided with 2 outlets, one leading to the blood tank situated in the by-products (bp.) building and the other to a sewer. The blood gutter must have a good slope as blood clots rapidly & its entrance shd. be covered with low perforated steel plates to prevent contain.	Do.
3	The inclusion of a rendering plant in Slaughter houses located in large cities is highly desirable in order to ensure collection & rendering of raw fat daily.	Do.
4	Adequate accommodation in slaughter houses for the hygienic processing & storage of casings, provision of simple type of machinery for gut cleaning, etc. & ample supply of fresh water would be necessary to facilitate manufacture of good quality casings.	Do.
5	Provision of special containers, freezing units refrigeration facilities for the collection & storage of various glands would be required to minimise the wastage occurring at present, particularly of the pituitary, thyroid, parathyroid glands, etc.	Do.

Sl. No.	Recommendations	Action to be taken by
6	Provision of rendering plants for the conversion of condemned meat into meat-meal, is highly desirable to ensure large returns from the slaughter houses.	I. C. A. R. & State Govts.
7	It is necessary to train personnel engaged in the slaughter houses to ensure the hygienic production of meat & the proper utilisation of by-products.	Do.
8	Immediate action to be taken for setting up 2 modern slaughter houses at Bombay & Calcutta.	Do.
9	The scheme for modernising slaughter houses already included in the 3rd Plan should be implemented early.	Do.
10	The economics for the setting up of a glandular products project for which applications have been received should be considered.	Do.
11	The Working group for the 4th plan should give due consideration to the need of modernising slaughter houses in the country and for the use of waste from dead animals.	Planning Commission

B. WASTE FROM DEAD ANIMALS

1	Collection of bones of the dead animals requires to be organised on intensive scale. Community Development Organisation in collaboration with Kh. & V. I. Commission can work out a scheme of organising the bone collection.	Min. of Comm. Devt. & Kh. & V.I. Commn.
2	Use of bone digesters for preparation of meat meal, bone meal and extraction of fats should be popularised.	Min. of Food, Kh. V.I. Commn., Planning Commn.
3	Suitable facilities for training & other technical guidance for the utilisation of wastes from dead animals should be provided on State or regional basis.	Kh. & V.I. Commn.
4	Centres for the utilisation of bones should be organised on scientific lines.	Min. of Comm. Devt. & Kh. V.I. Commn.

II. FOR FUTURE INVESTIGATIONS

5	Investigations should be carried out to improve the flaying techniques including improvement of implements for flaying.	C.L.R.I. & Kh. V.I. Commn.
6	Indigenous techniques adopted by Village Chamars in the utilisation of carcass need to be improved and it is desirable that scientific investigation in this direction should be intensified.	Min. of Food & Agri., C.L.R.I., Kh. V. I. Commn.

Sl. No.	Recommendations	Action to be taken by-
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III. FUTURE SURVEY NECESSARY

- | | | |
|----|---|------------------|
| 7. | Survey should be carried to find out the availability of bones from various accessible and inaccessible parts of the country in order to meet the requirements of indigenous industry for the manufacture of ossein & special gelatine for internal use & also export enough bone grist for foreign exchange. | Kh. & V.I. Commn |
|----|---|------------------|

Statewise Distribution of Livestock in India as per 1961 Census

S. No.	Name of the State	Provisional Data			
		Cattle (In thou- sands)	Buffalo. (In thou- sands)	Goat (In thou- sands)	Sheep. (In thou- sands)
1	2	3	4	5	6
1	Andhra Pradesh . . .	12,280·8	6,965·3	4,267·1	8,370·6
2	Assam . . .	6,497·5	570·6	1,877·8	54·2
3	Bihar . . .	16,125·3	3,862·8	8,571·0	1,156·2
4	Delhi . . .	89·2	60·5	6·5	33·5
5	Gujarat . . .	6,513·0	2,858·4	2,226·1	1,488·0
6	Himachal Pradesh . . .	1,212·8	211·6	665·0	596·9
7	Jammu & Kashmir . . .	1,831·1	401·2	577·4	1,161·2
8	Kerala . . .	2,686·4	485·4	1,252·1	36·2
9	Madras . . .	10,817·3	2,574·1	3,427·0	7,159·2
10	Madhya Pradesh . . .	24,774·1	5,575·8	5,538·6	1,009·3
11	Maharashtra . . .	15,526·2	3,133·5	5,168·4	2,125·3
12	Mysore . . .	9,659·1	3,022·0	2,905·4	4,763·5
13	Orissa . . .	8,982·5	1,116·0	2,310·0	960·3
14	Punjab . . .	6,053·4	4,426·0	1,221·2	901·3
15	Rajasthan . . .	13,169·2	4,030·2	8,015·0	7,342·0
16	Tripura . . .	480·8	42·5	153·3	3·0
17	Uttar Pradesh . . .	26,331·1	10,968·8	7,973·0	2,465·8
18	West Bengal . . .	11,464·8	948·5	4,474·0	548·2
19	Andaman & Nicobār Is- lands.	7·4	8·3	8·6	..
20	Laccadevi, Minicovy, Amindivi and other islands.	0·8	..	3·8	..
TOTAL		1,74,502·8	51,261·5	60,677·3	40,174·7

SOURCE.—“Agricultural situation in India Issues from July, 61 to Sep-
tember, '62.”

Production of Hides in India (Tentative & Estimated)

(Figures in lakh pieces)

S.No.	Name of the State	Buffalo Hides	Cow Hides
1	2	3	4
1	Andhra Pradesh	8·90	12·87
2	Assam	0·57	6·80
3	Bihar	5·51	16·56
4	Gujarat	2·57	6·00
5	Himachal Pradesh	0·26	1·52
6	Jammu & Kashmir	0·34	1·53
7	Kerala	0·43	3·35
8	Madhya Pradesh	4·82	21·35
9	Madras	3·27	11·59
10	Mysore	2·57	9·93
11	Maharashtra	2·94	14·21
12	Orissa	1·35	11·10
13	Punjab	3·53	7·57
14	Rajasthan	4·17	13·14
15	Uttar Pradesh	14·27	21·90
16	West Bengal	1·33	13·26
17	Others including Andaman, Nicobar, Delhi, Laccadevi, Manipur, Pondi & Tripura.	0·49	0·96
TOTAL .		59·32	173·64

SOURCE.—Directorate of Marketing & Inspection, Nagpur.

*Estimated Statewise Production of Goat and Sheep Skins in
India in 1961*

(Lakh pieces)

S. No.	Name of the State	Sheep	Goat
1	2	3	4
1	Andhra Pradesh	26.78	13.58
2	Assam	0.21	3.72
3	Bihar	3.58	26.23
4	Gujarat	13.84	16.25
5	Himachal Pradesh	1.66	1.49
6	Jammu & Kashmir	3.62	3.98
7	Kerala	0.12	4.26
8	Madras	27.20	13.02
9	Maharashtra	19.76	37.73
10	Madhya Pradesh	5.17	24.70
11	Mysore	21.70	13.22
12	Orissa	2.02	3.80
13	Punjab	2.73	7.33
14	Rajasthan	19.82	25.12
15	Uttar Pradesh	22.54	55.81
16	West Bengal	2.58	15.70
17	Others	0.17	0.83
TOTAL .		173.50	266.77

NOTE.—Production of skins has been estimated on the basis of 1961 population of goat and sheep by utilising the production percentages of skins to the population of goat and sheep in each state, as given in the Report on the "Marketing of Raw skins in India" published in 1955 by the Directorate of Marketing and Inspection, Government of India, Nagpur (Estimated by Leather Economics Project, Central Leather Research Institute, Madras).

LEATHER AND LEATHER-GOODS INDUSTRY IN THIRD PLAN

Sole Leather Consumption and Raw Hides

	Units	1960-61			1965-66		
		Western Type	Indian Type	Total	Western Type	Indian Type	Total
1	2	3	4	5	6	7	8
(1) Shoe Production—							
(a) Large Scale	Pairs	6,200,000	2,800,000	9,000,000	9,300,000	4,200,000	13,500,000
(b) Small scale & cottage sector	„	22,300,000	70,700,000	93,000,000	33,450,000	106,050,000	139,500,000
		28,500,000	73,500,000	102,000,000	42,750,000	110,250,000	153,000,000
(2) Percentage of production of Rubber Soles—							
(a) Large scale	„	20	40	..	20	40	..
(b) Small scale & cottage	„	10	20	..	10	20	..
(3) Shoe Production with Leather Soles—							
(a) Large scale	„	4,960,000	1,680,000	6,640,000	7,440,000	2,520,000	9,960,000
(b) Small scale & cottage	„	20,070,000	56,560,000	76,630,000	30,105,000	84,840,000	114,945,000
		25,030,000	58,240,000	83,270,000	37,545,000	87,360,000	124,905,000

	1	2	3	4	5	6	7	8
(4) Consumption of sole Leather per pair—								
(a) Large scale Lbs.			0·80	0·80	..	0·80	0·80	..
(b) Small scale & cottage „			0·60	0·50	..	0·60	0·50	..
(5) Total consumption in lbs.								
(a) Large scale sector „			3,968,000	1,344,000	5,312,000	5,952,000	2,016,000	7,968,000
(b) Small scale & cottage „			12,042,000	28,280,000	40,322,000	18,063,000	42,420,000	60,483,000
			16,010,000	29,624,000	45,634,000	24,015,000	44,436,000	68,451,000
(6) Sole leather in No. of Hides (1 buff=25 lb).—								
(a) Large scale Nos.			159,000	68,000	227,000	238,500	102,000	340,500
(b) Small scale „			481,680	1,130,000	1,611,680	722,520	1,695,000	2,417,520
			640,680	1,198,000	1,838,680	961,020	1,797,000	2,758,020
(7) Shoe Production—								
(a) Large scale Pairs			6,200,000	2,800,000	9,000,000	9,300,000	4,200,000	13,500,000
(b) Small scale & cottage „			22,300,000	70,700,000	9,300,000	33,450,000	106,050,000	139,500,000
			28,500,000	73,500,000	102,000,000	42,750,000	110,250,000	153,000,000

	1	2	3	4	5	6	7	8
(8) Sq. ft. per pair—								
(a) Large scale Sq. ft.			1·38	0·40	..	1·38	0·40	..
(b) Small scale & Cottage „			1·38	0·40	..	1·38	0·40	..
(9) Total square ft.—								
(a) Large scale „			8,556,000	1,120,000	9,676,000	12,834,000	1,680,000	14,514,000
(b) Small Scale „			30,774,000	28,280,000	59,054,000	46,161,000	42,420,000	88,581,000
			39,330,000	29,400,000	68,730,000	58,995,000	44,100,000	103,095,000
(10) Total cow hides—(1 hide=16 sq. ft.)								
(a) Large scale Nos.			534,750	70,000	604,750	802,125	105,000	907,125
(b) Small Scale „			1,923,375	1,767,500	3,690,875	2,885,062	2,651,250	5,536,312
			2,458,125	1,837,500	4,295,625	3,687,187	2,756,250	6,443,437

Statistics Regarding Buffalo Hides

1. Production of Buff-Hides (1951)	No. of Buffalos 415·18 Lakhs		Slaughtered 6·08 Lakhs		Dead 41·63 Lakhs		Total No. of Buff-hides 47·71 Lakhs	
	1953-54	1954-55	1955-56	1956 (April-Dec.)	1957	1958	1959	1960 (Jan.-Mar.)
1	2	3	4	5	6	7	8	9
2. Raw Buff Hides (Imports)								
Nos.	6,626	8,396	3,755	2,674	1,01,010	1,12,105	1,32,111	42,030
Cwts.	1,957	2,772	1,372	869	27,965	36,845	44,037	14,010
Rs.	92,561	91,677	58,813	44,645	30,99,613	30,82,695	34,67,233	12,89,388
3. Raw Buff Hides (Exports)								
NIL								
4. Tanned Buff Hides (Imports)								
Separate figures not available.								
5. Tanned Buff Hides (Exports)								
NIL								
Nos.	292,916	270,502	176,540	132,645	15,54,957	13,77,175	9,71,400	5,51,920
Cwts.	21,964	17,871	11,905	8,272	35,810	31,519	24,285	13,759
Rs.	41,30,386	38,08,854	26,64,752	17,14,492	1,00,37,701	95,88,433	73,71,652	57,55,639

1	2	3	4	5	6	7	8	9
	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.
6. Total Availability—								
(i) Buff Hides available in the country		47.71	47.71	35.80	47.71	47.71	47.71	11.93
(ii) Raw Buff Hides Imported		0.084	0.038	0.027	1.010	1.121	1.32	.42
		47.794	47.748	35.827	48.720	48.831	49.03	12.35
Exports—								
(i) Raw Buff Hides		Nil.	Nil.	Nil.	Nil.	Nil.	Nil.	Nil.
(ii) Tanned Dressed Buff hides		2.7	1.76	1.33	15.55	13.77	9.71	5.51
		2.7	1.76	1.33	15.55	13.77	9.71	5.51
Internal consumption		45.094	45.988	34.497	33.17	35.061	39.32	6.84
TOTAL		47.794	47.748	35.827	48.720	48.831	49.03	12.35

Statistics Regarding Cow Hides

1. Production of cow hides (1951)	No. of cows (1951) 1396.52 lakhs		Slaughtered 18.79 lakhs		Dead 122.77 lakhs		Total No. of cow hides 141.56 lakhs	
	1953-54	1954-55	1955-56	1956 (April.-Dec.)	1957	1958	1959	1960 (Jan.-Mar.)
	1	2	3	4	5	6	7	8
2. Raw cow hides (Imports by land and sea)—								
Nos.	504,172	907,910	1,343,621	1,071,091	469,414	373,254	612,924	190,278
Cwts.	55,832	93,118	1,53,303	1,19,288	67,792	1,48,512	1,02,154	31,713
Rs.	55,25,893	74,19,990	1,28,17,561	77,82,318	39,87,463	65,37,179	93,44,910	32,02,869
3. Tanned Cow Hides (Imports)—								
Nos.	81	1,206	900	18	10,172	5,788	Nil	Nil
Cwts.	9	134	1	2	3,561	1,204		
Rs.	7,498	17,721	444	2,412	3,53,000	3,29,330		
4. Raw Cow Hides (Imports)—								
NIL								
5. Cow Hides (Tanned & Dressed) Exports—								
Nos.	5,455,960	4,101,361	5,392,738	3,207,234	5,124,569	34,74,595	8,165,508	1,099,626
Cwts.	300,405	235,423	229,610	168,576	220,345	168,468	371,164	49,983
Rs.	8,82,61,150	7,07,10,436	7,40,17,710	4,68,74,848	6,57,01,788	5,29,66,486	10,41,91,503	2,10,53,027

1	2	3	4	5	6	7	8	9
6. Total availability—		Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.
Cow Hides available in the country.		141·56	141·56	106·17	141·56	141·56	141·56	35·89
Raw cow hides (Imported).		9·08	13·43	10·71	4·69	3·73	6·12	1·90
		150·64	154·99	116·88	146·25	145·29	147·68	37·79
Exports								
(i) Raw cow hides		Nil	Nil	Nil	Nil	Nil	Nil	Nil
(ii) Tanned & dressed hides		41·01	53·92	32·07	51·24	34·74	81·65	10·99
		41·01	53·92	32·07	51·24	34·74	81·65	10·99
Internal consumption		109·63	101·07	84·81	95·01	110·55	66·03	26·80
TOTAL		150·64	154·99	116·88	146·25	145·29	147·68	37·79

Statistics Regarding Sheep Skins

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1. Production of Sheep kins (1951)—	No. of sheep 388·32 lakhs		Slaughtered 122·64 lakhs		Dead 32·40 lakhs		Total No. of sheep skins 155·04 lakhs	
	1953-54	1954-55	1955-56	1956 (Apr.-Dec.)	1957	1958	1959	1960 (Jan.- Mar.)
	1	2	3	4	5	6	7	8
2. Raw Sheep Skins (Imports)—								
Nos.	284,865	403,034	469,218	163,743	777,318	825,792	663,596	112,526
Cwts.	7,383	8,411	11,358	4,475	16,690	17,554	14,426	2,881
Rs.	10,94,252	14,74,022	17,85,846	5,66,106	21,55,693	14,57,959	13,23,247	3,26,636
3. Raw Sheep Skins (Export)—								
Nos.	109,736	146,018	119,305	123,092	326,047	284,569	265,742	39,974
Cwts.	1,447	223	243	2,755	6,300	3,379	5,777	869
Rs.	3,57,353	4,58,466	3,59,645	4,14,042	12,95,305	15,33,576	31,91,992	3,58,229
4. Imports (Tanned Sheep Skins)—NIL								
5. Exports (Tanned & Dressed Sheep Skins)—								
Nos.	13,024,960	10,629,543	11,029,357	8,794,660	11,498,567	9,227,644	12,719,552	3,118,800
Cwts.	73,741	58,417	57,947	47,325	63,238	49,955	69,128	16,950
Rs.	7,05,99,049	5,45,43,379	5,46,13,815	4,32,33,896	6,22,56,808	4,81,36,630	7,55,40,798	2,05,02,788

