

INDIAN
SHOE
FEDERATION

Exhibition of Footwear Components, Accessories & Finished Leather

9-10 July 2011, Ambur Trade Centre, Ambur.



at a glance

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- Agra Footwear Mfrs. & Exporters Chamber (AFMEC)



Shri PV Gopalakrishna,
President, ISF

TODAY, the Components Industry walks hand in hand with the Footwear Industry to meet the global challenges and the exacting quality requirements to meet international standards as well as to increase India's share in the exports basket. The Footwear Industry has also increased its domestic sourcing levels of footwear components. This had helped the component industry to raise the level of quality of their products on par with International quality. The importance of being innovative and the need to constantly update products is a step to overcome product obsolescence and survive in the future. The 6th edition of the exhibition of Footwear Components, Accessories and Finished Leather – the AMBUR OPEN 2 is a step in this direction.

Ambur Open 1 was an outstanding success and it spurred us to make Ambur Open 2 even bigger and grander. Ambur Open 2 will be a one-stop shop for Footwear Components, Accessories and Finished Leather. A new and added attraction would be the display of machinery at the Ambur Open 2.

Ambur Open is here to stay and we have striven to give you all a truly enriching and world class event. Concurrent seminars have carefully chosen topics that highlight the current needs of the industry. The business ambience of the fair is ideal for strong coupled exhibitor-buyer discussions. Amenities and facilities at the fair are of top international standards

Any major outcome is the result of synergistic efforts and as stake holders in the enhancement of "Image India" in the Leather Arena, we invite you to walk hand in hand with us in our journey of making Ambur OPEN a meaningful exposition for the discerning.

It has been an absolute pleasure to organize this fair and in this effort I have received the full backing and support of all the Institutions and local industry associations. I am truly indebted to all of them.

I wish all the participants of the exhibition success in meeting their business objectives..



Shri M Rafeeqe Ahmed,
Chairman, CLE

Last year we took the historic decision of organizing the ISF-IFCOMA Exhibition of Footwear Components and Accessories in Ambur.

Ambur Open 2010 was a fair of many firsts : It was the first time that a fair of such magnitude was being held in Ambur; it was the first time that a fair was being held at the majestic Ambur Trade Centre; it was the first time that ISF and IFCOMA were holding their Footwear Components and Accessories exhibition outside Chennai; it was the first time that Finished Leather was also being exhibited vide an expanded scope for the exhibition; it was the first time that AEDOL and the local associations were jointly organizing a fair of such huge proportions along with ISF and IFCOMA; it was the first time that a world class testing facility was being inaugurated; it was for the first time that a fair was being organized in the heart of a manufacturing cluster. . . .

It was indeed the culmination of the dreams of the visionaries who gave shape and nurtured the dreams to fruition.

Following its Grand Debut, I am really pleased to know that the second edition of the Exhibition – the Ambur Open 2 has also received an overwhelming response from the exhibitors across the country and it is also completely sold out.

International Trade is not only full of complexities, challenges, risks & uncertainties but is a world of opportunities as well. Maintaining a very high degree of competitiveness, quality and service at all levels is a pre-requisite for any company to stay afloat in international trade. To remain ahead of competition, it is necessary to source the right ingredient for your products and exhibitions like Ambur Open 2 which is being organized right in the middle of a manufacturing hub gives all of us a chance to interact one-on-one with the exhibitors and helps us source the most optimum components for our product lines.

My hearty wishes to ISF and IFCOMA and all the exhibitors and visitors for Ambur Open 2 to be a grand success which would help rekindle the fire to help the industry march to a brighter future.



Shri Sanjay Gupta,
President, IFCOMA

It is indeed a great pleasure to watch the second edition of the AMBUR OPEN rising to the occasion. IFCOMA & ISF initiated to bring the exhibition near the footwear hub of AMBUR covering the entire belt of Ambur, Vellore, Ranipet & Vaniyambadi which has been widely appreciated by the industry.

The First edition of the AMBUR OPEN met with the resounding success to facilitate the local industry with the exhibition on Footwear Components, Accessories, Machinery & Finished Leather. It has strengthened our spirits to showcase the best of the products being put up on display and a great opportunity for the local Footwear Manufacturers & Exporters to get a feel of the latest quality that is on offer along with the future developments that can take place as a result of fruitful business discussions during the event.

Our objective has always been to reach the footwear hubs of India so that the interactions between the buyers & sellers could be effective and result oriented catering to the needs and requirements of the industry at large and attain the broader perspective of the business.

AMBUR OPEN would also be hosting interesting seminars for the benefit of the audience and the industry. Prominent Speakers from various quarters would come together to enlighten us on vital aspects of the Footwear and allied industry.

The efforts and support of various institutions and associations connected to the Leather & Footwear industry deserves a great degree of appreciation and without their unstinted co-operation AMBUR OPEN would not have been so much successful.

The Footwear Industry as a whole has been a great pillar of support and motivation in helping the AMBUR OPEN become a major event. We extend our sincere thanks to everybody who has assisted us in building up of this grand event..



Shri R K Jalan Vice Chairman, CLE

Close on the success of the India Leather Summit (ILS) comes the vibrant Ambur Open 2 which was such an unqualified success last year. While the ILS was held in the backdrop of the ambitious targets set by the Ministry of Commerce and Industry and addressed crucial issues like Infrastructure Development, Marketing, Finance, Environment Management, Product Design and Development, HRD etc. the Ambur Open is the 'Business Platform' to convert these ideas into practical reality through display and sourcing of the finest footwear components, leathers, machinery and accessories to help make quality products that would fetch premium in the global markets.

I learn that Ambur Open 2 has been a complete 'sell out' with bookings already closed. This is a matter of great satisfaction and is indicative of the fact that the Exhibition is here to stay. The overwhelming response is a major "thumbs up" for the vision and acumen of ISF, IFCOMA, CLE, AEDOL, Institutions like CLRI and the local associations of the leather belt in putting up an event of this magnitude in the heart of the Leather and Leather Products manufacturing cluster. They deserve all plaudits for their tireless efforts.

The Ambur Open will play a major role in the growth of the industry by bringing together all the various players in the industry to the heart of the manufacturing belt and I am confident that this event will only grow in popularity and is bound to attract many more participants in the ensuing years.

I wish the exhibition and the participants a huge success.

Editorial Credits

- Editors – in – Chief : **Mr M Rafeeqe Ahmed**, Chairman, CLE
Mr PV Gopalakrishna, President, ISF and **Mr Sanjay Gupta**, President, IFCOMA
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- Printed at : **Global Printing Press**, 98407 89096
- Ambur Open Newsletter : Joint endeavour of **ISF, IFCOMA**, and **CSIR-CLRI**



Shri MM Hashim,
Chairman, KH Group

It was indeed a pleasure last year to preside over the Inaugural edition of the Ambur Open. I had marveled at the scale and magnitude of the Herculean effort in organizing this Exhibition. The feedback I obtained from many exhibitors as well as visitors both from India and Abroad was very positive. It is therefore, no surprise that the second edition of the fair – Ambur Open 2 was completely booked much in advance. This is a testimony to the spirit and unflagging zeal of the young and dynamic team at ISF, IFCOMA, Amburtec and the local associations.

Ambur Open is a meeting point to discuss and showcase our capabilities to our clients. The atmosphere is very congenial for business discussions and transactions. The host associations provide the enabling touch and I would like to congratulate the team behind this endeavour for their excellent work.

India has a lot of resources in terms of skilled manpower, raw material, design techniques, entrepreneurial skills and all our energies have to be utilized with concentration to achieve global leadership. We have to be pro-active to garner a larger piece of the global cake and for this we would have to invest substantially in the tanning sector, implement modernization schemes, improve productivity, rationalize labour policies, initiate excellence in designing skills and have more exporter friendly policies.

It is indeed heartening to note that Ambur Open finds strong support of not only the leather sector as a whole but also the apex leather institutions like CLRI and associations who are our worthy associates in galvanising the leather sector to greater heights.

Let Ambur Open be the platform to show our intent in scaling higher peaks in this sector and help us to achieve new relationships and to create stronger ties with the global leather trading community.

My heartiest wishes to all the participants at Ambur Open 2 for a successful and fruitful exposition.



Prof. Dr. A B Mandal,
Director, CSIR-CLRI

Ambur Open 1 was an eye-opener in terms of its popularity, seriousness of purpose and the excellent ambience that it provided for the discerning business exhibitors and clients the world over. It received approbation as one of the most professionally organized as well as one of the most fruitful business expositions for Footwear components and accessories. For me, the inclusion of Finished Leather for display at the Exhibition was a high point.

The Leather Industry works hand in hand with CLRI for adoption of the latest technologies to upgrade their outputs in meeting with the expectations of the international business community. This synergistic relationship has made this sector very vibrant and with a strong foothold in the global leather arena.

