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# Leather & **HIVE**

A Quarterly Magazine of Footwear Exchange



**BANGLADESH LEATHER – BEYOND THE SURFACE  
EXPLORING THE TRUTH, CHALLENGES, AND  
FUTURE OF BANGLADESH’S LEATHER INDUSTRY**



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# Editor's Note

## Let's keep moving forward — with clarity, courage, and collaboration.

As we step into the 6th issue of *Leather & Footwear HIVE*, we continue our mission of bringing industry insights, honest reflections, and future-forward narratives to our readers. This edition, titled “Bangladesh Leather – Beyond the Surface,” invites you to take a deeper look at the forces shaping the leather and footwear industry in Bangladesh.

In this issue, we examine the country's evolving journey through several powerful lenses. Our cover feature explores the current status of LWG (Leather Working Group) compliance and sustainability practices in Bangladesh, alongside a data-rich analysis of rawhide economics during Eid-ul-Adha — a vital seasonal driver for the sector.

We also bring to you an in-depth report from our recent roundtable, where policymakers, manufacturers, and stakeholders engaged in candid dialogue on the truth, challenges, and future trajectory of the leather sector.

At the national level, the presentation by the Chairman of BIDA at the *BIDA Investment Summit 2025* signals a promising era of strategic reforms and investor readiness. We reflect on this momentum and how it complements the country's long-term industrial ambition. In parallel, our analysis of the *Bangladesh FY 2025–26 Budget* examines its implications for leather and footwear — highlighting policy intent, identifying gaps, and suggesting the way forward.

Looking beyond economics, this issue features a forward-thinking article on AI tool development for tech innovators, offering a seven-step framework from “sketch to production.” We also dive into operational excellence with a piece on conflict management on the production floor, as well as an article on seasonality considerations in footwear investment — an often overlooked yet critical topic for manufacturers and investors.

As always, the issue is rounded out with curated news, expert views, and stories from the ground — continuing our commitment to create a platform that informs, inspires, and connects.

We thank our contributors, supporters, and readers who make *Leather & Footwear HIVE* a growing voice of the industry. Let's keep moving forward — with clarity, courage, and collaboration

Editorial Team  
Leather & Footwear HIVE

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### Leather & Footwear HIVE

Leather & Footwear HIVE is a quarterly magazine of Footwear Exchange, a platform of people from all around the world who make the footwear, leather and allied industry work. Our mission is to advance all stakeholder of footwear, leather and allied industry through gathering and sharing knowledge.

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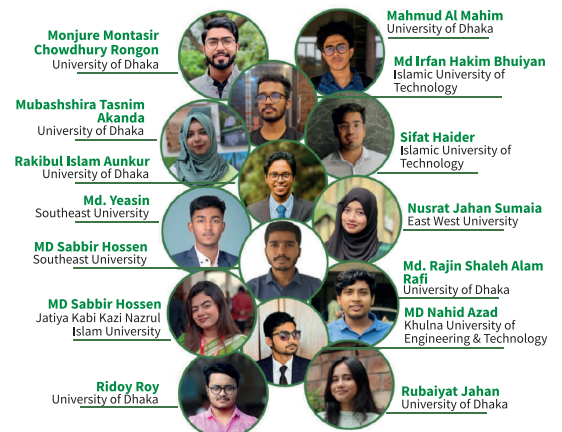
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Launched for the first time in 2022, World Leather Day is a global movement dedicated to celebrating leather as a material and promoting a deeper understanding of the leather industry. It is recognized by leather manufacturers, traders, chemical companies, brands and retailers, leather workers and craftsmen worldwide. The 2025 theme, “Beyond the Surface”, called on stakeholders across the world to look past long-held misconceptions and appreciate the transparency, longevity, and environmental value of responsibly produced leather

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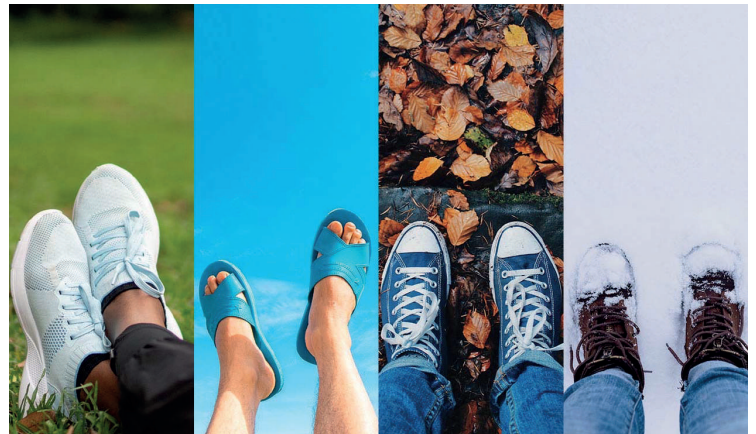
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INVEST  
BANGLADESH

## BIDA INVESTMENT SUMMIT 2025: UNLOCKING BANGLADESH'S ECONOMIC MOMENTUM

L&F Hive Desk

Bangladesh is stepping confidently into the global investment arena. The **BIDA Investment Summit 2025**, hosted by the Bangladesh Investment Development Authority (BIDA), showcased the country's evolving economic landscape, strategic reforms, and enormous untapped potential for international and local investors alike. Bangladesh is setting a bold course toward becoming South Asia's investment hub as revealed in it. For industries like leather and footwear, Bangladesh is shaping up as a cost-effective and opportunity-rich destination

In addition to strong domestic fundamentals, Bangladesh's strategic location offers unmatched regional connectivity. Situated adjacent to Nepal, Bhutan, and India's Seven Sister states, the country has the geographic potential to become the gateway to Northeast South Asia. With multinational corporations already operating at a scale of USD 180 million, projections suggest this figure will grow to USD 262 million in the near future. To support this, Bangladesh is rapidly enhancing its maritime infrastructure — expanding the capacity of Chittagong Port and developing key facilities at

Mongla, Matarbari, Patenga, Bay Terminal, Laldia, and New Mooring. These upgrades are expected to boost the country's total port capacity to 7.23 million TEUs, positioning Bangladesh as a critical logistics and trade hub for the region.

### DRIVING REFORMS TO SET THE COURSE RIGHT: QUICK WINS AND LONG-TERM COMMITMENTS TO BUILD INVESTOR CONFIDENCE

#### ✔ Immediate Reform Priorities (Quick Wins)

- One Stop Service (OSS) platform expanded to integrate more investor services
- Simplified licensing and permitting procedures with time-bound service delivery
- Digitization of trade, customs, and regulatory systems
- Streamlined tax administration for smoother investor onboarding
- Incentive packages for key export sectors (e.g. leather, electronics, textiles)
- Policy transparency and real-time investor grievance redressal
- SEZs supported by fast-track clearance and

- modern utilities
- Public-private dialogue mechanisms institutionalized

✔ **Long-Term Policy Support Measures**

- National Industrial Policy restructured to target higher-value sectors
- Customs and logistics aligned with global trade facilitation standards
- Comprehensive tax policy reform to ensure predictability and compliance ease
- Legal empowerment of BIDA and cross-agency coordination reforms
- IP, R&D, and tech transfer frameworks to attract high-skill industries
- National workforce strategy geared for 4IR (Fourth Industrial Revolution) sectors
- Sustainable infrastructure and green industry incentives
- Investment in multimodal logistics, corridors, and inland connectivity
- Deeper regional trade integration and FTAs to expand export access

