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History of leather business and future perspective in Bangladesh

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Abstract
The study aims at to known the history of leather business and future perspective in Bangladesh. The leather industrial sector of Bangladesh has been almost entirely supported by local raw material resources while 1.0 million live cattle are imported every year from neighbouring countries to meet our protein demand adding extra number of raw hides and skins. Bangladesh process 85,000 tons' raw hides and skins per year. Among those 40% are done during the Qaurbani time (75 days) at 450 tons'/day rate and rests are processed in 225 days at 230 tons'/day production rate. Value addition of leather and leather goods and footwear exports on averages 85% local and 15% foreign. About 40-100 tannery units among 206 are now in operation in the sector. To prosper in the future, our tanneries must remain at the forefront of technological development.

Keywords: history, leather business, future perspective, Bangladesh

1. Introduction
Bangladesh has the potential of developing leather industries here. There are huge amount of quality raw materials and the cheapest labour market, which attracts most of the foreign entrepreneurs to set up their manufacturing industries here. They contribute a lot to the government by tax paying and by creating new employment to the social context. Additionally, they introduce most recent technology to their industries. But still the leather industries face severe problem for its existence due to the improper management of our resources losing the investor's attraction.

Leather is an exclusive, vastly multi-dimensional, and mutually dependent material all over the world. Now more than 500,000 people are working in this sector around the world, and the workers are increasing day by day [1, 2].

The growth rate of tanning materials is increasing in developing countries rather than in developed countries (2010: p. 29). The Bangladeshi leather sector plays a vital role to expand the Bangladeshi economy in terms of export and domestic market [3, 4, 5]. Currently, the number of leather and manufacturing units in Bangladesh has increased to 313 [6]. Among them, approximately 300 of the tanneries are situated in Hazaribagh, Dhaka. According to Billah *et al.*, [7] about 100,000 people are engaged with this industry directly and indirectly. In the peak season1 between 12,000 and 15,000 people work in the tanneries and during the off season their number decreases to between 12,000 and 8000. However, "the leather tanning industry has been identified as one of the main causes of environmental pollution in the capital city of 8 million people" [8, 9].

Scholars, environment specialist, columnist, journalist, and NGO experts are very conscious about the environment of Hazaribagh and Dhaka. They discuss different aspect like water, soil, and air of the environment individually [10, 11], [12, 13, 14]. They take "environment" as a watchword, and neglect the workers who live in that environment. They separate environment from the human being and other organisms. Very few scholars talk on laborer who work and live in Hazaribagh; even though almost all workers live in Hazaribagh with or without family. The workers suffer from double-edged problem: as an inhabitant, they face surrounding environment problem directly, and as a worker of tanning industry, they suffer from detrimental chemicals and wastes which are generated in the tannery itself.

The study aims to the history of leather business and future perspective in Bangladesh.

2. Methodology
2.1 Sampling selection
Data has been collected from random sampling method, which includes different types of tannery, employees on different levels, such as executives, technologists, management officers, workers, bankers, and experts for interviewing.

2.2 Sources of data
We know every research is done on the basis of data and data is two types in nature. One is primary data and another is secondary data. Primary data is getting from the field level survey, which is not published while secondary data is published data. This project is done on the basis of both primary and secondary data so that anyone can see the scenario of leather sector at a glance. Besides, field level survey is also done for getting the practical view.

3. Result and discussion
3.1 General history

Tanning hides and skins is one of mankind's oldest trades. It began when primitive man realized there was more value to an animal than food. Our prehistoric predecessors used the hides and skins of large mammals for clothing that protected them from adverse weather conditions. However, left untreated the hide or skin of an animal quickly begins to rot, putrefy and smell. So, our ancestors found ways to stop this natural process so their clothing didn't become un-wearable, if not unbearable. Just think how those early discoveries happened. After a hide lay out in the sun for a few days, it became stiff and hard, but the offensive smell disappeared.