Ambur Open 2, will, I am sure surpass all expectations and the credit for this must be given to the Team at ISF, IFCOMA, CLE and other Supporting Associations for their meticulous planning right from conceptualization to actual hosting of the exhibition. They have pioneered and spearheaded this new initiative that makes Ambur Open 2 a 'must visit' fair by all leather connoisseurs across the world.

The events planned clearly reflect that the organizers have been alive to the dynamic needs of the industry and have been expeditious in their actions to ensure the smooth conduct of the fair.

CLRI is indeed proud to be associated in supporting this Exhibition actively.

I am sure that in the years ahead Ambur Open will emerge taller and taller.

My Best Wishes to all participants of Ambur Open 2.



Shri Habib Hussain,
Chairman, NSDC and CEO, AVT Leather

Though one year is not a very significant period of time in the life span of any event, the organizers of Ambur Open can justifiably look back proudly at the conduct of Ambur Open 1, which was indeed a watershed moment in the annals of history of the Leather Sector of this region.

The keenness to come back for the next edition clearly signifies the huge success of the previous edition. The team behind this effort particularly ISF, IFCOMA, CLE, Amburtec and the local associations in synergy with Institutions like CLRI deserve applause for their contributions in promoting India as a major destination for manufacture of quality Leather and Leather Products through the successful conduct of the Ambur Open.

The second edition of the fair, as befitting the occasion, has received an overwhelming response from the exhibitors across the country with bookings completely closed well in advance. The value added seminars covering diverse topics ranging from quality to technology to Management add the major interest element to the fair.

We are once again at crossroads, and the seriousness of the global competition is clear for all to see. The Indian leather and leather product industry is in the midst of far reaching changes and it is heartening to note that the manufacturers are striving towards value addition in the backdrop of intensifying competition. I am sure the Indian industry will seize this opportunity and set up world class facilities which will significantly increase our share of the world market.

I am sure that this event will continue to promote India's Brand Image and also generate good business for the participants.

I am looking forward to another successful edition of Ambur Open and wish all the participants success in their endeavours.



Shri PR Aqeel Ahmed
Chairman (SR), CLE

I am very much pleased that Indian Shoe Federation (ISF) and Indian Footwear Components Manufacturers Association (IFCOMA), are jointly organizing the 2nd edition of AMBUR OPEN – Exhibition of Footwear Components, Accessories & Finished Leather- from 9th to 10th July 2011 in Ambur Trade Centre.

The first edition of Ambur Open was held coinciding with the inauguration of Ambur Trade Centre on 24th July 2010 and it provided an excellent venue for this important Exhibition within the major Leather Industry cluster of Ambur. There was a very positive and encouraging response from participants and visitors and the show was successful in providing an ideal trade platform for manufacturers /suppliers of raw- materials, components, accessories, chemicals and allied products to showcase their latest and newly developed materials and components for the Footwear and Leather Products sector.

The Leather & Leather Products industry is amongst the top ten foreign exchange earners of the Indian economy, providing large employment opportunities to millions of people. The Leather Industry is one of the Focus Sectors, receiving due attention from the Government of India towards its overall development and achieving greater export growth. As per the strategy for doubling exports from the Leather Sector, the industry is poised to achieve the export target of US\$.8.50 Billion by 2013-14.

Obviously, more concerted and aggressive efforts are required to be taken by all segments of the Indian Leather Industry mainly towards augmentation of production capacities with state-of-the-art technology and machinery. Thus, more industrialized activities would necessarily increase the demand for basic materials like Finished Leathers and also for components, accessories etc.

It is in this context, the 2nd edition of AMBUR OPEN would definitely prove beneficial both to manufacturers of Materials/Components as well as for the manufacturers of Footwear and other Leather Products in their endeavour to enhance production.

With the proximity to major production centres of Leather & Footwear in the Southern Region and the infrastructure facilities of Ambur Trade Centre, I am confident that the Ambur Exhibition would result in fruitful business interactions and good business generation.

I would like to congratulate ISF, IFCOMA and other supporting trade Associations for their endeavors towards successfully organizing this Trade event.

I wish the participants and Business visitors all success.



Shri N Mohamed Sayeed,
Chairman, AMBURTEC

It was indeed a joyous day for Ambur when the Ambur Open 2010 was staged at the Grand and imposing Ambur Trade Centre. This was the realization of a beautiful dream into reality and put Ambur on the Global Fair map, which has ensured that Ambur would become a preferred destination for sourcing of leather and leather products. This has been possible due to the zeal and enlightened vision of Mr M Rafeeqe Ahmed, currently Chairman, CLE and the local industry support associations which demonstrates the remarkability of what one can achieve through vision, detailed planning and execution.

I must also compliment ISF, IFCOMA, CLE for the successful staging of the Ambur Open 1. That the maiden edition was successful is clearly underlined by the fact that the response to Ambur Open 2 has been tremendous and the fair is fully booked.

The entrepreneurs of this region also needed to be applauded for their export performance and I urge them to continue to maintain this leadership. The industry in this region had set an example by complying with the environmental norms and I request the Government for continued support for the further growth of this industry.

We must also acknowledge the contribution of this industry in generating large scale employment and for their role in poverty elimination in this region. My hearty wishes to the industry members to keep on performing well and I hope that they would be able to meet their export targets soon.

However, to maximize the potential and take full benefit of the competitive advantages of this region, we must define appropriate plans which would enable the exporters to effectively build on the present and manage the future. Fairs such as the Ambur Open provide the requisite platform to plan and reassess the strategies to be followed to stride ahead of competition. The informative seminars ranging from Newer Materials, Modern technology and Modern Management Practices would be an eye opener for all the entrepreneurs.

We, at Amburtec, are proud to be partners in this venture and assure our wholehearted support for the success of this fair by providing an enabling business ambience and invite all to enjoy the experience.



Shri VP Naimur Rahman
Chairman, IFLMEA

I still fondly recollect the memories when the first edition of the Ambur Open fair was held in 2010. Hosting of the fair at the Ambur Trade Centre has paved the way for presenting the products in a world class ambience. It was an excellent fair of International Class and the visionaries who conceived it deserve all our encomiums for putting this region on the global fair map.

With the rapid strides it is making, I am sure that the Ambur Open will soon be recognized as one of the major leather events not only in our country but in the entire Asian region. The growth of the fair both in terms of number of exhibitors and business visitors expected this year as compared to the last year, is a testimony to the growing stature of the fair.

The ISF and IFCOMA are playing an active role in promoting the Ambur Open and are organizing various activities during the fair, especially the well thought out seminars which span a spectrum of subjects from Technology to Management.

The inclusion of Finished Leather in the expanded scope of this fair has been very heartening for us and IFLMEA is thankful to the fair organizers for this opportunity. The Leather Sector is now back in the growth trajectory and has been set an ambitious target to achieve in the coming years. I am confident that this growth momentum will continue and exports from Leather Sector will cross the target of US \$ 8.5 billion by 2013-14.

Besides experiencing growth on the export front, we are now seeing an increasing interest shown by foreign brands in developing business relations with India, considering the rising domestic demand for high quality leather products and footwear. On account of this, there is more scope for joint ventures and technical collaborations between Indian and overseas companies. Thus, we are in an advantageous position both on the export front and in the domestic market and we have to fully utilize the opportunities available.

Fairs such as the Ambur Open are an important cog in the wheel of quality product manufacturing which offers you to source the best quality leather and components under one roof.

I congratulate ISF, IFCOMA, the Supporting Institutions and all those associated with Ambur Open 2 for all their endeavours towards successfully organizing this fair, which will surely boost the image of the Indian Leather industry and the country.

I convey my best wishes to all the exhibitors and business visitors at the Ambur Open 2011 for their successful business interactions.



Shri Niranjan Nadkarni,
Chief Executive Officer, TÜV SÜD South Asia

Ambur OPEN is today recognized as one of the major leather industry events not only in our country but in the entire South Asia region. I still fondly recollect the memories when the first edition of the fair was held in 2010 in Ambur Trade Centre.

"Ambur Open 2" offers tremendous business opportunities and the USP of this Event is that there is a fascinating amalgamation of product display, ranging from finest finished leather products, accessories & impressive decorative components etc. This would be a golden opportunity for the Leather product manufacturers, buyers from across the country as well as from overseas to source their requirement, thereby facilitating a one stop solution. The added attraction is that the exhibition is being held in Ambur at its newest Trade Centre, which is very closely accessible to the manufacturing industries and this is a tremendous advantage.