1	2	3	4	5	6	7	8	9
6. Total Availability—		Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.
(i) Sheep skins available in the country		155.04	155.04	116.28	155.04	155.04	155.04	38.76
(ii) Raw Sheep Skins (Imports)—		4.03	4.69	1.63	7.77	8.25	6.63	1.12
		159.07	159.73	117.81	162.81	163.29	161.67	39.88
Exports Raw		1.46	1.19	1.23	3.26	2.84	2.65	0.40
Exports Tanned & Dressed		106.29	110.29	87.94	114.98	92.27	127.19	31.18
		107.75	111.48	89.17	118.24	95.11	129.84	31.58
Internal Consumption.		51.32	48.25	28.64	44.57	68.18	31.83	8.30
TOTAL		159.07	159.73	117.81	162.81	163.29	161.67	39.88

Statistics Regarding Goat Skins

1. Production of Goat Skins (1951)—	No. of goats (1951)— 473·31 lakhs		Slaughtered 250·00 lakhs		Dead 50·00 lakhs		Total No. of goat skins 300·00 lakhs*	
	1953-54	1954-55	1955-56	1956 (Aprl.-Dec.)	1957	1958	1959	1960 (Jan.-Mar.)
	1	2	3	4	5	6	7	8
2. Raw Goat Skins (Imports by Land and Sea)—								
Nos.	1,337,838	1,169,287	1,129,837	648,565	421,736	794,309	976,880	2,61,840
Cwts.	26,503	22,179	24,647	13,018	7,728	8,679	12,211	3,273
Rs.	36,40,194	32,21,628	35,08,132	17,58,865	13,20,453	12,72,469	18,71,095	6,30,173
3. Tanned Goat Skins (Imports)—								
Nos.	50	11,000	74,550	6,650	33,347			
Cwts.	1	220	1,491	133	307	Nil	Nil	Nil
Rs.	1,299	52,445	1,44,634	184,334	72,177			
4. Raw Goat Skins (Exports)—								
Nos.	15,268,109	17,614,329	16,341,081	11,567,823	18,516,185	17,623,249	19,592,800@	4,938,320@
Cwts.	194,409	213,300	193,238	141,682	229,503	227,356	244,910	61,729
Rs.	5,42,36,648	6,58,23,968	5,83,17,213	3,80,44,006	6,45,16,161	6,83,96,656	10,13,68,224	3,09,83,252

	1	2	3	4	5	6	7	8	9
5. Tanned & Dressed Goat Skins (Exports)—	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.	Lakh Nos.
Nos.	11,987,438	11,291,355	13,474,528	10,187,725	13,880,984	11,712,347	11,731,905†	2,728,080	
Cwts.	93,207	83,329	96,642	72,516	96,553	86,242	86,903	20,208	
Rs.	6,39,28,430	6,13,07,455	7,58,09,336	5,35,82,467	7,64,37,531	7,02,34,327	8,61,18,418	2,29,71,782	
6. Total Availability—	..								
(i) Goat skins available in the country.	..	300	300	225	333·75	300·00	320·00	80·00	
(ii) Raw goat skins (imported).	..	11·69	11·30	6·49	4·22	7·94	9·76	2·61	
	..	311·69	311·30	231·49	337·97	307·94	329·76	82·61	
Exports—									
(i) Raw Goat Skins .	..	176·14	163·41	115·68	185·16	176·23	195·92	49·38	
(ii) Tanned & Dressed Goat skins.	..	112·91	134·74	101·88	138·81	117·12	117·31	27·28	
	..	289·05	298·15	217·56	323·97	293·35	313·23	76·66	
Internal Consumption.	..	22·64	13·15	13·93	14·00	14·59	16·53	5·95	
TOTAL	..	311·69	311·30	231·49	337·97@	307·94	329·76	82·61	

*This has risen to 333·75 in 1957 and 320 lakhs in 1959. [@Raw goat skins 80 Nos. per 1 cwt.

†Tanned Goat Skins 135, Nos. per 1 cwt.

SOURCE.— Journal of Industry and Trade, January 1961.

STATISTICS

*Summary statement of the requirement of tanning chemicals
etc. for tanning & leather industry*

Items of Chemicals	Total quantity in Tons
Soaking agents such as Teepol Mollescal B.M. etc.	62.34
,, ,, ,, ,, Sod. Sulphide	828.19
,, ,, ,, ,, Bleaching Powder	16
,, ,, ,, ,, Caustic Soda	92.8
Liming agents such as Sodium Sulphide	N.A.
,, ,, ,, ,, Slaked Lime	23.102
,, ,, ,, ,, Sajimati	328.13
,, ,, ,, ,, Soda ash	209.55
Deliming agents such as Boric acid	128.565
,, ,, ,, ,, Ammon Sulph	N.A.
,, ,, ,, ,, Chloride	129.035
,, ,, ,, ,, Wheat Bran	861
,, ,, ,, ,, Acetic Acid	22.42
,, ,, ,, ,, Bates	43.93
,, ,, ,, ,, Sulphuric Acid	1901.76
,, ,, ,, ,, Common Salt	4884.3
,, ,, ,, ,, Babul Barks	10,292.1
,, ,, ,, ,, Myrab Nuts	19,228
,, ,, ,, ,, Wattle Bark	5,036
,, ,, ,, ,, Wattle Extract	11,160
Tan barks other than babul such as Avaram, Konam etc.	15,596
,, ,, ,, ,, Bichromate of Soda	1,000.98
,, ,, ,, ,, Basic Chrome Sulphate	350
,, ,, ,, ,, Borax	56.43
,, ,, ,, ,, Sodibicarb	17.21

Items of Chemicals	Total quantity in Tons
Other Sulphonated oils	116.43
„ T.R. oil	133.27
Sulpholine P & Shellchrome	262.05
Syntans	517
Veg. oils	3,619
Stearic Acid	24
Tallow	46.11
Cod or fish oil	68.06
Pigment finishes	150(33570-Gall)
Casein	23.2
Shellac	15.2 90 lbs.
Ammonia	13 ton ½ cwt.
Binder	13 „
Formaldehyde	8.6 tons
Nigrosine	60.465 tons
Other Acid Dyes	8.12 tons
Direct dyes of all colours	62.23 tons
Glue	2 tons 35 lbs.
Lithopone	108 tons
Acrylic Resin Emulsion	40 tons
Alum	22.93 tons
Sodium Bisulphite	109 tons
Arsenic Sulphide	.46 tons
Mordants	.88 tons
Hydrochloric Acid	11.2 tons
Hypo	84.3 tons

Particulars on Excise duty on footwear realised
(Organised Units)

State	Amount realised (Rupees in Thousands)		
	1961-62	1962-63	1963-64
1. Andhra	Nil	Nil	Nil
2. Assam	Nil	Nil	Nil
3. Bihar	1,270	1,758	1,536
4. Maharashtra	1,793	2,336	2,490
5. Gujarat	88	99	110
6. Jammu & Kashmir	Nil	Nil	Nil
7. Kerala	119	73	72
8. Madhya Pradesh	Nil	Nil	Nil
9. Madras	11	6	41
10. Mysore	Nil	Nil	Nil
11. Orissa	Nil	Nil	Nil
12. Punjab	Nil	46	260
13. Rajasthan	Nil	1	Nil
14. U.P.	1,454	1,312	2,763
15. West Bengal	12,415	14,180	15,624
16. Delhi	1,291	1,550	1,781
17. Himachal Pradesh	Nil	Nil	Nil
18. Manipur	Nil	Nil	Nil
19. Tripura	Nil	Nil	Nil
20. Pondichery	Nil	Nil	Nil
21. Goa	Nil	Nil	Nil
ALL INDIA TOTAL	18,441	21,361	24,677

NOTE.—Excise duty is levied only on footwear from 28-2-1954 (10%).

Duty on component parts on footwear introduced on 1-3-1960 (15%).

SOURCE.—Information obtained from the Office of the Collector of Central Excise, Madras.

Cost of Export Finance and Domestic Finance in India and in some Foreign Countries

(Per cent per annum)

Name of country	Short-term			Medium-term		
	Cost of export finance	Cost of domestic finance	Margin below domestic cost	Cost of export finance	Cost of domestic finance	Margin below domestic cost
Belgium	4—5	6—6½	1—2½	5—5½	5½—6	½—1
France	4½	4½	½	5—5½	5½—6	½—1
West Germany	5—6½	5—6½	..	6—8½	6—8½	..
Italy	4½—4½	6	1½—1½	5½—6	7	1—1½
Japan	(a) 4½*—5½†	7½—7½	2—3½	5½4	7½—8	2—2½
	(b) 4**					
U.K.	5½—6	5½—6	..	5½	5½—6	½
U.S.A.	5½	5½—6	..	6	6	..
India	6½††—7½	(a) 7@	..	6—7½@@@	(a) 7@	..
		(b) 7½@@		..	(b) 7½@@	1

NOTES :—(1) These are latest available data based mainly on published sources.

(2) The margin below domestic cost indicates the presence of special facilities for export finance.

(3) The rates have been rounded off to the nearest quarter per cent per annum.

*Rate for export advance bills rediscountable with the Bank of Japan.

†Rate for export advance bills eligible for collateral loans from the Bank of Japan.

**Rate for foreign currency bills which are eligible for advance from the Bank of Japan.

††Rate for rupee usance export bills covered by the Rupee Export Bills Scheme.

@Minimum rate. @@Average rate.

@@@Rate for usance export bills against which refinance is obtained from the Industrial Development Bank.

SOURCE :—Report of the Chabani Committee on Cost of Export Credit. "Commerce" Vol. CIX. No. 2793, P. 766 (1964).

Rates of Local Sales Tax & Stage of Levy on

State/Union Territory	Raw Wool		Hides & Skins (Raw and Tanned).	
	Rate of Tax	Whether single/multipoint & stage of levy	Rate of tax	Whether single/multipoint & stage of levy
Andhra Pradesh	1%	S.P. 1st sale	2%	S.P. At the point of 1st purchase for tanners & at the point of last purchase for others.
Assam . . .	4%	S.P. Last sale	2%	S.P. Last sale.
Bihar . . .	Nil	..	2%	S.P. Last sale.
Delhi . . .	Nil	..	Nil	..
Gujarat . . .	2½%	2% G.S.T. + ½% R.S.T.	2%	S.P. either G.S.T. or P.T.
Himachal Pradesh.	Nil	..	Nil	..
Jammu & Kashmir.	Nil	..	2%	S.P. Last sale
	knitting wool 7% S.P. on last sale			
Kerala . . .	3%	M.P.	2%	S.P. last purchase
Madhya Pradesh	Nil	..	2%	S.P. last sale
	knitting wool 7% S.P. on 1st sale			
Madras . . .	1%	S.P. last purchase	2%	S.P. last purchase (Raw)
			2%	S.P. first sale (dressed).
Maharashtra . .	1%	G.S.T. or P.T.	2%	G.S.T. or P.T.
Manipur . . .	3%	S.P. last sale	Nil	..
Mysore . . .	3%	S.P. 1st purchase	2%	S.P. 1st purchase.
Orissa . . .	5%	S.P. last sale	2%	S.P. last sale
Punjab . . .	6%	S.P. last sale	1%	S.P. last sale.
Rajasthan . .	2%	S.P. last sale	1%	S.P. last sale (dressed).
			2%	S.P. Last sale (raw).
Uttar Pradesh	2%	M.P.	½%	S.P. last sale (raw)
			2%	S.P. last sale (tanned)
West Bengal . .	5%	S.P. Last sale	2%	S.P. Last sale.

ABBREVIATIONS USED:—S.P.—Single Point ; M.P.—Multi Point.
P.T.—Purchase Tax. S.T.—Sales Tax.
G.S.T.—General Sales Tax: R.S.T.—Retail Sales Tax.
SGURCE.—Saraiya Committee Report.

Trends in India's Exports of Skins, Leathers, Leather Goods and Tanning Material
(1957-1964)

Quantity in Kgs. and Value in Rs.

Sl. No.	Item	1957		1958		1959	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
1. <i>Skins Raw</i>							
1.1	Total Goat Skins Raw	1,17,32,750	6,48,71,712	1,15,53,366	6,84,09,425	1,23,62,708	10,05,05,691
1.2	Total Sheep Skins Raw	3,20,059	12,97,305	1,71,663	15,33,628	2,58,637	30,27,847
1.3	Total Reptile Skins Raw	3,66,594	31,48,293	3,05,477	17,64,117	3,13,302	21,54,712
1.4	Total Fur Skins Raw	1,39,762	4,98,157	1,00,793	18,69,333	42,776	27,54,163
Total of Skins Raw		1,25,59,165	6,98,15,467	1,21,31,299	7,35,76,503	1,29,77,423	10,84,42,413
2. <i>Hides Tanned</i>							
2.1	Cow Hides Tanned	91,45,861	4,50,05,057	70,77,671	3,61,38,740	1,08,38,922	7,18,49,129
2.2	Cowcalf Skins Tanned	9,15,673	76,31,631	5,69,044	49,60,410	11,54,854	1,19,49,980
2.3	Buffalo Hides Tanned	4,08,558	16,80,239	3,47,188	15,34,161	5,39,680	27,64,801
2.4	Buffalo calf Skins Tanned	13,07,212	78,22,911	12,10,839	78,39,460	19,56,779	1,43,27,011
2.5	Kips Tanned	1,79,741	8,70,467	1,57,388	8,29,046	2,04,380	12,62,221
TOTAL OF HIDES TANNED		1,19,57,045	6,30,10,305	93,62,130	5,13,01,817	1,46,94,615	10,21,53,142

Sl. No.	Item	1957		1958		1959	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
3.	<i>Skins Tanned</i>						
3.1	Goat Skins Tanned . . .	48,79,984	7,57,29,301	45,61,754	6,93,62,291	43,56,510	8,42,86,199
3.2	Sheep Skins Tanned . . .	32,03,790	6,21,49,194	24,89,042	4,73,90,715	35,02,054	7,43,75,905
3.3	Reptile Skins Tanned . . .	28,849	6,82,465	29,669	5,18,208	61,421	10,19,507
3.4	Fur Skins Tanned . . .	13,88,497	2,32,027	12,32,176	1,02,064	5,080	2,600
	Total of Skins Tanned ..	95,01,120	13,87,92,987	83,12,641	11,73,73,278	79,25,065	15,96,84,211
4.	<i>Finished Leathers</i> . . .	11,99,205	1,41,06,444	9,07,443	1,33,83,515	18,04,878	2,69,69,196
5.	<i>Leather Manufactures</i> . . .	..	10,42,106		8,56,956	..	9,29,957
6.	<i>Leather Goods</i> . . .	..	9,66,821	..	7,86,913	..	7,29,965
7.	<i>Footwear</i> (Quantity in Pairs) . .	25,78,407	2,31,22,420	21,42,298	1,78,69,323	26,69,919	2,55,34,799
	Total of items 1 to 7 (Value only) .		31,08,56,550		27,51,48,305		42,44,43,683
8.	<i>Hair</i>						
8.1	Goat hair other than Angora . .	39,46,628	1,00,32,417	23,44,368	45,77,503	32,43,342	66,59,380
9.	<i>Tanning Materials</i>						
9.1	Myrobalan whole . . .	92,48,483	15,45,056	1,18,22,417	17,03,787	96,65,677	13,46,554
9.2	Myrobalan crushed . . .	1,37,44,599	30,49,297	1,79,71,714	30,66,692	1,53,48,501	27,73,479
9.3	Myrobalan Extract . . .	34,97,371	20,26,555	22,70,117	14,10,060	16,45,857	9,75,871
	Total of Tanning Materials (Value only)		66,20,908		61,80,539		50,95,904

