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PROBLEMS AND PROSPECTS ARISING IN  
THE MARKETING OF FISHMEAT AND LEATHER  
GOODS IN DEVELOPING COUNTRIES

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## I N T R O D U C T I O N

If one looks at the production figures of footwear alone, isolated, and from other factors, the progress made by India during the 25-year period from 1947 to 1971, will seem impressive.

In 1947, the country produced a mere total of 81 million pairs of footwear. The figure for 1971 was 501.6 millions, 5.7 times as much as in 1947. Leather footwear production rose phenomenally from 59.4 million pairs to 215.9 millions. Rubber footwear production more than doubled itself, growing to 43.7 million from 21.6 million pairs. And on top of this in 1971, 42 million pairs of plastic footwear were produced.

All this would appear to represent considerable achievement, something to be proud of. If we see these figures in the correct perspective, setting them against the tremendous growth of population in India and the achievements of other countries during the corresponding period, there will, however, be little room for satisfaction.

During the 25-year period referred to, India's population grew from 341 to 546 million. Despite an approximate four-fold increase in production, the annual per capita consumption has gone up to a meagre 0.55 from 0.24. In the U.S.A. and the U.K., the annual per capita consumption is 5 to 6 pairs.

An attempt is made in this paper to analyse the causes for this poor performance and the means to step up production and ensure efficient distribution. Distribution being largely a marketing problem, this paper will concern itself with the relevant aspects of this discipline as far as footwear and leather goods are concerned.

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## CHAPTER I

### THE LEATHER INDUSTRY IN INDIA

Till India became independent in 1947 and entered on an era of industrial expansion, production of footwear and leather goods was largely a cottage industry. Hardly any machines were used, all the work being done by craftsmen with hereditary skills. The range of manufacture was limited to chappals and boots for the armed forces.

Today the picture is different, but the changes that have taken place are not as radical as one may suppose. The range of production is larger and more varied, and our products are known and accepted in international markets. The bulk of the production, nearly 70% of it, is still accounted for by the small units.

The industry falls into three categories:

1. The organized, mechanized sector
2. The small-scale sector with minimal mechanization
3. The Cottage industry sector

There are 12 major units in the organized sector with a total investment of Rs 1 billion. The investment of the small-scale and cottage industry sectors is Rs 1.3 billion. These two sectors provide employment for over 600,000 people.

The cottage industry units are, for the most part, scattered around Agra and Kanpur. In Agra alone, over 25,000 cobblers are engaged in this work.

The small-scale sectors are located mainly in Maharashtra, West Bengal, Bihar, Gujarat, Madhya Pradesh, Punjab, Rajasthan and Uttar Pradesh.

Expansion of production capacity is permitted only in the small-scale sector. In the organized sector, new units and expansion of capacity for the production of leather footwear in existing units are allowed only for export.\*

\* See Tables 1 & 2

## CHAPTER II

## PROBLEMS OF THE FOOTWEAR INDUSTRY IN INDIA

It is by no means easy to generalize on the problems that face the footwear industry in India. The problems of the organized sector are not the same as those that bother the small-scale sector. The small-scale sector has its own special headaches.

There are, however, certain difficulties experienced by the trade in general, and it is with these we would like to concern ourselves. The organized sector is systematically tackling many of these problems, and it should be said that scientific management and efficient organization are helping to find solutions.

#### A. Poor Quality of Hides

The fact that about 30% of hides are from fallen stock, added to poor flaying and curing techniques, are responsible for uneven quality unsuitable for production of quality-footwear in volume.

DMI rates of Mortality and Slaughter (1958-59)  
for cattle, buffaloes, sheep and goats

(Percentages)

Cattle		Buffalo		Sheep		Goats	
<u>Dead</u>	<u>Slaughtered</u>	<u>Dead</u>	<u>Slaughtered</u>	<u>Dead</u>	<u>Slaughtered</u>	<u>Dead</u>	<u>Slaughtered</u>
9.4	0.5	10.1	0.9	3.24	43.85	4.25	43.10

#### B. Shortage of Tanning Materials

The problem of shortage of tanning materials is very acute. There is severe restriction on import and local production is entirely inadequate.

#### C. Shortage of Footwear Machinery

Mechanization of the industry is slow owing to the shortage of machines. India manufactures only machines for splitting leather, rolling and punching,

representing barely 5% of the total requirement.