On the performance front, AMBUR is the leading cluster for export of Finished Leather, Shoe Uppers and Full Shoes. AMBUR cluster comprising of Ambur-Ranipet-Vellore-Vaniyambadi-Pernambut-Visharam has earned a very good reputation for quality and delivery in the International Market. The fact that a number of leading international brands source their supplies from AMBUR cluster bears testimony to the reputation and competitiveness of this cluster. Besides experiencing growth on the export front, we are now seeing an increasing interest shown by foreign brands in developing business relations with India, considering the rising domestic demand for high quality leather products and footwear. On account of this, there is more scope for joint ventures and technical collaborations between Indian and overseas companies. Thus, we are in an advantageous position both on the export front and in the domestic market and we have to fully utilize the opportunities available.

As an Internationally recognized Technical Solutions Provider, TÜV SÜD South Asia is pleased to contribute to the development of these Leather Clusters with our State of the Art - ISO 17025 accredited Laboratory for Testing, along with Inspection, Auditing & Training Solutions, rightly placed in Ambur Trade Centre, Ambur.

I congratulate ISF and IFCOMA and all those associated with Ambur OPEN 2 for all their endeavors towards successfully organizing this Event, year after year, so as to boost the image of the Indian Leather industry and our Country.



Shri Ali Ahmed Khan,
Executive Director, CLE

Ambur Open 1 was an eye-opener in terms of its popularity, seriousness of purpose and the excellent ambience that it provided for the discerning business exhibitors and clients the world over. It received approbation as one of the most professionally organized as well as one of the most fruitful business expositions for Footwear components and accessories. For me, the inclusion of Finished Leather for display at the Exhibition was a high point.

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Indian Finished Leather:

Shri K. Srinivasan, Convenor – Finished Leather Panel

The Indian Tanning Industry Produces about 2 billion Square feet of Leather (10% of world leather requirement) with major tanning clusters at Chennai, Ambur, Ranipet, Kolkata, Kanpur, Jalandhar etc. There are about 2091 tanneries with 45% in Tamil Nadu, 26% in West Bengal and 18% in Uttar Pradesh. There is availability of best tanning technology and most tanners follow Eco-sustainable tanning processes. With a strong infrastructure for leather tanning and abundant presence of Chemicals and Auxiliaries industry, it is a matter of pride that Indian colors are continuously being selected at the MODEUROP Congress.

India has amongst the largest livestock population in the world, providing a strong raw material base in goat, buffalo, cow and sheep leather. In terms of raw material availability in pieces, India is endowed with 12.55% of Bovine hides & skins, 12.29% of goat and kid skins, and 3.48% of Sheep and Lamb skins in the world. The range of finished leathers include classic finishes (polish, glazed, aniline, patent), matt surfaces (suedes, nubuck), nappa, burnished & oily leathers, crackled & distressed finishes etc. Amongst the major producers of finished leather in the world, the Indian Leather Industry has a long tradition of supplying high quality leather for the global market.

Livestock and Production Details – India

Categories	2005	2006	2007	2008	2009
Number of Bovine animals (million heads)	279.71	277.51	275.29	273.11	270.10
Number of Sheep and Lambs (million heads)	62.85	63.55	64.27	64.99	65.33
Number of Goat and kids (million heads)	124.90	125.18	125.45	125.73	126.39
Production of Bovine hides and skins (million pcs)	27.7	23.4	23.3	24.4	25.7
Production of sheepskins and lambskins (million pcs)	31.5	31.9	32.2	32.6	32.8
Production of Goatskins and Kidskins (million pcs)	72.0	72.0	72.2	72.3	72.8
Production of Light Leather from Bovine animals (mn. Sq.ft)	650.4	647.2	632.4	648.8	
Production of Light Leather from Sheep and Goats (million sq.ft)	610.7	652.5	665.0	655.0	

Global Scenario:

The global import of finished leather declined from US\$ 19888.97 million in 2005 to US\$ 14429.45 million in 2009. India's share has increased from 3.20% to 4.34% during the said period.

A Statement showing global import of finished leather, India's export and share 2005-2009

(Value in Million US\$)					
Details	2005	2006	2007	2008	2009
World Import	19888.97	21747.07	23245.73	21660.96	14429.45
India's Export	636.27	724.00	807.19	673.37	625.54
% Share of India	3.20%	3.33%	3.47%	3.11%	4.34%

Source: ITC, Geneva

Major Importing Countries of Finished Leather

(Value in Million US\$)

Countries	2004	2005	2006	2007	2008	2009
China	3353.19	3502.81	4129.53	4344.26	3791.79	3021.79
Hong Kong	3300.47	3377.99	3665.32	3342.86	2665.35	2032.62
Italy	2178.28	2172.33	2616.61	3039.53	2659.09	1538.25
Germany	637.95	735.95	808.36	855.49	858.67	637.83
Romania	733.59	775.95	813.66	843.52	784.46	598.46
USA	843.38	859.28	823.21	791.75	670.14	444.60
Spain	593.96	539.60	568.01	677.37	652.14	407.84
Poland	514.80	493.74	538.36	586.46	531.28	341.53
Mexico	878.11	781.36	687.51	591.02	527.59	301.56
France	426.11	388.48	385.35	458.95	476.48	359.53

Source: ITC, Geneva

Major Exporting Countries of Finished Leather

(Value in Million US\$)

Countries	2004	2005	2006	2007	2008	2009
Italy	4225.46	4089.38	4595.82	5176.50	4872.87	3641.25
Hong Kong	2740.67	2822.77	3040.03	2772.82	2101.85	1636.66
Brazil	1290.78	1395.82	1875.32	2192.27	1877.64	1159.04
USA	1193.60	1107.00	1043.02	1144.04	911.31	563.58
Argentina	812.50	811.11	883.10	963.72	894.51	651.84
Germany	816.77	713.09	836.30	951.51	892.57	587.93
Korea Rep.	987.46	861.46	833.33	853.88	849.56	683.46
Taiwan	763.72	778.80	770.66	810.67	816.12	611.87
Nigeria	NA	NA	78.26	330.26	680.17	512.49

Source: ITC, Geneva



Ambur Open 2 - 2011

Region-wise Export of Finished Leather (in sq.ft.) (Source : CLE Membership Records)

(Value in Million US\$)

Region	2005-06	2006-07	2007-08	2008-09	2009-10
South	260,432,333	280,460,586	277,947,631	237,888,805	229,213,570
Central	195,490,431	279,829,738	284,551,012	219,051,229	240,348,288
West	19,707,243	22,037,810	22,797,021	22,074,457	19,131,083
East	62,600,947	36,162,362	34,435,669	24,853,790	21,429,701
North	28,897,802	32,250,676	24,789,355	21,869,527	21,885,414
Total	567,128,756	650,741,172	644,520,688	525,737,808	532,008,056

Source: ITC, Geneva

India's Export of Finished Leather – Major markets

The Major markets for Indian Finished Leather are Germany with a share of 3.52%, Italy 12.00%, Hong Kong 37.55%, Spain 2.99%, China 7.34% and Korea Rep 4.42%. (Source: DGCI&S)

(Value in Million US\$)

Countries	2005-06	2006-07	2007-08	2008-09	2009-10
Germany	34.56	26.16	34.60	26.77	22.02
USA	12.24	10.71	9.20	7.64	7.67
UK	2.82	2.69	2.87	3.42	2.68
Italy	86.20	121.00	140.44	99.40	75.06
France	13.09	12.07	10.11	6.28	8.71
Hong Kong	242.96	271.62	268.84	219.80	234.86
Spain	22.54	22.02	28.22	23.46	18.70
Netherlands	6.68	6.22	8.43	8.82	11.56
South Africa	11.23	16.63	13.27	9.29	8.48
Portugal	11.34	8.76	12.85	12.34	9.71
China	34.86	38.86	51.77	45.79	45.93
Indonesia	10.57	9.57	14.54	12.75	9.16
Korea Rep	33.52	34.73	28.35	23.49	27.62
Russia	8.42	12.31	9.77	6.95	3.35

Source: ITC, Geneva

The Department of Commerce, Government of India has set ambitious Export Targets for Leather and Leather Products to be achieved by 2013-14.

(Value in Million US\$)

Product Category	2009-10	2010-11	2011-12	2012-13	2013-14
	Actual Exports				
Finished Leather	625.54	660	720	810	950
Total Export	3400.98	3750	4850	6300	8500

Source: ITC, Geneva



Ambur Open 2 - 2011

Quantity-wise Export of Finished Leather (in sq.ft.) (Source : CLE Membership Records)

(Value in Million US\$)

Category	2005-06	2006-07	2007-08	2008-09	2009-10
Goat Leather	189,882,564	195,075,053	189,808,286	183,597,321	147,847,876
Buff Leather	203,904,595	190,887,830	208,400,706	140,084,671	172,428,617
Cow Leather	79,324,079	85,982,053	90,130,049	68,674,431	60,569,512
Sheep Leather	31,091,114	40,338,691	44,781,694	42,046,463	43,856,194
Buff Calf Leather	25,206,033	33,749,851	28,818,943	16,800,963	56,886,742
Cow Calf Leather	12,540,191	18,600,194	16,408,130	13,815,558	10,245,130
Upholstery Leather	13,656,125	76,532,576	49,277,277	48,124,232	30,09,478
Sole Leather	3,711,043	1,676,351	844,768	1,017,259	441,601
Others (Leather)	5,768,844	7,680,926	15,836,925	8,496,713	7,804,292
Industrial Leather	2,044,169	217,647	213,910	3,080,196	1,828,606
Total	567,128,757	650,741,172	644,520,688	525,737,807	532,008,057

Source: ITC, Geneva



The Export of finished leather is projected to grow at a CAGR of 11.01% from 2009-10 to 2013-14.

