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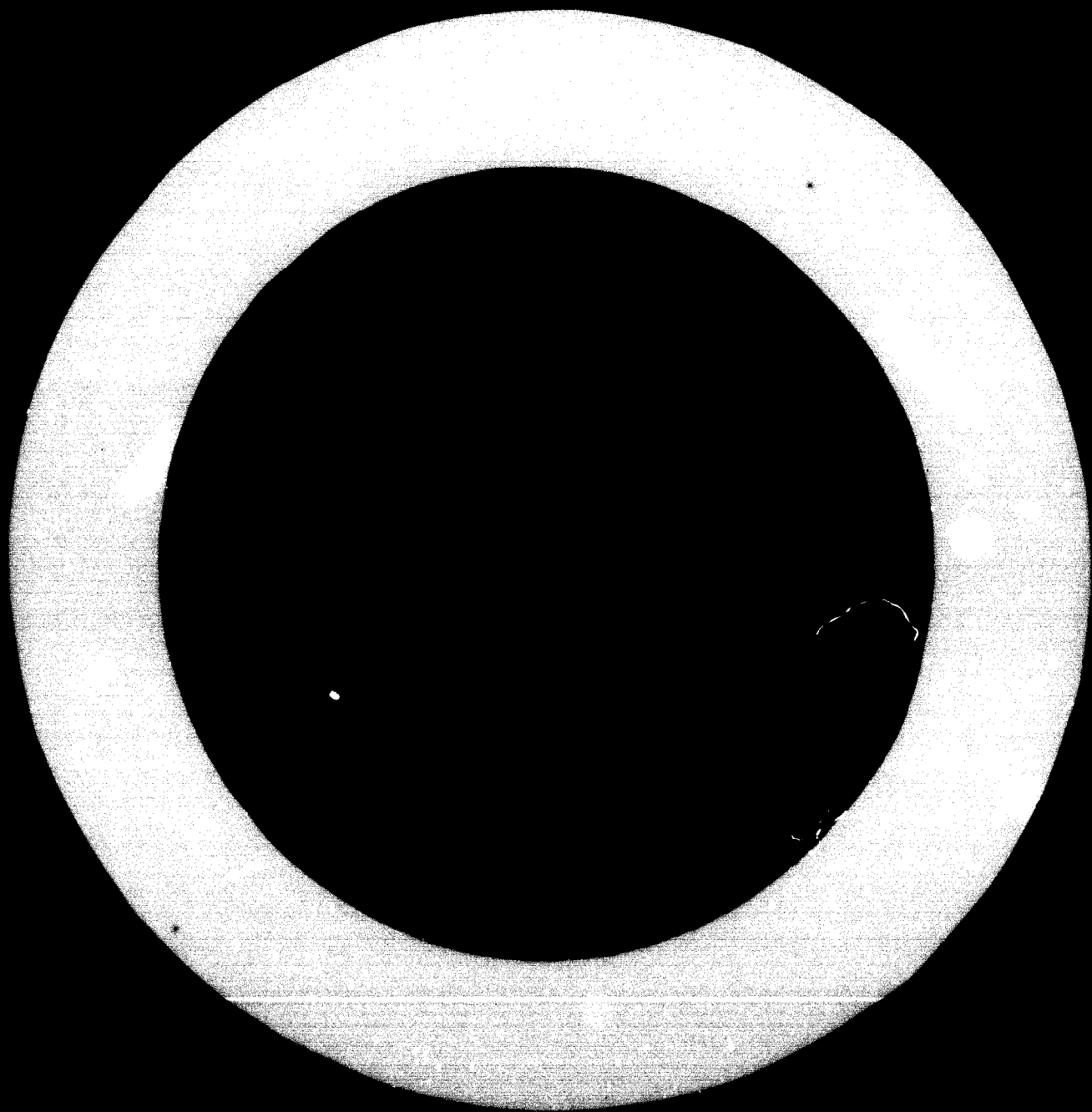
Workshop on Leather Industry Development
in Developing Countries
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STATEMENT
ON THE SITUATION OF THE LEATHER INDUSTRY IN
BULGARIA 1/

presented by
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DEVELOPMENT OF LEATHER INDUSTRY IN BULGARIA

From the point of view of its historical background the branch of the leather and fur industry could safely be referred to as one of the oldest in the country. Numerous old records and documents mention the fact that the basic activity of the Old-Bulgarians was hunting and the related to it animal husbandry. They certainly knew some trades connected with this activity including processing of hides and skins and manufacturing of various leather articles.

