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PROBLEMS AND PROSPECTS OF LEATHER INDUSTRY IN VELLORE DISTRICT

DR. AJAY KUMAR SHARMA
SR. ASST. PROFESSOR
DEPARTMENT OF COMMERCE
SSL
VIT UNIVERSITY
VELLORE

ABSTRACT

Indian leather industry has experienced a huge change from being an exporter of raw leather to an exporter of finished leather products. Credit can be given to the various policy initiatives taken by the government from time to time. At present leather industry is among top industries which earn foreign exchange for India. There are more than 1200 units in Vellore district contributing around 37% of Indian leather goods exported to foreign countries. In Vellore these industries are facing environmental issues. Measures are required to avoid pollution of ground water and agriculture fields due to effluents from these leather and tanning units. Through this paper, an attempt has been made to see the present condition of leather industry, its current problems and other burning issues.

KEYWORDS

tanning, effluents, export, zero liquid discharge.

INTRODUCTION

There are around 1200 leather tannery in and around Vellore. Vaniyambadi, Ambur, Visharam, Ranipet and Pernambut are the towns of Vellore district. Vellore district contributes 37% of the India's export of leather. Hence Vellore district is one of the top exporters of finished leather in India. The chemicals used for making leather are highly dangerous to environment. In order to assess the level of technology used in leather production and waste disposal technology, tanneries located in Ambur and Vaniyambadi were selected since most of the small scale and large scale tanneries are concentrated in this area. The CETP (Common Effluent Treatment Plant) at Valayampet in Vaniyambadi has achieved complete ZLD (Zero Liquid Discharge) at a cost of 150 crores. In order to determine social impact of leather production on the nearby society and workers, labour working at the waste disposal site and the villagers of the nearby village were interviewed. Finally, an officer in charge of Waste Water Treatment Plant was consulted to assess the effluent treatment technology used in cleaning the effluent coming from tanneries.

HISTORY OF LEATHER INDUSTRY IN VELLORE

British rule inspired the people in the trade to put up leather tanneries. Since leather industry required plenty of water, the main source of water was the Palar river and it was the natural resource. It had continuous flow of clean water. The next requirement was transport to Chennai, which was the gate way port for export of leather to European market. The kingdom of Mysore was also a well reputed buyer of the industry in the past. The port still holds an important medium even today after more than a century. Vaniyambadi, Ambur, Pernambut and Ranipet, which fulfilled the basic requirements, attracted the leather men.

PROCESS OF TANNING

The process of leather tanning into mechanized industry has rather been slow in Vellore district was no exception. For more than 50 years, tanning was essentially a manual operation. The process was known as vegetable tanning and the method was bark tanning.

The transformation from house hold activity to mass production methods in separate premises engaging group of workers took place in the Forty. By mid-forty there were about 20 such organized production centers which could fit into the definition of a tannery. It was in the fifties that mechanically driven drum was introduced and tanning with wattle extract was extensively used. The vegetable tanning or East India (E.I) tanning dominated the leather industry for the next 25 to 30 years. The phase of mechanization gained momentum in the seventies and eighties with the introduction of chrome tanning, necessitated by the increasing demand for chrome tanned leather in international markets.

REVIEW OF LITERATURE

Leather industries play an important role in the development of our economy, while describing some basic issues pertaining to the leather industries in developing economies, some review of literature are given here.

Shetty (1963) pointed out that the technological base in the industry was extremely primitive and a unit was rarely interested to adopt technological modification in the process.

Usha (1985) based on Tamil Nadu Leather Tanning Industry in Year 1978-79. She focused attention on some selected issues related to the structure of work force, Mechanization and the prospect of the traditional skilled and unskilled workforce in the industry. Her Major findings were that the leather tanning sector in Tamil Nadu, about 90.0 per cent of the total entrepreneurs" belonged to the Muslim Community and rest belong to the Hindu Community. As regards the Mechanization of Industry, most of the tanning and manufacturing units were using Labor-intensive technique, in which the skilled hand workers formed a majority of the workforce.

Qureshi (1990) discussed some issues of leather making artisans of Mewat region in the district of Gurgaon, Haryana A large Majority of Leather Products makers were facing problems of inferior quality of goods, time consuming, less profitability, low prices for products, non-availability of credit and payment delays.