**WHY INVEST IN BANGLADESH: A NATION ON THE RISE**

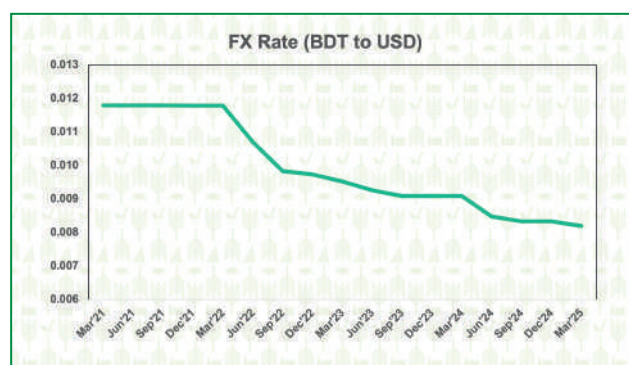
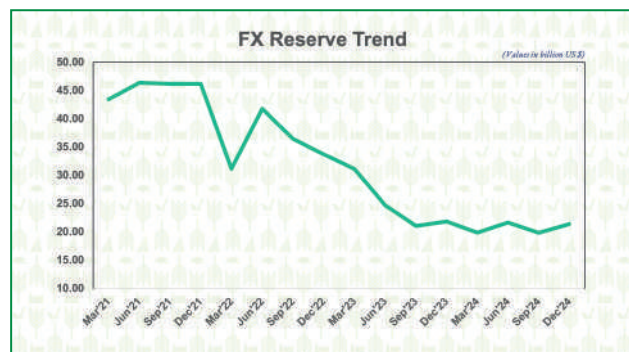
Bangladesh is fully aware that attracting global investment requires more than just potential—it demands trust, efficiency, and consistent policy support. With this in mind, the government has prioritized building a predictable and business-friendly environment where investors feel both confident and supported. To turn this vision into reality, BIDA has focused on the following key areas—implementing quick wins for immediate ease of doing business, while also laying down strong policy foundations to support long-term investment growth

✔ **Macroeconomic Turnaround: Stability in Motion**

Bangladesh’s economic rebound has been impressive. According to data from the International Monetary Fund (IMF) and Bangladesh Bank, the country is witnessing stable growth in foreign exchange (FX) reserves, a relatively steady BDT to USD exchange rate, and a recovery in GDP growth. Despite global uncertainties, macroeconomic recovery is gaining traction.

**FX Reserve Trend (USD Billion)**

Year	Reserve
2022	35.8B
2023	27.0B
2024	24.5B

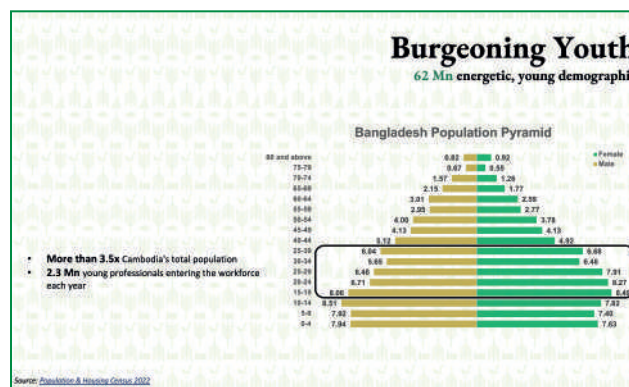


The IMF reports that key indicators—including inflation control, reserve strengthening, and exchange rate stability—are showing positive trends, laying the groundwork for renewed investor confidence.

✔ **Demographic Advantage: A Workforce Engine:**

With 2.3 million youth entering the workforce annually, Bangladesh’s population is one of its strongest economic assets. The Population & Housing Census 2022 shows that the largest population segment lies between 15–39 years of age—a perfect match for labor-intensive industries.

**Bangladesh Population by Age Group**



This growing labor force, combined with affordable wages, creates a reliable manufacturing backbone—especially appealing to footwear, leather, and apparel investors.

## INVESTMENT

### ✔ A Surging Consumer Market: The Next Big Frontier

According to Boston Consulting Group, Bangladesh’s Middle and Affluent Class (MAC) is rapidly expanding:

#### Year MAC (in millions)

- 2019 18M
- 2021 22M
- 2023 28M
- 2025 34M (projected)

This rise in consumption capacity turns Bangladesh into a lucrative retail market, with increased demand for quality fashion, footwear, electronics, and lifestyle products.

### ✔ Cost Competitiveness: Investing Smart

Bangladesh continues to offer one of the lowest operational costs in Asia:

- **Labor:** Among the most affordable in the region
- **Land Lease Rates:** Lower than most ASEAN countries
- **Utilities:** Reasonable pricing for electricity, water, and gas

Cost						
Labor	114	410	273	377	500	271
Land	1.35	6.65	1.81	1.23	5.00	19.92
Gas	0.24	6.18	2.90	6.0	1.25	2.10
Electricity	0.296	0.53	0.25	0.3	0.36	0.32
Water	0.086	0.127	0.074	0.068	0.046	0.42

For leather and footwear industries that require low-cost, high-output operations, Bangladesh’s pricing model is a game changer.

### ✔ Infrastructure Momentum: Building for the Future

Bangladesh is making major strides in infrastructure development:

- Chittagong Port has increased capacity and improved container handling efficiency.
- Special Economic Zones (SEZs) are being fast-tracked with tax breaks and land incentives.
- Digitized trade processes are streamlining logistics and customs.

Port	Current Capacity	Projected Capacity
New Mooring Container Terminal (NCT)	1.27	1.5
Patenga Container Terminal (PCT)	0	0.5
Laldia Container Terminal (LCT)	0	1
Bay Terminal	0	3.6
Matarbari Deep Sea Port	0	0.63
Mongla Port	0.1	0.63
<b>Total</b>	<b>1.37</b>	<b>7.86</b>

This development supports smoother export logistics—especially for time-sensitive global retail orders.

### ✔ Policy Reforms: Enabling Investment Confidence

BIDA spotlighted several reforms aimed at streamlining business operations:

- One-stop service for permits and licenses
- Authorized Economic Operator (AEO) certification
- Digitized trade facilitation systems
- Stronger IPR protection, tax incentives, and investor support

These pro-business reforms are helping build trust among both local and global investors.

## WHY BANGLADESH – AT A GLANCE

### Strength

Young workforce  
Booming consumer market  
Low production costs  
Strategic location  
Reform-driven governance

### Advantage

2.3M new workers/year  
34M MAC by 2025  
Labor, utilities, land  
Gateway to South & Southeast Asia  
Investor-friendly policies

The BIDA Investment Summit 2025 was more than just a high-level gathering—it was a statement. Bangladesh is reforming, growing, and opening its doors to the world. As Asia’s next manufacturing and consumer hotspot, it invites stakeholders in leather, footwear, textiles, and beyond to step in and scale up.



# BUDGET FY 2025-26

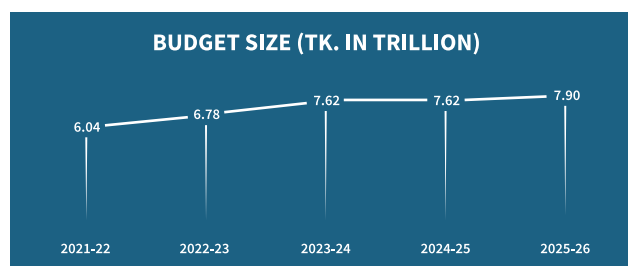


## BANGLADESH'S FY2025–26 BUDGET AND ITS IMPACT ON THE LEATHER AND FOOTWEAR SECTOR: PROMISES, GAPS, AND THE PATH FORWARD

Md. Abdullah Apu

A national budget is more than a financial document—it is a mirror of the government's political philosophy. Every allocation, every tax reform, and every subsidy reflect deeper values and intentions. It reveals the trade-offs leaders are willing to make—and those they are not. It decides who gets empowered, who gets overlooked, and who must wait. Whether it prioritizes growth over equity, infrastructure over public services, or private enterprise over public welfare, the budget silently articulates what the ruling leadership believes in, and where it wants to take the country.