At the beginning of our era hides and skins served the Old-Bulgarians as exchange units in their relations with the surrounding tribes, which later on was adopted throughout the whole Asiatic world. There is even a hypothesis of an eminent Bulgarian scientist that the name of the Bulgarian people originates from the name of that exchange unit called "bulga". There are also a number of historical documents relating that by IV century A.D. processing of hides and skins was a flourishing trade in Bulgarian lands and that the leather manufactured there was much looked after.

All socioeconomic changes which accompanied the development of the Slavo-Bulgarian state (680 A.D.) until its falling under Ottoman rule (1396 A.D.) and during the period of that rule did not hold back leather manufacturing. On the contrary, it developed further owing to the enormous military demand of the Ottoman empire of footwear and leather articles. The good qualities of the Russia leather manufactured in Bulgaria were known and much in demand all over Europe.

The towns of Gabrovo, Lovetch, Shoumen, Roussé, Sofia, Yambol and Sliven have established themselves as centres of the leather industry in Bulgaria.

At that time for the production of various kinds of sole leather were used local and imported cattle hides and imported vegetable tanning materials. The upper leather -

Russia leather, Morocco, and lining were manufactured out of local raw materials using Bulgarian sumac as tanning material.

The leather factories in their greatest part were mixed - processing hides and skins into sole leather, Russia leather, upper and lining leathers.

At the same time developed the shoe industry as well. Thus for instance, prior to the liberation of the country (1878) 200,000 pairs of shoes were produced annually in Gabrovo only.

The development of the leather, fur and shoe branch from 1878 to 1944 - the liberation of the country from fascist rule, was characterized by all features relevant to a capitalist type of industrialization.

This branch had to overcome its backwardness in every respect and to meet the sharp demand of shoes. The bourgeois government established a number of measures for the promotion of industry. The first capitalist leather factory came into being in Gabrovo in 1880. Several years later the first leather processing machinery was imported, thus marking the beginning of mechanization of manual operation in that sub-branch.

In Gabrovo for the first time in the country was introduced mineral tanning with the beginning of box calf production and later of kid leather. The leather industry developed on the basis of partial import of hides, vegetable tanning materials, chrome salts, dyes and other auxiliary materials.

In 1939 there were 54 leather and 7 fur manufacturing industrial enterprises in the country and none in the shoe line.

During World War II resulting from the sharp demand of leather and shoes several leather factories came into being in Popovo, Varna, Bourgas and elsewhere with purely speculative ends.

The technical base of the leather, fur and shoe branch in the period of capitalist industrialization was far behind the technical base of this branch in the European countries. Owing to lack of capital investments there were no very big enterprises in the country. Machines were insufficient and

that ruled out mechanized production completely.

The technological level was also very low owing to absence of qualified specialists. The work was restricted to following certain "recipes" without any knowledge of the chemistry of the processes in manufacturing of hides and skins.

The first industrial shoe enterprise in Bulgaria was set up in Ihtiman in 1942 by the foreign firm "Bata".

On September 9, 1944 the state of the branch was very bad. This was due, on one hand, to the general economic devastation, resulting from World War II and on the other, to the impossibility to import any hides and skins, and leather auxiliary materials.

For several years the leather, fur and shoe industry continued to work mainly for the needs of the army.

By January 1, 1946 there were 65 leather industrial enterprises, whose capacities were used up to 10-15 % for the hard and 20-30 % for the soft leather.

The first national economic plan (1947-1948) created the background for setting the national economy on a socialist way of management and development. The enterprises worked according to approved plans with workers' control inside them and restriction of the influence of their owners.

