

TANNING INDUSTRY IN PAKISTAN

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No one can deny the importance of tanning industry in the national economy of a country; it supplies the most essential requirements of the people during the days of war and peace alike. It is one of the key industries of every country and attempts are being made to foster it with the aid of science and other artificial devices even where natural conditions are against its healthy development.

Tanning industry in Pakistan and India is not a new industry; it has existed in its indigenous form since long. To meet the local demand for inferior kinds of leather, locally available tanning materials have long been used for curing and tanning hides. Modern methods of tanning were first introduced by the military authorities at Cawnpur in 1860. During the war of 1914-18 this industry made remarkable progress. In 1917-18 the value of tanned hides amounted to Rs. 4.86 crores. In the Second World War the Government of India purchased the entire output of the organized tanneries of the country, since January 1942. The industry was still on the road to progress after the war when on 15th August 1947, two separate and independent states, Pakistan and India, came into being. At the time of Partition almost all the modern tanneries were concentrated in areas which now comprise India and only five fell within the area of Pakistan. Of these five only one could be compared favourably with the organized tanneries that existed in India.

Pakistan occupies a predominant place in the production of raw hides and skins. It is estimated that our annual production is as follows:

buffalow hides	8,11,000
cow hides	44,73,000
goat skins and	53,50,000
Sheep skins	20,75,000

Most of these hides and skins are exported to U. K., U. S. A., India and other countries. Pakistan enjoys one great advantage. It has almost a monopoly of the best varieties known to the world trade of "slaughter" hides

and skins. As the slaughter of cows is prohibited in India, she has to depend on "Fallen" hides, *i.e.*, animals that die a natural death. The hides are, therefore, of inferior quality and fetch lower prices. The leather made of these hides known as chrome, lacks elasticity and is comparatively less durable.

The availability of skilled labour is another great advantage enjoyed by the industry in Pakistan. The labour employed in the tanneries of India was mostly Muslim. As a result of prohibition of slaughter and on account of the general prejudice against the industry prevailing in the ruling community of that country, most of the skilled labour has migrated to Pakistan, where it is gradually being absorbed in the new tanneries. The availability of skilled labour is decisively a matter of chief importance for the industry.

Tanning industry is dependent on industries like footwear and leather goods manufactures. The demand for footwear and leather goods indirectly affects the demand for tanned leather. The annual foot-wear requirement of Pakistan is 28.5 million pairs but the annual production is. 10.75 million pairs. The biggest centre of shoe making industry was Agra before Partition but it has shifted to Karachi where the daily transactions of the industry run into lakhs of rupees. Karachi like Agra will have the monopoly of cheap made foot-wear whereas Lahore is famous for the manufacture of high class foot-wear. The foot-wear industry and the leather goods industry are the steady consumers of tanned leather both by vegetable and chrome tanning.

In Pakistan tanning materials like lime, fish and vegetable oil, Mangrove bark and babul bark are also available. The wattle bark is imported from South Africa and East Africa. We are short of tanstuffs like myrabolams and avaram bark which at present is imported from India but it has been found by the tanning experts that babul, kikar and mangrove bark which are abundantly found in Pakistan are fairly good substitutes. For chemicals and dyes we are dependent on foreign countries. Summing up the argument, Pakistan possesses almost all the requirements that are necessary for the growth of the industry.

But this does not mean that the problems facing the industry are small or few. Immediately after the partition the industry had to face grave problems. Firstly there was the shortage of chemicals and machinery. The countries supplying these commodities asked for a period of two to three years to do so. So effort was made to manufacture some of the machinery in Pakistan. A factory was set up for this purpose and it is producing many important machines, such as Shaving, Cleaning, Puffing Drumps and Paddle machines. However, foreign countries are willing and able to supply us

machinery and chemicals at short notice. Further, the industry remains under a constant threat of foreign competition, both in buying hides and skins and in selling tanned leather. Frequently this competition leads to abnormally high price of hides and skins and the chances of profits for the producers decline.

Pakistan Government fully realizes the importance of this industry and is taking keen interest in its development. An Advisory Committee was set up in 1948, which decided that during the next ten to fifteen years 20 tanneries for sole leather and 25 tanneries for upper leather would be set up. A proposal to establish Leather Trade Institute with a fully equipped Laboratory was adopted.

The production capacity of each of the five tanneries working at the time of Partition and the two that have been recently established is more than 200 hides per day. In 1949-50 the total output of our tanneries was 25 lakh lbs. sole leather, 15 lakh square feet upper leather. Production of leather by indigenous methods amounts to about 20 percent of the machine-tanned leather. We require approximately 2 crores 25 lakh lbs. of sole leather and 1 crore and 5 lakh square feet upper leather. Even after we are able to produce the leather upto our requirements we will have to depend on other countries for high class leather. Pakistan on the other hand would be able to export tanned leather of inferior quality.

Pakistan has started to produce crust leather which formerly was a monopoly of South India. Our crust leather is superior to that of India and its popularity abroad is increasing. Moreover, there are certain difficulties in the development of chrome tanning such as higher technical processes requiring high chemical knowledge and costly mechanical equipment.

However, great the advance of the industry may be a great deal of work remains to be done. The application of science to the processes of tanning, the breeding of healthy cattle, the prevention of animal diseases,, the scientific rearing of slump and lastly the use of scientific instruments for removing the skins of the animals can revolutionize the industry. Further, Pakistanis should be sent abroad to get training in the art of flaying and curing processes.

Of all the countries of the East, Pakistan is best suited to become the chief producer of tanned leather. The industry being on the decline in India, there is a chance for Pakistan to step in the place left vacant by India. We have all the necessary requirements for developing this industry. What is required is to implement the programmes that have been already chalked out.