The National Budget for FY2025–26, unveiled on June 2, 2025, presents a mixed landscape for businesses, aiming to stabilize the economy while introducing measures that could both support and challenge the private sector. The budget size for the last five fiscal years (FY) has seen a general trend of increase.



*(Trend of last 05 years' budget size-Source: Export Promotion Bureau)*

Against the budget size of Tk.7.90 trillion, Tk.5.64 trillion is expected to be achieved from revenue generation. The deficit portion of Tk.2.26 trillion is to be managed through domestic and foreign sources. Considering the existing political situation, geopolitics, and other external factors, it's a big question how much of the budget target will be achieved!

## BUDGET

The consequence of recent political turmoil has directly affected our domestic and international business. RMG sector is facing a severe crisis due to a suddenly created vacuum in the factory management. Eventually other problems like labor unrest, unemployment, sluggish supply chain system, and poor performance of existing bank loans have been raised. Like RMG, our entire leather sector (the second largest export earning sector) remains under big threat also.



(Export performance of Leather, Leather goods, & non-leather footwear- Source: Export Promotion Bureau)

Export earnings through the leather sector in the last three consecutive fiscal years showed a downward trend. Mentionable, from July 2024 to May 2025 the export volume shows USD.1.06 billion (Leather & Leather goods' contribution is 41.51%, and non-leather goods' contribution is 58.49%). Keeping sluggish business growth, expecting high revenue through corporate tax seems to be a fantasy or over ambition of the government!

Even in the darkness, a faint light flickers! Footwear and leather goods may show us the light although finished leather exports are decreasing day by day. It is high time for the govt to firmly stand by the leather & footwear industry. In this sector, the main raw materials (hides/skins) are obtained from domestic sources, other raw materials (chemicals, accessories, adhesives etc.) come from abroad whereas each material of RMG and/or other businesses comes from abroad. So, there is a big scope of booming this sector and some initiatives have been taken in the proposed budget 2025-26.

### KEY MEASURES IN THE BUDGET-

- Reduction in export source tax from 1.00% to 0.50%.
- Duty reduction on leather processing chemicals from 5.00% to 1.00%.
- Increasing the cash incentive for non-leather footwear and bags exports from the existing 2.00% to 4.00%.

We may expect a positive outcome from the above changes in the upcoming budget. Moreover, Bangladesh's leather and footwear industry has benefited from a shift in investments from countries like China, partly due to anti-dumping duties imposed by the EU on Chinese and Vietnamese shoes. This has positioned Bangladesh as an attractive destination for foreign direct investment (FDI) in this sector.

The Bangladesh Investment Development Authority (BIDA) has prioritized the leather and footwear industry, streamlining entry processes to attract further FDI and joint ventures. Additionally, the establishment of industrial estates in Rajshahi, Savar, and Chattogram provides robust infrastructural support for leather and tannery operations.

### SWOT ANALYSIS

**S**  
Strengths

- Tax exemptions and cash incentives on exports.
- Approximately 90% of raw materials are sourced locally.
- Low labor cost.
- Proximity to major markets like the EU, US, and Asia facilitates trade.

**W**  
Weaknesses

- Non compliance in the environmental issues.
- Shortage of skilled manpower.
- Limited access to advanced technology.
- Poor infrastructure, including power supply and transportation, impacts operational efficiency.

**O**  
Opportunity

- Expanding into non-traditional markets such as Australia, Singapore, and South Africa presents growth opportunities.
- Shifting focus from raw material exports to finished goods can increase profitability.
- Adopting eco-friendly manufacturing processes can attract environmentally conscious consumers.
- Implementing digital technologies can enhance efficiency and market reach.

**T**  
Threats

- Countries like China, Vietnam, and India pose significant competition in the global market.
- Global economic downturn can affect demand for leather products. Stricter environmental laws may increase compliance costs.

PATH FORWARD

- 
**Environmental**
  - Fast-track CETP
  - Governance shift to PMO/BEPZA
  - LWG certification push
- 
**Infrastructure**
  - Full execution of estates (Savar, Chattogram, Rajshahi)
  - Operational oversight
- 
**Skill/R&D**
  - Boost R&D at ILET, DU
  - Vocational training
  - Partner with brands
- 
**Incentives & Diversion**
  - Expand non-leather segments
  - Maintain export rebates
  - New markets focus
- 
**Compliance & Quality**
  - Regular audits
  - Environmental & labor standard adoption

To ensure the true advancement of the leather sector, we must think outside the box. There needs to be a strong understanding between industry owners and government policymakers, where LETS'B can play a significant role. The collaboration between ILET, DU and the leather sector must be further strengthened.

ILET should focus on research related to creativity, innovation in new technologies, improving product quality, and reducing production costs. The outcomes of these research efforts can then be shared and regularly discussed in meetings between LETS'B and factories.

Anyway, let's come to the topic of the budget. The FY2025–26 budget reflects strong policy support and global opportunity trends for Bangladesh's leather & footwear industry. But turning this into sustainable gains needs robust implementation: environmental compliance, infrastructure delivery, and quality-driven production at scale. If the government and private sector unite around these targets, Bangladesh could transform into a leading global manufacturer, achieving the \$5.00 billion export vision and delivering lasting socio economic benefits.

ABOUT AUTHOR

**Md. Abdullah Apu** currently works as a Credit Analyst in the CRM Division at South East Bank, holding the role of First Assistant Vice President. He earned his BSc in Leather Engineering from the Institute of Leather Engineering and Technology (ILET), followed by an MBA in Finance from the University of Dhaka. With a strong background in financial analysis, he has developed strong expertise combining industry knowledge with a strategic approach to banking.



**SEVEN STEPS TO  
AI TOOLS  
DEVELOPMENT**  
From Sketch to Production

# A FRAMEWORK FOR TECH INNOVATORS: SEVEN STEPS FROM "SKETCH TO PRODUCTION" IN AI TOOLS DEVELOPMENT

Naveed Anwar, PhD

Artificial Intelligence has taken industries by storm, and the world of fashion design is no exception. The thought of an AI tool capable of going from sketch to production, conceptualizing ideas and transforming them into tangible, detailed tech packs is fascinating—almost an irresistible innovation. But how can we achieve this pie in the sky? Here are seven steps AI tool developers should take to realize this thrilling vision.

## STEP 1: ONBOARD PRODUCT TECHNICAL EXPERTS

Entering into a new field demands understanding its nitty-gritty. Involving technical experts who have deep knowledge about the product development cycle will lend the technology credibility, as it's being rooted on a solid foundation built with experienced insights proving invaluable.



The journey towards creating AI that can transition seamlessly from a sketch to a complete tech pack begins with those who understand the intricacies of design and production—product technical experts. These professionals, with their years of hands-on experience and industry skillfulness, possess the necessary understanding of every single process involved in going from conceptualization to final product. What makes their input invaluable is not just their technical expertise about materials, construction, and grading, but also a practical insight into time frames, communication flows, and common obstacles met during this voyage.