The Leather Industry however requires the support of the GOI to help achieve its targets and some of the measures suggested are:

- Power outages are frequent in India compared to a 2 week time in China. Indian companies lose 8.4% per year compared to less than 2% in China
- Port infrastructure, average clearance time is 3.47 days as compared to 18 hrs in China. World Banking logistics reports 2007 claims India rank 39 among 150 nations for high costs
- Encourage investments from Large Corporates as this would facilitate quality products, large capacities and reduce unit cost to boost up sales
- Facilitate FDI into our sector that can bring lot of linkages to our sector with developed countries. China's FDI from Taiwanese in the leather sector brought linkages with the western world. The Government provided lot of incentives to the FIE's like 2 year tax exemption, 50% income tax on the third year, single-window clearance for all approvals and delegation to local authorities for approving foreign investments. FDI brings in scale, efficiency in operations and latest management practices for the industry to benefit.
- Access to capital for SME & MSME as the access to the bank funds is low at the moment
- Status Holders Incentive Scrip Scheme (SHIS) missing for finished leather 1%

What's happening in **Ambur OPEN 2**

Welcome on Board ... **to the second edition of the AMBUR OPEN** – the Indian Shoe Federation (ISF) & Indian Footwear Component Manufacturers Association (IFCOMA) Exhibition of Footwear Components, Accessories and Finished Leather being held on the 9th and 10th of July 2011 at the Ambur Trade Centre, Ambur.

Need for Ambur Open and where the Indian Leather Sector is poised on the Growth Curve:

International Trade is not only full of complexities, challenges, risks & uncertainties but is a world of opportunities as well. Maintaining a very high degree of competitiveness, quality and service at all levels is a pre-requisite for any company to stay afloat in international trade. Industrial Sectors which made right strategies at the right time have created history by becoming global leaders.

The Indian Leather Industry too is an active participant in the International Trade. Our beginnings have been humble but we have today earned the respectful position as a reliable partner in the global leather trade. Sustained efforts of the industry, pro-active support of the Government and continuous inputs on various fronts from the technical, research and training institutions, have contributed to the significant growth and development of the Indian Leather Industry. With a workforce of 2.5 million, the industry takes pride in being one of the largest employment providers, particularly for economically weaker sections of the society.

No doubt, the Indian Leather Industry has scaled new heights with exports crossing the USD 3.75 billion mark this year and has set ambitious target of achieving US\$ 8.5 billion exports by 2013-14. We have charted the growth path of the Indian Leather Industry, through our ceaseless efforts in diverse areas such as export promotion, market diversification, information dissemination and infrastructure development.

To debate, discuss and plan and showcase our strengths, Ambur Open 2 is OUR WINDOW to the niche Global Leather world.

Florence Nightingale once said, **"People with goals succeed because they know where they're going"** and the ISF and IFCOMA certainly know where they are going as is evidenced by the efficient piloting of the Ambur Open which has helped Ambur – the pride of the Indian leather Industry leap frog to global prominence.

The impressive growth of the Indian leather sector over the past four decades makes for fascinating reading. **"From a mere cottage industry to a thrust industry earning valuable foreign exchange for the country, the Indian Leather industry has undergone a dramatic transition"** – due to the path breaking initiatives of the leaders of the Industry. To provide fresh impetus and **"rekindle the fire to march to a brighter future"**, **Ambur Open 2 would be the platform. It would** energize the industry to face global competition and create a conducive environment for growth.

About Ambur Open 2

We take great pleasure in informing you that the stage is set for the second edition of Ambur OPEN.

"Ambur Open 2," will provide a trade and networking platform showcasing the very best of Finished Leather, components and technology in the Leather and Leather Products Sector.

The USP of this fair is that apart from components, you have witnessed in the last edition; all the leading South Indian Tanners would be displaying their Leathers also and this would be a golden opportunity for the product manufacturers from across the country to source some of the finest leathers.

This exhibition has been successful in generating genuine business interest among National and International visitors. It provides a platform to enlarge business networking and makes

a genuine attempt to link the various building blocks of the Indian Leather Sector right from Leather to components to products, which in turn enhances the growth of the Indian Leather Sector.

The added attraction is that the exhibition is being held in the heart of the manufacturing industry in Ambur and this is a tremendous advantage. We envisage strong buyer presence and overall success with assured participation from the industry members of the Chennai-Ranipet-Vellore-Ambur-Vaniyambadi-Pernambut belt. We are upbeat of the visitorship both in numbers and quality.

This event has set new standards in the last edition and we continue to expand our exhibitor base and have also been tapping newer markets. Besides the area covered last year, we have added more stalls this year, to accommodate all of those who could not be accommodated last year.

There will be three Halls:

- **Hall A** (Ground Floor): for Footwear Components & Accessories
- **Hall B** (Ground Floor, extension): for Machinery manufacturers, Chemicals & Technology
- **Hall C** (First Floor): for Finished Leather Manufacturers.

The enthusiasm for Ambur OPEN 2 is great and we are confident of continued patronage from across the manufacturing and export fraternity. This being a prestigious event in the Indian Leather Sector, people of eminence would be participating.

Ambur OPEN is here to stay!

The second edition of Ambur OPEN promises to be even bigger and grander. We are inviting you to witness what Ambur OPEN 2 will re-write in the pages of the India success stories! Concurrent. Events such as seminars and product demonstrations, presentations for the growth of the sector, are other highlights.

Ambur OPEN 2 will be a one-stop shop for Footwear Components, Accessories and Finished Leather. A new and added attraction would be the display of machinery at the Ambur Open 2.

The countdown begins... an exhibition that meets with exacting needs of your factories...



What's happening in **Ambur OPEN 2**

Overview of the Events

TODAY, the Components Industry walks hand in hand with the Footwear Industry to meet the global challenges and the exacting quality requirements to meet international standards as well as to increase India's share in the exports basket. The Footwear Industry has also increased its domestic sourcing levels of footwear components. This has helped the component industry to raise the level of quality of their products on par with International quality. The importance of being innovative and the need to constantly update products is a step to overcome product obsolescence and survive in the future.

There is always interest in sourcing of finest finished leathers apart from Components. Once again all the leading South Indian Tanners would be displaying their Leathers also and this would be a golden opportunity for the product manufacturers from across the country to source quality leathers. The 6th edition of the exhibition of Footwear Components, Accessories and Finished Leather is a step in this direction.

AMBUR is the leading cluster for export of Finished Leather, Shoe Uppers and Full Shoes. AMBUR cluster comprising of Ranipet- Vellore-Ambur-Vaniyambadi-Pernambut has earned a very good reputation for quality and delivery in the International Market. The fact that a number of leading international brands source their supplies from AMBUR cluster bears testimony to the reputation and competitiveness of this cluster.

AMBUR OPEN 2011 : Hope Floats

What does it mean for the EXHIBITORS?	What does it mean to the BUSINESS VISITORS?
<p>Fruitful Business Proposition Grab the moods of positivity and optimism in the industry and realize them into fruitful and successful business opportunities.</p> <p>Captive Audience An often heard grouse from the Exhibitors is the absence 'business visitors' – in this Fair EXCELLENT VISITORSHIP is GUARANTEED.</p> <p>World Class Facility The Ambur Trade Centre boasts of World Class facilities for the Exhibitors. Finer details in preparing your travel and stay are handled.</p>	<p>New Season's Sourcing Ideas Time opportune to source the newest trends and technology from the Component Manufacturers for the right season.</p> <p>Finished Leather : an USP @ Ambur Open Finest of Leathers for Leather Garments, Shoes and Accessories – for the A.W. 11/12 and Spring Summer 2012 seasons from the leading tanneries.</p> <p>Machinery on display @ Ambur Open 2 A new segment for displaying Machinery has been opened up at this fair and would the visitors get acquainted with the latest in technology and automation.</p>

On Display at Ambur Open 2

The Fair would provide an ideal opportunity for your colleagues to interact ONE-ON-ONE with the exhibitors to source the most optimum components for your product lines. The Exhibitor profile includes a display of a comprehensive range of products :

Finished Leather	Cutting Dies	Leather Soles
Leather Shoes	Insoles	Soles
Accessories	Labels	Adhesives
Lasts	Software	Boxes
Chemicals	Tapes	Synthetic linings
Testing	Machinery	Others

Ambur Open 2 : bigger and better

The Ambur Open 2 has had an overwhelming response from the Footwear Component manufacturers Finished Leather and the new segment Machinery signifying a 30% increase in space sold and a 15% increase in the number of Exhibitors over last year.