Sl. No.	Item	1960-61		1961-62		1962-63	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
1.	<i>Skins Raw</i>						
1.1	Total Goat Skins Raw . . .	1,15,23,431	9,14,41,932	1,10,07,375	7,62,12,870	1,38,11,213	9,58,31,822
1.2	Total Sheep Skins Raw . . .	1,88,627	10,21,552	1,84,982	16,33,486	1,36,668	69,25,106
1.3	Total Reptile Skins Raw . . .	2,99,822	22,27,979	5,16,723	46,83,852	5,45,509	56,59,608
1.4	Total Fur Skins Raw . . .	33,011	55,23,421	35,186	57,42,993	7,717	16,84,374
	Total of Skins Raw . . .	1,20,44,891	10,02,14,881	1,17,44,266	8,82,73,201	1,45,01,107	11,01,00,910
2.	<i>Hides Tanned</i>						
2.1	Cow hides tanned . . .	84,77,763	5,11,62,676	74,86,728	4,60,37,124	70,72,501	4,28,22,683
2.2	Cowcalf skins tanned . . .	8,49,920	86,15,544	8,51,007	80,37,471	8,95,137	85,23,866
2.3	Buffalo hides tanned . . .	4,68,422	22,25,281	4,67,934	26,12,725	1,71,122	9,39,032
2.4	Buffalocalf skins tanned . . .	14,67,241	1,01,74,129	18,13,400	1,38,67,180	20,65,946	1,73,52,851
2.5	Kips tanned . . .	2,95,453	17,97,671	4,99,196	31,55,484	5,05,726	32,11,332
	Total of Hides Tanned . . .	1,15,58,799	7,39,75,301	1,11,18,265	7,37,09,984	1,07,10,432	7,28,49,964

Sl. No.	Item	1960-61		1961-62		1962-63	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
3.	<i>Skins Tanned</i>						
3.1	Goat skins tanned	40,98,366	8,11,58,727	47,92,034	9,28,71,172	45,55,914	8,17,58,046
3.2	Sheep skins tanned	30,55,932	7,39,06,891	33,74,127	6,65,01,100	30,06,708	5,61,64,491
3.3	Reptile skins tanned	53,802	9,38,486	1,73,211	30,15,779	1,29,312	27,11,095
3.4	Fur skins tanned	..	..	8	400	..	..
	Total of Skins Tanned	72,08,100	15,60,04,104	83,39,380	16,23,88,451	76,91,934	14,06,33,632
4.	<i>Finished Leathers</i>	12,88,260	1,83,78,464	12,63,787	1,71,31,249	8,05,868	1,14,98,476
5.	<i>Leather Manufactures</i>	..	11,59,778	..	11,36,072	..	13,58,900
6.	<i>Leather Goods</i>	..	3,48,390	..	5,01,828	..	7,75,136
7.	<i>Footwear</i> (Quantity in Pairs)	24,67,680	2,63,94,407	20,47,780	1,85,89,034	27,24,991	2,21,18,158
	Total of items 1 to 7 (Value only)		37,64,75,328		36,17,29,819		35,93,35,176
8.	<i>Hair</i>						
8.1	Goat hair other than Angora	22,35,474	41,51,004	25,42,054	48,81,176	26,47,013	51,78,662
9.	<i>Tanning Materials</i>						
9.1	Myrobalan whole	97,53,231	16,80,284	68,44,558	13,65,808	48,20,874	10,01,211
9.2	Myrobalan crushed	1,41,93,293	31,75,259	1,52,62,367	38,09,988	1,36,56,342	39,12,844
9.3	Myrobalan extract	8,22,943	5,24,407	7,47,934	6,20,624	3,87,955	3,06,326
	Total of tanning materials (Value only)		53,79,950		57,96,420		52,20,381

*Trends in Indias Exports of Skins, Leathers, Leather Goods and Tanning Materials
During 1963-64 & 1964-65*

Sl. No.	Item	1963-64		1964-65	
		Kgs.	Rs.	Kgs.	Rs.
1.	<i>Skins Raw</i>				
1.1	Total Goat Skins Raw	1,08,71,012	8,38,18,349	1,17,78,893	7,90,88,865
1.2	Total Sheep Skins Raw	1,05,831	49,09,482	42,969	34,57,744
1.3	Total Reptile Skins Raw	5,86,869	72,95,305	4,88,031	81,35,858
1.4	Total Fur Skins Raw	21,249	50,75,903	2,660	6,41,093
	Total of Skins Raw	1,15,84,961	10,10,99,039	1,23,12,553	9,13,23,560
2.	<i>Hides Tanned</i>				
2.1	Cow hides tanned	63,47,319	3,72,43,137	60,71,957	3,29,80,685
2.2	Cow calf skins tanned	8,78,574	82,54,482	7,82,391	68,36,083
2.3	Buffalo hides tanned	1,57,764	8,12,997	1,24,507	6,10,357
2.4	Buffalo calf skins tanned	21,11,747	1,81,10,525	21,51,267	1,67,61,341
2.5	Kips tanned	1,65,308	12,07,978	1,85,403	12,03,515
	Total of hides tanned	96,60,712	6,56,29,119	93,15,525	5,83,91,981
3.	<i>Skins Tanned</i>				
3.1	Goat skins tanned	51,06,267	9,63,74,517	59,66,432	11,00,58,731
3.2	Sheep skins tanned	36,82,066	7,87,98,853	33,85,834	7,40,29,241
3.3	Reptile skins tanned	1,35,336	55,55,129	1,67,149	95,68,493
3.4	Fur skins tanned	..	..	..	..
	Total of skins tanned	89,23,669	18,07,28,499	95,19,415	19,36,56,465

Sl. No.	Item	1963—64		1964—65	
		Kgs.	Rs.	Kgs.	Rs.
4.	Finished Leather	18,14,114	1,57,06,585	16,18,387	2,03,45,467
5.	Leather Manufactures	..	17,22,174	..	18,98,158
6.	Leather Goods	..	4,87,545	..	6,73,390
7.	Footwear (Quantity in Pairs)	30,16,372	2,93,33,437	40,21,695	3,48,29,189
Total of items 1 to 7 (value only)			39,47,06,398		40,11,18,210
8.	Hair				
8.1	Goat hair other than Angora	31,07,677	83,11,657	31,18,719	78,64,624
9.	Tanning Materials				
9.1	Myrobalan whole	44,64,180	9,05,186	53,57,319	13,08,677
9.2	Myrobalan crushed	1,04,79,456	23,41,906	1,20,02,246	27,27,399
9.3	Myrobalan extract	2,50,225	1,85,951	3,20,977	2,53,594
Total of Tanning Materials (value only)			34,33,043		42,89,670

Source :—"Monthly Statistics of Foreign Trade of India" 1964 and 1965 (March Issue).

India's Exports of Wool, Goat Hair, Bones, Sheep Casings etc. during 1961-62 to 1963-64

Quantity in Kgs. and Value in Rs.

Sl. No.]	Item	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
1	<i>Wool & other Animal Hair Sheep & lamb greasy or back washed.</i>	.	.				
	Australia . .	3,18,905	20,38,482	2,44,106	16,01,870	4,225	24,772
	Belgium . .	5,08,990	30,09,823	1,61,737	8,88,572	3,30,151	21,11,356
	Czechoslovakia .	11,066	60,855	..	..	..	..
	Denmark . .	16,928	1,25,213	7,108	51,893	..	..
	France . .	3,38,825	18,41,886	2,30,824	12,28,375	1,32,697	8,08,453
	Germany W. .	1,27,072	4,63,655	1,54,132	5,41,288	3,15,897	10,24,447
	Japan . .	7,777	43,983	..	..	..	..
	Lebanon . .	48,055	3,12,516	33,861	2,23,679	..	..
	Libya . .	6,155	40,914	..	..	..	..
	Netherlands .	1,04,502	2,24,715	42,353	1,60,027	1,72,156	7,30,490
	U.K. . .	40,52,573	2,25,93,011	26,20,285	1,51,41,258	41,07,636	2,52,24,864
	U.S.A. . .	10,39,270	62,46,346	3,17,885	18,81,851	13,84,046	89,68,961
	U.S.S.R. . .	68,02,471	4,04,69,635	52,25,553	3,22,38,725	25,71,606	1,69,85,923
	Yugoslavia . .	51,574	3,17,133	..	..	..	..
	Sm Val Trns .	541	1,358	..	..	..	..
	Bulgaria . .	..	..	2	15	..	..

Sl. No.	Items	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
	Germany E..	..	..	4	22	..	..
	Hungary . .	..	..	14,477	28,609	..	..
	Italy . . .	..	..	16,100	1,19,071	17,150	92,176
	Thailand . .	..	..	1,121	5,892	1,141	7,542
	Finland . .	..	..	..	..	969	2,164
	TOTAL .	1,34,34,804	7,79,89,525	91,12,673	5,43,97,793	90,37,674	5,59,81,148
2	Sheep & Lamb wool [scoured whether or not bleached or dyed sheep & lamb wool scoured dyed or not.			..	..	..	..
	Australia . .	17,224	98,851	..	..	Belgium 9,591	49,857
	France. . .	2,46,292	15,12,681	1,20,787	7,89,606	2,08,707	13,47,612
	W. Germany .	15,236	32,366	125	790	..	..
	Netherlands .	2,706	10,352	..	..	..	..
	U. K. . . .	4,04,482	22,80,493	1,24,868	7,18,710	1,27,528	7,24,892
	U.S.A.. . .	3,96,792	23,15,771	1,69,002	9,74,432	5,13,531	31,52,266
	Yugoslavia . .	..	..	28,218	1,72,314	..	..
	TOTAL .	10,82,732	62,50,514	4,43,000	26,55,852	8,59,357	52,74,627

Sl. No.	Items	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
3	Fine Animal Hair including Angora Rabbit hair suitable for spinning other than wool.				..	..	..
	(a) <i>Fine Animal hair Excl. Wool.</i>						
	Belgium	6,595		..	16,923	9,133	11,085
	Germany W.	4,943	24,730	1,780	33,128	222	22,864
	Japan . . .	1,089	10,244	13,993	96,154	France 10	2,229
	Netherlands .	701	6,213	..	..	..	..
	U.K. . . .	10,862	1,13,050	5,330	29,437	..	..
	U.S.A.. . .	2,515	24,193	9	1,280	3,621	10,480
	Sm Val Trns. .	98	1,025	..	..	..	..
	TOTAL .	20,208	1,79,445	27,707	1,76,922	12,986	46,658
4	Horse Hair & other Coarse Hair Goat Hair other than Angora.						
	U.K. . . .	1,01,507	1,57,974	46,603	1,09,497	79,577	2,71,544
	W. Germany .	8,49,267	16,76,434	7,21,658	13,56,748	7,52,175	21,30,021
	E. Germany. .	3,07,115	11,97,258	3,90,736	12,97,775	2,00,952	6,03,098
	Netherlands .	4,70,154	6,15,815	5,00,149	7,54,679	6,10,851	11,24,894
	Belgium . .	1,09,386	1,67,600	2,73,382	5,49,199	1,81,786	6,03,981

Sl. No.	Items	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
	France. . .	2,72,878	4,30,414	1,27,755	2,66,353	2,23,127	6,91,073
	Iraq . . .	..	..	..	..	..	..
	Japan . . .	13, 871	39,503	5,102	9,837	30,384	1,95,843
	U.S.A.. . .	1,33,449	1,92,675	57,744	1,15,246	2,73,605	9,02,145
	Australia . .	1,60,599	1,71,818	3,14,552	3,97,116	6,47,331	14,08,606
	New Zealand .	..	..	..	..	..	..
	Sm Val Trns .	1,607	1,678	..	..	..	..
	Hungary . . .	97,760	1,83,940	1,38,644	1,90,113	..	..
	Italy	11,073	20,975	17,311	11,759	27,077	1,03,277
	Syria	13,288	25,092	8,013	23,985	..	..
	Bulgaria . . .	..	..	8,128	24,187	..	..
	Czechoslovakia .	..	..	15,000	32,471	57,271	1,24,172
	Hong Kong . .	..	..	9,691	12,172	5,037	38,252
	Poland	..	..	7,693	22,231	..	..
	Sweden	..	..	4,852	5,300	..	..
	Finland	..	..	..	..	1,032	1,462
	Gibraltar . . .	..	..	..	..	4,800	18,730
	Kuwait	..	..	..	..	2,400	15,300
	Yugoslavia . .	..	..	..	..	10,272	19,259
	TOTAL	25,42,054	48,81,176	26,47,013	51,78,662	31,07,677	83,11,657

Sl. No.	Items	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
<i>Others</i>							
	U.K.	1,59,359	1,53,211	23,818	98,361	45,206	1,67,865
	W. Germany . .	59,037	1,81,024	66,284	2,88,090	1,19,778	3,13,752
	France	..	..	25,659	19,913	17,445	20,235
	Japan	1,016	10,430	1,554	13,936	..	..
						Hong Kong 1,533	8,370
	Sm Val Trns . .	2,339	3,935	..	..	..	..
						Switzerland 750	4,280
	Belgium	5,115	4,528	3,095	2,625	..	..
	Netherlands . .	5,901	9,065	..	..	11,353	26,341
	Australia . . .	..	..	..	5,060	15,159	19,774
	Canada	..	..	..	455	..	..
	Hungary	..	..	..	16,182	..	..
	U.S.A.	..	..	..	9,466	59,883	1,15,330
TOTAL		2,32,807	3,62,193	1,51,573	4,53,958	2,71,107	6,75,947

Sl. No.	Items	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
5	<i>Wool or Fine Hair corded or combed in- cluding Tops</i>						
	<i>Wool Tops</i>						
	France . . .	..	..	1,452	8,387	..	..
	<i>Others</i>						
	U.K.	1,65,954	2,21,706	2,47,558	6,29,839	3,03,929	11,65,863
	West Germany . .	4,78,135	13,70,876	6,01,757	18,25,785	2,19,103	7,05,158
	Italy	12,656	16,848	1,367	7,446	33,432	1,82,412
	Netherlands . . .	81,469	2,82,982	61,396	1,38,787	35,069	71,211
	U.S.A.	24,768	81,182	28,239	1,59,296	31,480	2,38,483
	France	7,958	14,732	22,661	74,477	100	1,466
	Sm Val Trns . . .	10	20	..	..	..	..
	Belgium	3,937	12,942	30,132	79,045	2,007	6,853
	Hungary	4,851	13,602	..	..	..	..
	Sweden	..	..	..	..	414	..
	Burma	..	..	2,424	14,560	..	1,462
	Japan	..	..	987	13,733	350	3,341
	TOTAL	7,79,738	20,14,890	9,96,521	29,42,968	6,25,884	23,76,249
6	<i>Wool Shoddy</i>						
	Netherlands . . .	..	..	..	..	2,286	11,111
	U.K.	..	..	..	..	7,120	35,885
	TOTAL	..	..	..	..	9,406	46,996

Sl. No.	Items	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
7	Waste of wool and of other Animal Hair						
	W. Germany .	13,986	1,47,000	9,016	1,13,775	13,418	1,70,997
	Netherlands .	..	..	..	..	27,775	1,27,689
	Japan .	1,224	8,925	1,568	18,200	305	2,210
	S. Korea .	509	5,955	..	..	..	..
	U.K. .	17,385	77,982	40,325	2,14,800	2,64,960	9,76,691
	U.S.A. .	14,540	1,04,658	28,452	1,91,594	9,225	54,091
	Sm Val Trns .	1,877	2,903	..	..	..	..
	Hong Kong .	..	..	509	4,200	7,262	1,04,498
	Somaliland Fr. .	..	..	1,000	14,540	..	..
	Spain .	..	..	254	2,225	..	..
	Belgium .	..	..	..	..	533	3,020
	Denmark .	..	..	..	..	80	779
	Finland .	..	..	..	..	682	10,062
	France .	..	..	..	..	10,421	80,401
	TOTAL	49,521	3,47,423	81,124	5,59,334	3,44,661	15,30,438

Sl. No.	Items	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
8	<i>Bones, ivory horns, hoops, claws & similar products :</i>						
	<i>Bones crushed :</i>						
	Behrein Islands	..	..	..	..	56,281	17,499
	Belgium	1,67,36,439	69,94,629	1,62,60,668	68,35,549	1,02,58,029	38,71,487
	Ceylon	49,912	18,069	25,139	9,347	..	..
	Czechoslovakia	5,27,830	2,45,585	4,86,025	2,23,762	8,29,630	3,54,744
	France	46,48,472	18,67,763	38,39,885	15,77,109	72,80,143	25,84,574
	E. Germany	3,51,929	1,58,931	28,35,035	12,84,055	62,27,418	26,18,554
	W. Germany	45,97,065	20,57,370	49,34,374	21,57,961	22,85,758	9,04,350
	Japan	23,94,015	10,26,418	21,55,716	12,14,111	21,66,412	8,33,672
	Netherlands	66,30,205	26,89,813	41,73,416	18,32,880	47,36,862	17,09,558
	Poland	3,45,907	2,51,224	2,50,000	1,12,000	..	..
	U.K.	1,72,27,529	70,27,545	1,47,85,100	57,24,940	1,60,84,062	58,24,420
	U.S.A.	61,33,306	27,45,250	93,65,212	40,16,803	24,91,974	10,18,289
	Yugoslavia	22,071	9,517	..	..	..	..
	Sm Val Trns	2,152	637	..	..	..	..
	Denmark	..	..	2,02,000	81,590	..	..
	Bel. Congo	..	..	1,00,352	37,988	..	..
	Thailand	..	..	..	..	99,000	36,544
	TOTAL	5,96,65,832	2,50,92,751	5,94,12,922	2,51,08,095	5,25,15,569	1,97,73,691