When we bring these experts onboard right at the outset for AI tools development, these savants

become guides, giving the technology accuracy & reliability it needs at its core level by appropriately directing machine learning towards conditions it needs to adapt to mimic human-like sensitivity required in designing. These seasoned gurus will be able to pass on detailed criteria, helping streamline design parameters and effectively aiding superior algorithm progression.

Moreover, having them closely associated ensures that as these software evolve, refinements can be made more precisely, wherein tool advancements accurately reflect real-world requirements rather than taking flight into wishful theories.

Additionally, in an era where end-users are becoming more discerning & require solutions answering custom-needs better, expert insights help build AI tools offering not just number-crunching results but provide actionable outputs steeped into wisdom now logged digitally via these specialists!

So indeed, 'onboarding technical experts' forms our foundational necessity—embedding industrial knowledge deep within, making sure growth remains harnessed yet proliferates universally while carrying forth legacies passed on from one generation of creators onto another.

## STEP 2: INTEGRATE MACHINE LEARNING & ADVANCED ANALYTICS

Considering data's immense power in guiding choices & reducing errors, integrating Machine Learning (ML) and advanced analytics can allow these tools to learn from past experiences, perform trend analysis, and essentially be equipped with the robust predictive ability needed for trend forecasting.

**KEY TAKEAWAYS** Integrating machine learning and advanced analytics into the AI tool is the second crucial step in our journey. Machine Learning (ML) is essentially what gives a tool "brains", enabling it to learn from historical data, understand patterns, formulate insight, and make informed predictions. In production design, ML algorithms could be trained on thousands of successful tech pack designs or trend stories to identify commonalities and differences against which novel sketches can be benchmarked.

Further, enhancing this setup with advanced analytics bi-folds the capabilities of an AI-driven system by providing amplified reasoning ability

based on granular data slices. For instance, your ML model might suggest three different designs popular in market segment A; however, by applying advanced analytic layers, we can further refine suggestions considering parameters such as buyer demography; sustainability ranking; cost brackets or even just seasonality, thereby boiling down suggestions about what "really" works and thus significantly intensifying result potential!

However, merely incorporating ML and analytics into a system isn't enough—these ought to extend to sophisticated tools for visualizing outputs, enabling professionals across a company's hierarchy (and not just CSV-loving analysts!) to benefit from resulting insights more effectively, driving the decision-making process that much closer towards reliability and success.

In summary, integrating ML and advanced analytics may initially sound like amplifying complexity, but when harnessed appropriately, this duo makes your intelligent tool rightly anticipative, serving smarter choices and elevating organizational performance through superior outcomes!

## STEP 3: DEVELOP SPECIALIZED ALGORITHMS

The crux lies at developing specialized algorithms tailored to keep unique industry requirements in mind—including predicting buyer preferences, analyzing metadata, guiding material selections based on sustainability parameters, etc., which may lay successful cornerstones.

**KEY TAKEAWAYS** The development of specialized algorithms then underpins the operational efficiency of AI-empowered tools. These are tailor-made mathematical models that represent a set of instructions designed to perform specific tasks within our tech-pack AI platform. In other words, they're like the brain's synaptic network, working in silence behind the scenes but driving all functions upfront.

Coding such algorithms requires utmost precision because they would manage complex merges between machine learning patterns and practical industry knowledge initially fed in via technical experts' guidance. For instance, these algorithms need to smoothly integrate aspects such as silhouette sketching, 2D/3D imagery adaptation, or even comprehensive annotation detailing, amongst many other tasks, each possessing its own unique nuisances requiring careful coding fine-tuning!

## ■ TECHNOLOGY

Furthermore, high-performing special algorithms also cater toward sturdier error handling mechanisms, including perceptive warnings for potential misjudgements, feeding right into improving design integrity, massively reducing wastages in terms of time and resources incurred over iterations, hence proving to be true performance boosters!

Developing these intricate maps demonstrates an effective interplay between advanced technology and industrially grounded insights, allowing our platform to be more than a mere software assistant; instead, it evolves into an intuitive partner able to self-evolve over time, yielding continuously enhanced results.

So indeed, designing precise algorithms forms our third critical milestone—marrying human intelligence with artificial brilliance—powering professional solutions that are truly futuristic while remaining practically grounded.

### STEP 4: IMPLEMENT REAL-TIME PROTOTYPING

Incorporating real-time prototyping using accurate 3D models would provide live feedback, ensuring faster corrections, eventually leading towards quality product design outputs more reliably & swiftly!



At the fourth milestone, we're looking at implementing real-time prototyping. The concept of 'seeing it before building it' isn't new to tech pack designing, but the experience becomes truly dynamic by utilizing AI-powered prototyping tools that offer designers an instantaneous visual representation of their ideas.

AI driven platforms translate technical specifics into a vivid 3D model instantly, giving designers an opportunity to explore how different elements like color variants, fabric types, or design features such as cut, fit, or embellishments might impact the overall aesthetic of their concept. An early-stage 'physical' evaluation drastically reduces feedback time, leading to more agile development cycles and subsequent iterations.

Further, with a capability for limitless pre-production reviews in virtually any environment—whether in a store-like setting, on a runway mode, or even over a real-life digital avatar—professionals are provided with extensive feasibility checks, thereby mitigating future risks related to manufacturability issues or

market acceptability.

By enabling trial-and-error experimentation without actual physical constraints, advanced AI tools enable designers to bring their creativity fully alive! Not only do iterative adjustments come easily, rolling in smooth tweaks, conserving vital resources, including that most precious non-renewable one—"time."

Real-time prototyping, then is our transformative fourth step—fueling design imaginations by transitioning vision directly from the mind's canvas onto a visible one, making failure cheaper, faster, and thus ultimately less intimidating for businesses, empowering them to make those audacious leaps which otherwise seem risky from traditional lenses!

### STEP 5: TRAINING USING EXTENSIVE VARIATIONS

Train your system using extensive variations across periods, market segments, trend shifts, etc, thereby robustifying its future predictions while making it adapt well over time, adapting consistently through ever-evolving fashion landscapes just like designers do!



The last but unquestionably not the least milestone revolves around a critical facet of AI tool development: 'Training Using Extensive Variations'. Just as a fine sommelier understands the nuanced variations between different wines or a seasoned marketing expert discerns subtle differences in consumer behaviors, AI tools are only as good as the diverse data they're trained on.

To maximize their versatility and accuracy, we expose our tech-pack AI platform to wide-ranging data sets, inclusive of all possible design variations spanning across industries, product types, styles, and even cultural preferences. Think of clothing items from straightforward tees to intricate gowns or accessories ranging from minimalist wrist-watches to elaborate chandelier earrings—teaching it to handle both simplicity and complexity, adroitly fitting within predefined standards.

Moreover, through iterative training with constant feedback loops involving real-life industry experts, the system learns how individual components combine together into comprehensive tech packs in various unique ways, akin to 'No two snowflakes being identical'. It incorporates lessons learnt from

myriad examples, refining its understanding, progressively enabling designers to advise over diverse aspects like optimal fabric utilization techniques, preferred stitching methods, or even creating futuristic patterns!

This intensive training phase hence, is about building an insightful repository possessing depth-intensive technical know-how converted into an AI-decipherable form! The primary aim here remains developing digital expertise which doesn't just process cold data entries but instead explores hidden narratives tying individual parts, propelling it closer toward that holy grail of any intelligent machinery, "Wisdom"!

Thus culminating our fifth critical milestone: a precise interweaving between exhaustive variation exposure, aligning rigid machine language structures with fluid human intelligence, and creating highly advanced cognitive solutions going beyond expanding operational efficiencies, instead transforming them altogether.

