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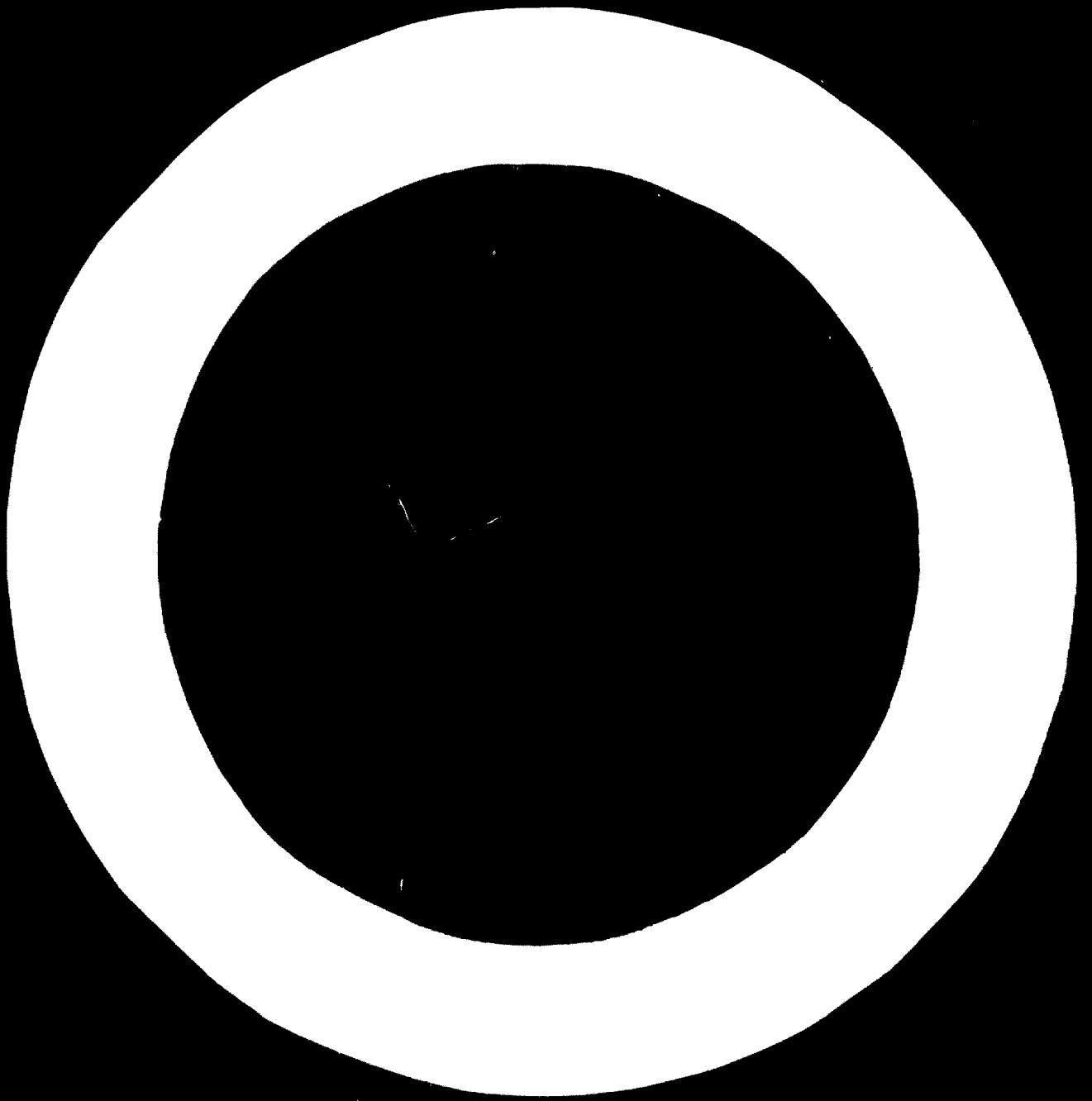
Workshop on Leather Industry Development
Vienna, Austria, 17 August to 4 September 1973

STATEMENT
ON THE SITUATION OF THE LEATHER INDUSTRY IN
THE AREA

Mr. G. Zanetti
President, Leather Exporters' Association

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Hides and Skins, Leather and Leather

Products in Turkey

It is known that tanning was developed in the East and later spread to the West. Although more ancient developments cannot be traced, during the days of the Hittites, according to the historical documents covering the period 1500 - 1200 B. C., the leather industry is seen to have reached the zenith of progress and then to have declined.