Sl. No.	Items	1961—62		1962—63		1963—64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
9	<i>Bone Grist for manufacturing Purposes</i>						
	Belgium . . .	4,79,637	1,96,638	4,95,046	1,77,392	50,294	15,350
	Ceylon . . .	5,54,758	2,15,941	7,26,782	2,51,792	4,69,393	1,47,592
	Channel Islands .	70,171	25,047	..	..	..	..
	France . . .	43,01,499	16,66,462	50,80,416	19,74,780	34,61,751	10,34,459
	Netherlands .	40,333	16,352	..	..	..	..
	U.K. . . .	48,13,262	18,26,717	40,80,110	13,87,674	44,14,206	13,12,506
	U.S.A. . . .	1,01,306	37,667	..	..	..	..
	Bahrein Islands .	..	..	150	75	..	..
	E. Germany .	..	..	88	40	3,95,627	1,58,946
	Japan . . .	..	..	..	..	60,078	18,723
	TOTAL .	1,03,60,966	40,04,824	1,03,82,592	37,91,753	88,51,349	26,87,576
10	<i>Hoofs, Horns, Tips PCS of Horns un-manufactured</i>						
	Kuwait . . .	..	..	..	..	275	315
	Ceylon . . .	49,541	26,476	..	..	..	..
	France . . .	26,367	1,05,091	36,824	98,739	7,032	34,504
	W. Germany .	1,71,462	3,45,179	1,65,720	3,07,296	2,20,004	4,47,869
	Italy . . .	24,333	3,38,844	21,712	44,042	10,410	34,175
	Japan . . .	13,56,773	6,52,930	5,28,945	2,61,128	14,98,727	6,69,339

Sl. No.	Items	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
	S. Korea . .	8,636	7,257	5,271	4,740	1,842	1,562
	Netherlands .	14,613	46,033	6,016	14,491	10,000	10,842
	E. Pakistan .	94,583	1,48,503	70,531	92,753	33,569	46,611
	Saudi Arabia .	1,490	2,964	300	609	1,625	2,454
	Spain . . .	3,000	6,782	1,016	1,424	507	1,553
	U.K. . . .	6,07,340	4,08,249	18,40,457	9,08,199	11,12,627	6,77,758
	U.S.A. . . .	15,240	13,828	20,332	19,115	11,140	2 0,158
	Sm Val Trns .	14,657	12,703	..	..	..	..
	Denmark . .	..	..	..	..	70	576
	Singapore . .	..	..	..	..	1,000	1,800
	TOTAL . .	23,88,035	18,14,839	26,97,124	17,52,536	29,08,918	19,49,498
11	<i>Materials of Animal origin NES</i>						
	<i>Bone Sinews</i>						
	E. Germany .	..	..	..	..	9,860	5,117
	Japan . . .	20,30,159	10,77,004	11,58,447	4,96,723	4,22,286	1,88,836
	U.K. . . .	48,000	21,756	98,670	48,999	..	..
	W. Pakistan .	..	..	..	..	930	2,992
	TOTAL . .	20,78,159	10,98,760	12,57,117	5,45,722	4,33,076	1,96,945

Sl. No.	Items	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
12	<i>Hog Pig & Boar Bristles</i>						
	Burma	..	..	26	2,200	..	..
	Egypt	494	57,150	..	..	..	..
	France	816	11,394	5,125	63,563	..	..
	E. Germany	..	..	518	41,944	1,754	1,24,976
	W. Germany	17,141	2,26,155	21,856	5,37,494	8,612	3,14,844
	Italy	..	..	300	13,913	520	23,363
	Japan	7,158	2,04,326	3,490	81,419	9,850	2,63,051
	Netherlands	603	22,188	3,996	59,952	1,500	20,230
	Pakistan W.	172	21,696	..	..	..	..
	Poland	..	..	16,530	9,27,542	7,616	5,30,960
	U.K.	3,01,345	59,70,863	1,27,329	72,85,064	1,25,309	84,54,164
	U.S.A.	1,11,330	44,81,549	60,646	63,26,390	31,302	42,66,654
	Sm Val Trns	226	4,241	..	..	..	..
	Sweden	..	..	136	9,808	..	..
	Czechoslovakia	..	..	..	..	546	29,196
	TOTAL	4,39,285	1,09,99,564	2,39,952	1,53,49,289	1,87,109	1,40,27,339

Sl. No.	Items	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
13	<i>Raw hides and skins cuttings of</i>						
	Australia . . .	29,755	7,809	14,384	3,828	20,157	5,290
	U.K.	1,06,377	50,420	2,76,274	1,11,400	2,95,812	1,71,083
	Sm Val Trns . .	3,556	2,109	..	..	..	..
	Czechoslovakia .	..	..	22,203	53,400	..	..
	TOTAL	1,39,688	60,338	3,12,861	1,68,628	3,15,969	1,76,373
14	<i>Sheep Guts salted</i>						
	Sm Val Trns . .	5	504	..	..	..	..
15	<i>Cow Bezoar or Goulou- chan</i>						
	Burma	..	..	..	..	..	5,702
	Ceylon	..	..	..	2,800	..	658
	China	..	5,025	..	17,506	..	..
	Federation of Malaya	..	3,450	..	480	..	..
	Hong Kong . . .	..	4,62,541	..	3,87,622	..	1,59,229
	Sm Val Trns . .	..	3	..	..	..	..
	Japan	..	1,77,312	..	2,03,057	..	89,788
	Jamaica	..	..	..	375	..	..
	Singapore	..	..	..	..	..	2,171
	Spain	..	..	..	..	..	18,933
	TOTAL	..	6,48,331	..	6,11,840	..	3,76,481

Sl. No.	Items	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
16	<i>Gall nuts</i>						
	Ceylon	..	..	14	69	..	..
	W. Pakistan	3,219	8,719	41,990	9,562	..	..
	Sm val Trns	928	2,952	..	..	..	..
	Burma	..	..	500	2,500	100	656
	Singapore	..	..	50	230	..	..
	Japan	..	..	..	..	2,530	10,333
	Lebanon	..	..	..	..	4,959	13,500
	TOTAL	4,147	11,671	42,554	12,361	7,589	24,489
17	<i>Casein Albumen Gelatine Glue and Dressings</i>						
	<i>Clarified Pig Glue</i>						
	Sm Val Trns	20	170	..	..	..	..
	Muscat	..	..	4	27	..	..
	Tanganyika	..	..	15	136	..	..
	TOTAL	20	170	19	163	..	..

Sl. No.	Items	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
	<i>Bone Glue</i> Afghani- stan.	..	..	700	1,400	..	..
	<i>Gelatine Glue</i> W. Pakistan.	..	..	..	..	81	1,984
	<i>Hide Glue</i>						
	E. Pakistan	1,475	3,553	..	..	..	..
	Afghanistan	..	..	2,425	5,200	..	..
	U.K.	..	..	..	..	5,000	3,500
	TOTAL	1,475	3,553	2,425	5,200	5,000	3,500
18	<i>Meat Extracts & Pre- parations of meat Nes Incl. Natural Sausage Casings</i>						
	<i>Sheep Casings</i>						
	Netherlands	..	..	..	..	799	36,163
	Bulgaria	..	..	..	..	1	16
	W. Pakistan.	..	..	..	..	1,381	5,374
	Poland	..	..	1,280	58,320	1,002	33,240
	Australia	90	2,550	495	17,607	549	27,699
	Austria	4,067	1,92,863	6,515	3,33,678	2,109	1,64,509
	Denmark	2,034	55,032	1,065	49,124	306	12,267
	Finland	1,298	41,980	2,953	1,35,084	1,324	75,564

Sl. No.	Items	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
	E. Germany . . .	2,565	86,700	3	32		
	W. Germany . . .	19,863	5,84,220	17,702	5,45,471	10,315	2,97,378
	Italy	9,275	1,11,563	10,628	2,26,189	18,922	3,55,422
	Japan	90,074	32,48,531	1,30,940	62,76,259	1,40,780	59,05,116
	Philippines . . .	40	1,643	40	1,743	..	..
	Switzerland . . .	599	29,336	1,121	38,601	1,748	49,052
	U.K.	..	..	..	..	60	933
	U.S.A.	235	6,294	1,204	49,869	36	1,464
	Yugoslavia . . .	280	8,100	200	9,000	869	32,915
	U.S.S.R.	..	..	..	..	16	610
	Sm Val Trns . . .	123	1,871	..	..	..	..
	Spain	5,765	1,20,406	7,530	1,15,890	4,379	67,626
	Czechoslovakia . .	..	..	400	15,167	10,567	5,25,042
	France	..	..	290	14,569	1,316	55,045
	Fr Eqtr Afr . . .	..	..	100	3,000	..	..
	Hong Kong . . .	..	..	22	700	..	..
	Iraq	..	..	70	2,460	330	3,179
	Lebanon	..	..	45	1,200	4	148
	Fedn. Malaya . . .	..	..	..	..	53	1,647
	TOTAL	1,36,308	44,92,089	1,82,603	78,95,043	1,97,866	76,50,509

ms	1961-62		1962-63		1963-64	
	Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
19 Animal Casings NES						
Belgium . . .	..	..	..	..	1,099	28,167
W. Germany . .	579	11,086	7,189	1,95,014	6,343	1,78,974
Italy . . .	350	7,100	1,967	64,425	500	4,672
Japan . . .	1,548	42,561	1,498	40,856	768	24,900
Tanganyika . .	..	..	..	..	400	14,097
Portugal . . .	19,750	5,90,355	..	..	..	..
Spain . . .	1,34,103	26,52,210	1,21,516	28,68,672	1,79,339	39,22,020
Switzerland . .	8,649	2,36,383	9,183	2,07,749	7,615	2,50,329
U.K. . . .	..	..	..	..	..	13
Venezuela . . .	1,658	17,666	..	..	..	..
Netherlands . .	..	..	4,351	1,04,287	4,761	1,22,284
Sweden . . .	..	..	425	13,456	..	..
TOTAL . . .	1,66,637	33,57,361	1,46,129	35,57,459	2,00,825	45,45,456
Others						
Czechoslovakia .	..	..	950	54,166	..	..
Bahrein Islands .	50	1,250	..	..	..	..
Nepal . . .	..	..	..	..	158	1,100
Fedn. Malaya . .	275	5,040	..	..	..	..
Netherlands . .	..	..	..	..	2,765	70,763

Sl. No.	Items	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
	France.	1,408	23,288	..	..	..	..
	Japan . .	200	4,677	500	16,130	170	7,253
	Portugal . .	10,120	2,05,604	..	..	..	..
	Singapore . .	2,022	47,327	2,733	40,484	2,488	50,406
	Spain . . .	48,123	9,94,705	35,154	7,92,396	21,021	4,69,701
	Switzerland . .	6,880	2,01,304	7,140	1,60,135	4,362	1,44,292
	Venezuela . .	2,395	45,333	..	..	..	..
	Sm Val Trns .	72	845	..	..	..	..
	W. Germany .	..	..	9,189	2,39,148	4,309	97,526
	Italy . . .	..	..	2,266	27,110	1,605	18,381
	U.S.A. . . .	..	..	2,495	15,460	680	19,760
	TOTAL .	71,545	15,29,363	60,427	13,45,029	37,558	8,79,452
20	<i>Natural Fertilizers of Animal or Vegetable origin not chemically treated.</i>						
	<i>Hoof meal for fertilizers</i>						
	U.K. . . .	184	86,171	409	1,77,780	49	22,336
	Ceylon . . .	..	..	50	24,120	..	..
	Fedn. Malaya .	..	..	1	600	..	..
	TOTAL .	184	86,171	460	2,02,500	49	22,336

Sl. No.	Items	1961-62		1962-63		1963-64	
		Kgs.	Rs.	Kgs.	Rs.	Kgs.	Rs.
<i>Horn meal for fertilizers</i>							
	U.K.	264	1,23,309	49	22,358	148	77,513
	Sm Val Trns . .	3	1,800	..	..	..	..
	Ceylon	..	..	49	22,493	..	..
	TOTAL	267	1,25,109	98	44,851	148	77,513
<i>Sterilized animal meal</i>							
	Kenya	..	..	..	244	..	..
	Ceylon	100	33,885	530	1,83,455	50	18,114
	Fedn. Malaya . .	200	76,550	85	33,020	2	602
	N. Borneo	3	1,250	5	1,960	5	1,810
	Saudi Arabia . .	..	..	1	408	..	..
	Sarawak	2,729	10,28,004	225	84,506	40	14,498
	Singapore	2,216	8,23,469	1,462	5,24,995	1,081	3,83,944
	Tanganyika . . .	..	..	2	335	2	362
	Sm Val Trns . . .	3	1,122	..	..	..	..
	U.K.	..	..	71	33,075	..	..
	TOTAL	5,251	19,64,280	2,381	8,61,998	1,180	4,19,330

SOURCE.—“Monthly Statistics of Foreign Trade of India” 1962—1964 (March Issue).

*India's Exports of Wool, Goat Hair, Bones, Horns, Sheep Casings
etc. during 1964-65*

Sl. No.	Items	1964-65	
		Quantity Kgs.	Value Rs.
1.	<i>Wool & other Animal Hair</i>		
	<i>Sheep & Lamb wool greasy or back washed</i>		
	Australia	17,913	1,19,729
	Belgium	1,99,673	14,35,536
	Czechoslovakia	6,444	22,615
	Denmark	14,004	1,18,056
	France	4,16,596	28,74,815
	Germany W.	1,87,868	5,53,925
	Japan	..	..
	Lebanon	..	..
	Libya	..	..
	Netherlands	78,506	2,63,755
	U.K.	34,34,830	2,12,49,760
	U.S.A.	10,35,723	68,46,190
	U.S.S.R.	56,29,975	3,66,65,646
	Yugoslavia	..	..
	Sm Val Trns	..	..
	Bulgaria	4,926	7,792
	Germany E.	6,314	14,175
	Hungary	12,314	49,210
	Italy	..	..
	Thailand	1,136	7,907
	Finland	..	..
	Nepal	148	3,429
	Pakistan E.	3,745	11,775
	Pakistan W.	700	4,150
	Poland	2	24
	TOTAL	1,10,45,817	7,02,48,484

Sl. No.	Items	1964-65	
		Quantity Kgs.	Value Rs.
2.	<i>Sheep & Lamb wool scoured whether or not bleached or dyed ; sheep & lamb wool scoured dyed or not</i>		
	Australia	3,559	22,230
	Belgium	23,400	1,25,236
	France	3,18,280	21,73,511
	W. Germany	20,783	50,659
	Netherlands	14,763	75,176
	U.K.	3,74,418	23,82,734
	U.S.A.	1,47,540	9,90,124
	Yugoslavia		..
	Switzerland	6,765	80,075
	TOTAL	9,09,508	58,99,745
3.	<i>Fine Animal Hair including Angora Rabbit hair suitable for spinning other than wool:</i>		
	<i>(a) Fine Animal hair for spinning excluding wool—</i>		
	Belgium	100	9,600
	Germany W.	..	..
	France	..	..
	Japan	..	..
	Netherlands	..	..
	U.K.	..	..
	U.S.A.	12	1,714
	Sm Val Trns	..	..
	TOTAL	112	11,314
4.	<i>Horse Hair & other Coarse Hair : Goat Hair other than Angora—</i>		
	U.K.	68,288	2,12,650
	W. Germany	5,57,111	14,30,106
	E. Germany	35,785	1,72,107
	Netherlands	8,58,800	15,33,628
	Belgium	2,19,733	6,56,087
	France	82,927	2,33,099
	Iraq	2,100	9,650
	Saudi Arabia	451	2,625
	Japan	18,884	2,36,930
	U.S.A.	1,28,480	5,80,636