## STEP 6: ENSURE SEAMLESS INTEGRATION

Parachuting down stand-alone software never works! Ensuring seamless integration of the AI tool with existing systems (design, manufacturing, etc) is a must, ensuring continuity of work without interruptions; a smooth transition aids better adoption rates.



As we come to the final step, it is necessary to focus on operational practicality. Regardless of how advanced or useful an AI solution might be, its effectiveness largely depends on its ability to integrate seamlessly with pre-existing systems and processes. This seamless integration forms the backbone of Step 6.

Understanding specific workflows and business models that vary across every organization requires us to build flexible AI-driven tools capable of adapting swiftly to different environments. Achieving this involves making the tech pack AI platform not just compatible with common design software like Adobe Illustrator or CAD files but also aligning it towards meeting unique business requirements, whether a startup's fast-paced dynamic needs or a well-rooted multinational's complex system interlinkages.

Importantly, though, seamless integration doesn't

just signify technological compatibility but extends into aspects related to user experience as well! Our goal is for design professionals at all levels—from novices stepping fresh off grad-school doors through seasoned industry veterans—to utilize our tool, feeling as if it were custom-crafted for them individually! Guiding this user-centric orientation frontline should be concepts such as intuitive navigation paths, easily comprehensible features, or personalized assistance options, synchronizing digital sophistication comfortably within their familiar working landscapes!

Seamless integration thereby sums up our dedicated sixth milestone—articulating more specifically why each sequential step holds crucial in creating advanced intelligent solutions and redesigning the tech-packing world forever—realigning technology away from being a complicated, devoid entity towards turning it into a personalized, user-friendly ally, enhancing productivity, unlocking immense untapped potential, and propelling businesses to newer, improved heights.

## STEP 7: SUSTAIN, ITERATE, AND IMPROVE

Software development is never 'one & done'. Continuous iteration incorporating feedback & enlightenments along the journey to maintain pace with evolving user requirements, besides catering to technological advances—the process ought not to stop at product launch but rather continue iteratively!



With the tech pack AI platform now fully integrated into the workflow, our journey doesn't end there. Much like how businesses evolve and grow over time, our AI solution must be equipped to adapt to these changes. This is where we arrive at Step 7: 'Sustain, Iterate, and Improve'.

A core aspect of many successful businesses is not in launching a perfect product but rather in their ability to fine-tune their offering continuously based on feedback loops and performance analytics. The same applies here! We don't merely launch an AI modulating its operation according to existing parameters, but instead continue acclimatizing it toward market trends or user preference shifts, enabling it to stay ahead of industry curves!

Sustaining this iterative progress depends on comprehensive evaluations, such as customer

## ■ TECHNOLOGY

feedback reviews or data-driven analytics, translating them into actionable improvements. These valuable insights help us identify gaps between what was planned and actual implementation, aiding in aligning things better!

Furthermore, consistently improving upon an already advanced system injects it with innovative upgrades echoing evolving business landscapes and imbuing added features as per industry advancements, helping users keep pace and even surpass competitors! Simultaneously, though being mindful enough, prevent unnecessary complexity inclusion, thus complicating things for users, thereby maintaining a careful balance between sophistication and simplicity.

Therefore, concluding our 7th iterative milestone: emphasizing the significance behind constant sustenance refining processes, iterating over set objectives which aren't fundamentally creating something groundbreaking initially, instead focusing upon those minor daily improvements accumulation leading to transforming ordinary into extraordinary and achieving that often-elusive competitive edge!

and achieving that often-elusive competitive edge!

## CONCLUSION:

The path laid down above is but a simple map guiding us towards an exciting future where man and artificial intelligence can co-create technological symphonies! Brace yourself for an era where AI tools could potentially draw durable bridges from mere sketches to production-ready tech packs in the field of fashion design, breathing life into visions & revolutionizing industry norms.

Feel free to share your thoughts or suggest additional steps that may help enrich this AI-driven journey. Here's looking forward to contributing footprints as we walk on a path uncharted yet so colossal. Be inspired, be innovative!

## ABOUT AUTHOR

**Naveed Anwar, PhD**, A committed and passionate professional footwear expert, has consistently been to transcend the limits of innovation and design within the footwear industry.





# BUILDING BLOCKS OF THE EUROPEAN UNION'S ECODESIGN FOR SUSTAINABLE PRODUCTS REGULATION (ESPR):

## TEXTILES AND FOOTWEAR INDUSTRIES AT A FUTURE CROSSROADS

Md. Rayhan Sarker

Textiles, garments, and footwear dominate Bangladesh's exports to the European Union (EU), accounting for over 93% of exports to the region in 2024, which also represents about 35% of the country's total global exports—highlighting the EU's strategic trade importance. Textiles and apparel will be subject to specific Ecodesign for Sustainable Products Regulation (ESPR) requirements by the end of 2026, with full enforcement by late 2027 or early 2028, after an 18-month transition period. Footwear regulations will follow post-2027, once a dedicated impact study on sustainability requirements is completed by the ESPR footwear task force.

The ESPR, effective since July 2024 under the EU's Circular Economy Action Plan 2020, is set to reshape the design, production, and lifecycle management of textiles and footwear. Its goals include reducing environmental impact, promoting circularity, and increasing transparency in high-impact industries.

A clear understanding of the footwear sector-specific guidelines will emerge once the ESPR footwear task force completes its dedicated study on sustainability requirements by the end of 2027. This phased implementation offers Bangladeshi exporters valuable time to prepare for the transition. However, how well do we currently know the building blocks of the ESPR and their implications for the country's key export sectors? The following section outlines the core building blocks and key measures of the ESPR, with a particular focus on the most relevant to the footwear industry.



Fig. 1 Building blocks of the ESPR

**HERE'S HOW EACH OF THE 16 ESPR BUILDING BLOCKS APPLIES TO FOOTWEAR MANUFACTURING:**

**01 Recycled Content:** Use of recycled materials in footwear components, such as recycled rubber for soles or recycled polyester for uppers, reducing reliance on virgin resources and supporting circularity in footwear design.

**02 Water Use & Efficiency:** Minimizing water consumption in footwear material processing—such as leather and fabric treatment—and implementing water-saving technologies in factories, such as closed-loop water systems, water recycling units, and dry processing techniques, can significantly reduce the water footprint of each pair of shoes.

**03 Resource Use & Efficiency:** Optimizing footwear materials use by minimizing offcuts in leather and fabric, choosing lighter and more sustainable materials, and eliminating non-essential components. Embracing minimalist and standardized design principles not only reduces overall resource consumption but also promotes cleaner, more functional product aesthetics aligned with sustainability goals.

**04 Upgradability:** Designing footwear with replaceable or upgradeable components—such as footbeds, outsoles, uppers, and trims—helps extend the product's lifespan and reduce waste by allowing consumers to refresh or update their shoes rather than discard them.

**05 Possibility of Recycling:** Constructing footwear for easy disassembly, using recyclable mono-materials or separable components to facilitate recycling at end-of-life, and avoiding glues or combinations that prevent recyclability.

**06 Possibility of Recovery of Materials:** Ensuring that valuable materials—such as metal eyelets, high-grade rubber, premium leather, and quality textiles—can be efficiently extracted and reused during the recycling process supports effective material recovery systems and reduces the need for virgin resources.

**07 Possibility of Remanufacturing:** Enabling used shoes or components to be restored, cleaned, and incorporated into new products, often through brand-led or sustainability-focused initiatives, for example, through refurbishment schemes or modular designs that accept remanufactured parts.