Ambur Open 2 will have:

- Total No of Sq. meters - 1005
- Total No. of Exhibitors - 130
- Total No. of Components Exhibitors - 68
- Total No. of Leather Exhibitors - 17
- Total No. of Chemicals Exhibitors - 17
- Total No. of Machinery Exhibitors - 14
- Total No. of Services Exhibitors - 14

TUV – the leading Quality Assurance and Testing Agency is actively involved as the MAIN SPONSOR of the event.

Did we also tell you that we have lined up very interesting seminars?

Why Seminars and the Exhibition go hand in Hand?

Keeping Abreast: SEMINARS @ Ambur OPEN 2

Well thought of and contemporary/topical seminars will update on the global developments.

Saturday, 9 July 2011	
Seminar Hall A	<p>• Timings: 3.00 pm to 4.00 pm "International Regulatory Requirements for Leather & Footwear - A Consultative Approach" by Mrs Meena Kumari, Global Technical Head-Softlines, TUV SUD Group, Chennai.</p> <p>• Timings: 4.30 pm to 5.30 pm Supply Chain Management in Footwear Industries by Mr P. Venkatesan, Business Development Manager, SGS India Private Ltd., Chennai</p>
Seminar Hall B	<p>• Timings: 3.30 pm to 4.30 pm Trends for Autumn Winter 2012-13 season by Team CSIR-CLRI</p>
Sunday, 10 July 2011	
Seminar Hall A	<p>• Timings: 10.30 am to 11.30 am Tannery efficiency improvement measurements by Mr B Ramalingam, Executive Committee Member & Former President, AC Tech Leather and Footwear Alumni Association.</p> <p>• Timings: 12 Noon to 1.00 pm Transforming Managers into Leaders by Mr Shiv Subramaniam, Madras Management Association - KAS</p>
Seminar Hall B	<p>• Timings: 10.30 am to 11.30 am Introduction of the new ICD Terminal & Public bonded ware-house in Ambur by WESTERN GATEWAY CARGO SERVICES PRIVATE LIMITED.</p> <p>• Timings: 12 Noon to 1.00 pm PolyUrethane and Footwear by Mr Rahul Gautam, Chairman, Indian Polyurethane Association</p>

These seminars would give you and your team a value-added opportunity to be enlightened on topics related to leather and leather products technology, Shoe Components, Fashion Trends, Quality Control and Business and Management Concepts.

New Product Initiatives By Component Manufacturers

We have invited Mr Michal Spacek, from International Shoe Competence Center (ISC), Pirmasens GmbH, who would visit all the participants/ exhibitors and highlight the new or innovative products displayed at the Fair to ISF & IFCOMA.

His feedback would enable ISF & IFCOMA to evaluate the advance preparedness of our Components Sector and its global competitiveness. He is also an International Jury member at various International Fairs.

More Information On The Seminars

Tannery efficiency improvement measurements by Mr B Ramalingam, Executive Committee Member & Former President, AC Tech Leather and Footwear Alumni Association.



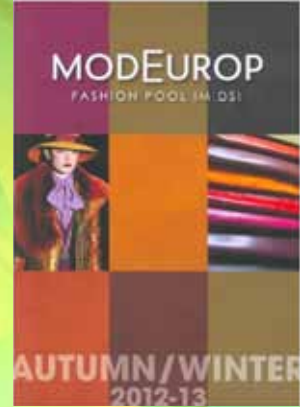
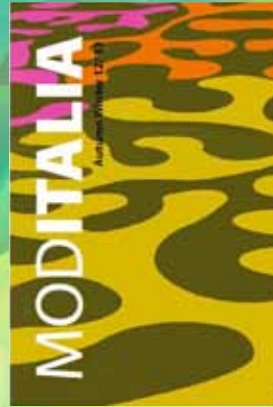
The talk on Tannery efficiency improvement measures would provide you with an insight on why efficiency improvement measures are required, provide clues on areas where efficiency can be enhanced, comparison between traditional and modern practices, tools for improvement, and above all benefits of change. The talk would in detail cover issues relating to quality control, HR, production and process layout, energy saving and information management

An Autumn in Ambur !

A Trend presentation on Colours, Leathers & Textures for the Autumn Winter 12/ 13 season

Saturday, 9 July 2011; 3.30 pm to 4.30 pm, Room B, Second Floor, Ambur Trade Centre

On the occasion of Ambur OPEN 2, CSIR-CLRI & ISF will be presenting "An Autumn in AMBUR" - A Trend presentation on Colours, Leathers & Textures for the Autumn Winter 12/ 13 season on Saturday, 9 July 2011; 3.30 pm to 4.30 pm, Room B, Second Floor, Ambur Trade Centre, Ambur.



The TREND presentation will be coupled with the release of **MODITALIA Colours & Textures** for the Autumn Winter 12/ 13 season and the release of the **official MODEUROP Colour Card** for the Autumn Winter 12/ 13 season.

We are inviting you to join us in our endeavour and witness what 'Ambur OPEN 2' holds and what we will re-write in the pages of India success stories.

Shri PV Gopalakrishna Bachi, President, ISF & **Shri K Srinivasan**, Convenor, Finished Leather Panel will be the Guests of Honour; **Prof Dr AB Mandal**, Director, CSIR-CLRI will preside.

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A Roadmap For The Indian Footwear Industry:

Shri P.V.Gopalakrishna (Bachi), Convenor, Leather Footwear Panel

The Global Footwear Trade is large and rich with a 5 billion pair leather and about 6 billion pair non-leather footwear trade with a total turn over of over US\$ 58 billion per year. This is an opportunity as India's share in global footwear trade in leather is ~ 1% in volume, 2.93% in value and negligible in non leather footwear.

The Value share in leather footwear reflects twice the value realization relative to global average. Without brand equity, low volume – mid and high value trade on footwear can be hardly sustainable. The Domestic segment of footwear is growing, but significant production is in decentralized sector with low technology back up support and weak quality systems.

The Export and domestic segments are weakly coupled. Export segment is based on low volume small capacity production model. Domestic segments are high volume mass production without quality standardization. The Challenge is in integration of models to suit India's cultural DNA of industrial production systems.

Global Scenario:

(Value in Million US\$) Source: ITC, Geneva

Details	2005	2006	2007	2008	2009
World Import	41048.47	44680.73	48381.44	51403.41	42862.89
India's Export	807.81	974.33	1174.03	1244.48	1254.37
% Share of India	1.97%	2.18%	2.43%	2.42%	2.93%

Source: ITC, Geneva

Major Exporting Countries of Leather Footwear

(Value in Million US\$) (Source: ITC, Geneva)

Countries	2005	2006	2007	2008	2009
China	8058.15	8769.20	9560.18	9809.16	8348.53
Italy	5931.77	6319.32	7488.62	7871.21	6213.64
Hong Kong	3736.17	3751.83	3730.94	3899.14	3053.31
Vietnam	1059.93	1438.67	2051.75	2408.42	NA
Germany	1664.03	1849.66	2041.93	2414.10	2005.83
Belgium	962.65	1424.45	1810.97	1968.50	1780.55
Spain	1488.78	1564.43	1746.66	1822.87	1639.62
India	1045.24	1236.91	1489.35	1534.32	1507.51
Portugal	1175.38	1210.33	1372.33	1456.49	1232.44
Netherlands	1040.36	1110.38	1208.57	1400.65	1313.95
Indonesia	905.96	1140.35	1151.35	1323.92	1170.82
Brazil	1479.55	1437.39	1386.49	1279.52	895.15
France	832.92	943.44	1081.29	1154.04	1020.73

Source: ITC, Geneva

Major Importing Countries of Leather Footwear

(Value in Million US\$) (Source: ITC, Geneva)

Countries	2005	2006	2007	2008	2009
USA	12115.27	12785.39	12373.90	11971.58	10049.16
Germany	3584.76	3788.09	3868.83	4190.18	3580.52
France	2911.24	3131.34	3474.80	3571.77	3282.79
Italy	2412.37	2730.29	3042.83	3197.15	2926.96
UK	3331.34	3352.79	3488.88	3383.30	2877.77
Hong Kong	3288.36	3327.61	3283.56	3422.58	2711.31
Netherlands	1149.43	1291.82	1460.42	1677.94	1522.89
Belgium	1129.57	1231.23	1530.76	1709.32	1485.40
Spain	1018.52	1196.47	1329.50	1604.20	1238.18
Russia	175.15	675.48	1384.16	1840.43	1223.83

Source: ITC, Geneva

Leather Footwear: is likely to lose share of the footwear market to non-leather footwear. Currently non-leather footwear price controls the global average price. Therefore, Leather Footwear could become a niche product segment. Leather footwear as a niche product will start determining its own price. Leather footwear may move towards customized product segment with market and price advantages.