D. Inadequate Supply of Rubber

The consumption of new rubbers during the year 1968-69 was 115,000 tons, whereas the production was about 97,000 tons, made up of 72,000 tons of natural rubber and 25,000 tons of SER type synthetic rubber.

Here\*are the details of the shortfall in natural and synthetic rubber over the years.

The inadequacy of supplies of natural and synthetic rubber has resulted in a downward trend in rubber footwear, although there is no slackening in demand.\*\*

E. Erratic Fluctuations in the Price of Rubber

Erratic fluctuations in price have adversely affected the rubber goods industry. When the ceiling on prices of natural rubber was withdrawn, there was an immediate increase of 44%, from Rs 4150.- a ton to Rs 6000.-. Shortages made the position worse.

F. Poor Profit Margin for Manufacturers

The footwear manufacturers is indeed in a perilous position. He is hard put to it to meet the demands from his wholesalers, distributors and retailers. Competition often forces him to trim his profits further.

This is a problem in marketing and does not admit of any easy solution. Franchising may provide the answer and is certainly worth trying.

Franchising, to put it simply, is the permission granted to a distributor to stock and sell the company's products. There are generally certain conditions laid down by the producer to which the distributor must agree before being granted the franchise. These usually include an undertaking not

\* See Table 3 & 4

\*\* See Table 5



to sell competitive products. The producer, on his part, may undertake not to grant a franchise to another distributor in the same locality.

In the U.K., the U.S.A. and Canada, franchising has paid off for the companies adopting this medium of distribution. It makes for attractive profits with fewer headaches, while ensuring effective control over service and special techniques.

A pleasing feature of franchising is the opportunity it gives the 'small' businessman to thrive. He can jump aboard somebody else's bandwagon without losing his independence and individuality.

Franchising is most definitely worth exploiting in India.

#### G. Bewildering Variety of Buyer Characteristics

Selling footwear in India is a marketing man's nightmare. There is no such thing as a uniform pattern or even a few well defined patterns of buying. There is a maddening array of tastes and requirements.

80% of the people in India live in villages. Their tastes have often little in common with those living in towns and villages. Here again it is difficult to generalize as fashions in footwear in the cities inevitably infect the villages.

The size roll and fitting suitable for Manipur, Dimapur and Aizal, will not do at all in the Punjab, Haryana or Maharashtra. The fitting again of Khasi and Garo Hill tribes and of the Nepalese of Darjeeling are so different from that of consumers in Tamilnadu or Hyderabad.

#### H. A Perpetual State of Flux

The Indian market is in a perpetual state of flux. There are so many shifts and changes in the relationship of companies to their markets, and among competing companies.

It may be premature to talk of consumerism in India, but without question, the consumer is coming into his own. In the footwear market, it is the buyer who now decides. He will not be imposed upon. Old selling techniques, the high pressure and the gracious onslaught, have become ineffectual. New marketing strategies have to be evolved. This is vital for survival.

There are enough examples in the footwear trade in India of manufacturers resisting change, and in consequence being forced to close down, sell out or change their line of business. It is dangerous to be out-of-tune with the environment.

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## CHAPTER III

## PROBLEMS RELATING TO EXPORT OF INDIAN FOOTWEAR

Steady growth has marked the export of Indian footwear during the last quarter of a century. In 1947, India exported 1.9 million pairs of rubber footwear and 4 million pairs of leather footwear. In 1971, the figures were an impressive 8.5 million and 7.6 million pairs respectively.

What is now exported is mainly utility items and summerwear. There is a sizeable demand also for typically Indian items like Kolhapuri chappals. It is uncertain if this demand will be sustained. \*

From the statistical information presented, it would be seen that, today, India is able to find a market for its leather footwear even in the most sophisticated countries. In 1970, India increased her exports of footwear by 28% over the previous year. The 1970 figures were improved by 17% in 1971. Leather footwear represents about half the total export, the other half being made up by rubber and canvas.

More than 50% of the total exports from India is from the small-scale sector through the medium of the State Trading Corporation.

The State Trading Corporation which is wholly State owned and State managed, functions as an autonomous commercial organisation. It is specially concerned with

- a) Trade with Eastern Block Countries
- b) Finding markets for traditional goods as well as new products
- c) Bulk contracting and bulk handling
- d) Export of commodities with high internal costs
- e) Arranging barter deals
- f) Gaining favourable terms, stabilising internal prices and securing benefits from speculative commodities.