Sl. No.	Items	1964-65	
		Quantity Kgs.	Value Rs.
	Australia	6,92,680	13,11,746
	New Zealand	..	..
	Sm Val Trns	..	..
	Hungary	2,25,195	6,61,745
	Italy	..	..
	Syria	11,826	30,150
	Bulgaria	65,278	2,39,277
	Czechoslovakia	90,635	2,47,657
	Hong Kong	20,277	1,05,611
	Poland	5,661	9,792
	Kuwait	29,701	1,56,504
	Yugoslavia	4,507	28,394
	Switzerland	400	6,730
	TOTAL	31,18,719	78,64,624
	<i>Others</i>		
	U.K.	28,082	1,50,855
	W. Germany	53,134	3,04,013
	Japan	355	3,550
	Netherlands	20,221	29,135
	Hungary	2,511	4,026
	U. S. A.	15,272	30,901
	Nepal	1,000	9,600
	Iraq	8,000	44,070
	Kuwait	83,021	4,29,036
	Finland	500	5,873
	TOTAL	2,12,096	10,11,059
5.	<i>Wool or Fine Hair carded or combed including Tops—</i>		
	<i>Wool Tops</i>		
	U.S.S.R.	2,08,126	24,25,261
	Nepal	..	2
	Yugoslavia	205	2,718
	TOTAL	2,08,331	24,27,981

Sl. No.	Items	1964-65	
		Quantity Kgs.	Value Rs.
	<i>Others</i>		
	U.K.	65,343	3,52,611
	W. Germany	2,960	10,339
	Netherlands	10,610	13,271
	Belgium	5,851	20,701
	Denmark	2,298	11,896
	TOTAL	87,062	4,08,818
6.	<i>Wool Shoddy</i>		
	Netherlands	3,362	16,880
	U.K.	9,435	51,780
	TOTAL	12,797	68,660
7.	<i>Waste of wool and other Animal Hair—</i>		
	W. Germany	44,800	2,04,242
	U.K.	67,150	1,49,546
	Australia	8,069	52,171
	Kenya	50	720
	U.S.A.	11,341	74,851
	Denmark	300	3,586
	TOTAL	1,31,710	4,85,116
8.	<i>Bones, Ivory Horns, Hoofs, Claws & similar products—</i>		
	(a) <i>Bones crushed</i>		
	Belgium	1,78,82,979	69,96,471
	Czechoslovakia	3,45,294	1,57,821
	France	94,94,550	35,43,161
	E. Germany	85,94,662	34,13,127
	W. Germany	21,24,512	8,39,278
	Japan	35,73,980	14,98,654
	Netherlands	22,65,188	9,24,516
	U.K.	1,76,47,051	68,16,966
	U.S.A.	35,18,734	12,91,074
	Jordan	10,000	5,422
	Syria	30,321	28,762
	Netherlands Antilles	2,80,993	1,20,079
	Hungary	11,04,006	4,55,661
	TOTAL	6,68,72,270	2,60,90,992

Sl. No.	Items	1964-65	
		Quantity Kgs.	Value Rs.
9. Bone Grist for manufacturing purposes—			
	Ceylon	5,10,801	1,81,647
	France	31,76,664	10,16,840
	U.K.	44,43,455	14,45,968
	Japan	1,10,002	39,566
	Hungary	2,99,736	1,07,770
	TOTAL .	85,40,658	27,91,791
10. Hoofs, Horns, Tips PCS of Horns unmanufactured—			
	France	6,666	34,090
	W. Germany	2,07,548	3,66,850
	Italy	20,272	42,567
	Japan	6,63,273	3,32,196
	Netherlands	6,000	8,640
	E. Pakistan	67,550	95,791
	Saudi Arabia	6,093	6,423
	U.K.	12,27,587	6,52,372
	U.S.A	18,954	37,825
	Aden	6,137	8,579
	TOTAL .	22,30,080	15,85,333
11. Materials of Animal origin NES—			
(a) Bone, Sinews			
	Austria	1	133
	France	511	267
	W. Germany	1	133
	E. Germany	9,890	5,087
	Japan	4,90,092	2,01,628
	U.K.	1,78,326	77,494
	Italy	114	67
	Netherlands	260	320
	Spain	2	67
	Switzerland	501	213
	TOTAL .	6,79,698	2,85,409

S. No.	Items	1964-65	
		Quantity Kgs.	Value Rs.
12.	<i>Hog, Pig & Boar Bristles—</i>		
	Burma	28	2,900
	E. Germany	18,691	13,19,740
	W. Germany	3,172	1,70,601
	Japan	3,070	1,15,602
	Netherlands	1,072	70,966
	E. Pakistan	1,428	62,710
	Poland	480	23,036
	U.K.	1,03,097	61,59,000
	U.S.A.	47,558	59,35,795
	Chile	114	5,620
	TOTAL	1,78,710	1,38,65,970
13.	<i>Raw hides and skins cuttings of—</i>		
	Australia	81,458	18,924
	U.K.	5,40,706	2,34,825
	Spain	3,373	7,478
	Belgium	50,642	12,703
	TOTAL	6,76,179	2,73,930
14.	<i>Sheep Guts salted</i>	..	..
15.	<i>Cow Bezoar or Goulqchan—</i>		
	Hong Kong	..	2,84,791
	Japan	..	3,30,724
	Singapore	..	884
	Spain	..	82,933
	U.S.A.	..	10,313
	TOTAL	..	7,09,645
16.	<i>Gall nuts—</i>		
	Aden	1,001	6,867
	Singapore	425	680
	Guiana Br.	1,000	618
	TOTAL	2,426	8,165
17.	<i>Casein Albumen Gelatine Glue and Dress-ings</i>		
	(a) Clarified Pig Glue	..	..
	(b) Bone Glue Canada	8	120
	(c) Gelatine Glue	..	..
	(d) Hide Glue	..	..

Sl. No.	Items	1964-65	
		Quantity Kgs.	Value Rs.
18.	<i>Meat Extracts & Preparations of meat NES Incl. Natural Sausage Casein Sheep Casein—</i>		
	Aden	26	839
	Netherlands	1,192	61,984
	Australia	211	9,250
	Austria	6,267	2,37,080
	Denmark	230	8,000
	E. Germany	1	45
	W. Germany	10,951	3,50,202
	Italy	15,230	2,77,836
	Japan	1,25,082	49,29,757
	Switzerland	6,029	1,47,063
	Yugoslavia	1,266	46,760
	Spain	35,249	6,01,970
	Czechoslovakia	4,803	1,84,410
	France	267	11,058
	Lebanon	360	16,633
	Fedn. Malaya	300	3,888
	Singapore	222	4,892
	Belgium	300	9,148
	Sweden	180	7,867
	TOTAL	2,08,166	69,08,682
19.	<i>Animal Casein NES—</i>		
	Australia	275	5,464
	Bahrein Islands	2,576	49,600
	W. Germany	2,448	43,177
	Italy	260	3,200
	Japan	392	17,774
	Spain	21,525	3,33,800
	Switzerland	4,192	1,40,540
	Malaya Federation	65	1,781
	Czechoslovakia	900	37,320
	TOTAL	32,633	6,32,656

Sl. No.	Items	1964-65	
		Quantity Kgs.	Value Rs.
<i>Others—</i>			
	Austria	..	267
	Belgium	..	655
	Bahrein Islands	..	140
	Fedn. Malaya	..	3,325
	Netherlands	..	1,000
	France	..	4,301
	Japan	..	2,49,792
	Singapore	..	81,245
	Switzerland	..	95,390
	W. Germany	..	61,789
	Italy	..	1,04,099
	U.S.A.	..	10,109
	Kenya	..	93
	Malagasy Rep.	..	142
	South Africa	..	5,205
	Hong Kong	..	1,41,682
	Pakistan West	..	1,526
	U.K.	..	1,18,388
	Finland	..	133
	Spain	..	1,28,774
	Turkey	..	343
	TOTAL	..	10,08,398
20. <i>Natural Fertilizers of Animal or vegetable origin not chemically treated, Hoof meal for fertilizers, Horn meal for fertilizer—</i>			
	U.K.	100	52,936
<i>Sterilized animal meal—</i>			
	Ceylon	100	34,584
	Fedn. Malaya	645	2,35,859
	Singapore	615	2,17,861
	Indonesia	5	1,907
	TOTAL	1,365	4,90,211

SOURCE.—“Monthly Statistics of Foreign Trade of India” March, 1965.

Trend in India's Imports of Raw Hides & Skins Tanned Hides & Skins, Leathers & Tanning Materials, etc.

Sl. No.	Items	1957		1958		1959	
		Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs
1. Raw Hides							
1·1·1	Buffalo hides	14,19,385	30,98,503	18,69,550	30,80,249	22,37,212	34,67,233
1·1·2	Buffalo calf skins.	1,321	1,110	2,286	2,446	..	..
1·2·1	Cow hides	33,52,642	37,55,650	74,03,623	62,25,270	50,70,393	90,47,162
1·2·2	Cow calf skins	1,68,869	2,15,321	1,41,232	3,11,909	1,14,256	2,97,748
1·2·3	Cow kips	24,131	16,492	..	..	..	..
1·3	Other cattle hides	24,589	1,20,783	18,746	51,656	1,59,826	5,98,782
Grand Total of Hides Raw		49,90,937	72,07,859	94,35,437	96,71,530	75,81,687	1,34,10,925
2. Raw Skins							
2·1	Total Goat skins	3,95,603	13,26,498	4,41,173	12,72,974	6,20,355	18,71,095
2·2	Total Sheep skins	8,47,902	21,65,693	8,91,999	14,57,959	7,32,884	13,23,247
2·3	Total Reptile skins.	67,060	5,97,535	35,308	3,44,455	46,739	3,20,905
2·4	Total Fur skins	34,292	2,41,328	23,623	1,93,539	6,249	83,613
Grand Total of Skins Raw		13,44,857	43,31,054	13,92,103	32,68,927	14,06,227	35,98,860

Sl. No.	Items	1957		1958		1959	
		Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.
3.	<i>Tanned hides</i>						
	3·1·1 Buffalo hides	89,667	1,71,531	9,043	37,135	45,723	94,322
	3·1·2 Buffalo calf skins	2,489	2,410	4,471	12,657	..	..
	3·2·1 Cow hides	1,74,712	2,51,718	59,287	3,17,088	..	..
	3·2·2 Cow calf skins	..	90,569	1,575	7,606	254	2,558
	3·2·3 Cow kips	5,080	3,091	102	65	..	..
	Grand Total of Hides tanned.	2,71,948	5,19,319	74,478	3,74,551	45,977	96,880
4.	<i>Tanned Skins</i>						
	4·1 Total Goat skins	15,597	72,177	864	422	51	892
	4·2 Total sheep skins	9,246	16,555	1,727	28,156	1,473	22,773
	4·3 Total Reptile skins.	4,572	2,482	305	14,378	..	..
	4·4 Total Fur skins	23,166	9,545	..	..	..	..
	Grand Total of Tanned skins.	52,581	1,00,759	2,896	42,956	1,524	23,665
5	Finished Leathers	7,80,436	3,26,676	6,11,008	2,01,940	6,90,108	2,15,887
6.	Leather Goods	..	63,007	..	24,927	..	46,107
7.	Leather Manufactures	3,30,759	72,40,329	2,44,667	38,99,310	2,23,381	35,22,344
8.	Footwear (Quantity in Pairs).	1,365	44,632	672	11,974	761	16,288

Sl.No.	Items	1957		1958		1959	
		Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.
9.	<i>Tanning Materials</i>						
	9.1 Gallotannic Acid	24,345	1,07,238	20,144	1,78,625	39,276	3,65,505
	9.2 Gambier Extract	2,502	13,218	3,06,947	6,90,705	2,68,892	5,93,888
	9.3 Quebracho	3,809	6,480	52,199	84,394	57,931	80,937
	9.4 Wattle Extract	96,92,907	95,47,247	87,77,612	74,98,723	1,14,88,021	94,08,592
	9.5 Wattle Bark	59,45,577	29,23,881	54,80,664	25,93,510	76,14,791	34,84,200
	9.6 Other tanning substances.	12,83,636	27,86,266	6,38,846	14,55,978	3,93,824	4,42,751
	9.7 Other tanning extracts.	3,07,398	3,15,599	2,74,103	2,63,272	3,76,459	3,92,770
	9.8 Synthetic tanning materials.	8,10,915	8,31,306	5,00,357	6,19,362	6,12,937	9,46,226
	Grand Total of tanning materials (in value).		1,65,31,245		1,33,84,569		1,57,14,869
10.	<i>Tanning Machineries</i>						
	10.1 Boot & Shoe machinery excluding sewing.	86,162	7,93,039	56,950	6,14,065	39,730	5,21,232
	10.2 Parts of boot shoe manufacturing machinery.	42,522	6,79,252	27,789	6,36,765	16,206	3,20,642
	10.3 Leather tanning & curing machinery.	79,761	4,55,774	1,09,684	5,99,477	32,209	2,32,330
	Grand Total of tanning machineries (in value only).		19,28,065		18,50,307		10,74,2

Source:—Monthly Statistics of Foreign Trade of India, December issue from 1957 to 1959.

Sl. No.	Items	1960-61		1961-62	
		Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.
1.	<i>Raw Hides</i>				
1.1.1	Buffalo hides	28,11,681	56,58,281	32,84,722	69,13,720
1.1.2	Buffalo calf skins	60	707	1,000	10,495
1.2.1	Cow hides	44,31,370	1,00,53,612	35,33,335	83,75,892
1.2.2	Cow calf skins	4,18,660	9,82,512	3,93,447	9,16,035
1.2.3	Cow kips	..	..	..	..
1.3	Other cattle hides	3,58,869	14,45,133	9,56,724	28,75,855
	Grand Total of Hides Raw	80,20,640	1,81,40,245	81,69,228	1,90,91,997
2.	<i>Raw Skins</i>				
2.1	Total Goat skins	8,34,991	34,25,896	3,79,121	13,28,946
2.2	Total Sheep skins	8,35,534	21,75,147	5,47,432	11,89,256
2.3	Total of Reptile skins	87,096	5,24,669	76,322	4,52,998
2.4	Total of Fur skins	31,054	2,04,041	4,378	36,009
	Grand Total of Skins Raw	17,88,675	63,39,753	10,07,253	30,07,209

Sl. No.	Items	1960-61		1961-62	
		Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.
3.	<i>Tanned Hides</i>				
3·1·1	Buffalo hides	3,072	4,347	52,312	94,038
3·1·2	Buffalo calf skins	..	..	..	..
3·2·1	Cow hides	..	..	..	..
3·2·2	Cow calf skins	205	1,995	..	..
3·2·3	Cow kips	..	..	..	..
	Grand Total of Hides tanned	3,277	6,342	52,312	94,038
4.	<i>Tanned Skins</i>				
4·1	Total Goat skins	..	..	..	..
4·2	Total Sheep skins	2,556	50,874	2,706	36,481
4·3	Total of Reptile skins	..	..	..	..
4·4	Total of Fur skins	..	..	..	..
	Grand Total of tanned skins	2,556	50,874	2,706	36,481
5.	Finished Leathers	6,59,725	2,57,076	8,34,797	5,39,998
6.	Leather Goods	..	20,154	..	14,505
7.	Leather Manufacture	1,78,144	26,66,803	..	8,88,867
8.	Footwear (Quantity in Pairs)	493	3,289	3,155	45,026

Sl. No.	Items	1960-61		1961-62	
		Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.
9.	<i>Tanning Materials</i>				
9-1	Gallotannic Acid	14,878	1,28,754	73,544	1,40,728
9-2	Gambier Extract	2,06,157	3,77,673	1,92,325	2,65,983
9-3	Quebracho	77,469	92,171	1,00,094	92,789
9-4	Wattle Extract	1,11,78,846	82,98,782	1,37,71,211	99,50,652
9-5	Wattle Bark	86,07,051	37,02,182	71,40,545	28,99,734
9-6	Other tanning substances	3,17,847	3,40,865	2,92,944	4,13,070
9-7	Other tanning extracts	5,47,804	4,82,721	8,19,664	6,49,884
9-8.	Synthetic tanning materials	8,79,015	12,90,414	9,13,842	14,55,659
	Total of tanning materials (in value)		1,47,13,562		1,58,68,499
10.	<i>Tanning Machineries</i>				
10-1	Boot & Shoe Machinery excluding sewing	38,709	6,96,192	19,178	3,04,421
10-2	Parts of Boot & Shoe Mfg. machinery	11,724	5,21,374	24,365	8,42,589
10-3	Leather Tanning & Curing machinery	1,12,794	8,07,384	60,887	3,87,314
	Total of Tanning Machineries (in value)		20,24,950		15,34,324

Sl. No.	Items	1962-63		1963-64		1964-65	
		Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.
1. Raw Hides							
1.1.1	Buffalo hides	36,23,203	69,83,681	64,40,890	1,07,37,133	53,02,863	1,05,07,158
1.1.2	Buffalo calf skins.	..	..	..	..	..	..
1.2.1	Cow hides	34,24,019	91,01,465	42,37,766	94,15,247	45,24,697	90,89,538
1.2.2	Cow calf skins	3,85,272	10,67,640	10,43,126	27,38,328	1,27,949	3,12,569
1.2.3	Cow kips	..	..	..	..	..	..
1.3	Other cattle hides.	13,08,056	43,56,962	16,34,267	38,44,264	20,04,544	50,36,685
Grand Total of Hides Raw.		87,40,550	2,15,09,748	1,33,56,049	2,67,34,972	1,19,60,053	2,49,45,950
2. Raw Skins							
2.1	Total Goat skins	12,19,281	41,29,682	7,69,232	28,54,635	6,07,978	17,87,976
2.2	Total Sheep skins.	2,23,232	4,99,342	7,14,190	12,82,358	16,12,695	24,06,469
2.3	Total Reptile skins.	2,35,210	11,66,045	3,80,256	20,00,236	3,18,799	16,28,967
2.4	Total Fur skins	6,875	73,017	9,501	64,977	15,746	1,35,485
Grand Total of Skins		16,84,598	58,68,086	18,73,179	62,02,206	25,55,218	59,58,897

Items	1962-63		1963-64		1964-65	
	Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.
3. Tanned Hides						
3·1·1 Buffalo hides .	29,320	67,705	33,528	58,073	20,320	72,100
3·1·2 Buffalo calf skins.	..	..	..	..	24	784
3·2·1 Cow hides .	..	..	..	..	..	..
3·2·2 Cow calf skins	..	..	..	..	..	..
3·2·3 Cow kips .	..	..	..	..	..	..
Grand Total of Hides tanned.	29,320	67,705	33,528	58,073	20,344	72,884
4. Tanned Skins						
4·1 Total Goat skins.	..	..	..	..	..	..
4·2 Total Sheep skins.	508	17,611	..	..	..	..
4·3 Total Reptile skins.	..	..	..	..	..	..
4·4 Total Fur skins	..	..	..	..	..	..
Grand Total of tanned Skins.	508	17,611	..	..	..	..