Will it become innovation driven manufactured product? Will economy of scope become the USP?

Pricing of Footwear among major Asian Countries

(Unit Value/Pair-US\$) (Source: US Leather Industry Stats 2010)

Country	2003	2004	2005	2006	2007	2008	2009
China	6.75	6.49	6.61	6.76	6.83	7.46	7.68
Hong Kong	6.96	4.78	5.18	5.57	8.62	7.94	5.51
Vietnam	10.61	10.14	10.37	10.30	10.51	10.83	10.86
Indonesia	9.11	10.41	10.87	11.03	11.00	10.97	10.87
Thailand	11.31	11.38	11.67	12.46	12.08	13.18	12.43
Brazil	10.46	11.63	13.88	14.65	15.87	16.96	17.58
India	14.77	15.55	14.67	14.88	15.93	17.84	17.45

Source: ITC, Geneva

Ambur Open 2 - 2011

Major Markets

(Value in Million US\$) (Source: DGC&S)

Countries	2005-06	2006-07	2007-08	2008-09	2009-10	%
UK	164.18	190.23	216.33	220.84	270.92	21.60
Germany	140.87	176.75	204.18	185.48	182.59	14.56
Italy	91.11	136.50	169.42	164.67	170.35	13.58
France	56.94	75.78	87.26	97.88	124.15	9.90
USA	121.16	121.01	132.43	158.74	120.85	9.63

Source: ITC, Geneva

Footwear Product Mix

The Footwear Product Mix has also undergone a major change with a significant increase in the manufacture of Women's Footwear and Children's footwear. The exact percentages are:



The Export Targets set for Leather and Leather Products industry by the Department of Commerce, Govt. of India is quite challenging.

(Value in Million US\$)

Product Category	2009-10 Actual Exports	2010-11	2011-12	2012-13	2013-14
Finished Leather	625.54	660	720	810	950
Footwear					
(Leather, Non-Leather and Components)	1507.51	1670	2150	3000	4600
Leather Garments	428.52	475	660	900	1050
Leather Goods	756.02	850	1200	1400	1680
Saddlery & Harness	83.39	95	120	190	220
Total Export	3400.98	3750	4850	6300	8500

Source: ITC, Geneva

The Export of Footwear (leather, non-leather & components) is projected to grow at a CAGR of 32.16% from 2009-10 to 2013-14

There is a great **Opportunity** for India to take advantage of and increase its share of the global Leather and Leather Products trade significantly. India caters to just 2.93% of the worlds imports. The **increasing cost of manufacturing in other competing countries** give us **great advantages to capture a larger market share**. Our **technological strengths, abundant man power** and **good raw material resources** used cleverly **will make us world leaders** in this segment. Given the ambitious targets the industry needs support and intervention in the many areas primary among them being:

- **Infrastructure**
- Clusters to be developed in areas where cost of real estate is reasonable and labour is available in large numbers
(Traditional clusters are hindered by high cost of land and non availability of labour making expansion an unviable proposition)
- The cluster development should be holistic in nature covering tanneries as well as component manufactures in the fold
(This will provide logistic advantages as well as give more confidence to the foreign investors)
- Training facilities and technical institutions as well as testing laboratories



to be set up to feed manufacturing companies with continuous semi skilled/skilled man power

(Basic health care, schools and connectivity by rail and road to be also considered for providing a conducive atmosphere for people and goods to move in and out freely)

- Some common facility centers to be set up for high cost processes so that they can also be offered by smaller and medium scale manufacturers
- Strengthening infrastructure at ports to clear goods in and out to be addressed as customers lose confidence when delays occur due to these issues

(This will also help in controlling some illegal movements of semi processed goods under the guise of finished products)

- **Marketing & Promotion**

Our share in the pie among the worlds largest importers is negligible. Our promotional activity should be focused, continuous and effective. At this time when CHINA has lost its sheen due to negative publicity we should capitalize to build lasting relationships.

CLE should be present in each of the top 5 importing countries. Such offices should have facilities to provide the following:

- In depth knowledge of the industry there
- Should engage in constant promotional activities
- Facilitate B2B events regularly
- Arrange customer visit for members
- Provide correct information and ease JV and FDI from these countries.
- Have product portfolio's and member capability matrix for customers to shorten and reduce costs and time to find suitable supply partners
- Provide warehousing facilities to members with such requirements
- Form tie-ups with technical and skill development institutes for quick and up to date technology transfers
- Collect financial data on companies to make sure that members are working with right partners
- Provide technically trained translation services.
- **Important fairs and exhibitions to be identified and sufficient support to be extended to enable a good representation from our country**
- **Policy Intervention**

Footwear industry is first among all industries to employ a large number of people especially women with nil or negligible education. The industry works on low margins and also are subjected to the vagaries of Exchange fluctuation and volatile changes in input material costs. It provides the stepping stones for many poor families to afford basic amenities and educate their offspring. A service that goes unacknowledged. We request to consider a lower amount of taxation to be given as a support measure and would also require some other Policy Interventions for support, primary amongst them being:

- Cost of land to be included within clusters in the IDLS scheme
- Service tax to be exempted on testing and designing costs from both Indian and Foreign providers
- To raise DFIS from 3% to 5% and allow procurement from domestic vendors under this scheme
- Products listed for the use of DFIS license to be increased to all items as per SION
- Ladies footwear to get higher benefit under FPS as this is the largest segment and such a measure will motivate capacity expansion in this segment
- Domestic market is also a growing segment. Organized manufacturers find it difficult to compete with the unorganized sector due to excise duties, octroi etc to enable the organized sector to offer competitive pricing these rates need to be revised. Footwear is an essential item for daily life and should be treated as such.
- Children's shoes are exempted from taxes and duties even in developed countries such as UK. Request the authorities to look at the following a similar system so that school going children who grow fast can afford to buy shoes that fit them properly as parents make them wear either shoes too small or too big which cause long lasting problems.

The Footwear Sector is the engine of growth for the Indian leather industry and the Global leather sector cannot resist the change of wind, where innovation and competition will overtake the present, for long.





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Particulars	Shell Scheme - per sq.mtr. (Min. booking 9 sq.mtr.)	Bare Space - per sq.mtr. (Min. booking 36 sq.mtr.)	Compulsory Web Charges
National Participants	Rs.6,000/-	₹ 5,500/-	₹ 2,500/-
International Participants	US\$200/-	US\$180/-	US\$100/-

Service Tax @ 10.30 % will be charged extra.



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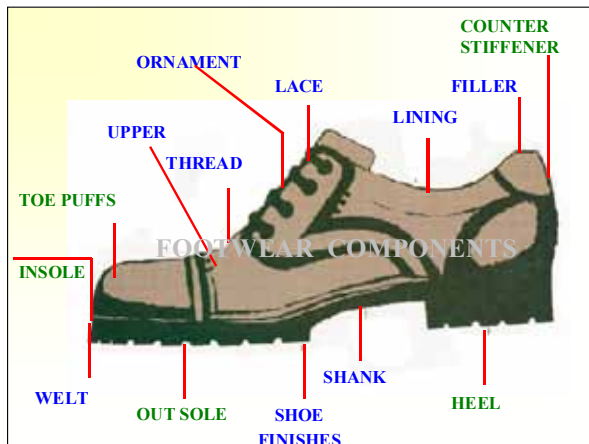
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Indian Footwear Components

Shri Sanjay Gupta – Convenor, Footwear Components Panel

The Indian Leather Industry consists of various segments namely tanning, footwear & footwear components, leather goods (including gloves), leather garments and harness & saddlery items. The footwear components sector is the backbone of the footwear industry and the growth of the footwear industry depends upon the growth of the footwear components sector and vice-versa. In the late 90's the Govt. of India executed a National Leather Development program for promotion of the leather industry in the country. The purpose of the program was also to develop the footwear components industry.

Various Components Used In Making A Shoe



Over View Of Footwear Components Sector

- A footwear is produced by using 31 major components and accessories. Different specifications and colours are required as per the design and type of footwear.
- Almost 90 - 95% of the components are produced in micro and small scale sectors in our country.
- India produces 2100 million pairs of Footwear every year estimated at around Rs. 17,000/- Crores out of which footwear components comprise of Rs.5,000/- Crores excluding leather uppers.