\* See Tables 6 & 7

g) Import and internal distribution of commodities in short supply with a view to stabilizing prices and rationalizing distribution.

Difficulties faced by Indian exporters are numerous, and the more important of these are spotlighted here.

A. International Competition

The inadequacy of rubber supplies at reasonable prices makes it difficult to compete in the international markets. Prohibitive freight charges are another deterrent. Insufficient financial incentives and subsidies discourage enterprises.

B. Long Transit Time

The inordinately long time it takes to ship finished leather out of India has always posed a serious problem. Indian exporters are a minimum of three months away by the sea route.

C. Technological Gap

Changes in fashion of leather footwear and clothing, require the manufacture of new types of finished leather. The facilities and material required for these new types are not available in India; and by the time they are imported, fashions change, rendering them obsolete.

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## CHAPTER IV

### THE SPECIAL PROBLEMS OF THE SMALL-SCALE SECTOR

In Chapter II the main problems confronting the footwear trade in general were discussed. The small-scale sector which accounts for nearly 70% of the production, has some very special problems. It will help in understanding these problems to know how the retail trade is operated in India.

There are three types of retail outlets from which shoes are sold:

1. Family Stores
2. Specialized Fashion Stores
3. Retail Chain Stores

#### A. Competition from Chain Stores

The trend is generally towards family shoe stores. The 'giants' or chain stores may seem small when related to the entire industry, but they are a force to reckon with because of their relatively large size. They establish patterns in retailing, styling and merchandising.

Inevitably, there is a certain amount of embarrassment in the relations between the large companies and the small retail stores. The large companies can by no means afford to ignore the latter. They are at once their best customers and chief competitors.

The fact has to be faced however, that the small stores are being elbowed out by the large chain 'captive' operations of shoe manufacturing companies. After registering good progress in the post-war years, many independent 'family stores' were forced to close down as it was impossible for them to offer demanding consumers, styles and service comparable to the 'giants' in the trade.

It is not difficult to understand the success of the chain stores. The consumer finds in them plenty of variety and styles to choose from. The

standard prices are another attraction.

These outlets make for greater integration and a stronger industry. Large, well-knit organizations have the resources to invest in research and development so essential to the footwear industry. Most innovations in shoe manufacturing and retailing are done by medium and large size companies with their own retail chains. Some of these innovations are worth recording.

- a) Better-wearing soles and heels
- b) Durable nylon lifts
- c) Plastic patents
- d) Leather that can be cut and glued to form homogeneous strips for automated machinery
- e) New concepts in comfort and fitting

It does not follow from all this that there is no future whatever for independent footwear retailers. In the fiercely competitive market, only those retailers who acquire the necessary knowledge and techniques and can serve the customer, can survive. Independent stores can develop an individuality of their own and specialize in providing personalized service. They do not run the danger of becoming completely impersonal like the 'chain' stores.

#### B. Maintaining Adequate Supplies

A problem not peculiar to the footwear industry but affecting the national marketing of any commodity in this country, is maintaining adequate supplies at all selling points. Points from which supplies can emanate may be strategically located, but the logistics will still be frightening. Transportation facilities are inadequate, expensive and time-consuming. Selling points in rural areas particularly may be starved of necessary lines during crucial periods. Advance planning and marketing forethought help to an extent the organized sector. But even they frequently run into difficulties. The small,

independent store, in this respect is an undesirable position. If a needed style runs out, it may not be able to obtain replenishments from the suppliers to meet a seasonal demand.

#### C. Retail Trade at the Mercy of Season and Fashion

Many phases of shoe retailing are highly seasonal. Women's and Children's shoes reach their peak sales during June, July and Id. It requires great organization and advance planning to ensure that the necessary styles are available at the required time in all relevant outlets.

The most vexatious problem in the footwear industry in India is the clearance of lines made obsolescent by changes in fashion, season and the like. It is not at all unusual for a great deal of the profit to be drained away by stock which has become obsolete.

Here is an example. When the rains are over, only a nominal quantity of waterproof shoes can be sold. 'Chain' stores can move stocks of such items to outlets in other parts of the country where they can be sold. If the monsoon fails in Bombay, rubber footwear can be transferred to the Madras coast where the rains appear later in the year, or to the Punjab where there is a demand for waterproof shoes in winter. The small retailer is at a disadvantage in these matters.