Another successful invention was vegetable tanning. It probably started when hides were placed in a pool of water surrounded by trees. Pieces of wood, bark and leaves floated in the pond, which contained natural "agents," or chemicals, that tanned the hide. This type of treatment dominated the leather industry until the 19th century when the chrome tanning process for leather emerged. During the Middle Ages, tanneries became well organized. They gathered in special areas where raw materials (hides and skins, access to water) were present in large quantities. Many tanneries have been located in the same areas in Europe for more than 500 years. There weren't many changes in leather manufacturing from the Middle Ages through the end of the 17th century. But advancements in chemistry in the 19th century were vital to the development of the industry, especially chrome tanning, which utilizes salts of chromium to tan the animal skins and hides, as well as the use of enzymes and many other discoveries.

At first, the science of leather tanning was accidental. Yesterday, tanning harnessed the best practices of an agrarian craft and transformed it into a modern industry. Today, research and development is a systematic process that maximizes the benefits of animal hides and skins as an important natural resource while minimizing stress on the environment. Tomorrow, the leather industry will continue to develop innovative clean technologies that bring sustainable solutions to complex ecological, safety, aesthetic and performance challenges.

3.2 Leather sector: an overview in Bangladesh

Leather sector was in chaotic condition after liberation war. Bangladesh tannery sector at that time was producing wet blue and exported it earning 10-12 million Taka only. The newly formed tanneries corporation tried its best to uplift scenario. During 1972-78 the corporation tried to develop in management, technological and other infrastructures. Almost 50% of those tanneries were being operated by layman technician and unqualified management.

In the meantime, government observed that the ongoing practice of leather sector being run both from public and private entrepreneurship is not giving a fruitful result. The production lineup and factory mechanism is needed up-gradation. A rethinking for this sector is emerged. The government took decision to abolish the tanneries corporation and sold those to private entrepreneurs. A group of entrepreneurs with new ideas and commitment started their new venture to rebuild this sector. During 1979-90, the wet blue export was banned and encouraged to produce crust and finished leather.

The leather sector of our country runs with traditional technology discharging heavy pollution load to the environment. They are not taking any pollution measures. So our European buyers are pressurizing to avoid business here and thus the productivity as well as export potentialities are decreasing day by day.

3.3 History of raw materials of leather industry in Bangladesh

The leather industrial sector of Bangladesh has been almost entirely supported by local raw material resources while 1.0 million live cattle are imported every year from neighbouring countries to meet our protein demand adding extra number of raw hides and skins. According to the UNIDO and Hides and Skins Merchants Association Report 2005, Bangladesh process 85,000 tons' raw hides and skins per year. Among those 40% are done during the Qaurbani time (75 days) at 450 tons'/day rate and rests are processed in 225 days at 230 tons'/day production rate. Table-1 gives data relating to the animal population, annual production of hides and skins in the past few years.

Table 1: Animal population and production of hides and skins and leather in Bangladesh

Category	No. of animals (Million heads)	Hides & skins productions (Million pieces)	Average weight (Kg/piece)	Total annual production (Tonnes)	Average area (Sq.ft./piece)
Cow	24.31	4.00	12-15	48,000	20-22
Buffalo	0.85	0.50	20-25	11,000	32-35
Goat and sheep	32.70	15.00	1.5-2.0	26,000	1.00-3.75

***Source*:** Livestock census, 2004 & hides & skins merchants' association, 2005.

3.4 Number of tanneries in Bangladesh and future perspective

Most of our tanneries are located at Hazaribagh categorising as 'operating tanneries', which refers to run by their owners and 'other tanneries' which are running by leasing method named job-work done by the first category. The following table-2 provides information about their location and the number of these currently operational industries.