Sahasranaman (1993) pointed out some basic problems of the leather product industry. According to this study, in the Leather Product Industry, the dominance of traditional production system, confinement of production to a particular community, absence of modernization of technology, were the basic problems of the producers.

Chandramouli's (1999) on "Leather and Social Development" focused on some characteristics of Leather Industry. The author stated that the production of leather and leather products involves various socio-economic activities. The economic activities were largely in the form of generation of income, creation of employment, etc. On the other hand, the production of leather and leather goods led to the social development in the form of understanding, awareness, social equity, better health, education and nutrition.

Bhavani (2010) highlights the issue of quality employment generation by the SSIs and negates the short term attitude of increasing the volume of employment generation compromising with quality. The author argues that employment generation by the SSIs may be high in quantitative term but very low in quality. Technological up gradation would enable the small firms to create quality employment improving, duration and skill. This structural shift may reduce the rate of employment generation in the short run but would ensure high-income employment generation in the long run.

Thygarajan, A.V. Srinivasan, A. Amudesweriin Leather 2010 make an in- depth analysis of the Indian Leather Industry and a forecast of its prospects in future. According to them, Indian Leather Industry has risen from the position of exporter of raw hides and skins to a level of major player in the global leather trade.

S.C. Kumar in his research paper provides some basic information pertaining to nature and structure of the leather industry and highlights its significance in the national economy and its linkages.

The work of Saurabh Sinha and Sanjay Sinha give a light on the Indian Leather Industry as a whole, the general background, the regulatory and policy changes needed for the promotion and development of leather industry from the exporter of raw hides and skins to the finished leather and leather products exporter. They deal, at length, with the world market, future demand for finished leather, raw material availability, the production infrastructure, productivity and quality. T. Ramaswami discusses the contribution of CLRI to the promotion of Indian leather industry in his article in "Indian Survey of Indian Leather Industry". The CLRI has developed technologies for cleaner production, cost reduction, improvement of quality of leather, manufacture of more sophisticated leather chemicals, end of pipe treatment of tannery waste waters, improved methods of fabrication of shoes, leather garments and leather goods and recovery of value added materials from by products.

Satya Sundaram discusses the favourable aspects of Indian footwear industry which put India one among the top ten producers of footwear and its components. Three major factors have been identified as favourable for Indian shoes manufacture. India is one of the big producers of raw hides and skins and its tanning costs are comparatively low. Due to deregulation of the economy massive foreign investment are coming into India.

A. Kumaresan, on the basis of a survey about the export performance of leather and related goods, has revealed that the Indian leather industry has bucked the general economic trend and registered good growth in exports in 2008-09. The future of this industry remains bright, as the demand for leather products is projected to increase both within India and across the globe.

The work of Dhulasi Birundha Varadarajan and Saradha Krishnamoorthy is an effort to assess the economics of the growth of leather and its impact on environment. While emphasizing the importance of growth of leather industry for its positive effects, one is aware of the negative effects viz. environmental damage through the spoilage of drinking water, water for farming and land fertility. So a trade-off occurs while emphasizing the growth of the leather and its environmental damage. A team of experts of CLRI conducted a survey on raw hides and skins for the Ministry of Commerce, Government of India. The report provides valuable information on the present status of the raw material, production, quality, magnitude of wastage occurring, curing and preservation practices, market structure, time lag and arrival and destination of raw materials pertaining to important terminal markets for hides and skins and meat animals. This survey covers different states including the state of Kerala.

Dr. Satya Sundaram in his article in "Facts for you" describes the potentiality of leather industry in the economic development of the country. Leather industry occupies an important place among the major industries because of its high employment potential. Leather units in the country are mainly concentrated in places like Chennai, Vaniambadi/Ambur, Delhi/Agra, Bangalore, Kanpur, Calcutta, Pune and Hyderabad. The Southern region produces as much as 75% of the total finished leather, while for leather goods like wallets, ladies handbags, luggage cases etc. eastern region is ahead of other regions. The favourable factors for the industry include availability of adequate raw material, abundant low waged labour, liberalized economic policies and governmental support for the industry's growth and export.