#### D. Shortage of Capital

The greatest handicap to the small retailer in footwear, is inadequate capital. The problem may be considerably eased by a proper implementation of the State Bank of India Aid Plan. The Bank proposes to provide financial assistance by way of loans to small manufacturers, shop keepers, truck drivers and the like. As the Bank operates through a large number of branches, this can prove a real boon to small footwear traders.

A unit with capacity to produce 500 pairs of leather footwear per day,

will cost ₹ 12 lakhs in machinery alone. It can be seen from this what a huge investment will be necessary to mechanize the 70% of the industry which is as yet unmechanized.

**E. Shortage of Trained Personnel**

The small-scale sector suffers from yet another handicap. Currently, it can neither attract nor afford trained personnel to handle their manufacturing and marketing.

**F. Restricted Marketing Opportunities**

Except for the large units in the organized sector, marketing techniques are hardly in use in the footwear industry. The small-scale and the cottage industry sectors, for the most part, seem content with haphazard, time-worn methods of selling. The quality of the products manufactured in these sectors has steadily improved, thanks mainly to the excellent work done by the State Trading Corporation in providing the technical know-how. No attention, unfortunately, has been paid to modernizing their marketing techniques.

It may be worthwhile for the State Trading Corporation to take on in addition to the export trade, the task of distributing through wholesale and retail channels in the home market, the footwear manufactured by these sectors. It should not be difficult for the State Trading Corporation to evolve and build up its own domestic marketing organization, in consultation with experts in marketing and advertising.

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## CHAPTER V

## THE LEATHER GOODS INDUSTRY

29% of all finished leather in world markets in 1966 was from India. It was next only to France whose share was 35.5%.\*

In the same year, India's share in the export of goat skin was the highest.\*\*

Today India also exports nylon chords, threads, filaments and synthetic ropes which are required in the manufacture of leather footwear.

The production of hides and skins the world over being inelastic, and with the growing demand for leather manufactures, it would be economically sound for India to establish large capacity units for the manufacture of leather goods, including leather garments.

European buyers prefer finished leather goods and garments to leather. There is a definite swing in fashion to suedes. India can fully exploit these current modes by exporting 'made-up' items. Production facilities should be geared up for the manufacture of leather garments which are now the rage in many countries.

Indian raw material is ideal in that it has just the right weight for garment leather.

#### A. Dyes and Finishing Materials

To produce finished leather, technical know-how and adequate supplies of the right dyes and finishing materials are necessary. Technical know-how does not pose much of a problem. It is the non-availability of the right dyes and finishing materials in required quantities which proves the most serious obstacle.

Till India is able to produce adequate quantities of the required dyes

\* See Table 8

\*\* See Table 9 & 10

auxiliaries, the procedure for importing these should be made smooth. At the moment, the formalities involved are cumbersome and discouraging.

There is also a serious lack of embellishments and nylon threads necessary for the manufacture of leather garments.

#### B. Designing Expertise

India lacks expertise in designing leather garments and leather goods. To make the grade today and become a pace-setter in this industry, it is essential to have trained designers.

It is of the utmost importance that India should, without delay, set up a Design Centre, where training can be imparted to selected candidates in designing leather garments and other goods, including footwear. Initially, the trainers should be brought from other countries for specially contracted periods.

Trained, expert designers will be able to meet the sophisticated and constantly changing demands of export markets. There is a tremendous potential, as in the more affluent economies, local manufacture of leather garments has become prohibitively costly owing to a variety of economic factors. They are now looking to developing economies like India to supply these at reasonable prices.

#### C. Suggestions

If the industry is to survive in the face of international competition, it has to be given immediately all the assistance necessary in the shape of cash and incentives. Much can be learnt in this regard from the examples of Spain and Greece.

As the industry in India is largely in the small-scale sector, dynamic and dramatic measures alone will help to build up the necessary infrastructure.

If the Government can see their way to give cash assistance to the extent of 10% of the F.O.B. value of exports, the industry can quickly establish itself. This assistance can take the form of vouchers which, accumulated over a period of three years, can be used towards the cost of importing the plants and machinery needed for strengthening the infrastructure.