Sl. No.	Items	1962-63		1963-64		1964-65	
		Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.
5.	Finished Leathers	20,48,338	7,79,908	18,28,032	6,38,383	10,68,208	4,67,177
6.	Leather Goods	..	59,997	..	46,208	..	14,133
7.	Leather Manufactures.	..	5,11,817	..	1,04,809	..	1,85,926
8.	Footwear (Quantity in Pairs)	616	6,979	108	5,962	195	5,683
9.	<i>Tanning Materials</i>						
9-1	Gallotannic Acid.	7,328	86,103	4,618	55,100	8,511	85,431
9-2	Gambier Extract.	80,488	1,45,458	18,772	34,956	..	..
9-3	Quebracho	1,60,281	1,56,911	1,28,271	1,37,109	10,10,031	11,16,685
9-4	Wattle Extract	1,59,34,506	1,27,30,754	1,52,54,746	1,24,07,115	2,45,61,354	2,16,43,387
9-5	Wattle Bark	70,19,162	30,52,947	56,52,194	25,05,115	62,50,918	30,01,220
9-6	Other Tanning substances	1,43,815	3,16,584	68,619	1,50,825	63,596	97,603
9-7	Other Tanning Extracts.	13,11,974	12,85,253	13,25,167	12,75,894	19,35,614	19,07,701
9-8	Synthetic Tanning Materials.	7,58,502	18,42,365	7,21,938	12,20,018	9,45,862	17,01,799
9-9	Cutch Extract	5,588	17,505	..	..	..	..
9-10	Gall Nuts	..	..	45,078	2,07,672	41,268	2,12,000
Grand Total of Tanning Materials (in value)			1,96,33,880		1,79,93,804		2,97,65,926

Sl. No.	Items	1962-63		1963-64		1964-65	
		Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.	Quantity Kgs.	Value Rs.
10.	<i>Tanning Machineries</i>						
10·1	Boot & Shoe Machinery excl. sewing.	10,079	2,12,705	15,259	5,14,217	13,106	3,14,698
10·2	Parts of Boot and Shoe Mfg. Machinery.	30,521	8,32,932	39,931	6,40,921	11,274	4,65,027
10·3	Leather tanning & curing Machinery.	1,30,579	8,02,411	59,348	3,96,456	1,69,020	12,27,728
Total of Tanning Machineries (in value)			18,48,048		15,51,594		20,07,453

Source.— Monthly Statistics of Foreign Trade of India, Issued by the Director-General of Commercial Intelligence and Statistics, Calcutta. March issue of 1963 to 1965.

*Imports of Hides, Skins, Tanning Materials, Machinery etc.
Into India during 1964-65*

Sl. No.	Names of the articles and countries	Unit of Qty.	1964-65	
			Quantity	Value Rs.
1	2	3	4	5
I Raw Hides				
1.	Buffalo hides	Kgs.		
	Ethiopia		8,332	5,466
	Kenya		40,644	1,17,093
	Rhod. Nys. Fd.		10,929	9,206
	Total Region O		59,905	1,31,765
	Burma		3,16,703	3,33,495
	Ceylon		6,72,932	6,78,960
	Hongkong		1,35,346	3,69,424
	Malaya Fedn.		5,73,884	12,10,279
	Pakistan W.		1,68,652	3,09,336
	Singapore		2,50,268	3,95,680
	Thailand		29,69,675	67,76,472
	Total Region 4		50,87,460	1,00,73,646
	Italy		1,55,498	3,10,747
	Total Region 7		1,55,498	3,01,747
	TOTAL		53,02,863	1,05,07,158
2.	Cow hides			
	Kenya		30,664	77,783
	Rohd. Nys. Fd.		1,57,444	1,89,906
	Total Region O		1,88,108	2,67,689
	U.S.A.		11,473	20,174
	Total Region 1		11,473	20,174
	Australia		1,66,482	2,71,655
	Burma		1,81,361	2,15,368
	Hongkong		4,838	13,807
	Malaya Fedn.		2,180	4,633
	New Zealand		21,421	46,147
	Pakistan E.		34,58,531	67,28,214

1	2	3	4	5
	Singapore	Kg.	6,715	9,248
	Thailand		2,93,395	7,43,277
	Total Region 4		41,34,923	80,32,349
	France		23,479	87,767
	Italy		1,47,870	6,06,545
	Total Region 7		1,71,349	6,94,312
	U. K.		18,844	75,014
	Total Region 8		18,844	75,014
	TOTAL		45,24,697	90,89,538

3. Other cattle hides

Ethiopia	462	1,212
Kenya	1,11,706	3,40,928
Rhod. Nys. Fd.	6,72,240	5,82,961
Tanganyika	1,26,097	3,28,015
Uganda	53,504	1,99,232
Total Region 0,	9,64,009	14,47,348
Canada	3,466	3,955
U.S.A.	1,20,978	3,13,698
Total Region 1	1,24,444	3,17,653
Australia	87,471	2,04,866
Burma	37,048	42,233
Malaya Fedn.	2,540	6,400
New Zealand	8,196	24,797
Pakistan W.	5,113	4,110
Thailand	5,080	14,800
Total Region 4	1,45,448	2,97,206
Germany E.	19,763	60,838
Total Region 6	19,763	60,838
France	59,144	1,81,358
Germany W,	20,919	49,387
Italy	5,62,092	23,31,575
Netherlands	46,954	1,50,452
Total Region 7	6,89,109	27,12,772

1	2	3	4	5
	Sweden	Kg.	26,386	68,816
	Switzerland		2,276	10,048
	U.K.		33,109	1,22,004
	Total Region 8		61,771	200,868
	TOTAL		20,04,544	50,36,685
4.	Cow calf skins			
	Rhod. Nys. Fd.		2,271	10,188
	Total Region 0		2,271	10,188
	Pakistan E		1,25,678	3,02,381
	Total Region 4		1,25,678	3,02,381
	TOTAL		1,27,949	3,12,569
II.	Raw Skins			
1.	Sheep skin dry salted			
	Tanganyika		6,780	12,375
	Total Region 0		6,780	12,375
	Afghanistan		3,52,749	7,89,063
	Australia		725	4,467
	Malaya Fedn.		6,717	8,354
	Singapore		1,693	5,614
	Total Region 4		3,61,884	8,07,498
	Aden		92,954	1,60,654
	Muscat		525	1,744
	Total Region 5		98,479	1,62,398
	TOTAL		4,62,143	9,82,271
2.	Sheep skin wet salted			
	Burma		13,152	16,750
	Malaya Fedn.		8,86,784	9,01,012
	Singapore		73,677	55,335
	Total Region 4		9,73,613	9,73,097
	Iraq		1,02,494	2,61,060
	Total Region 5		1,02,494	2,61,060
	TOTAL		10,76,107	12,34,157

1	2	3	4	5
3.	Sheep skins otherwise cured	Kg.		
	Kenya		7,819	17,457
	Tanganyika		1,048	2,480
	Total Region 0		8,867	19,937
	Argentina		4,400	20,208
	Total Region 2		4,400	20,208
	Australia		5,679	31,035
	Malaya Fedn.		854	3,210
	New Zealand		546	2,958
	Total Region 4		7,079	37,203
	Aden		51,466	1,07,304
	Muscat		2,633	5,389
	Total Region 5		54,099	1,12,693
	TOTAL		74,445	1,90,041
4.	Goat skin dry salted			
	Kenya		504	2,933
	Rhod. Nys. Fd.		911	2,680
	Tanganyika		4,501	13,296
	Total Region 0		5,916	18,909
	Afghanistan		2,30,832	6,41,927
	Burma		13,994	47,168
	Malaya Fedn.		44,816	2,71,506
	Pakistan East		14,598	78,343
	Singapore		11,030	25,356
	Total Region 4		3,15,270	10,64,300
	Aden		41,210	98,181
	Muscat		17,006	48,570
	Total Region 5		58,216	1,46,751
	TOTAL		3,79,402	12,29,960
5.	Goat skin wet salted			
	Burma		1,14,384	2,47,021
	Malaya Fedn.		14,686	37,345
	Total Region 4		1,29,070	2,84,366
	Aden		1,634	3,056
	Total Region 5		1,634	3,056
	TOTAL		1,30,704	2,87,422

1	2	3	4	5
6. Goat skins otherwise cured		Kg.		
Kenya		24,612	59,196	
Tanganyika		5,486	14,813	
Total Region 0		30,098	74,009	
Indonesia		1,745	14,070	
Malaya Fedn.		14,501	39,268	
Total Region 4		16,246	53,338	
Aden		23,716	56,907	
Muscat		24,299	80,976	
Total Region 5		48,015	1,37,883	
TOTAL		94,359	2,65,230	
7. Other Kid skins				
Aden		3,513	5,364	
Total Region 5		3,513	5,364	
TOTAL		3,513	5,364	
<i>III Waste and used leather</i>				
1. Cutting of leather				
Rhod. Nys. Fedn.		1,28,198	71,299	
Total Region 0		1,28,198	71,299	
Australia		7,82,746	2,27,351	
Burma		6,804	2,716	
New Zealand		7,000	2,240	
Total Region 4		7,96,550	2,32,307	
Norway		5,000	1,300	
U.K.		3,12,901	1,46,368	
Total Region 8		3,17,901	1,47,668	
TOTAL		12,42,649	4,51,274	
<i>IV Raw Reptile Skins</i>				
1. Lizard skins				
Pakistan E.		23,194	2,73,598	
Total Region 4		23,194	2,73,598	

1	2	3	4	5
2. Others		Kg.		
	Sudan	2,985	8,226	
	Tanganyika	23,385	71,934	
	Total Region.	26,370	80,160	
	Australia	2,809	10,062	
	Nepal	1,17,288	4,90,648	
	Pakistan E.	1,379	12,146	
	Pakistan W.	201	18,748	
	Total Region 4	1,21,677	5,31,604	
	France	3,127	25,574	
	Italy	7,253	25,762	
	Netherlands	29,128	1,47,231	
	Total Region 7	39,508	1,98,567	
	Denmark	18,000	74,753	
	Sweden	89,550	4,65,165	
	U.K.	500	5,120	
	Total Region 8	1,08,050	5,45,038	
	TOTAL	2,95,605	13,55,369	
V Raw Fur Skins				
1. Others				
	France	6,488	80,017	
	Total Region 7	6,488	80,017	
	U.K.	9,258	55,468	
	Total Region 8	9,258	55,468	
	TOTAL	15,746	1,35,485	
VI Tanned Leather				
1. Buffalo calf skin				
	Australia	6	292	
	Total Region 4	6	292	
	U.K.	18	492	
	Total Region 8	18	492	
	TOTAL	24	784	
2. Buffalo hide				
	Thailand	20,320	72,100	
	Total Region 4	20,320	72,100	

1	2	3	4	5
VII Finished Leather				
1. Undressed Leather other sorts :	Kg .			
France		10,388		47,906
Total Region 7		10,388		47,906
U.K.		1,565		16,846
Total Region 8		1,565		16,846
TOTAL		11,953		64,752
2. Upholstery Leather dressed				
Germany		75		1,217
Total Region 7		75		1,217
3. Leather Chamois				
U.K.		18		1,406
Total Region 8		18		1,406
4. Chrome tanned buff leather				
Australia		16,980		4,971
Total Region 4		16,980		4,971
5. Chrome tanned splits				
U.S.A.		1,11,886		36,494
Total Region 1		1,11,886		36,494
Australia		7,26,333		2,21,703
Total Region 4		7,26,333		2,21,703
Norway		86,864		22,040
U.K.		94,155		52,992
Total Region 8		1,81,019		75,032
TOTAL		10,19,238		3,33,229
6. Chrome uppers from hide and calf skin				
Canada		1,325		20,729
Total Region 1		1,325		20,729
7. Chrome Leather NES				
Australia		15,963		4,478
Total Region 4		15,963		4,478

1	2	3	4	5
8. Other Leathers		Kg.		
U.S.A.			44	431
Total Region 1			44	431
Germany W.			1,612	26,520
Total Region 7			1,612	26,520
U.K.			1,000	9,444
Total Region 8			1,000	9,444
TOTAL			2,656	36,395
Total of Finished Leather			10,68,208	4,67,177
VIII <i>Reconstituted & Artificial leather , Containing Leather or Leather fibre</i>				
1. Other sorts				
U.K.			10,160	5,867
Total Region 8			10,160	5,867
IX <i>Manufactures of leather</i>				
1. Leather Belting				
U.S.A.			354	24,697
Total Region 1			354	24,697
Japan			117	938
Total Region 4			117	938
Germany W.			1,133	37,433
Total Region 7			1,133	37,433
U.K.			885	7,513
Total Region 8			885	7,513
TOTAL			2,489	70,581
2. Others				
U.S.A.			94	2,089
Total Region 1			94	2,089
U.K.			563	6,636
Total Region 8			563	6,636
TOTAL			657	8,725

1	2	3	4	5
3. Leather Manufactures NES . Kg.				
U. S. A.	.	.	..	14,968
Total Region 1	.	.	..	14,968
Poland	.	.	..	250
Total Region 6	.	.	..	250
France.	.	.	..	49,029
Germany W.	.	.	..	34,886
Total Region 7	.	.	..	83,915
U. K.	.	.	..	7,487
Total Region 8	.	.	..	7,487
TOTAL	.	.	..	1,06,620
Grand Total of Leather Manufactures			..	1,85,926
X. Leather Goods				
1. Travel goods of leather.				
Australia.	.	.	95	1,398
Japan	.	.	65	385
Total Region 4	.	.	160	1,783
Germany W.	.	.	2	39
Italy	.	.	85	772
Total Region 7	.	.	87	811
TOTAL	.	.	247	2,594
2. Leather Fancy handbags				
Japan	.	.	..	1,498
Total Region 4	.	.	..	1,498
U. K.	.	.	..	785
Total Region 8	.	.	..	785
TOTAL	.	.	..	2,283
3. Other articles of leather				
Hongkong	.	.	..	2,709
Japan	.	.	..	1,778
Pakistan W.	.	.	..	275
Total Region 4	.	.	..	4,762

1	2	3	4	5
		Kg.		
	Germany E.	.	.	30
	Italy	.	.	738
	Netherlands	.	.	100
	Total Region	.	.	868
	U. K.	.	.	752
	Total Region 8	.	.	752
	TOTAL	.	.	6,382
4.	Leather coats and other clothing			
	Germany W	.	.	2,874
	Total Region	.	.	2,874
	Grand Total of Leather Goods	.	.	14,133
XI: Footwear of Leather				
1.	Others	Pairs		
	Italy	.	.	2,753
	Total Region 7	.	.	2,753
	U. K.	.	.	2,930
	Total Region 8	.	.	2,930
	TOTAL	.	.	5,683
XII Tanning Materials				
1.	Wattle bark or Mimosa Bark	Kg.		
	Kenya	.	.	28,12,820
	Rhod. Nys. Fd.	.	.	14,682
	Tanganyika	.	.	1,26,569
	Uganda	.	.	23,150
	Total Region 0	.	.	29,77,221
	Australia	.	.	22,599
	Ceylon	.	.	1,500
	Total Region 4	.	.	24,099
	TOTAL	.	.	30,01,320