R.R. Prasad and G. Rajanikanth deal with the origin, development and growth of leather and allied industries in different parts of India. The use of skins began so early in the history of human race. The early man used skins for various purposes like covering his body, making house hold utensils etc. the origin, development and distribution of leather and allied industries in different parts of India are influenced by various social, economic, religious and ecological factors. The tanning industry is mainly depended upon 16 two things for its development- the pelts of animal and the tanning materials. India is very rich in tanning materials like 'avaram' (Cassia Auriculata), 'babul' (Acacia Arabica), 'myrobalan' (Terminalia Chebula), 'wattle' (Acacia Decurrens) and 'dividivi' (Caesalpinia Cariania). The production of hides and skins depends upon the total cattle population in different regions and a number of other factors such as the religious sentiments of the people.

OBJECTIVES OF THE STUDY

1. To know the current trends in leather market
2. To study about the problem faced by tanners

RESEARCH METHODOLOGY

Source of data is primary data like Questionnaire through direct personal interviews and secondary data – Internet, books, various publications and magazines from 30 tanners of Vellore district. Statistical techniques like frequency distribution, percentage analysis of the data is applied. The period covered under this study was January 2016 to April 2016.

LIMITATION OF THE STUDY

The major limitation of the study is that the results may not be universally applicable as it is descriptive study. The opinion of the respondents may differ at different points of time. If a large number of respondents have been considered from study, the results might have differed in the case. The sample size restricted to 30 only and the area of study is also restricted to only Vellore district.

ANALYSIS AND INTERPRETATIONS

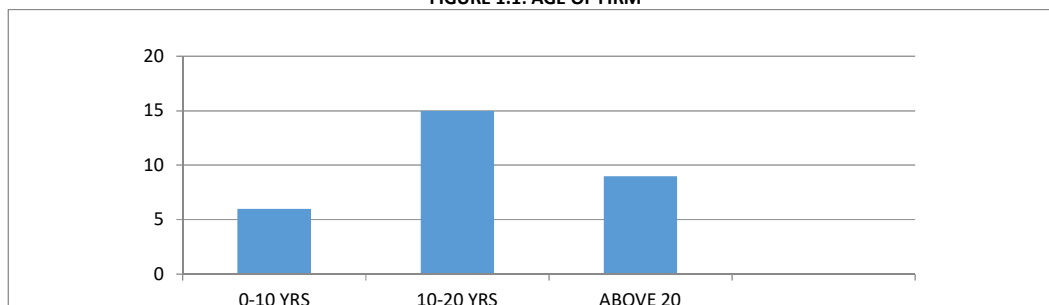
PERCENTAGE ANALYSIS

The data pertaining to age of firm of the respondents are presented in table 1.1:

TABLE 1.1: AGE OF FIRM

AGE	FREQUENCY	PERCENT
0-10 YEARS	6	20%
10-20 YEARS	15	50%
ABOVE 20 YEARS	9	30%
TOTAL	30	100%

FIGURE 1.1: AGE OF FIRM



Source: primary data

INFERENCE

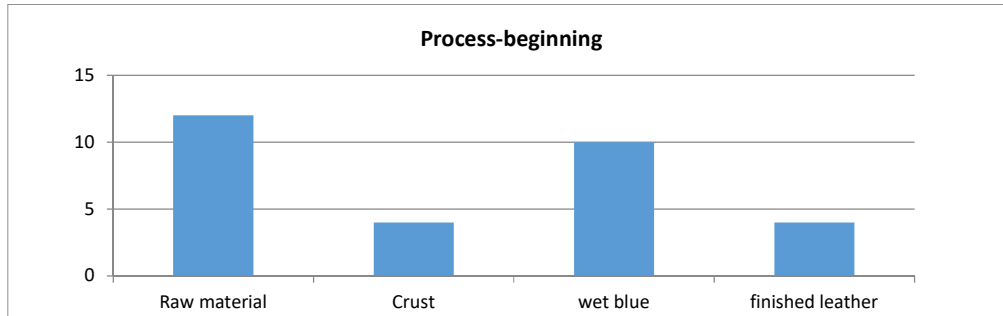
From the above table it is inferred that the 50% of the age of firm belongs 10-20 years. The 30% belongs to above 20 years and only 20% of the tanners are lesser than 10 years. The same resulted are also exhibited in figure 1.1.