80% of the leather industry being in the small-scale sector, no large investments have been made by the industry during the last four plan periods. The export earnings from this industry can be raised from present 95 crores to 160 crores by strengthening it by vertical integration.

The following suggestions are made for reaching the desired goal.

- a) Industrial licences for finishing should be issued without delay to tanners who are manufacturing tanned leather up to their installed capacity.
  - b) The leather industry should be exempted from Sec.11A of the Industries Development and Regulations Act, enabling all tanned leather manufacturers automatically to finish leather up to their installed capacity.
  - c) Our bilateral trade agreements should stipulate purchase by the respective countries of at least 25% in value of finished leather and leather manufactures, based on their tanned leather buying.
  - d) Since import of machinery calls for heavy investment, the necessary assistance should be given to the industry by the Government financial institutions. Payments should be spread over a long term.
  - e) A public notification should be issued by the Ministry of Industrial Development for applications to install plants for manufacturing finished leather with tanned leather as the basic material.
-

## CHAPTER VI

## SPOTLIGHT ON TRENDS

A. The Changing Rural Scene

In the Fourth Five-Year Plan 24% of the total outlay was earmarked for agriculture and rural development.

a radical change is noticeable in the pattern of consumer expenditure in rural areas.

80% of the people live in the villages of India. Providing the right kind of footwear for the rural population is a challenge the industry has to face.

The industry would do well to remember that in catering to the rural population, it should look for volume sales, whittling the profit per unit sales. This is essential as the purchasing power of the agrarian population in villages is low. It will be taking a short-sighted view of things to boost per unit profits, keeping the volume low.

B. Governmental Assistance to the Small-Scale Sector

The State Trading Corporation is doing commendable work in its Footwear Division by providing information on the latest styles and techniques to the small scale industrialists as well as the cottage industry.

Small tanneries in South India and even in Calcutta are now in a position to manufacture supple buffalo or cow hide and kid which are used for shoe uppers. The quality has found acceptance even in the most competitive world markets.

C. Styling

There is a healthy trend towards comfort these days. Pointed toes are on their way out. Teenagers refuse shoes that hurt. To the relief of many, men's and women's shoes are less pointed.

Fashion reigns supreme in the shoe business. It can make or mar sales. For volume sales, shoes have also to be comfortable. Durability comes next.

The industry should produce shoes that look better, are soft and comfortable, wear longer and cost less. Comfort, style and low price should be the objectives of any retail merchandising system in this industry.

#### D. The Synthetic Leather

The moribund synthetic leather industry in the U.S.A. has been resurrected and is now thriving. Mr George Newman who now markets Corfam (the synthetic leather developed by Duponts) reports that 7.5 million pairs of Corfam shoes are expected to be sold in the United States during 1973. Shoes made from poromerics (porous synthetic leather) such as Corfam, Jentra and Clarino are priced nearly 20% cheaper than comparable leather shoes.

What effect these developments in synthetic leather will have on the Indian export of leather, only time can say.

#### The Future

In the introduction to this paper, it was pointed out that in 1971, the annual per capita consumption of footwear in India was as low as 0.55. It is essential to plan for a 10% annual growth. This is certainly realistic and not an unreasonable target.

<u>Year</u>	<u>Target Pairs</u>
1973	330,000,000
1974	360,000,000
1975	390,000,000
1976	430,000,000
1977	470,000,000
1978	500,000,000

There can be no phenomenal improvement in the shoe industry while India is faced with the problem of the essentials of life like food and clothing.

With the slowed down growth of the per capita income and the steep rise in the price of food stuffs, who can forecast when every citizen of India can move about, shod in comfortable footwear.

The industry is poised for a slow but steady growth. The market potential is so vast, that it will be no problem for the small-scale sector and the organized 'giants' to co-exist.