Real opportunities for a genuine planned production, for realization of concentration and specialization of the enterprises were created following the nationalization of the industry on December 23, 1947.

The Bill of Nationalization transferred into state ownership 103 leather, 25 fur and 48 shoe enterprises of various capacities, degree of specialization, level of equipment and technology and various degrees of profitability.

In accordance with the socialist principle of development and management it became necessary gradually in stages to carry out reorganization, amalgamation and specialization of the nationalized enterprises. All that, naturally, had to be effected hand in glove with the fulfilment of the general production programme.

Initially were liquidated the smallest and most unprofitable enterprises, whereas their equipment was transferred to the amalgamated ones. At the end of 1948 the number of the leather manufacturing enterprises was reduced to 26, of the fur manufacturing to 7 and of the shoe manufacturing to 7 also. The process of amalgamation in fact continued up to 1955, when the leather enterprises of the republican industry became only 8, the fur manufacturing - 2 and the shoe producing - 3.

During the period 1961-1965 the leather, fur and shoe branch developed at a faster rate. Reconstruction of a considerable number of enterprises was effected resulting into an improvement of the production efficiency and the quality and widening of the assortment of the articles manufactured.

A further amalgamation in the leather business was effected in 1965 leading to improved efficiency of production and management.

The state economic corporation "Pirin" was established in April 1965 in whose system were included the enterprises of the leather, fur, shoe, rubber-shoe and leather goods industry of the country.

The corporation faced the task of a speedier carrying out of the measures of concentration, specialization of the enterprises and maximum satisfaction of the demand of the population for products of better quality and appearance.

During this period a basic change in the conditions of work of the enterprises and the quality of the products occurred. Carried out were a number of reconstructions and supply of up-to-date equipment. The supply of the leather and fur manufacturing enterprises with hides and skins improved notably. The shoe industry started the production of deluxe shoes at corresponding prices. In all sub-branches were introduced improved technology and the assortment of the products - shoes, leather clothing, leather goods, etc. was widened considerably.

By the end of 1965 the "Pirin" state economic corporation had 22 industrial enterprises in all.

The development of the leather industry in the People's Republic of Bulgaria is effected on the basis of local and imported hides and skins. The same goes true for the auxiliary materials for the leather industry as well.

The production of laquers corresponds to all modern requirements as far as the laying of laquer covering and the kind of the materials used is concerned.

Production of kid leather has been reduced to minimum owing to lack of local raw material in sufficient quantity. The basic assortment of hard leather produced by the enterprises in this country are: butt sole leather for cement-lasted shoes, ordinary butt sole leather, etc.

In quality the basic types of hard leather are compatible to the average world production.

The leather enterprises manufacturing upper leather during the last few years almost entirely replaced their machine equipment. A major part of the newly supplied machines are of most modern type and decisively contributed to the increase of labour productivity and stabilization of the quality. Partially was introduced automation in the dosage of auxiliary materials and in the control of certain processes in manufacturing upper leather.

Mathematical and statistical methods for the control of the quality of the production were elaborated and implemented.

In the years to come it is envisaged to introduce a project for automatic systems of the production, labour and management, encompassing all the enterprises of the corporation with the application of computer technique.

In perspective the efforts for the development of the leather industry are directed towards the following technological changes:

- mechanization and automation of boiling and tanning processes by applying elements of semi-automatic systems, facilitating labour and increasing the control of technological processes;

- shortening the duration of the technological processes;

- introduction of production technology for the processing of buffalo hides into upper leather;
- introduction of technology for the production of synthetic tanning materials and fillers;
- introduction of fattening and impregnating products;
- introduction of technology for new assortment of articles produced out of pig leather.