In the course of archaeological excavations made at Bogazköy and Alişar, dating back to 2000 B. C., in a sarcophagus belonging to a child, pieces of leather were uncovered which were presumably used to wrap the child in the form of a coffin. These pieces of leather were observed to disintegrate upon exposure to air; hence it was impossible to analyse them chemically. It is presumed that these pieces symbolize the oldest specimen of animal skin discovered in the world. It has also been established, through diggings at Kültepe in the province of Kayseri and again at Bogazköy and Alişar that tanning was a well-practiced handicraft of the Hittites. Through these researches it has been possible to uncover many theretofore unknown social and legal aspects of the times reaching as far back as the XIX Century B.C. According to the stone engravings found, those who practiced tanning in those days were called "Askappum". Alums and black-ox-galls, which were to be found in abundance in the country, were used as tanning materials.

The historical records available to date reveal that another ancient folk known as the Hittites who around 1500 B.C. lived in the region presently covered by the modern-day Anatolian provinces of Van, Urfa and Diyarbakir, also had a highly developed leather industry. Because of the alkaline characteristics of the Anatolian soil, it has not become possible to uncover leather relics at the excavations conducted in this region.

The production of alums in Anatolia, which has a very ancient past, and their use as tanning material in leather manufacture, have furthered the progress of fur-making in Europe. The German word for furrier "Kuerschner" is derived from the Turkish word "Kürkçu". Many of the terms employed by European countries in connection with tanning or leather manufacture have also Turkish origins.

In a book written by Ibrahim Hasebi, a Turkish author, on the history of leather arts in the XVI and XVII Centuries A.D., it was cited that the progress of business in the West-Anatolian city of Manisa was safeguarded by laws and regulations. Leathers offered for sale were previously inspected by experts and those not meeting the requirements as provided in the regulations were destroyed. Manufacturers of such defective leather were subjected to a fine of fifty silver pounds and given fifty lashes with a rod.

Historical records reveal that during the rise and expansion of the Ottoman Empire considerable progress was registered by the tanning industry. The needs for shoes and other leatherware of the far-flung armies were met entirely through local sources and the quality of the production was superb.

Following these stages of development, the Turkish leather industry, was able to keep abreast of the new progress recorded in the West; however, with the decline of the Ottoman Empire, a gradual recession set in. This was caused not only by the reluctance shown towards the adoption of the new techniques but also by other factors. Among such factors we can cite the traditional handicaps connected with the Turkish leather and tanning industry such as the passing down of the profession from father to the son or from master to apprentice; hence non-existence of general and organized training; the general lack of interest towards this handicraft by all except those directly engaged in it; the inherent difficulties and hardships of the profession itself; extreme limitations exercised in keeping trade secrets; utter disregard of the new methods and processes etc.

Despite all this, the Ottoman Empire, which had a military character, taking into consideration the needs for shoes and other leather products needed by the armed forces established in 1810 a factory at Beykoz on the Bosphorus which forms the original plant of the present-day "Beykoz Leather and Shoe Industry". Subsequent interest shown by the Government towards the leather industry and the adoption of modern methods developed by the Western countries have helped the Turkish leather industry to attain the present state of progress.

The livestock flocking, mainly of cattle, sheep, camels and ordinary goats have long been important factors of the agriculture in Turkey. The great potential for production of livestock and livestock products, according to information from State Planning Organization and State Statistical Institute the total number of livestock in Turkey are given on table 1.

Table 1 Livestock population in Turkey

(in million)

	Sheep	Goats	Camels	Cattle	Buffalo	Camel	Pigs
1963	31,6	16,7	4,3	11,3	0,84	0,049	0,011
1964	32,2	16,3	4,3	11,5	0,85	0,046	0,017
1965	32,9	15,9	4,2	11,7	0,96	0,045	0,017
1966	33,5	15,5	4,2	11,6	0,97	0,043	0,016
1967	34,1	15,3	4,1	12,0	0,98	0,043	0,013
1968	34,7	14,8	4,1	12,1	0,99	0,042	0,014
1969	35,4	14,9	4,1	12,3	1,0	0,039	0,018
1970	36,5	14,9	4,1	12,5	1,0	0,031	0,02
1971	36,3	14,3	4,1	12,5	1,0	0,029	0,018
1972	37,4	14,7	4,1	12,9	0,98

Hides and skins productions for 1970, 1971 and 1972 are shown below :

	(Million number)			
	Slaughterhouses	Rural Slaughtered	Fallen animals	Total
1970: Sheep	7.0	6.4	2.2	15.6
Ordinary Goat	3.4	3.8	0.8	6.0
Angora Goat	0.2	1.0	0.3	1.5
Cattle	1.7	0.3	0.7	2.7
Buffalo	0.15	0.04	0.08	0.27
1971: Sheep	5.6	7.0	2.3	15.9
O. Goat	1.6	3.5	0.8	5.9
Angora Goat	0.2	0.97	0.3	1.2
Cattle	1.4	0.6	0.7	2.7
Buffalo	0.13	0.05	0.05	0.23
1972: Sheep	6.0	8.1	2.3	16.4
O. Goat	1.3	3.3	0.2	5.3
Angora Goat	0.1	1.0	0.3	1.4
Cattle	1.3	0.9	0.7	2.9
Buffalo	0.15	0.03	0.05	0.22

Official figures of animals slaughtered in municipal slaughterhouses are available. It should be borne in mind, however, that these figures only indicate the registered slaughtering. It is estimated that 50 % of slaughtering are carried out in slaughterhouses and the rest elsewhere.