Table 2: Number of tanneries in Bangladesh

Location	2003		2006	
	Total	**Operational**	**Total**	**Operational**
Hazaribagh	194	105	192	35
Savar/dhamri	3	1	3	2
Kaliakour	1	1	1	-
Noapara, jessore	1	1	1	1
Jamalpur	1	-	1	-
Rangpur	1	-	1	-
Khulna	1	-	1	-
Chittagong	18	5	6	2
Total	220	113	206	40

***Source*:** UNIDO survey report'2005/2006.

3.5 Capacity utilization of leather industry in Bangladesh

The capacity installed of these 206 tanneries is 250 million sq.ft/year but the actual production is 180 million sq.ft/year can provide employment about 50,000 people by the leather industries directly. The following table-3 gives abroad picture of this sector.

Table 3: Capacity of leather industry in Bangladesh

No. of tanneries (Year'2006)	**Total installed capacity**	**Total actual production**	**Distribution**
	(Million sq.ft./year)		(%)
142	80	48	32
42	70	50	28
15	60	52	24
7	40	30	16
Total = 206	250	180	100

***Source*:** UNIDO survey report'2006

3.6 The future prospect of the leather industry

Value addition of leather and leather goods and footwear exports on averages 85% local and 15% foreign. About 40-100 tannery units among 206 are now in operation in the sector. Most of the industries are located in the Hazaribag area of Dhaka city and earning from this sector is 1981 crore Taka in 2005, which holds 4% international leather market share. Table-4 provides the export performance of the leather sector over the past several years.

Table 4: Export of leather and leather products (value in million US$)

Year	Leather	Footwear	Leather products	Total
1998-1999	168.25	46.55	4.59	219.39
1999-2000	195.05	48.26	3.58	246.89
2000-2001	253.93	33.63	3.12	290.68
2001-2002	207.33	41.29	3.87	252.49
2002-2003	191.23	35.06	3.43	229.72
2003-2004	211.41	50.86	3.64	265.91
2004-2005	220.92	59.29	7.35	287.79

***Source*:** EPB and ITC Dhaka office

To prosper in the future, our tanneries must remain at the forefront of technological development. It is imperative that they establish co-operation within the EU and continue to participate in future R&D activities. The industry and scientists working for the industry are committed to reducing the environmental impact from the tanning process, and also to improve the quality of the product.

Leather has played an important role in man's conquest of space. Its superior breathability, flexibility and corrosion resistance makes it ideal for gloves, boots, helmets and other mission-critical spacesuit applications. Other surprising new uses for leather are being invented every day, thus assuring that nature's finest fabric will continue its remarkable history well into the future.

Counterfeiting and piracy causes significant damage to industrial operators and business in many sectors. Fashion sectors, such as Textiles and Leather, are particularly affected. Seizures at borders and on the market have increased in frequency over recent years revealing a concerning trend, yet this is only the 'tip of the iceberg'.

The first is a "red alert", to be used for passing urgent intelligence: e.g. the right holder knows that a particular consignment is enroot.

The second, the "new trends" form, is to alert Customs to new routes of fraud, concealment methods or other new and important developments.

The employment network created in order to help employers and employees to develop their skills, which can be particularly important and interesting in this sector, since it can help to find the workers and employees needed.

4. Conclusion

Quality improvement of raw hides and skins is to be ensured by taking proper handling and caring measures of the raw stock. A uniform method of curing for raw hides and skins is to be implemented and necessary publicity is needed through media. Workforce engaged in management should have modern method of management training. TQM may be implemented in all factory operations. ISO certification may

be introduced. Market exploration should be required; so group of marketing people should be oriented in international marketing. Pollution should be controlled through introducing modern production and waste management. Simultaneously, by-product industries should be given more emphasizes to utilize wastes and reducing environmental pollution. Provide well trained and skilled manpower on regular basis in every level of leather industry. For doing this Bangladesh College of Leather Technology should introduce various levels of training and courses for workforce. Besides, all vocational institutes may start training short courses. Common Facility Center may be introduced for supporting small industries. A strong and independent Leather Board should be formulated for policy making and monitoring the leather work at national and international levels. Leather Research Institute should be more effective in R & D activities for entrepreneurs.

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