**08 Reliability:** Guaranteeing that shoes maintain their performance, comfort, and appearance over time, resisting wear, deformation, and environmental exposure, which supports longer usage and consumer trust.

**09 Reusability:** Designing shoes to withstand multiple ownership cycles, making them suitable for resale, donation, or rental, with robust construction and timeless styles that retain value.

**10 Durability:** Prioritizing abrasion-resistant upper materials, durable trims, reinforced stitching, and robust outsoles ensures that footwear withstands repeated wear in desired conditions—directly reducing waste and extending product lifespan.

**11 Reparability:** Making it easy to repair shoes by providing replaceable parts (like trims, footbeds, insoles, laces, or soles), using fasteners instead of glue where possible, and ensuring critical spare parts are available at reasonable prices.

**12 Maintenance & Refurbishment:** Facilitating cleaning, polishing, and minor repairs, and supporting professional refurbishment services to extend the usable life of footwear.

**13 Generation of Waste Materials:** Reducing waste in manufacturing by optimizing cutting patterns, recycling offcuts, and designing shoes to minimize post-consumer waste at end-of-life.

**14 Environmental Footprint:** Measuring and reducing the total environmental impact of footwear, including carbon emissions, water use, and pollution, across sourcing, production, and disposal stages.

**15 Energy Use & Efficiency:** Reducing energy consumption in footwear manufacturing through multiple strategies—such as upgrading to energy-efficient machinery, optimizing production workflows, recovering waste heat, implementing smart factory systems, using LED lighting, and integrating renewable energy sources like solar or wind—can significantly improve energy performance and lower emissions.

**16 Presence of Substances of Concern:** Footwear manufacturing often involves hazardous chemicals that can pose risks to human health and the environment. In addition to certain adhesives, volatile organic compounds (VOCs),

dyes, and tanning agents, other concerning substances include phthalates (used in plastics), formaldehyde (in some textiles), chromium VI (a by-product in leather tanning), heavy metals (like lead and cadmium in pigments or trims), and PFAS (used for water repellency). Avoiding these and adhering to chemical safety standards like REACH ensures safer products and production environments.

### THE ESPR FRAMEWORK INTRODUCES THREE KEY MEASURES TO ENHANCE PRODUCT SUSTAINABILITY AND CIRCULARITY:

- **Digital Product Passport (DPP):** The ESPR will establish a DPP—an electronic profile containing essential information about a product’s technical performance, material origins, repair and recycling options, and environmental impact. This aims to improve transparency for consumers, manufacturers, and regulators, while enabling customs authorities to verify imported goods automatically.
- **Ban on Destruction of Unsold Goods:** To prevent resource waste, the ESPR bans the destruction of unsold textiles and footwear, with potential expansion to other sectors. Large and medium-sized companies will also be required to publish annual data on unsold products—such as quantities discarded and reasons for doing so. Retailers can manage unsold footwear sustainably through donation, recycling, material recovery, resale, refurbishment, and upcycling, aligning with circular economy and regulatory goals.
- **Green Public Procurement (GPP):** With EU public spending at €1.8 trillion annually, the ESPR enables mandatory sustainability requirements for selected product categories under public procurement. This measure aims to boost demand for sustainable products and incentivize manufacturers to enhance product circularity and performance.

Textiles, apparel, and footwear industries account for 10% of global carbon emissions, making the EU’s implementation of the ESPR a timely and necessary step toward promoting sustainability in these and other high-impact sectors. These regulations will empower consumers to make informed decisions when purchasing sustainable products. Undoubtedly, the ESPR will reshape the way business is conducted. The question remains: Are we ready to embrace the changes needed for a more sustainable future?

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### ABOUT AUTHOR

**Md. Rayhan Sarker** is currently on leave as an Assistant Professor at the Institute of Leather Engineering and Technology (ILET), University of Dhaka, and is pursuing his Ph.D. in Sustainable Fashion Business at Kansas State University, USA. He holds both his BSc and MSc degrees from ILET, University of Dhaka, and later completed his Master’s in Advanced Engineering Management from BUET. Known for his commitment to sustainability in fashion and leather sectors, he has also earned several international certifications in circular product design, sustainability and ESG, sustainable fashion etc. He brings a thoughtful blend of academic excellence and forward-thinking insight to the evolving global conversation on sustainability and responsible production.



# EMPOWERING YOUTH FOR SUSTAINABLE INDUSTRY: FOOTWEAR EXCHANGE HOSTS CAMPUS AMBASSADOR ORIENTATION 2025

On the occasion of World Leather Day 2025, Footwear Exchange successfully hosted its Campus Ambassador Orientation Programme—a dynamic initiative aimed at bridging academic talent with the pulse of Bangladesh’s leather and footwear industry.

The programme welcomed over 14 selected student ambassadors from universities across the country, reflecting a new generation of leaders committed to driving innovation, ethical practices, and sustainable growth in the sector.

## INTRODUCING THE CAMPUS AMBASSADORS

**Monjure Montasir Chowdhury Rongon**  
University of Dhaka

**Mubashshira Tasnim Akanda**  
University of Dhaka

**Rakibul Islam Aunkur**  
University of Dhaka

**Md. Yeasin**  
Southeast University

**MD Sabbir Hossen**  
Southeast University

**MD Sabbir Hossen**  
Jatiya Kabi Kazi Nazrul Islam University

**Ridoiy Roy**  
University of Dhaka

**Mahmud Al Mahim**  
University of Dhaka

**Md Irfan Hakim Bhuiyan**  
Islamic University of Technology

**Sifat Haider**  
Islamic University of Technology

**Nusrat Jahan Sumaia**  
East West University

**Md. Rajin Shaleh Alam Rafi**  
University of Dhaka

**MD Nahid Azad**  
Khulna University of Engineering & Technology

**Rubaiyat Jahan**  
University of Dhaka

The newly inducted Campus Ambassadors come from diverse academic disciplines but share a common passion for the leather and footwear sector.

Chosen through a rigorous selection process, they embody energy, curiosity, and a strong sense of social and environmental responsibility.

As representatives of Footwear Exchange on their campuses, these young leaders are expected to facilitate dialogue, promote awareness, and act as a bridge between academia and industry.

The orientation programme was designed to offer not just a knowledge base but a transformative experience—instilling leadership, vision, and a deep understanding of the industry’s challenges and opportunities.

### IMMERSIVE LEARNING: FROM DIALOGUE TO FIELD VISITS

The orientation began with participation in an exclusive roundtable discussion titled **“Bangladesh Leather – Beyond the Surface”**. Attending as observers, the ambassadors were exposed to insights from prominent figures representing different facets of the leather ecosystem—including experts in testing, manufacturing, exports, chemical solutions, and government regulatory bodies. The conversation explored global market dynamics, sustainability concerns, industrial transformation, and the changing skills landscape for the sector’s future.



This intellectual engagement was followed by a field visit to the Central Effluent Treatment Plant (CETP) at Savar Tannery Estate. Here, ambassadors witnessed firsthand the scale and complexity of environmentally responsible leather processing. The visit provided crucial context to the technical, regulatory, and ecological dimensions of modern tannery operations in Bangladesh.



### REFLECTIONS FROM AMBASSADORS

Ambassadors shared enthusiastic feedback on their experience. **Nusrat Jahan**, a student of Business Administration at East West University, said, “The roundtable provided a rare chance to hear directly from leaders in the industry. It helped me feel more engaged with a new sector and sparked a strong interest in ethical footwear design. Coming from a BBA background, I had little knowledge about these topics before the discussion. The insights I gained about the leather industry truly broadened my understanding and made me reflect deeply on its potential and impact.”