There is an excess of production of sheep and goat skins over and above that required for internal consumption. These excesses are placed on the world market as raw materials, pelted skins and finished leather.

The leather industry in this country has a very ancient background. It was a flourishing industry until 18th century then it stagnated, started as the industry could not keep pace with the technological progress in Europe. During recent years, however, new progress has been recorded. The number of tanneries and labor force employed are shown below :

TANNERIES in TANZANIA

	<u>1957</u>	<u>1964</u>	<u>1971</u>
Mechanized Tanneries	434	500	577
Unmechanized Tanneries	1572	1000	500
Labor Force	6618	6000	3000

As it will be seen from above, leather industry is essentially composed of a number of small size tanneries. These operate with very primitive tanning and leather working methods.

Unmechanized tanneries have been closing down and the number of mechanized tanneries has been increasing, but newly established tanneries have taken the example of the old ones, they do not have modern technology and their capacity is small.

In the recent years with the help of the experts who are trained in foreign countries, and as a result of modernization, new capacity additions and the merger of small units, though not to the desired extent, good quality production has been started.

Leather is used primarily in footwear production. Footwear industry is scattered all over the country in small units. The capacity, investments and labor force of this industry are shown below:

Footwear Industry (1971)

	Large Establishments		Small Establishments	Total
	Public	Private		
Units	3	11	15,000	15,014
Labor force	1400	350	30,000	32,250
Fixed assets (Million L.)	75,0	18,0	75,0	168,0
Capacity (Million Pairs)	-	-	-	30,0

Another important product is leather clothing. With the leadership of the Turkish emigrants who came from Turkistan, Bulgaria, Yugoslavia this industry has been developing rapidly in recent years. It is a cottage industry the production was first started at home, then moved to work shops. Along with high quality production there are also goods of low quality. This industry is centered primarily in Istanbul and Izmir. The information about this industry is shown below:

Leather Clothing Industry (1971)

Number of the Units	500
Labor force	30,000
Investment (Million L.)	75,0
Capacity (Pieces)	750,000

Saddlery industry is generally centered in Istanbul. Although there are saddlers in places other than Istanbul, the production is not in great quantities. The history of this industry is quite old. Sultan Suleyman II, for their services to the army, exempted the saddlers from taxation and combined them under the name Saddlery in Istanbul. Since the need for animals in the Army has been decreasing, saddlers have started to work more on production of leather goods, as in leather clothing in saddlery as well to keep up with ^{the fashion} is important.

Production of leather industries in China 1971-1972

1971

1972

	<u>Quantity</u>	<u>Value (x)</u>	<u>Quantity</u>	<u>Value (x)</u>
Sheep and Goat Leather (Billion Dm ²)	250,0	225,0	300,0	375,0
Upper leather (Billion Dm ²)	325,0	125,0	350,0	490,0
Sole leather (000 Tons)	5,5	110,0	5,7	142,5
Leather Clothing (000 number)	600,0	353,1	700,0	450,0
Leather Goods	-	60,0	-	78,0
Foot wear: (Billion number)				
a) Leather upper	18,0	1770,0	18,5	1480,0
b) Plastic materials	10,0	100,0	10,2	224,4
c) Textile "	3,2	60,0	3,4	102,0
d) Rubber	9,0	108,0	9,2	119,6
e) Slippers	2,0	30,0	2,1	35,7
Total	-	2617,1	-	3497,2

(x) Million T.L

In the leather industry, exports and imports are given in the next tables. Although leather industry is not developed, we did not need any imports of leather and leather products. Only very small amount of technical leather has been imported.