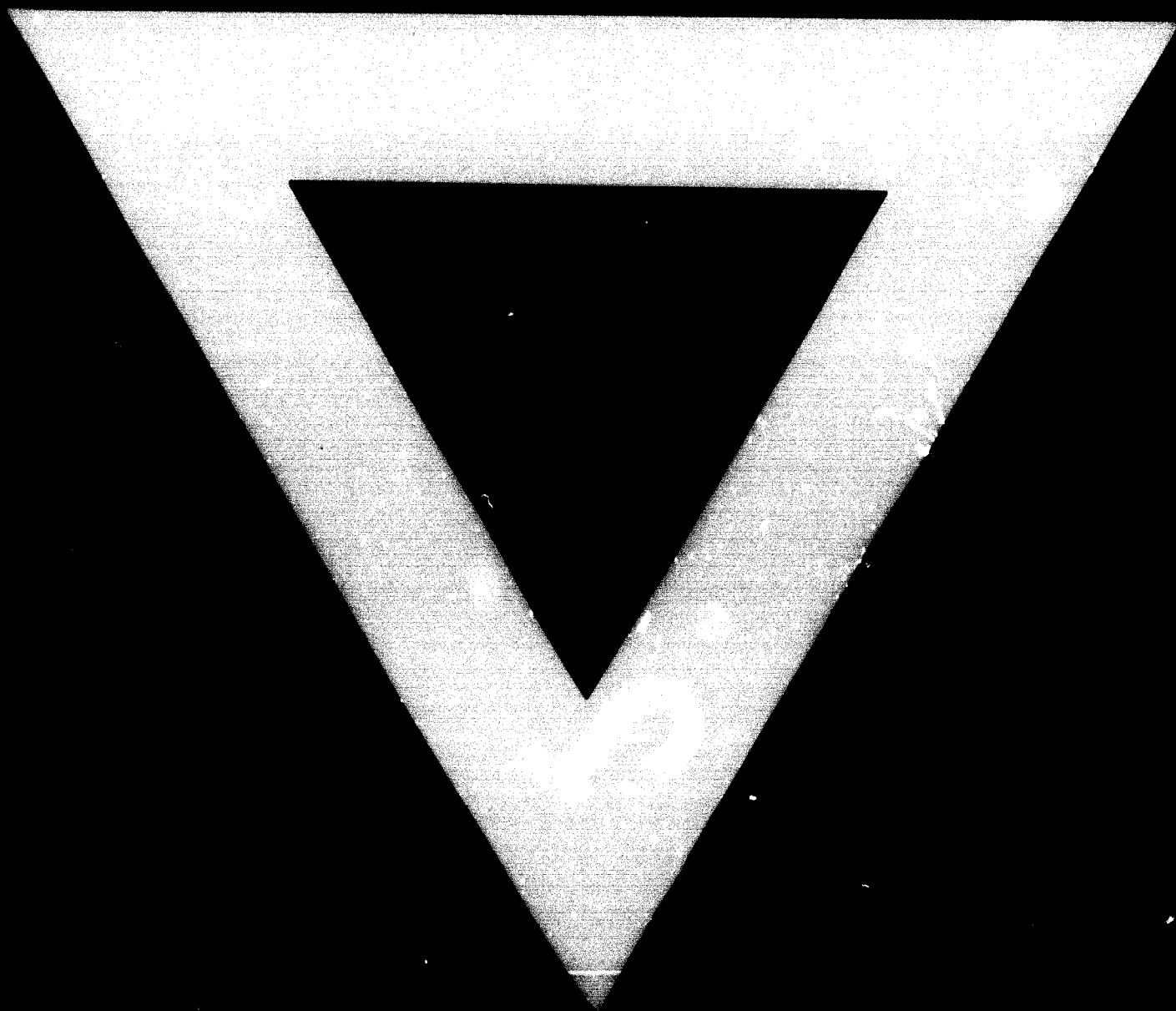
The old equipment will gradually be replaced by new and partial automation will be introduced as follows:

- introduction of assembly aggregates of increased productivity for the wet and dry processing, extruder installations, etc.;
- automatic dosage and automatic control;
- mechanization of inner-shop and inner-plant transport operations;
- design and introduction of automated management systems.

A leading role in the introduction of the technological processes in the leather and fur industry in this country is played also by the Scientific Research Institute of the Leather Industry in Gabrovo, established in 1963.

In conclusion it has to be mentioned that the development of the leather industry is continuing at accelerated rates aiming at further raising of technical level of the production and ultimate higher quality leather products.





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