**Md. Nahid Azad**, from the Department of Leather Engineering at KUET, added, “Visiting the CETP opened my eyes to how sustainability is not just theory—it’s a real, operational challenge. I feel a new sense of responsibility to be part of the solution. The roundtable discussion further deepened this perspective, offering valuable insights from industry experts on how collaborative efforts and innovative thinking are key to driving sustainable change.”



### LOOKING AHEAD

The orientation marks the beginning of a long-term engagement. The ambassadors will now represent Footwear Exchange on their respective campuses, contributing content, facilitating awareness, and helping connect academic insights with real-world industry goals. Their journey forward will continue to focus on sustainability, innovation, and ethical leadership.

### CONCLUSION

The 2025 Campus Ambassador Orientation Programme stands as a powerful testament to Footwear Exchange’s commitment to youth empowerment, sustainability, and sectoral transformation. Through a blend of knowledge-sharing, mentorship, and real-world exposure, it has set the stage for a new generation of informed, inspired, and engaged young leaders ready to shape the future of Bangladesh’s leather and footwear industry.

# BANGLADESH'S LEATHER AND FOOTWEAR EXPORTS FY 24 - 25

## BANGLADESH FOOTWEAR EXPORT SOAR 24%, POWERING LEATHER SECTOR GROWTH IN 2024-25.



Bangladesh's leather and footwear industry closed the fiscal year 2024–25 with total exports reaching USD 1,667.66 million, marking a 15% year-on-year growth compared to FY2023–24. This overall rise is driven primarily by robust performance in the footwear segments, despite modest declines in traditional leather and leather goods. While the footwear segment recorded impressive growth, traditional leather and leather goods exports saw a marginal decline. The trends highlight both emerging opportunities and persistent challenges in the sector's export landscape.

### FINISHED LEATHER: CONTINUED DECLINE DESPITE EID-UL-AZHA BOOST

In FY2024–25, exports of finished leather fell to USD 114.94 million, down from USD 128.21 million the previous year, representing a 10% year-on-year decline.

### LEATHER PRODUCTS: STAGNATION IN A SEGMENT WITH UNTAPPED POTENTIAL

Exports of leather products — including belts, year. This 2% decrease, though marginal, suggests stagnation in a segment that has the potential to grow with the right interventions.

### LEATHER FOOTWEAR: THE DRIVING FORCE BEHIND GROWTH

The brightest spot in the sector was leather footwear, which saw robust export growth, climbing to USD 834.59 million in FY2024–25 from USD 672.07 million in the previous year — a 24% year-on-year increase. This performance reaffirms leather footwear's status as the leading export segment in Bangladesh's leather industry.

### LEATHER FOOTWEAR: THE DRIVING FORCE BEHIND GROWTH

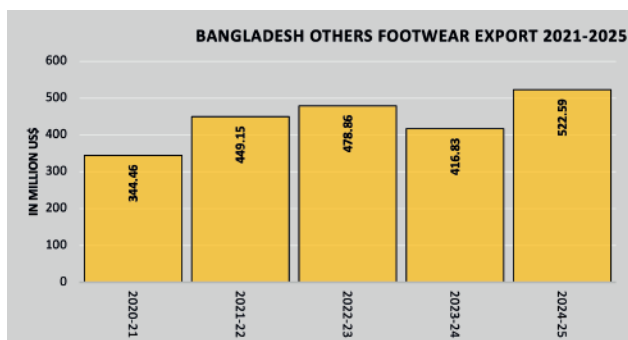
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### NON-LEATHER FOOTWEAR: RISING WITH GLOBAL TRENDS

Non-leather footwear also posted significant growth, with exports reaching USD 653.24 million, compared to USD 522.59 million in FY2023–24 — marking a 25% increase. This surge reflects shifting

global consumer preferences toward vegan, synthetic, and textile-based shoes, particularly in the sports and casual footwear segments.

### 5 YEARS OF OTHER FOOTWEAR EXPORT TREND



### TOP 10 EXPORT COUNTRY FOR OTHER FOOTWEAR FOR FY 2024-25

FR: France	19.0%
IN: INDIA	17.2%
DE: Germany	11.7%
ES: Spain	9.1%
NL: Netherlands	7.1%
BL: Bangladesh local export code	6.7%
PL: Poland	4.3%
US: United States	3.7%
KR: Korean Republic of	2.0%
GB: Great Britain	1.8%

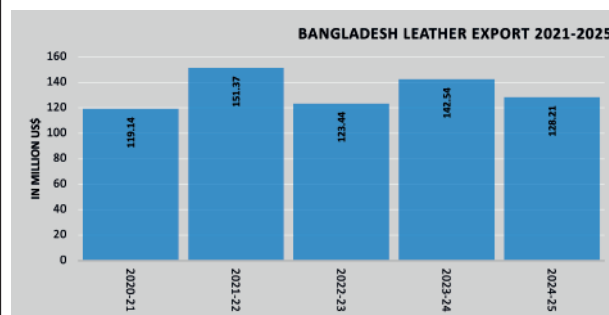
### 5 YEARS OF LEATHER FOOTWEAR EXPORT TREND



### TOP 10 EXPORT COUNTRY FOR LEATHER FOOTWEAR FOR FY 2024-25

US: United States	42.8%
NL: Netherlands	8.9%
CA: Canada	7.1%
DE: Germany	6.6%
PL: Poland	4.9%
JP: Japan	4.1%
IT: Italy	3.6%
IN: INDIA	3.4%
GB: Great Britain	2.8%
FR: France	2.6%

### 5 YEARS LEATHER EXPORT TREND



### TOP 10 EXPORT COUNTRY FOR LEATHER FOR FY 2024-25

CN: China	43.5%
BL: Bangladesh local export code	14.2%
IN: INDIA	10.6%
VN: Vietnam	7.4%
ES: Spain	5.7%
IT: Italy	4.1%
JP: Japan	2.8%
TW: New Taiwan	2.5%
HK: Hong Kong	2.0%
PT: Portugal	1.7%

### 5 YEARS LEATHER PRODUCT EXPORT TREND



### TOP 10 EXPORT COUNTRY FOR LEATHER PRODUCTS FOR FY 2024-25

US: United States	26.2%
IN: INDIA	20.9%
JP: Japan	16.4%
BE: Belgium	8.2%
NL: Netherlands	6.3%
DE: Germany	2.3%
AU: Australia	2.2%
MX: Mexico	2.0%
CN: China	1.8%
CA: Canada	1.8%





## ECONOMICS OF RAWHIDE AROUND EID-UL-AZHA 2025

Dr. Foyasal Khan

Eid-ul-Adha is the second most significant festival for the world's more than 2.05 billion Muslims. Every year, on this occasion, financially able Muslims sacrifice animals such as sheep, goats, cows, and camels to commemorate the prophet Ibrahim's willingness to obey Allah by sacrificing his son Ismail. According to religious teachings, they also distribute a portion of their meat among the poor and destitute people of the society. This temporarily, to some extent, fills the nutritional deficit of a large section of the society. On the other hand, since beef and rawhide are produced in fixed proportions as a classic example of joint product, Eid-ul-Adha remains the peak season for rawhide supply. Tanners collect a significant portion of their annual supply during this time and a huge economy develops around it.