The data pertaining to the beginning of process are presented in table 1.2

TABLE 1.2: PROCESS-FROM

VARIABLE	FREQUENCY	PERCENT
RAW MATERIAL	12	40%
CRUST	4	13.33%
WET BLUE	10	33.34%
FINISHED LEATHER	4	13.33%

FIGURE 1.2: PROCESS-FROM



Source: primary data

INFERENCE

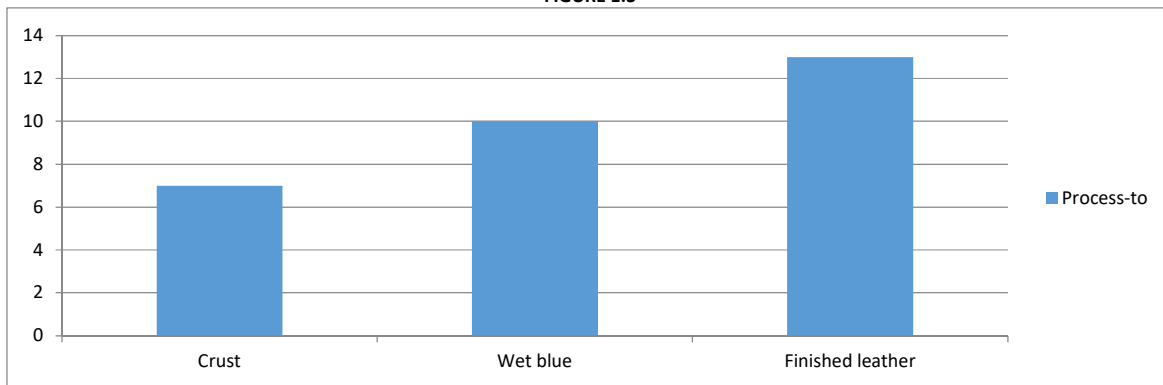
From the above table it is inferred that 40% of the respondents start their tanning process from Raw materials. The percentage of tanners start their process from crust and finished leather are almost equal to 13.33% and tanners who start their process from wet blue are 33.34%. as shown in table 1.2.

The data pertaining to the ending of manufacturing process are presented in table 1.3.

TABLE 1.3: PROCESS-TO

VARIABLE	FREQUENCY	PERCENT
CRUST	7	23.33%
WET BLUE	10	33.33%
FINISHED LEATHER	13	43.34%

FIGURE 1.3



Source: Primary data

INFERENCE

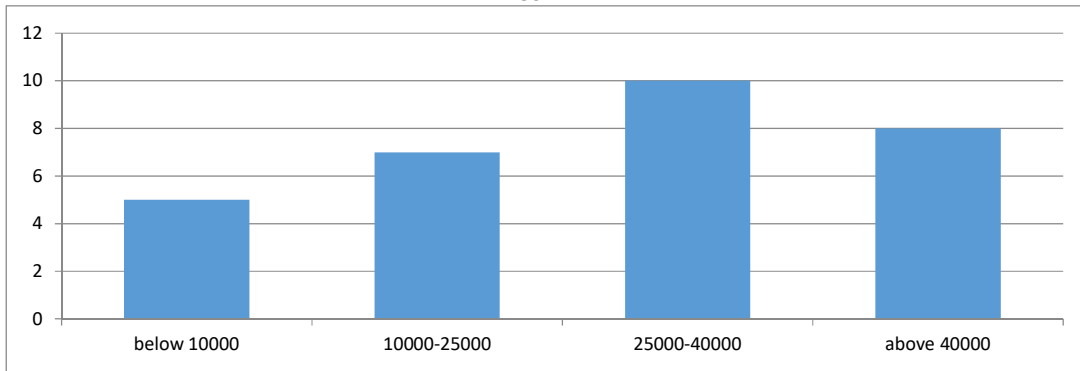
From the above table it is inferred that 43.34% of the tanners produce finished leather.33.33% of the tanners produces Wet blue and remaining 23.33% manufacture Crust leather. There are few tanners even produce leather products such as Wallets, Jackets, shoes etc. but it is not taken in the record. The same resulted are also exhibited in figure 1.3.

The data pertaining to capacity of production are presented in table 1.4.