1	2	3	4	5
2. Other tanning substances.		Kg.		
Kenya		9,960	4,581	
Total Region 0		9,960	4,581	
Jamaica		2,511	9,784	
Total Region 3		2,511	9,784	
Malaya Fedn.		17,461	41,591	
Total Region 4		17,461	41,591	
France		29,400	23,782	
Total Region 7		29,400	23,782	
U. K.		4,264	17,865	
Total Region 8		4,264	17,865	
TOTAL		63,596	97,603	
3. Quebracho				
Argentina		7,06,975	7,84,375	
Paraguay		2,99,500	3,25,997	
Total Region 2		10,06,475	11,10,372	
U. K.		3,556	6,313	
Total Region 8		3,556	6,313	
TOTAL		10,10,031	11,16,685	
4. Wattle Extract				
Kenya		91,54,761	81,21,414	
Mozambique		3,02,976	2,73,002	
Rhod. Nys—Fd.		1,17,81,569	1,03,96,279	
Tanganyika		32,37,827	27,68,566	
Total Region 0		2,44,77,133	2,15,59,261	
Argentina		62,250	67,629	
Total Region 2		62,250	67,629	
France		5,000	3,547	
Total Region 7		5,000	3,547	
Norway		10,160	4,473	
U. K.		6,811	8,477	
Total Region 8		16,971	12,950	
TOTAL		2,45,61,354	2,16,43,387	

1	2	3	4	5
5. Other tanning extract		Kg.		
Rhod, Nys. Fedn.		3,263	2,328	
Tanganyika		1,04,737	84,964	
Total Region 0		1,08,000	87,292	
Canada		74,821	89,251	
Total Region 1		74,821	89,251	
Argentina		1,97,180	2,03,421	
Paraguay		1,00,000	1,17,092	
Total Region 2		2,97,180	3,20,513	
Australia		1,261	2,500	
Total Region 4		1,261	2,500	
France		4,32,400	3,69,445	
Germany W.		2,45,757	5,06,967	
Netherlands		45,262	75,228	
Total Region 7		7,23,419	9,51,640	
Norway		6,48,200	3,14,337	
U. K.		82,733	1,42,168	
Total Region 8		7,30,933	4,56,505	
TOTAL		19,35,614	19,07,701	
6. Other Synthetic tanning materials				
U. S. A.		12,201	62,497	
Total Region 1		12,201	62,497	
Australia		12,338	27,143	
Total Region 4		12,338	27,143	
Germany E.		10,000	28,889	
Hungary		300	900	
Poland.		150	329	
Total Region 6		10,450	30,118	
Belgium		17,110	24,623	
France		5,294	24,788	
Germany W.		5,55,271	12,08,877	
Italy		2,000	6,222	
Netherlands		3,540	10,766	
Total Region 7		5,83,215	12,75,221	

1	2	3	4	5
		Kg.		
Norway			1,40,996	61,026
Sweden			33,625	14,628
U. K.			1,53,037	2,31,166
Total Region 8			3,27,658	3,06,820
TOTAL			9,45,862	17,01,799

XIII Tanning Materials

1. Boot & Shoe Machinery excluding sewing

U. S. A.	120	3,770
Total Region 1	120	3,770
Japan	300	10,401
Total Region 4	300	10,491
Czechoslovakia	1,547	24,567
Poland	838	17,245
Total Region 6	2,385	41,812
Belgium	1,276	2,095
Germany W.	4,130	1,44,935
Netherlands	70	2,350
Total Region 7	5,476	1,49,380
U. K.	4,825	1,09,335
Total Region 8	4,825	1,09,335
TOTAL	13,106	3,14,698

2. Parts of Boot shoe Manufacturing Machinery

Canada	51	6,637
U. S. A.	1,542	50,189
Total Region 1	1,593	56,826
Japan	7	165
Total Region 4	7	165
Belgium	1,942	65,566
France.	250	573
Germany W.	780	65,568
Italy	12	1,057
Netherlands	281	5,011
Total Region 7	3,265	1,36,775

1	2	3	4	5
		Kg.		
Denmark		235	2,538	
Sweden		1,184	43,572	
U. K.		4,990	2,25,151	
Total Region 8		6,409	2,71,261	
TOTAL		11,274	4,65,027	
3. Leather tanning & curing machinery				
U. S. A.		35,343	2,31,226	
Total Region 1		35,343	2,31,226	
Czechoslovakia		64,530	3,24,446	
Total Region 6		64,530	3,24,446	
Germany W		24,447	3,10,564	
Italy		400	1,400	
Total Region 7		24,847	3,11,964	
U. K.		44,300	3,60,092	
Total Region 8		44,300	3,60,092	
TOTAL		1,69,020	12,27,728	

SOURCE.—Monthly Statistics of the Foreign Trade of India Vol. II, March 1965.

PART V

INDIAN LEATHER INDUSTRY

QUESTIONNAIRE ON THE PROBLEMS OF LEATHER INDUSTRY AND ON THE FUTURE PATTERN OF ITS DEVELOPMENT AND ITS EXPORT

(Observations/Suggestions wherever given may be ticked off according to choice/preference. Additional comments/suggestions if considered necessary may be entered at the end of each question)

A. RAW MATERIALS

Hides and Skins

- I. There is a feeling among tanners that the quality and quantity of hides supplied have been reduced. According to you, what may be the actual reason/reasons out of those suggested below :
 1. Anti-slaughter laws are responsible for the reduction in quality and quantity.
 2. Scarcity is not due to lack of supply but due to increased competition among different tanners.
 3. Tanners are not prepared to pay encouraging prices for quality hides.
 4. Village tanners are consuming increased quantities of quality hides thereby causing scarcity to the urban tanners.
 5. Quality cows are driven out of India in the borders reducing the total availability.
 6. The dead cows are buried in certain areas. Nobody is willing to flay the dead animal.
 7. The mortality rate has decreased.
- II. Do you think that any of the following measures may have to be taken to improve the situation ?
 1. Removal of restrictions on slaughter of cattle and buffaloes.
 2. Increased imports of raw hides from abroad.
 3. Introduction of grading of hides before they are marketed.
If 'yes' why is the Agmark system not given full support ?
 4. Establishment of flaying cum curing centre in each village or for a group of villages and employing therein trained personnel for the collection of carcasses and for proper flaying and curing of the raw hides.

5. Modernisation of existing slaughter houses.
6. Establishment of newer slaughter houses exclusively for goat and sheep.
7. Incentive for graded hides.
8. Supply of trimmed hides.
9. Any other views.

III. Carcass and Tannery By-products

In India we have large cattle wealth. The recovery and utilisation of carcass and tannery by-products have been indifferent. According to you what are the main bottle-necks in the way ?

1. Lack of technical knowhow for their utilisation.
2. It is not economical to process the products.
3. Social prejudices.
4. No proper facilities available in villages to recover the by-products of carcasses.
5. There is no any effective market locally for these products.
6. Other views.

IV. Will you consider the following measures for reducing the wastage in the recovery of the carcass products and thereby increasing the national wealth ?

1. Establishment of carcass recovery centre at least for a group of villages.
2. Imparting of technical training to the village chamar and flayers.
3. Establishment of processing factories for the carcass products.
4. Improvement of existing slaughter houses.
5. Starting newer slaughter houses on modern lines.
6. Fighting against the social prejudices and sentiments by organised and sustained efforts.
7. Others.

V. Regarding the export policy of goat skins, which of these opinions in your view are correct in the interests of the country ?

1. There should be a complete ban on export of raw goat skins.

2. A gradual ban should be introduced so that no goat skin is exported after the next 5 years.
 3. Allow raw goat skin export only when a considerable quantity of semi-processed or fully processed leather is also bought along with it.
 4. Allow only export in pickled or blue chrome form and not in the raw form.
 5. The E. I. and the pickled chrome crust tanneries have the capacity to absorb all the raw goat.
 6. The present demand for finished glazed kid, clothing and gloving leather is so great and likely to increase that we should not export goat skin in raw or processed form.
 7. Obtain collaboration with a foreign firm with great sales net work and export only crust and/or finished leathers.
 8. Export only crust-open an Indian finishing shop in foreign countries.
 9. Utilise excess raw goat skins for internal use as upper and other leathers and release cow upper for export.
- VI. In our foreign trade in skins some of the Afro-Asian countries are competing with India. What measures do you propose to improve our skins export position ?
1. An understanding must be reached among the main producing countries to avoid cut throat competition.
 2. Government of India should encourage the exports through export subsidy so that our exporters could withstand any competition in foreign markets.
 3. Restrictions on exports of raw goat skins should be waived in the context of growing competition from other countries in raw skins.
 4. Other views.

Tanning Materials

- VII. The prices of tanning materials such as babul produced in the country have gone up. Is it because
1. Of shortage of the supply of bark in the important leather manufacturing regions though there is much potential for exploitation from the existing resources.
 2. Little or nothing has been done to introduce tannin bearing plants in the afforestation programmes while deforestation has done immense havoc to this type of plants.

3. Of lack of an organised agency for the collection and marketing of tanning materials at village level.
4. The demand for tanning materials have moved upwards: in keeping with the expansion of the leather industry.
5. Of outmoded formats for forest contracts that need revision.
6. Any other reasons.

VIII. According to you, what measures may be necessary to improve the situation?

1. State Governments should make determined efforts at compulsory plantation of tanning bearing trees as part of their afforestation programme—is the wattle, babul plantation an economic proposition?
 2. Introduction of a system of compulsory debarking of tannin bearing trees before they are moved from forests.
 3. Organised collection and marketing of tanning materials at village level.
 4. Any other views.
- (b) Do you consider the recent 10% regulative levy on the imports of hides, skins, chemicals, machinery etc. may have the following effects on the Indian Leather Industry?
1. Imports of (a) raw hides and skins (b) tanning materials (c) auxiliaries and (d) machineries will come down.
 2. If imports continue as before the levy, production cost on all leathers and leather goods may go up.
 3. The export sector of the leather industry will face strain in marketing the products in foreign markets at competitive prices.
 4. The entire burden of import duties will be shifted to the consumer.
 5. Export entitlements and draw-backs are fair enough to overcome the import duty.
 6. Other views.

IX. It is often alleged that only the exporters are given liberal licences to import syntans, chemicals, finishing materials etc. The manufacturers of finished leather, who do not export what may be exported but cater to the needs of the footwear manufacturers are complaining that they are not given such facility. According to you what measures must be taken to make available these materials to the actual users.

1. Liberal granting of import licences to the actual consumer without linking with exports.
2. Measures must be taken to produce these materials in the country and make them available to the users.
3. Other views.

B. TANNED AND FINISHED LEATHERS

- X. The following may be the main bottlenecks inhibiting tanners in switching over from traditional tannage to non-traditional lines—for instance from E.I. tanned to finished leather. With which of these do you agree?
 1. Semi E.I. leathers can easily be marketed (particularly in foreign countries).
 2. The technique of manufacture of semi-processed leathers is simple and does not need much mechanisation or modern know-how.
 3. Vegetable tanning materials required for semi-processed leathers are easily obtainable.
 4. The chemicals and auxiliaries required for finishing leathers are not always regularly available and that at reasonable prices.
 5. Machinery and equipment necessary for finished leather manufacture are not indigenously available.
 6. The restrictions on imports of finished leathers in many of the western countries prevent any large scale venture in this line
 7. Lack of adequate technical know-how for the manufacture of finished leathers.
 8. Any other reasons.
- XI. What suggestions may be thought of for increasing the production of finished leathers?
 1. Making available chemicals, auxiliaries and machineries required for manufacturing finished leathers at reasonable prices and in regular supplies.
 2. Making available the latest know how for finished leather industry.
 3. Starting industrial estates for leather goods.
 4. Drawbacks, incentives for export of finished leathers and leather goods.
 5. Any other views.

XII. We have cheap labour. We have raw materials. We have traditional skill. Yet we have not progressed well in the manufacture and export of finished leathers? What are the main reasons?

1. Lack of entrepreneurship.
2. Lack of market studies.
3. Lack of mechanisation of production.
4. Lack of chemicals and auxiliaries.
5. Lack of credit facilities.
6. Other factors.

XIII. What are your suggestions for developing the finished leather industry in the country? Indicate the regions where potentialities exist.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

XIV. The Government of India's policy is to encourage the exports of finished products. But the performance of exports in the past show that the growth of finished leather exports is sluggish. According to you what are the reasons?

1. It is safe to depend more on internal market rather than risk in the international market.
2. Exact information on the foreign market demands is not known to all producers.
3. The supply of chemicals and machinery necessary for the production of finished leather is not available at competitive prices and regularly.
4. There are not adequate incentives and information about them for the exporter of finished leathers.
5. The international market for E.I. Leathers, pickled skins is favourable to Indian exporters.
6. The import restrictions abroad are discouraging our exports (of finished leathers).
7. The Export Promotion Councils should work more dynamically.

C. LEATHER GOODS

- XV.** Leather Goods manufacturers say that the supply of finished leather is not satisfactory. The tanners say that the finished leathers can be made available if there is adequate demand coupled with a fair price. What are your views on this issue (Answer may be given on a separate sheet).
- XVI.** Inspite of our having rich artistic talent in the country and the availability of cheap labour, we have not yet succeeded in manufacturing and exporting quality leather goods and footwear. According to you what are the main reasons ?
1. Availability of fine leathers and finishes is not satisfactory for the manufacture of quality leather goods.
 2. Production and supply of grindery items are not satisfactory.
 3. Skilled labour is not available in sufficient numbers.
 4. The productivity of Indian labour is low.
 5. Absence of proper agency that can procure the leather goods from indigenous manufacturers and export them.
 6. Preferences of consumers abroad are changing quickly.
 7. Foreign market conditions are not known to all producers.
 8. Lack of technical knowledge.
 9. Any other views.
- XVII.** According to you, what measures should be taken to augment our exports of leather goods and footwear ?
1. Extensive training in the modern methods of manufacturing leather goods and footwear.
 2. Starting of design research centre to develop different designs for the benefit of leather goods manufacture.
 3. Establishment of Export House on cooperative lines for leather goods and footwear.
 4. Mechanisation of footwear industry.
 5. Standardisation of quality of the footwear and leather-goods.
 6. Internal production and supply of grindery items, finishes light machinery etc. to the manufacturers.
 7. Introduction of compulsory inspection on the exported items.
 8. Other views.

D. FOOTWEAR

XVIII. Government of India has lifted the excise duty on the manufacture of footwear. What will be the effects on different sectors of leather industry?

1. The organised sector of footwear manufacture will increase the production.
2. Exports of footwear will go up.
3. The consumer price of footwear will go down by 10%.
4. The consumer price will not go down by 10% but it may show some slight decrease.
5. Consumers may not get any benefit.
6. The exports of E.I. kips may decrease owing to the increased demand for finished and sole leather in footwear industry.
7. The small scale and cottage sectors will suffer competition from organised sector with its favourable position.
8. Other views.

XIX. Do you agree with these views?

1. The organised sector should not be allowed to expand.
2. Mechanised factories may be set up.
3. Medium sized mechanised factories may be set up in different regions.
4. Cottage footwear manufacturing should be tied up with the organised factory.

E. GENERAL

XX. Do you think that the developmental rebate recently announced by Government of India will induce tanners to move their tanneries from concentrated areas to less developed areas?

Yes/No

If no, what are the main reasons?

1. Skilled labour is available in the existing centres of leather industry.
2. Water and power facilities may not be readily available in the new localities.
3. Marketing has been convenient in the existing centres.
4. Any other reasons.

XXI. Do you consider that compulsory preshipment inspection should be extended to the different items of leather?

Yes/No

If yes, what are the benefits?

1. International prestige will go up and so our exports can be stepped up.
2. Better price for the export can be obtained.
3. Other benefits.

If no, what are the disadvantages?

1. Our trade relation will suffer.
2. As long as the foreign buyers are satisfied there is no need for the introduction of compulsory preshipment inspection.
3. delays in the exports will take place owing to inspection.
4. Additional costs are involved for quality control which may be avoided.
5. This is not the opportune time to introduce the restrictions on the exports.
6. Already traditional and acceptable standards exist.
7. Other views.

