

Growth of Leather Industries in Tamil Nadu under the British – A Study

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INTRODUCTION

The leather and leather products industry is one of India's oldest manufacturing industries that catered to the international market right from the middle of the nineteenth century, the demand for its products being both domestic as well as international right from the beginning. About 46 per cent of the production in the sector is exported and it ranks eighth in the list of India's top export earning industries and contributes roughly Rs. 10,000 crores per annum, i.e., about 4 per cent to export earnings. The sector accounts for 2.5 per cent of the global leather-related trade of Rs. 387,200 crores. An estimated 15 per cent of total purchase of leading global brands in footwear, garments, leather goods & accessories, in Europe, and 10 percent of global supply is outsourced from India. The leather industry employs about 2.5 million people and has annual turnover of Rs. 25,000 crores¹. The industry is also one with strong links with the social structure through caste and community. Thus a large number of people engaged in the industry (entrepreneurs as well as workers) are even today from traditional leatherworking castes (belonging to the lower castes in the caste hierarchy) and the Muslim community. Due to the age of the industry and its links with the social structure, the organizational structure that has emerged is a very complex one that contains within it elements of continuity with traditional structures as well as those that represent a break with them. In addition to these historical aspects of its evolution, the dynamics of the industry has been shaped to a large extent by export orientation from colonial times. The sector is dominated by small-scale firms although there also exist a significant number of medium and large sized firms in all segments of the industry.

LOCATION OF LEATHER INDUSTRIES IN TAMIL NADU

The industry is concentrated in several leather clusters in four or five distinct locations in the country, with each cluster containing a wide variety of enterprise forms and organizational structure. To be more specific, the major production centers of leather and leather products are located at Chennai, Ambur, Ranipet, Vaniyambadi, Trichy, Dindigul in Tamil Nadu, Kolkata in West Bengal, Kanpur and Agra in U.P., Jalandhar in Punjab, Delhi, Hyderabad in Andhra Pradesh, Bangalore in Karnataka and Mumbai in Maharashtra. Tamil Nadu is the biggest leather exporter (40%) of the country and its share in India's output on leather products is 70%. The following three tables provide information on employment in different segments of the industry, different production centers and their composition in the sector².

The leather industry in Tamil Nadu has a long history going back to the middle of the nineteenth century. While India was a traditional producer of leather, export trade in raw hides and skins and leather began in the 1830s.³ It began to be recognized that India, with the largest cattle population in the world, could become a potential supplier on the world market. Initially, India exported only raw and cured hides and skins, but by 1850, began exporting tanned hides and skins as well⁴. This was due to a significant technical improvement introduced in the Madras Presidency.

METHODS OF LEATHER TANNED HIDES AND SKINS

Until 1847, locally tanned hides and skins in Madras, using the avaram bark, produced a pale yellow, flexible leather, which was defective in that when exposed to sunlight, oxidization resulted in it turning an ugly red colour and patchy. The Madras tanners received complaints from overseas buyers on account of this. In 1847, Charles De Sousa, a French Eurasian technologist treated this avaram tanned leather with a tan liquor from myrabulan, which came to be known as the myrabulan bath. Subsequently, the leathers tanned in the Madras Presidency were found to be of acceptable quality internationally⁵. Exports from Madras thus surged and both U.K and Germany became significant importers of tanned leather as well as raw hides and skins from India. This technical development marked the beginning of the development of the leather industry in Tamil Nadu. Another factor that expanded trade and stimulated growth in the industry was a second major technical improvement that took place in the first decade of the twentieth century, i.e., the development of chrome tanning. Although this was introduced in the USA and Europe as early as the 1890s, in India it was started on an experimental basis in a factory set up by the Government of Madras only in 1904. This was done at the initiative of A. Chatterton, one of the officials of the provincial government in the Madras Presidency as one of his attempts to foster economic development in the provinces by demonstrating the success of different lines of business with state

patronage. The industry in Tamil Nadu developed primarily in response to high raw material availability. The Madras industry specialized in skins. In addition, in terms of livestock availability, the south's advantage lay in goats and sheep, rather than cattle. The railways connected Madras to a wide area that supplies skins, from the Tamil countryside, to Southern Andhra, and from the Deccan to Orissa. Added to these advantages was the growth of Madras city as a destination for migrant labour. From the time that de Susa's factory was at work in Pondicherry, a tanning industry had developed near Madras. In 1857, experimental tanneries were set up in Madras and Bangalore to develop tanning methods.

The leather making activities were mainly in the hands of the village chamars and were sufficient to meet the local needs. International export started only during the 1880s. The history gives an account of the origin of tanning process. The tannin is a chemical that occurs in a wide variety of plants and trees, most notably, the oak. It is widely believed that man happened upon the sealing qualities of tannin by the most precise of scientific methods. In other words, it was discovered purely by accident. Early hide users were trying to dry the hides by smoking them. The tannins in the bark and leaves and leaves that were used to fuel the fire of the smoking process were released into the hides, thus helping to make said hides a pliable material. The primitive method of preparing hides was first they soaked it then pounded. The skin was then placed over a plank and carefully scraped. After the fat and meat were removed, the hide was coated with urine or wood ash to aid in hair removal. Dung from carnivores, such as dogs' was spread over the hide for bating. After bating, finishing was done. For finishing hide was washed and hung over a pole that rested over clay lined pit. The pit was filled with a mixture of water and crushed oak bark. The alternative method involved was using a brain soup to coat the hide with. The brain soup is prepared from the brain of the animal that provided the hide⁶. There were various emissions being generated in the leather tanning and finishing industry. VOC emissions may occur during finishing processes. Ammonia emissions may occur during some of the wet processing steps. Emissions of sulphide may occur during liming / unhairing and subsequent processes. Also alkaline sulfides in tannery waste water can be converted to hydrogen sulfide if the PH is less than 8.0, resulting in release of this gas. Chromium emissions may occur from chromate reduction, handling of basic chromic sulfate powder and from the buffing process. The twentieth century marked a new period in the trade history of the Indian leather industry⁷.