Importance Of Footwear Component Sector

- Footwear component is the “back bone of footwear industry” and a strong Components industry will only help in rapid growth of footwear industry also.
- The size of Indian footwear components Industry in the country is of Rs. 5,000 Crores and is expected to be doubled in next five years.
- The Component Sector, presently, has generated employment to approximately 13 lakh people in the country.
- This sector has attracted an approximate investment of Rs. 100 crores in last three years and which is likely to be doubled in next three years, provided suitable measures as suggested by us are taken to support this sector.

Achievements

- The production of footwear components in the country has grown by 40 to 50% during last 7 years.
- We have started exports of Soles, Insoles, Lasts, Toe-Counters, Textile

Linings, Rubber products etc., to recognized buyers in many parts of the world.

- Today we are producing 5000 pairs of Plastic Lasts every day as against 500 pairs about 7 year back and expected to double this capacity.
- There were no Sole Mould making units in the past but now more than 20 units are spread in various parts of our country. The country needs high technology base units in line with Italian industries to substitute imports.
- Renowned footwear buyers of the world like Coach, DKNY, Florsheim, Guess, Hugo Boss, Hush Puppies, Kenneth Cole, Marks & Spencer, Nautica, Nike, Nunn Bush, Reebok, Clarks, Stacy Adams, Tommy Hilfiger have been using footwear components produced by our country.

SWOT Analysis

STRENGTH

- Strong raw material base and Low – cost manpower to produce Footwear Components in the country.

WEAKNESS

- High Rate of Interest.
- Lack of Latest Technology.
- Weak Infrastructure.
- No rationale in Taxing system .
- Labour and HRD issues.
- Non presence of Fashion Studios to innovate new fashions.

OPPORTUNITIES

- Industries in Europe are winding up because of high cost of labour and raw materials and therefore shifting to third world countries. Their focus is on India for FDI's as we are favoured Nation.
- Large untapped global market.

THREATS

- Cheap imports from China, Taiwan & Bangkok.

To become more competitive the Industry requires handholding and support and some of the MEASURES required for the rapid growth of the Footwear Components industry are:

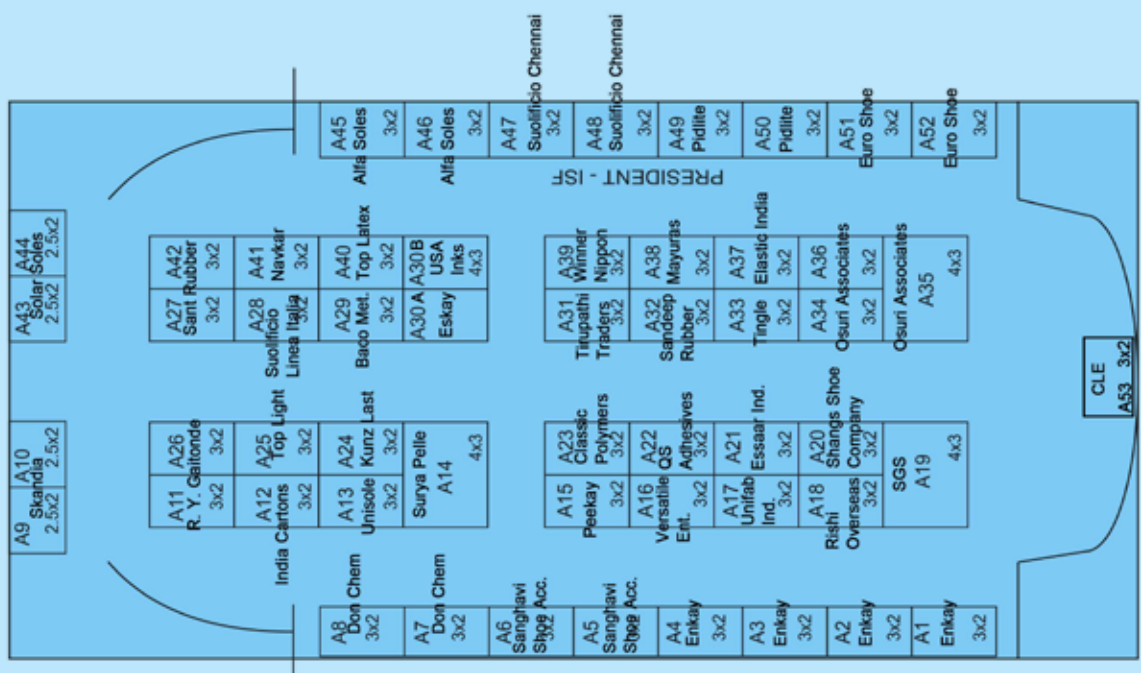
- Provision of Production Sheds with Plug In facility for machinery & Equipments.
- Recognition of footwear component manufacturers as deemed exporters on supply of components to 100% EOU/ EPZ units and 2% interest subvention scheme be extended to this sector also.
- Addition of machineries beyond chapter 64 of excise act also to support the footwear components/accessories industry under IDLS Scheme.
- Full Financial Assistance for Research & Development and also to purchase technical know-how.
- Re-introduction of higher subsidy for undertaking study tours/ participation in international/Domestic fairs.
- Concept of establishment of Fashion Design studio should be introduced.
- Upward Revision in Excise exemption limit for SSI Units to first clearance of specified goods.
- Relaxation & simplification of export procedures to neighboring countries.

Exhibitors At **AMBUR OPEN 2**

Company Name	Hall No.	Stall No.			
Aadil-Cunial Components India Pvt. Ltd.	B	B37	Malwa Footwear Components	B	B34
Abhilash Chemicals Pvt. Ltd.	C	C38	MAYURAS Industrial Service	A	A38
AGGU Soles	B	B33	Meccanica Alen SNC	B	B56
Agra Footwear Manufacturers & Exporters Chamber (AFMEC)	C	C52	Meditek International Pvt. Ltd.	B	B57
Al Furqan International	C	C10	Milspeed (I) Pvt. Ltd.	B	B31
Alfa Soles	A	A45, A46	N. Abdul Wajid & Co.	B	B29
APT Leather	C	C11	N. M. Zackriah & Co.	C	C2
BACO Metallic Industries	A	A29	Nadeem Ware Exports	C	C3
Balmer Lawrie & Co. Ltd.	C	C34, C35	Navkar India	A	A41
BASF India Ltd.	C	C13	Nibras Tannery Pvt. Ltd.	C	C32
Benson Polymers Ltd. (Polyfix)	B	B1	Osuri Associates	A	A34, A35, A36
Bizpro Associates	C	C1	Peekay Lamicoats Pvt. Ltd.	A	A15
Bostik India Pvt. Ltd.	B	B27	Pidlite Industries Ltd.	A	A49, A50
Bureau Veritas Consumer Products Services, India Pvt. Ltd.	C	C44	Presidency Leather Exports	C	C16
C&E Limited	C	C17, C18, C19	Pulcra Chemicals India Pvt. Ltd.	C	C26
CSIR-Central Leather Research Institute (CSIR-CLRI)	C	C45	QS Adhesives India Pvt. Ltd.	A	A22
Central Footwear Training Institute (CFTI)	C	C47	R. Y. Gaitonde & Company	A	A11, A26
Chemical Solution SRL Italy	C	C41	Rishi Overseas	A	A18
Clariant Chemicals (India) Ltd.	C	C8, C9	Rudra Blades & Edges Pvt. Ltd.	B	B17
Classic Enterprises	A	A23	S. P. Traders	B	B2
Council for Leather Exports (CLE)	A	A53	Sagittarians International Ltd.	B	B21, B22, B23
CMI Machines Pvt. Ltd.	B	B7	Salma International	B	B36
Color Shoppe	C	C29, C30	Sandeep Rubber Industries	A	A32
Comelz India Pvt. Ltd.	B	B60, B61	Sanghavi Shoe Acc.	A	A5, A6
Deccan Shoe Last Pvt. Ltd.	B	B24	Sant Rubbers Limited	A	A27, A42
Dhupar Chemicals Pvt. Ltd.	C	C6, C20	SGS India Pvt. Ltd.	A	A19
Don Chem Pvt. Ltd.	A	A7, A8	Shangs Shoe Components	A	A20
Elastic India	B	B19	Shasi Enterprises	B	B44
Enkay HWS India Limited	A	A1, A2, A3, A4	Skandia Cutting Dies Pvt. Ltd.	A	A9, A10
Eskay Sales Corporation	A	A30A	Sky Industries Ltd.	B	B25
Ess Aar Industries	A	A21	Solar soles	A	A43 and A44
Euro Shoe Company Pvt. Ltd.	A	A51, A52	Sri Venkateswara Textile Coating Co.	B	B14
FDDI International Testing Centre, Chennai	C	C48	Srinala Leathers India Pvt. Ltd.	C	C24
Focus Machines India Pvt. Ltd.	B	B45, B46	Stahl India Pvt. Ltd.	C	C14, C15
Forms N Fashions	C	C12	Star International Pvt. Ltd.	B	B28
Four Seasons Leather Chemicals	C	C40	Stilla Enterprises India Pvt. Ltd.	B	B35
Freudenberg Nonwovens India Pvt. Ltd.	B	B38	Sudhpriya Plastichem Pvt. Ltd.	B	B32
G. G. Organics (P) Ltd.	C	C31, C33	Suolificio Chennai	A	A47, A48
Gemini Shoes Enterprises Pvt. Ltd.	B	B43	Suolificio Linea Italia (India) Pvt. Ltd.	A	A28
GMS Machines India Pvt. Ltd.	B	B62, B62	Supreme Cuir Chem India Pvt. Ltd.	C	C42
Goodluck Shoetech Inc.	B	B5	Surya Pelle	A	A14
Hari Chand Anand & Co.	B	B58, B59	Textile Tapes Corporation	B	B8
Harman Ambur Clicking Dies	B	B10	Tingle Manufacturing Co.	A	A33
Harman Sales Pvt. Ltd.	B	B11	Tirupati Traders	A	A31
Horizon Leathers	C	C21	Top Latex Products	A	A40
Humifogg Systems	B	B40, B41	Top Light Labels and Elastics	A	A25
IndChem Marketing Corporation	C	C27, C28	Torielli SpA	B	B9
India Cartons	A	A12	TUV SUD South Asia	C	C50
Indofil Industries Limited	C	C36, C37	Unifab Industries	A	A17
Intek Tapes Pvt. Ltd.	B	B55	Unisole India Ltd	A	A13
International Corporation	C	C22, C23	Unity Engineers	B	B30
International Leather Materials	B	B16	USA Inks Corporation	A	A30B
J J Enterprises	B	B18	V. S. K. Enterprises	B	B47
Jafral Insoles India Pvt. Ltd.	B	B15	Versatile Enterprises Pvt. Ltd.	A	A16
Juki India Pvt. Ltd.	B	B12, B13	Vibgyor Trims	B	B39
K. M. Ahmed & Co.	C	C7	Viswaat Chemicals Ltd.	C	C4, C5
Kailash Trade Links Pvt. Ltd.	B	B42	Weston Polymers	B	B64
Kanna Chemie Pvt. Ltd.	C	C43	Winner Nippon Electronics Ltd.	A	A39
Katt Special Machines	B	B65, B66, B67	Zahnonero India Pvt. Ltd.	B	B26
KMK Enterprises B B6			Zuha Leather Pvt. Ltd.	C	C25, C39
Kunz Last Development (I) Pvt. Ltd.	A	A24	National Institute of Fashion Technology	C	C46
Leather Links	A	A37	e-Readiness Centre	C	C49
Magamayee Trading Enterprises	B	B20	Western Gateway Cargo Services Pvt Ltd	C	C51
			ETA Star Property Development Ltd	C	C53
			Skicorp	B	B3
			HDFC Banf Ltd	C	C52
			AFCAMMI	B	B4