XXII. Will you suggest a broad line of development of the leather, leather goods and carcass by-products based industries in different regions of the country? With which of these views do you agree?

1. It is not advisable to permit functioning of uneconomic units small or big.
2. Labour intensive cottage sector may be developed.
3. Capital intensive increased productivity based industry may be developed.
4. Small units should merge into a viable economic unit.
5. Small units production may be geared to feed the mechanised units.
6. The location of a tannery should only depend upon the techno-economic data.
7. Development of industries in each State, region to develop its own resources to the maximum may jeopardise the existing industries.

8. No new units should be started.
9. Government should set up export based factory.
10. Government should not come into production to compete with private industry.

XXIII. What are your suggestions for increasing our exports under different items and for broadening the area of our foreign trade?

XXIV. Are you engaged at present in any of the following enterprises?

- A. *Trading*
 - (i) Raw hides
 - (ii) Raw skins
 - (iii) Tanning materials/chemicals/auxiliaries/machinery (Please specify)
- B. *Producing*
 - (i) E.I. skins
 - (ii) E.I. kips
 - (iii) Pickled skins (Please specify)
 - (iv) Chrome leathers (Please specify)
 - (v) Finished leathers (Please specify)
 - (vi) Footwear (a) Indigenous type
(b) Western type
 - (vii) Leather goods (Please specify)
- C. *Exporting*
 - (i) Raw skins
 - (ii) E.I. skins
 - (iii) E.I. kips
 - (iv) Pickled skins
 - (v) Chrome leathers
 - (vi) Finished leathers
 - (vii) Footwear (Please specify)
 - (viii) Leather goods (Please specify)
 - (ix) Others (Please specify)
- D. *Importing*
 - (i) Raw hides
 - (ii) Skins
 - (iii) Tanning chemicals/auxiliaries/machinery
 - (iv) Wattle bark/extract
 - (v) Others (Please specify)

PART VI

LIST OF REFERENCES

CODE LIST OF REFERENCES

Code	Subject
a.	Social aspects.
b.	Organisational aspects—Planning.
c.	State and the Industry.
d.	Cooperative Sector.
e.	Livestock.
f.	Raw Hides and Skins.
g.	Carcass and Slaughter-house By-products.
h.	Tanning Materials.
i.	Chemicals and auxiliaries.
j.	Machinery, designs, tools implements etc.
k.	Research, Technology, Technical personnel and Training, Labour and Productivity.
l.	Substitutes.
m.	Products of leather industry other than Footwear.
n.	Footwear.
o.	Tanning by-products.
p.	Marketing.
q.	Quality control, Standardisation.
r.	Exports.
s.	Imports.
t.	Finance and taxation.

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CHAPTER VIII

REPORT ON THE OPINION SURVEY ON THE PROBLEMS OF LEATHER AND ALLIED INDUSTRIES

8.1 The Committee formed to review the progress of leather industry in India considered it fit to consult various shades of opinion on certain topical issues concerning the development of leather and allied industries. Accordingly, it designed a comprehensive questionnaire and circulated the same to 300 individuals belonging to trade, industry, and Government and Semi-Government institutions engaged in promoting the development of the industries.

8.2 So far, 59 duly filled in questionnaires have been received. The distribution of the filled in questionnaires according to various categories of informants is presented as :

(i) Trade and Industry	16
(ii) Research Training & Education	6
(iii) Government & Semi-Government Agencies	34
(iv) Others	3

8.3 The replies embodied in the questionnaires have been analysed; some interesting findings have come out from the above analysis. The discussions in the present report have been classified under the following headings :

- (A) Raw Materials
- (B) Tanned & Finished Leathers:
- (C) Leather Goods
- (D) Footwear
- (E) General

8.4 Raw Materials

It is the common experience of all concerned that the quality of Indian hides has deteriorated and its quantum of supply has remained almost stagnant during recent periods. Various factors are responsible for this state of affairs. According to the respondents of the questionnaires, the prevailing anti-slaughter laws, wastages due to non-collection, bad flaying and preservation methods and fall in the mortality rates of the bovine stocks are the major factors contributing, in order of importance, to this disquieting feature in the raw material front. Of course, the competition among the tanners on the market arrivals accentuates the

problem. There is a difference of opinion among the respondents whether there is an increasing intake by the village tanners. All-India data are lacking to arrive at a conclusive opinion in this sphere. Naturally, the measure suggested to over-come the present difficult situation is the removal of restriction on slaughter. There is almost a complete unanimity on this point. Of course, the proper development of flaying and curing centres in the villages on more economical basis and supported by a better system of organisation has been advocated. Opinion is divided on the question of introducing statutory grading and classification. Most of the industrial respondents feel that this type of regulation is not necessary as a certain system of market grading exist at present, although, the standard of classification is not upto the mark. Regarding the question of modernisation of existing slaughter houses and establishment of newer slaughter houses for goat and sheep there are no two opinions.

8.5 Carcass Recovery:

Social prejudices, absence of local market and want of proper facilities for collection and preservation etc. spoil the development of carcass recovery to the desirable extent. It has been stressed by the informants that at present animal byproducts collection for hides is more or less satisfactory but not more than 50% of the bone is collected ; tallow, an important material is collected to a very insignificant proportion of the total availability. Horns, hoofs, intestines and meat are allowed to be wasted almost completely. It is suggested that the development of carcass recovery centre is the right answer to this 'problem of non-utilisation ; but carcass recovery centre should be developed as one of the component units of the flaying and curing establishments in the villages. In this connection some doubts have been expressed regarding the efficacy of the functioning of the existing flaying, curing and carcass recovery centres.

8.6 Export of Goat Skins:

So far as the questionnaires are concerned it is opined by the majority that the restriction on goat skin export should stay and ultimately it should lead to a complete banning of export within a period of 5 to 10 years. Of course there is a strong opinion not to disturb the normal international export dealings. Opponents of the restriction measures hold that in the background of the insufficient capacity for processing the surplus goat skins and the difficulty of finding out the external market for tanned and finished leather the present policy regarding goat skin export fails to earn the maximum foreign exchange. As regards the promotion of export market the suggestion of export subsidy in different forms receives universal approval. Most of the respondents hold that it is difficult to arrive at an agreement among the supplying countries ; and even if such agreement is reached it may not last long.

8.7 Tanning Material:

Most of the informants contend that there is absolute physical scarcity for the indigenous tanning materials compared to the rising demand. Compulsory debarking and organised collection of tanning barks, fruits etc. may improve the position in the short run, but it is difficult to implement these measures. State Governments should be very much conscious and enterprising as regards the plantation for a long run solution of the problem.

8.8 Import Levy:

There is a complete unanimity that the present import levy on hides, skins and other raw materials for the tanning and leather industry will raise the cost of production and undermine our competitive strength in foreign markets. Most of the respondents voice their opinion in favour of its immediate abolition.

8.9 Chemicals Auxiliaries—Import Thereof:

There is a strong opinion in favour of granting users licences for import of chemicals, auxiliaries, machineries and equipments not linked with the volume of export. An important suggestion has been made to tie the size of a licence with the volume of output accepted by the income tax authorities.

8.10 Tanned and Finished Leather Industry-Development Thereof:

As regards development of finished leather industry, suggestions are many. According to the view points of the respondents the major factors which impede the development along non-traditional lines are the following :

- (a) E. I. leathers have traditional markets and its production simple manufacturing processes.
- (b) Absence of viable home market for finished leathers.
- (c) Problems of export of finished leather in Western Countries.
- (d) Lacuna regarding the availability of skill, chemicals and auxiliaries, machineries and equipments.
- (e) Lack of enterprising management, and
- (f) Lack of financial support from private and institutional credit agencies.

Accordingly, suggestions are being given for the development of finished leather industry in the following manner :

- (i) Each State Government should form a Leather Committee for advising it regarding the development of the industry.
- (ii) Manufacturing of chemicals, auxiliaries and machinery for leather manufacturing in India (as a long term measure).

- (iii) Closer study of world markets relating to competition and consumer habits and fashion changes.
- (iv) A positive and anti-delay policy for maintenance and developmental imports.
- (v) Subsidised air transport to finished leather exports to meet the changing demands and fashions.
- (vi) Concession in the field of taxation.
- (vii) Adequate incentives for finished leather exports.

8.11 Leather Goods:

The consensus is that, as the demand for quality finished leather for the manufacture of leather goods is not sufficient in the home market, it is not possible to produce it on a large scale. Moreover, the activities of the intermediaries in artificially raising the prices of finished leather constitutes an important hurdle for the leather goods manufacturers. Again, the basic limitation regarding the quality of indigenous raw materials (mainly hides) provides a limiting factor for the supply of good leathers. So, in a way, tanners are partially right when they say that they don't get incentive price for producing good leathers and the leather manufacturers are correct in saying that they don't get proper quality and adequate quantity at reasonable prices. Want of sufficient capital, absence of proper organisation for the procurement of leathers and selling the leather manufactures and the paucity of knowledge regarding the foreign market conditions, inhibit the development of leather goods industry. So in order to overcome these bottlenecks, it is suggested that a design research centre should be established. Export houses on cooperative lines, standardisation of quality of footwear and leather goods internal production and supply of grindery items, may ease the situation.

8.12 Footwear—Lifting of the Excise Duty:

The survey reveals the opinion that the effect of waiving of excise duty will be felt in different ways. The scope for expansion for the organised sector will definitely enlarge ; but, these measures by itself may not serve as a promoter of exports. Of course, the small and cottage sectors will face some competition from the organised sector and the consumers of footwear will definitely benefit from the lifting of the excise duty. It is opined that inspite of allowing the large sector to expand, it is desirable that few medium sized mechanised footwear factories may be set up having an export bias.

8.13 General—Effect of Development Rebate:

Most of the respondents express the opinion that the present state of concentration of tanneries in certain areas of the country will not change under the impact of the developmental rebate. This is because the existing centres are definitely enjoying the benefits of localization available in each area.

8.14 Compulsory Pre-shipment Inspection:

Opinions are widely diverging on this point. Most of the informants belonging to Government and semi-government organisations prefer the policy of pre-shipment inspection to be followed for most categories of skins, leathers, leather goods and footwear exported from the country. But the industry and trade representatives are very much uncertain on this point; their view is that it is not necessary as a general measure ; it can be pursued on a voluntary and selective basis.

8.15 Expansion of Capacities—The Development of New Units:

There is a wide diversity in the response on this point. A section of the informants hold that by putting a curb on the development of new units in tanning industry the process of exploitation of the surplus raw goat skin may be hampered ; moreover, this policy tends to perpetuate some of the old and uneconomical units in the developed areas and it may mean an embargo on the progress of underdeveloped areas. As a matter of practical policy each State Government will, definitely, try to utilise the unutilised resources and idle manpower within the state for boosting up the industrial potential.

Those who oppose the expansion of new capacities have got strong points, also. They feel that planning of the industry should be undertaken not from the interest of the particular area or a State but from the overall benefit to the country as a whole.

However, opinions are there which find a bridge between the two extremes. According to these opinions capacity should be allowed only under the conditions of proper economic and technical feasibilities. At present the picture is not clear because of the paucity of data on the aspects of utilisation of capacities in the existing units.

CHAPTER IX

INDIAN LEATHER INDUSTRY

GUIDE LINES FOR THE FOURTH PLAN AT A GLANCE

I. Targets :

(Figure in million pieces)

	1964-65	1966-67	1970-71
(1) Leather Targets :			
(i) Goat skins :			
<i>Exports :</i>			
Raw skins	10.93	9.54	4.40
Pickled & Chrome Blue	4.23	4.50	9.00
E. I. Tanned	14.92	15.50	17.75
Glazed kid	0.26	1.00	2.00
Finished Leather	0.30	0.40	1.00
TOTAL	30.64	30.94	34.15
Domestic consumption	4.07	4.54	7.35
(ii) Sheep skins :			
<i>Exports :</i>			
Raw skins	0.04	0.04	0.04
E. I. tanned	13.54	13.54	13.54
Finished Leather	0.11	0.15	1.00
TOTAL	13.69	13.73	14.58
Domestic consumption	4.48	4.35	4.52
(iii) Cow hides :			
<i>Exports :</i>			
E. I. tanned	2.17	2.10	1.75
Chrome uppers	0.59	0.80	1.50
Chrome crust	..	0.20	1.00
TOTAL	2.76	3.10	4.25
Domestic consumption	16.00	15.90	16.56
(iv) Buffalo hides :			
Exports	1.11	1.11	1.11
Domestic consumption	5.41	5.73	6.39
TOTAL	6.52	6.84	7.50

(In lakhs rupees)

(v) *Reptiles :**Exports :*

Raw

63.39 52.82 31.69

Tanned

95.68 113.79 150.00

TOTAL

159.07 166.61 181.69

Domestic consumption

.. .. .

(2) *Footwear target :*

(In million pairs)

Exports

3.00 4.20 9.00

Domestic consumption

150.00 156.30 191.00

TOTAL

153.00 160.50 200.00

(3) *Leather Goods & Leather Wares :*

(In million rupees)

Exports

1.07 2.34 4.90

Domestic consumption

.. .. .

II. Additional Men, Materials, Money Required for the Fourth Plan:

	Leather	Footwear	Leather goods
(1) Personal			
Managers	..	225	..
Foreman	..	610	..
Mechanics	..	270	..
Skilled workers & workers	2,432	18,540	..
Supervisors	583	..	..
Mistries	553	..	..
Unskilled workers	6,367	..	..
(2) Block Capital (Million Rupees)	51.0	50.5	3.75
(3) Foreign Exchange Requirements (Million Rupees)	60.7	20.0	..

III. Return :

(In million rupees)

	1965-66 (last year of the 3rd Plan)	1970-71 (last year of the 4th Plan)
Value of the output of the industry	..	..
Total Foreign Exchange earnings	420	553
Net Foreign Exchange earning (Total Gross Exports—Imports).	327	446

IV. Salient Features :

Skins.—While the ban on export of sheep in the raw or pickled will continue, export of raw goat skin will also be progressively curtailed. The goat skins so available would be diverted for export in the pickled/blue/finished form and for substituting cow upper leather. E. I. goat and sheep will maintain increase.

Hides.—The export of E. I. cow & buff will decrease progressively with an increase in the export of finished leather. The demand for finished leather for internal and external markets would increase necessitating further imports of cow hides or substituting them by indigenous buffalo hides or goat skins. The buffalo hides would be fully utilised for meeting the increased demand for sole, insole and lining leathers apart from industrial leathers.

Reptiles.—More exports of finished reptile leathers are envisaged by importing more reptile skins and/or raising crocodile farms in a systematic way.

Footwear.—The target for total production of footwear is 500 million pairs accounting for one pair per individual at the end of forth Plan. Of this 200 million pairs would be leather of which 9 million are for export. Large and medium scale mechanised units for footwear units should be set up.

Leather goods and leather wares.—A tenfold increase in this field is envisaged.

Growth of auxiliary industries.—The demand for machinery and materials is large enough and the foreign exchange position difficult enough to warrant internal developments and establishing auxiliary industries for manufacturing (a) Machinery for tanning, footwear, and leather goods, (b) Leather auxiliaries like syntans tan extracts, resin emulsions etc.

Bye Products.—A bye-product utilisation corporation is to be set up for export earning and import saving. This would also ensure the hide quality and hide availability.

V. Riders :

The success of the Plan will depend upon :—

- (1) Well defined and stable policy of the Government for the 5 year period and the determined & consistent efforts of the industry.
- (2) The availability of foreign exchange for importing machinery, and materials.
- (3) Setting up of new or modernising the existing footwear leather goods units.
- (4) The idle capacity of the leather industry is taken only for its land and building facilities. Introduction of newer machinery and newer productivity methods are essential for competing in the world markets.

- (5) The setting up of an up-to-date product-oriented design cell for footwear/leather goods backed by good market research in countries abroad.
- (6) Development of auxiliary industry in the country.
- (7) Modernisation of existing slaughter houses or setting up of new ones for better utilisation of bye-products and improvement of hide quality.
- (8) The data available for both raw hide and skins and footwear production are unreliable. The figures given in this plan are at best guide lines and only indicative of the relative trends.
- (9) As reliable data are not available for total inputs and outputs for the 3rd five year plan only additional requirements for men, materials and money for the Fourth plan are indicated.
- (10) The targets set and projections made for the coming years are at best tentative and based on the current trend of thinking and pattern of trade. Any unexpected variations in the international markets would naturally have a repercussion on the plan's progress. An year to year assessment and revision of the target is suggested.
- (11) It is expected that world trade conference decision to give preferential tariffs treatment to imports from developing countries would come into effect.