TABLE 1.4: CAPACITY OF PRODUCTION

VARIABLE	FREQUENCY	PERCENT
BELOW 10000 units	5	16.66%
10000-25000 units	7	23.33%
25000-40000 units	10	33.34%
ABOVE 40000 units	8	26.67%

FIGURE 1.4



Source: Primary data

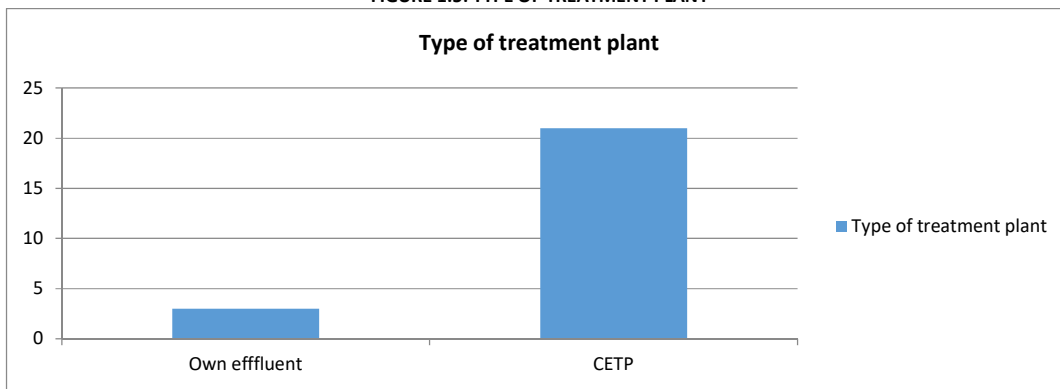
INFERENCE

From the above table it is inferred that 33.34% of the tanneries are medium level whose production capacity are 25000-40000 units per month. 26.67% of tanneries are large scale tanneries whose capacity of production are more than 40000 units. The small level tanneries whose limit is restricted between 10000 to 25000 units and 16.66% are very small units whose production limit is less than 10000 as shown in table 1.4 and figure 1.4 The data pertaining to Type of treatment plant are presented in table 1.5.

TABLE 1.5: TYPE OF TREATMENT PLANT

VARIABLE	FREQUENCY	PERCENT
OWN EFFLUENT TREATMENT PLANT	9	30%
COMMON EFFLUENT TREATMENT PLANT	21	70%
TOTAL	30	100%

FIGURE 1.5: TYPE OF TREATMENT PLANT



Source: Primary data

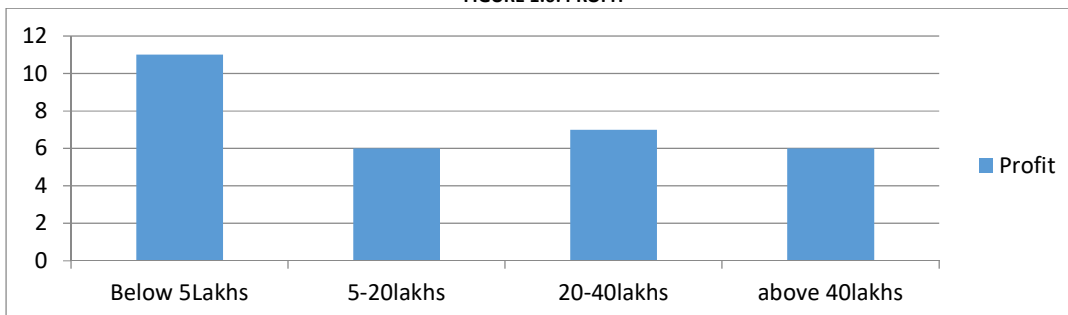
INFERENCE

In the table 1.5 it shows that the 70% of tanners use the common effluent treatment plant and remaining 30% of tanners have their own treatment plant. As shown in figure and table 1.5. The data pertaining to profit earned by tanners are presented in table 1.6.