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**Table 1. The Number of Persons by Categories of skill engaged in the Leather Footwear Industry in India**

Shoemakers & Repairers		Cutters, Lasters, Sewers Footwear & Related Workers		Total (All categories)	
Household	Non-Household	Household	Non-Household	Household	Non-Household
467,381	151,577	14,614	9,758	481,995	161,335

Source: Census of India 1961

**Table 2. Basic Statistics of the Indian Tanning Industry (By Sector)**

Sector	No. of Units	Percent	Labour Employed (number)	Percent	Capital invested (Rs lakhs)	Percent
Large-scale Sector	90	0.45	10,298	11.47	578.46	45.36
Small-Scale Sector	695	6.32	14,128	15.73	449.90	35.28
Household	10,258	93.23	65,383	72.80	246.93	19.36

Source: ASI Vol. IV, 1964; NSS Report 188, Census of India, 1961

Table 3. Production of Rubbers in India  
(In Metric Tons)

<u>Year</u>	<u>Natural Rubber</u>	<u>Synthetic Rubber</u>	<u>Total New Rubbers</u>
1966	53,196	15,604	68,800
1967	62,339	21,808	84,147
1968	68,817	25,090	93,907

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Table 4. Consumption of Rubbers in India  
(In Metric Tons)

<u>Year</u>	<u>Natural Rubber</u>	<u>Synthetic Rubber</u>	<u>Total New Rubbers</u>
1966	66,693	21,947	88,640
1967	72,516	25,247	97,763
1968	84,206	24,517	1,08,723

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Table 5. Comparison of Production & Consumption

(In Pairs)

<u>Year 1969</u>	<u>Production</u>	<u>Consumption</u>
Plastic	31,600,000	31,600,000
Rubber	49,361,000	43,261,000
Leather	191,683,000	187,001,000
<b>Total</b>	<b>272,644,000</b>	<b>261,862,000</b>
<u>Year 1970</u>	<u>Production</u>	<u>Consumption</u>
Plastic	37,431,000	37,431,000
Rubber	44,400,000	37,432,000
Leather	205,479,000	198,663,000
<b>Total</b>	<b>287,310,000</b>	<b>273,526,000</b>

Table 6. Production & Export Figures of Footwear  
(In Thousand Pairs)

Year	P r o d u c t i o n				E x p o r t			
	Plastic	Rubber	Leather	Total	Plastic	Rubber	Leather	Total
1947	-	21600	59400	81000	-	1912	474	2386
1952	-	21500	75690	97190	-	1135	1055	2190
1957	-	36892	77416	114308	-	2086	2631	4717
1962	-	49750	122300	172050	-	2837	2560	5397
1963	-	46600	134174	180774	-	2652	3049	5700
1964	-	46890	143053	190743	-	3715	3936	7651
1965	-	53070	155447	208517	-	3901	3672	7573
1966	1510	52150	158859	222519	-	6483	5006	11489
1967	4102	54557	177308	236567	-	5500	5127	10627
1968	22720	57760	188400	268900	-	6847	5729	12576
1969	31600	49361	191503	272644	-	6100	4682	10782
1970	37431	44400	205479	287310	-	7000	6816	13816
1971	42000	43700	215905	301685	-	8521	7625	16146
1972	40000	43820	223063	307783	-	8673	7755	16428

Table 7. Export of Leather and Leather Manufactures to Various Markets during April 1969 to March 1970

1) East Europe and Communist Countries	...	73.03%
2) West Europe	...	11.23%
3) African Countries	...	0.88%
4) West Asia and North African Countries	...	1.14%
5) East Asia and South Asian Countries	...	5.34%
6) South America, Cuba and West Indies	....	0.53%
7) U.S.A. and Canada	...	7.85%

**Table 6. World Exports of Finished Leather (SUSC 611)**

<u>Country</u>	<u>1966</u>
1. Australia	3.2
2. Canada	3.3
3. India	29.0
4. U.K.	23.0
5. Belgium	7.0
6. France	35.3
7. Italy	10.6
8. Netherlands	0.6
9. West Germany	20.9
10. U S A	15.0

Source: "Hides and Skins Quarterly" 1967, Commonwealth Secretariat, Commodities Division, 10 Carlton House Terrace, London

**Table 9. Exports of Goat Skins (Tons)**

<u>From Country</u>	<u>1966</u>
1. India	9,273
2. East Africa	1,306
3. Algeria	2,710
4. Pakistan	850
5. South Africa	2,268
6. Greece	912
7. Turkey	2,388
8. Brazil	2,282

Source: "Hides and Skins Quarterly", 1967, Commonwealth Secretariat, Commodities Division, London

Table 10. Export of Hides & Skins  
and Finished Leather  
 (Figures in lakhs)