IMPORTS

Table:

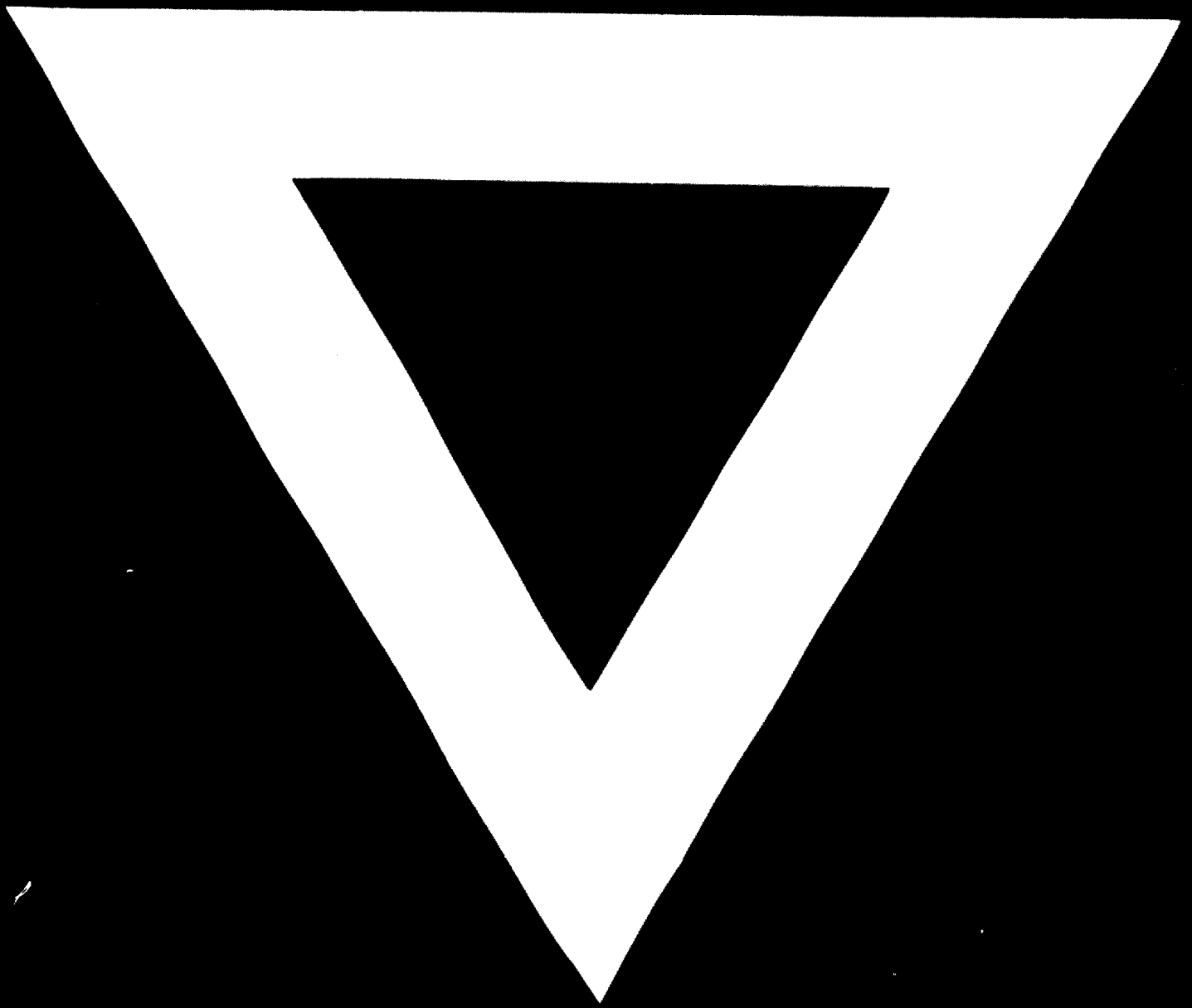
	1969	1970	1971	1972
	000 Tons Million L.	000 Tons Million L.	000 Tons Million L.	000 Tons Million L.
Waxes	3.8	3.3	4.6	4.2
Leather	-	...	0.01	-
Leather goods	0.02	0.02	0.06	0.02
Shoes, slippers	-
	19.5	17.8	44.5	29.6

1968 1969 1970 1971 1972
 000 000 000 000 000
 Dollars Tons Dollars Tons Dollars Tons

Wool	2,7	2245,2	2,0	350,1	2,0	175,2	2,0	2431,3	0,0	175,2
Pickled Oxine	1,7	2181,0	2,5	3705,1	2,2	2287,6	2,3	2351,5	0,5	1133,3
Leather	...	10,2	...	140,0	...	522,5	...	175,3	...	389,2
Leather Clothing	...	160,1	...	643,0	...	1,712,6	...	10,087,9	...	20,231,9
Leather Goods	...	2,3	...	1,0	...	21,9	...	47,3	...	4,1
Shoes, Slippers	...	26,0	...	110,8	...	110,4	...	91,2	...	83,5
Furs	...	194,6	...	195,0	...	214,2	...	370,0	...	514,3

Hides, Skin and Leather Research and Training Institute which will help the leather industry, has started to establish in 1967 and it is hoped that it is starting working by the autumn 1973. This institute along with leather workers will work on footwear, fur and other leather products.





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