TABLE 1.6: PROFIT

VARIABLE	FREQUENCY	PERCENT
BELOW 5LAKHS	11	36.66%
5-20LAKHS	6	20%
20-40LAKHS	7	23.34%
ABOVE 40LAKHS	6	20%
TOTAL	30	100%

FIGURE 1.6: PROFIT



Source: Primary data

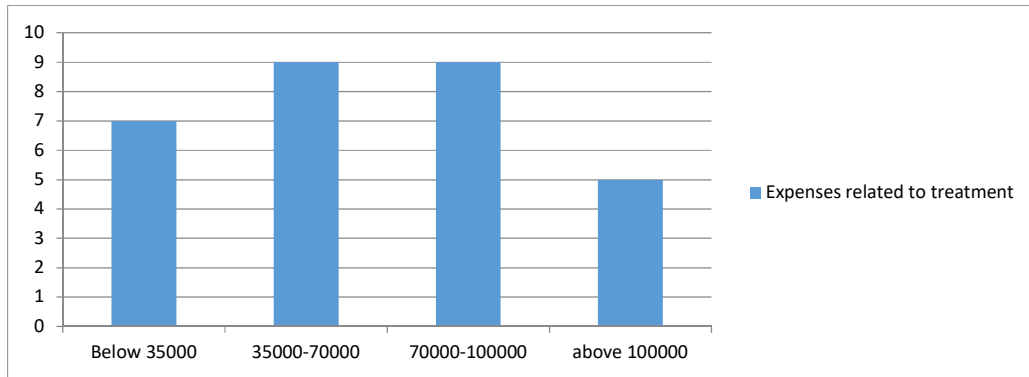
INFERENCE

From the above table it is inferred that 36.66% of the tanners receive the profit of below 5 lakhs. 23.34% of tanners has profit in range of 20-40lakhs. 20% of tanners have high profit of 40 lakhs and remaining market 20% of tanners has profit between 5-20 lakhs, as shown on table and figure 1.6. The data pertaining to expense related to production are presented in table 1.7.

TABLE 1.7: EXPENSES RELATED TO TREATMENT

VARIABLE	FREQUENCY	PERCENT
BELOW 35000	7	23.34
35000-70000	9	30%
70000-100000	9	30%
ABOVE 100000	5	16.66%
TOTAL	30	100%

GRAPH 1.7: EXPENSES RELATED TO TREATMENT



Source: Primary data

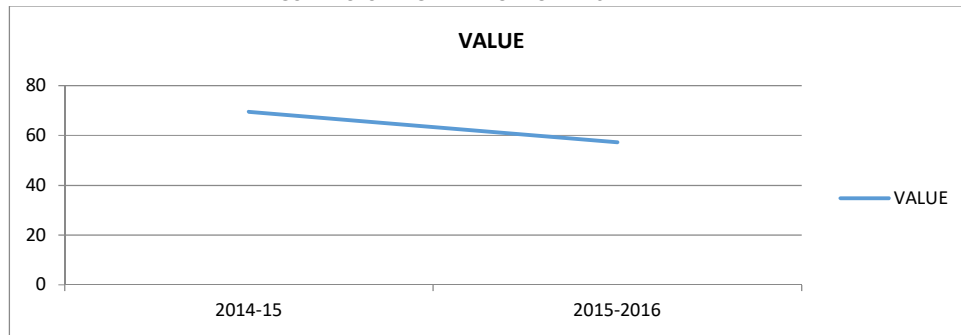
INFERENCE

From the above table it is inferred that 30% of the tanners incurred expenses related to treatment are 35000-70000 and 70000-100000. 23.34% of tanners expense below 35000 to treatment plant and 16.66% have high expense of treatment plant above 100000. The data pertaining to number of labors are presented in table 1.8.

TABLE 1.8: CHANGE IN EXPORT OF FINISHED LEATHER

YEAR	VALUE IN MILLION RS
2014-15	69500.48
2015-16	57353.95
CHANGES	-21%

FIGURE 1.8: CHANGE IN EXPORT OF FINISHED LEATHER



Source: Secondary data

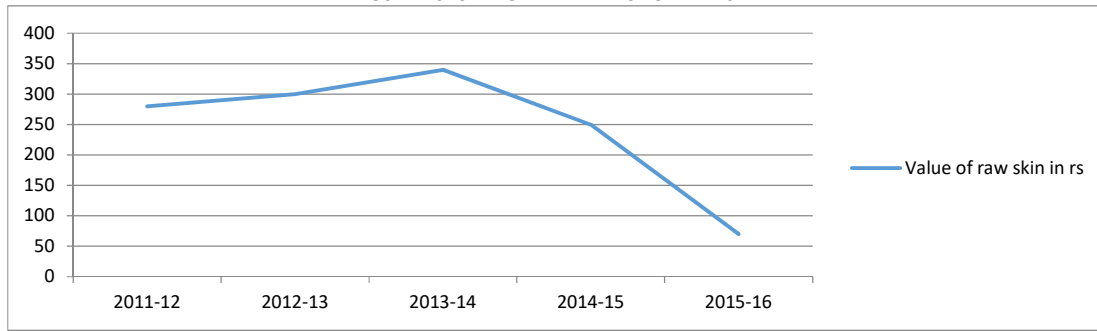
INFERENCE

Table 1.8 shows that the value of export has been reduced up to 21% as compared to last year. The data pertaining to change in the value of raw skin are presented in table 1.9