E.I. Tanned Hides & Skins

<u>1970-71</u>		<u>1971-72</u>		<u>1972-73</u>	
<u>Qty-Kg</u>	<u>Value Rs</u>	<u>Qty-Kg</u>	<u>Value Rs</u>	<u>Qty-Kg</u>	<u>Value Rs</u>
193.21	4440.00	251.52	6356.00	258.39	9481.00

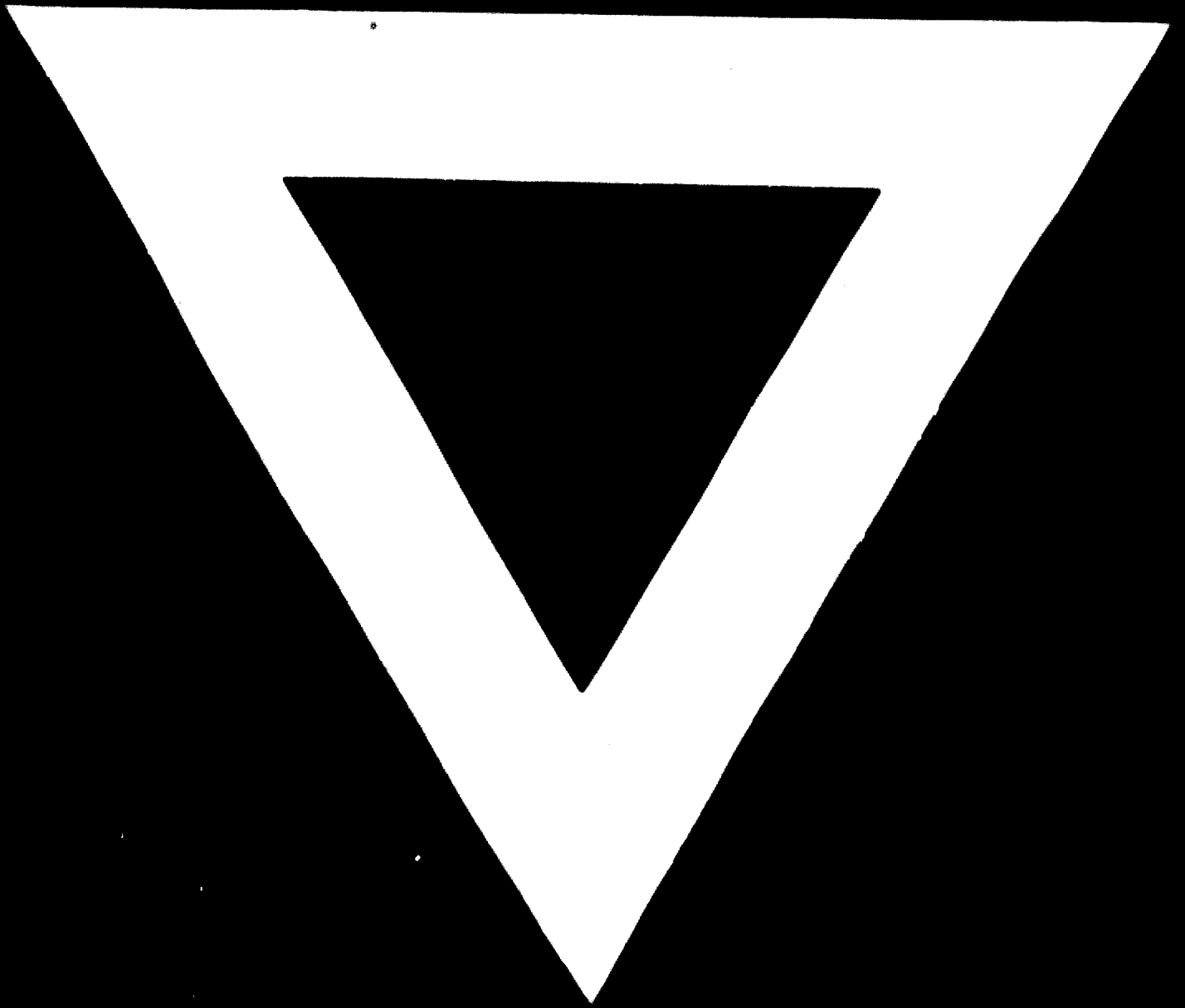
Blue Chrome Tanned Hides & Skins

137.90	2449.60	143.76	2176.00	351.50	5560.35
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Finished Leather

192.48	429.81	800.59
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