HALL - A GROUND FLOOR

Shoe Components & Accessories



FOYER - INAUGURATION

Ambur Open - 2011
9-10 July 2011

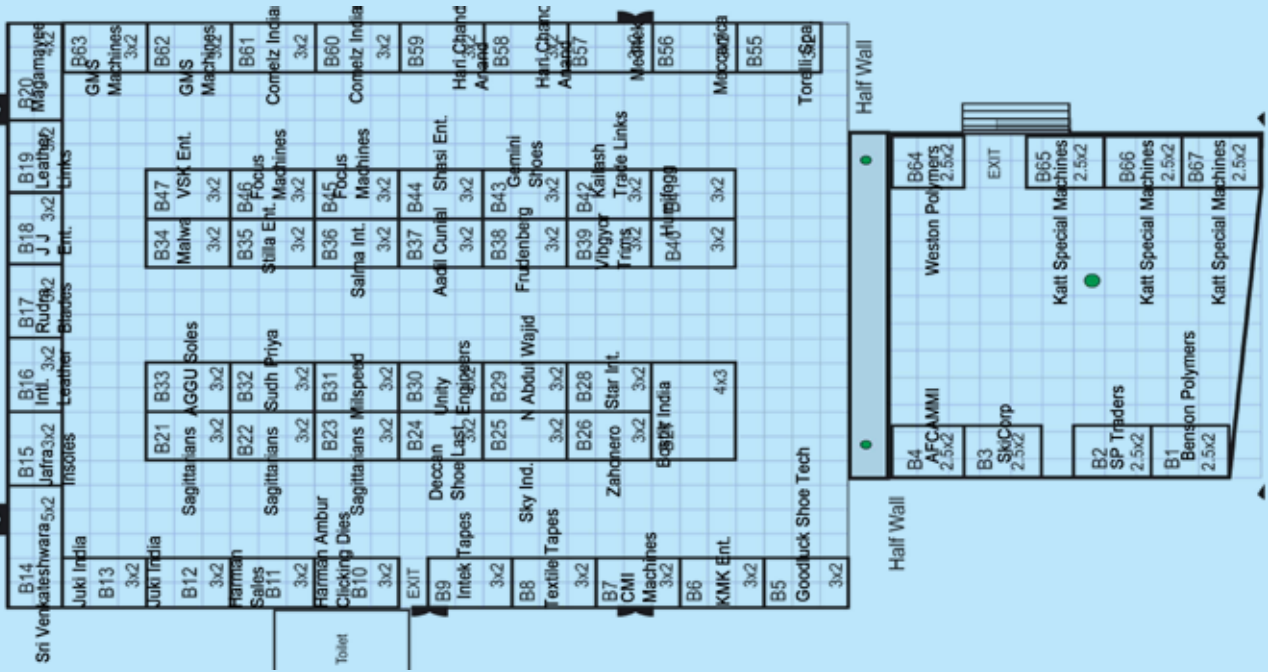
3m x 2m = 6sqm
4m x 3m = 12sqm
2.5m x 2m = 5sqm

Stalls - 44nos
- 4nos
- 4nos

Total - 332sqm

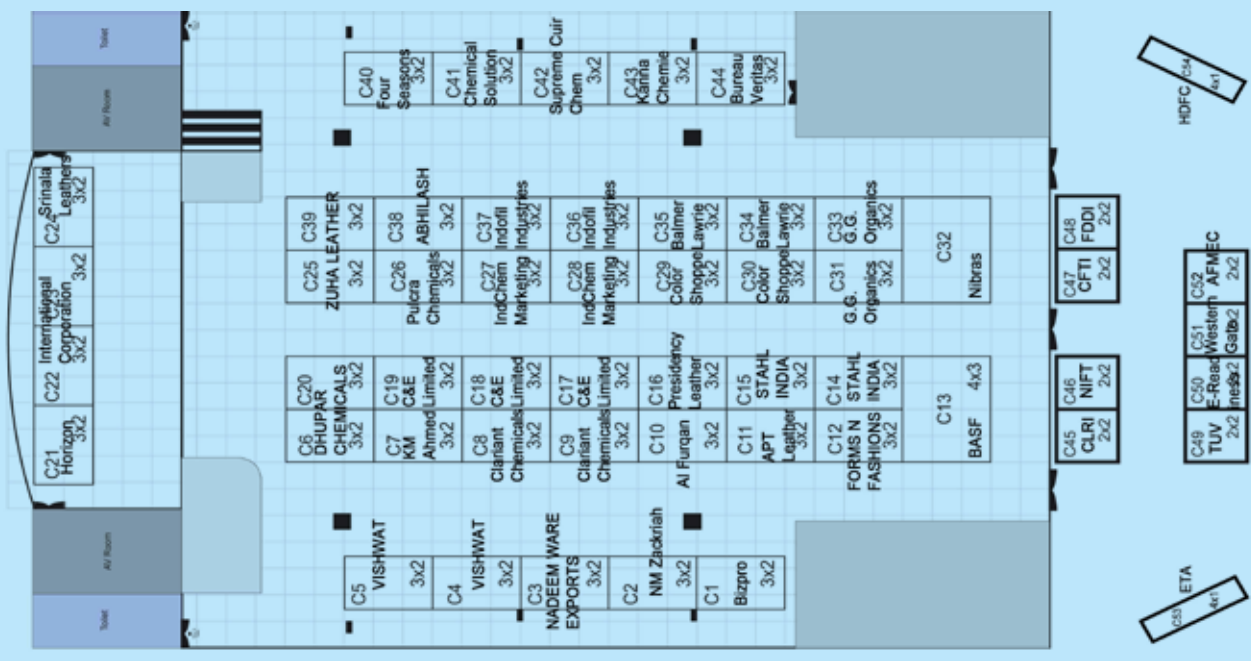
HALL - B

Shoe Components & Accessories



HALL - C

Finished Leathers





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