TABLE 1.9: CHANGE IN THE VALUE OF RAW SKIN

YEAR	VALUE IN RS/PSC OF 5FT
2011-12	280
2012-13	300
2013-14	340
2014-15	250
2015-16	70

FIGURE 1.9: CHANGE IN THE VALUE OF RAW SKIN



Source: Secondary data

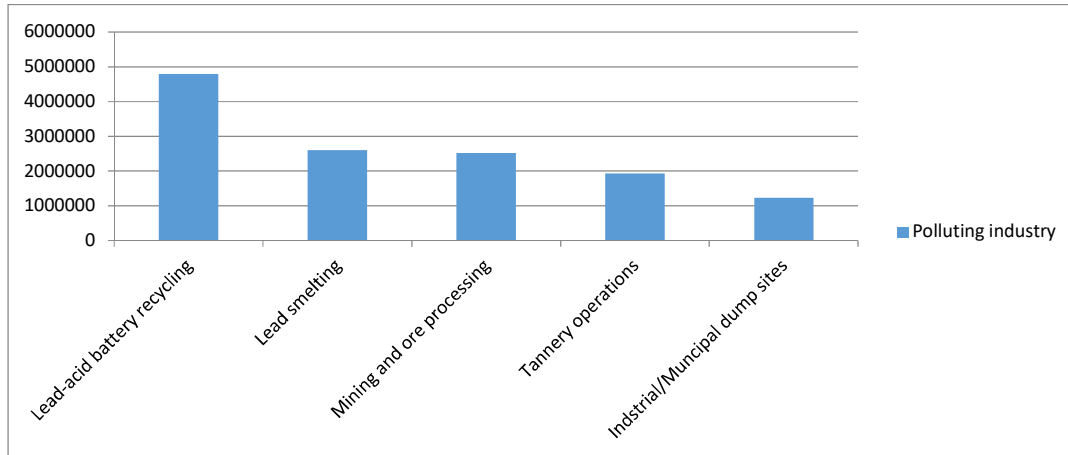
INFERENCE

From the table 1.9 value of raw skin has been shown which shows a downward trend. The data pertaining to polluting industries are presented in table 1.10.

TABLE 1.10: POLLUTING INDUSTRY

VARIABLES	AFFECTS NO.OF PERSONS
Lead-acid battery recycling	4800000
Lead smelting	2600000
Mining and ore processing	2521600
Tannery operations	1930000
Industrial/Municipal dump sites	1234000

FIGURE 1.10: POLLUTING INDUSTRY



Source: Secondary data

INFERENCE

From the table 1.13 the Lead-acid recycling industry cause high pollution.

FINDINGS

50% of the tanners engage in the business from 10 to 20 years. 40% of the tanners start their process to manufacture leather from raw skin. 43.34% of the tanners produce finished leather. 33.34% of the tanneries has capacity to produce 25000-40000 units per month. 50% of the tanners purchase raw material from national market. 33.33% of the tanners sale their product in national market. 70% of the tanners uses the common effluent treatment plant to treat the polluted water. 33.34% of the tanners incurred the expenses between 20-40 lakhs. 36.66% of the tanners receive the profit up to 5 lakhs. 60% of the tanners incurred expense related to treatment is in the range of 35000-100000. 30% of the tanners give job opportunity to below 20 persons. 40% of the tanners have 20-40 number of labors. -21% change has been identified in the export value. The value has reduced more than three times in a period of year. The tanning industry affects 19,30,000 of lives by pollution.

CONCLUSION

The government has to review its policy towards the industry, more incentives should be provided to tanners. The cost of treating the water should be reduced as much as possible because it is the burden for tanners. New technologies of manufacturing should be adopted by tanners and boost the industry. Well educated and talented technician, labors are required to make high class leather. The industry should focus on the finished and various kind of leather product from which the demand in international market will increase. Tanners should promote to export their product as much as possible. There is no import duty on raw skin, wet blue and crust this create the less opportunity of raw skin merchant to sale the product at good price. The tanners have suggested that due to barriers of using limited water they are not able to manufacture high quality of leather. The new methods which are suggested by CLRI (Central leather research institute) may pollute less than the traditional method but the quality has been reduced. There are several other industries which cause more pollution than leather industry but leather industry faces much obstacle from the government and pollution control board.

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