During 1900-1914, the export scene was dominated by Calcutta and Madras with the former exporting raw goods and the latter tanned ones. In 1912-13, the total export of hides/skins amounted to Rs. 8 crores as against Rs.4 crores from Madras. This was because 17 of the 22 organised tanneries were in Madras and the rest remained scattered in Bengal, Bihar, Orissa and Bombay. The outbreak of World War II gave an impetus to the development of leather and leather goods industry in India. While in

1913-14 only 25 large units, employing 2,753 workers, were established, by 1941, the number of units had increased to 114 and the workers to 26, 056⁸. Before 1947, though the British had shown considerable interest in leather manufacturing in India and had even established some chrome tanning units in Bengal, India mainly exported raw hides and skins.

By 1880-81, India was exporting Rs.3.5 million worth of tanned leather and most of this was from the province of in raw hides and skins, Madras exported tanned skins from very early on. The tanning industry, therefore, was fairly well developed in India by the 1920s and Tamil Nadu became one of its main centres. Small, unorganized tanneries were very large in number, with a provincial survey of unregistered factories conducted by the Royal Commission for Labour in 1931 showing that in Madras, 776 tanneries employed about 10000 workers⁹.

Further, in Tamil Nadu, the leather industry, from the very beginning, grew to cater to the export market and production units were more on a factory basis than on a cottage basis. The Tamil Nadu clusters are exclusively export oriented, with units either exporting directly, or fabricating for exporters, or doing job work for export production, or selling to exporters. The development of tanning in Tamil Nadu was because of military demand for tanned leather primarily for boot production. Pallavaram, a suburb of Madras, and Ambur, situated about 110 miles west; saw a spectacular growth of factories during and before World War I and subsequently the industry spread to cover a large area of the North Arcot district. While the early leather businesses in Tamil Nadu were in the hands of the Eurasians, the main indigenous group that became prominent was the Muslims who accumulated large surpluses through trade in timber, seeds, wool, bark, etc in addition to leather. Some of these merchants had migrated from Kutch in the 1860s and continue to be in control of some of the largest leather businesses in Tamil Nadu even today. Because of their dispersed trading interests in raw products of various kinds, they had established networks for the collection and trade in these different raw products, including leather, and could ultimately exercise a greater control over the production chain. These entrepreneurs could set up factories on larger scales than in other parts of the country because of the finance available to them and did not need a local market for tanned hides and skins that was necessary for the tanneries in Calcutta or Kanpur run by the non-Europeans. Madras and adjoining areas also did not have an important enough leather product making industry traditionally that could provide a local market for tanned hides and skins. Only a minority of the Madras firms was European. The largest Madras leather tannery, called the Chrome Leather Company, was set up near Pallavaram near Madras by a young European who was an assistant in a Madras tannery and this firm supplied chrome leather for upholstery to a coach making firm called Simpsons¹⁰. The area around this firm came to be subsequently known as Chromepet and is today distinct from Pallavaram.

CONCLUSION

India had been doing well in all types of traditional industries since the earliest times, especially, the leather industry. Due to the impact of the industrial revolution in England and Europe, importance of this industry up to grew especially in the 19th century. European markets needed raw material for their leather factories. Therefore, the British had been attempting to control the raw material in India.

During British rule in Tamil Nadu, the British governors followed the different policies as follows:

1. Spent huge amount of funds to establish a railway network in order to ensure the safety of the arrival of leather material to the ports.
2. The handicraft industry of Tamil Nadu had to face failure because of the scientific development made by British industries, which had a negative impact on the handicraft industry in Tamil Nadu.
3. The decline of Tamil Nadu's centuries-old handicrafts and village industries became the only source of sustenance for the Tamilians.

REFERENCES

- [1] Central Leather Research Institute (CLRI) (1987), report of all India survey on raw hides and skins, prepared for the ministry of commerce, Government of India, Chennai., p 239.
- [2] Report of the Expert Committee on Small Enterprises (1997).
- [3] As early as 1804, a prominent civil servant, H.T.Colebrooke, argued that England could replace her supplies of hides from Brazil with those from Bengal.
- [4] *Ibid.* This is because goats and sheep are adaptable to drier and drought prone lands, compared to cattle which thrive on grasslands.
- [5] All India Manufacturers' Organisation (1948), P. Usha (1984).
- [6] Nihila (1999) found that in skin tanning units in Tamil Nadu, chakkiliyan women were engaged in the initial process of opening the raw curried skin and of sorting and trimming them.
- [7] P. Usha's study (Usha (1984) found this to have taken place extensively in the tanneries in the various clusters that she studied in Tamil Nadu.
- [8] R. Selvarangan, *Tannery Problems of Pollution and Projections on Prevention*, Leather Markets, June, 1986. p.4.
- [9] Vijay Kumar, "Leather Industry Problems and Prospects", *Yojana*, Vol. 40, No. 5, May, 1996. p.11.
- [10] R. Selvarangan, *op.cit.*, p.4.