### RAWHIDE ECONOMY DURING EID-UL-AZHA AND INITIATIVES OF INTERIM GOVERNMENT

In Bangladesh, according to an estimate, rawhide business is worth around 4-5 billion Taka every year during Eid-ul-Azha. Nearly 10 million rawhides are collected during Eid-ul-Azha which is more than half of the total rawhides collected by tanners throughout the year, even though due to lack of proper management, 30 per cent of raw hides are wasted. However, the rawhide business has been in turmoil for several consecutive years. In the first week of May, ahead of Eid-ul-Azha, Chief Advisor Dr. Muhammad Yunus announced the interim government's commitment to ensuring fair prices for the rawhides of sacrificial animals, which had

long been absent due to syndicates or mismanagement.

To this end, several timely initiatives have been taken this year to revive the rawhide economy. First, to control the supply in the rawhide market during Eid-ul-Azha, the rawhide transportation from other districts to the capital Dhaka has been banned for 10 days from the day of Eid-ul-Azha. Second, 30,000 tons of salt have been distributed free of charge across the country to facilitate the preservation of rawhide at the local level. Third, government incentives worth Tk 2.5 billion have already been released for tannery owners. Fourth, to ensure accurate pricing in the local market, the government has relaxed export restrictions on raw and wet blue leather (processed hides with fur intact) for three months after nearly 35 years. Fifth and more importantly, a high-level committee headed by the Commerce Advisor was formed to ensure proper rawhide management.

On May 26, the Ministry of Commerce fixed the price of salted skins of sacrificial animals. The price of cow skins in Dhaka was fixed at 60-65 taka per square foot, which was 55-60 taka last year. The price of cowhide per square foot outside Dhaka has been fixed at 55-60 taka, which was 50-55 taka last year. In addition, salted goat hides have been fixed at 22-27 taka per square foot and goat hides at 20-22 taka.

## SHATTERED DREAMS



The interim government's initiatives raised hopes that the traditional rawhide business, centered around Eid-ul-Adha, would turn around this year. Sadly, none of the above initiatives and good intentions ultimately came to fruition. Once again, we witnessed a collapse in the price of rawhides of sacrificial animals. The owners of the sacrificial animals did not receive even half of the price set by the government. This has severely affected the poorest people, orphans and the needy, who are the ultimate beneficiaries of the money from the sale of raw hides of sacrificial animals. Second affected

group is the seasonal traders who were once again left frustrated and facing major losses as prices of rawhide was around 30-40 percent down the government-fixed minimum retail price (MRP). Initially, the raw hides were sold at a slightly higher price than previous years, but later the prices dropped. There were cases of rawhides being thrown away in various parts of the country and buried in the ground after not getting a good price.

10.1 million animals were sacrificed in 2023 and 10.4 million in 2024. However, this year we have noticed a significant departure from the general trend of increasing the number of sacrificed animals. According to the Ministry of Fisheries and Livestock, 9.13 million animals were sacrificed out of a supply of 12.4 million animals across the country, which is 12.5 per cent lower than last year. That means, the supply of rawhides has decreased by about 1.3 million. According to the law of supply and demand, a decrease in the supply of raw hides contributes to an increase in prices of raw hides, if the demand remains the same. Tannery owners have reduced their target to collect 8.5 -9 million rawhides this year, compared to 9.5 million last year. Therefore, the price of rawhides may decrease due to this reduced demand from tannery owners.

## REASONS FOR PLUMMETING THE RAWHIDE PRICE

Based on opinions from various stakeholders involved in the rawhide business during Eid-ul-Azha, such as seasonal traders, wholesalers, tannery owners etc., published in print and electronic media, several reasons for not getting the desired price for rawhides have been revealed.

**First,** Bangladesh is solely dependent on China for the export of processed leather. Therefore, there is not much competition in the sale of such leather. Bangladesh is forced to export leather to China at a relatively low price. The demand for leather is not increasing much due to the lack of new markets.

**Second,** Bangladesh's leather remains undervalued internationally, largely due to environmental non-compliance—particularly the dysfunction of the central effluent treatment plant (CETP) at Savar. Sustainability-focused global buyers are increasingly unwilling to source from facilities that do not meet environmental standards.

**Third,** the price of raw hides depends on its quality. Seasonal traders often lack the knowledge to maintain the quality of raw hides in the first 8-10 hours before selling to wholesalers. If the raw hides

are not salted within 8 hours of slaughter, the desired

**Fourth**, shortage of salt supply, abnormal increase in salt price during Eid-ul-Azha, and lack of adequate and effective preservation systems not only slow down the entire leather supply chain, but also increase the risk of leather quality deterioration.

**Fifth**, tanneries had sought loans of at least Tk 4.5 billion to procure hides this season, but received only Tk 1.25 billion—less than a quarter of the demand. According to Bangladesh Bank, the country's banks was supposed to provide loans of Tk 2.32 billion for the collection and preservation of hides, during Eid-ul-Azha. In 2024, the amount of bank loans in this sector was Tk 2.70 billion. This reduction of loan may impact low procurement of raw hides this year.

### WAY FORWARD

The recurring crises over rawhide pricing during Eid-ul-Adha remind us of the market vulnerabilities, structural inefficiencies and mismanagement that exists in the leather value chain in Bangladesh. To reposition Bangladesh's leather sector for sustainable growth and stabilize the raw hide market during Eid-ul-Adha, this article suggests the following actionable recommendations:

- To reduce over-reliance on a single export destination, namely China, we need to identify and negotiate preferential market access in alternative destinations such as Vietnam, India, Türkiye, South Korea, and selected EU markets; leverage bilateral and regional trade agreements (e.g., D-8, BIMSTEC, SARRC, OIC) to explore for leather export potential ; and promote international trade fairs and B2B matchmaking initiatives to access new buyers.
- CETP at the Savar Tannery Industrial Estate needs to be fully operationalized in accordance with international environmental standards. To this end, the advice of Syed Nasim Manzur, President of Leathergoods & Footwear Manufacturers & Exporters Association of Bangladesh (LFMEAB) is very pertinent. He suggests hiring a contractor from Europe who has a proven track record of setting up CETP or ETP in the leather or similar industries. The contractor will be responsible to upgrade and, if needed, rebuild the CETP to ensure that it can achieve LWG (Leather Working Group) certification and that the operating costs for the tanneries per square feet or liter of discharge treated can be affordable.
- Tanneries need to be incentivized to achieve LWG certification. In this case, tanneries can be

reimbursed for the investment made to achieve LWG certification.

- As the absence of timely preservation practices critically undermines rawhide quality, structured awareness and training programs can be launched at the grassroots level on rawhide handling, salting, and quality standards. Decentralized, temporary rawhide preservation hubs equipped with salting, cooling, and storage facilities can be established in high-volume districts during Eid-ul-Azha. Mobile rawhide preservation services can be introduced in collaboration with private logistics firms and NGO networks.
- To stabilize salt supply and control price volatility, public-private coordination is needed to ensure stock of industrial-grade salt before Eid-ul-Azha. The government needs to regulate salt market operations through real-time market monitoring, fair price shops, and mobile court interventions.
- As inadequate and delayed financing for rawhide procurement exacerbates supply chain disruptions, a dedicated Eid-ul-Azha Rawhide Financing Window can be established in selected commercial banks to ensure timely disbursement of working capital loans. Coverage of loans needs to be expanded for seasonal traders, wholesalers, and tanneries taking into account risk-sharing provisions and credit guarantees.
- A Centralized Digital Rawhide Trading Platform can be established to prevent price manipulation and uncoordinated procurement. The platform will share information related to rawhide trading including prices, quantities, and quality grades.

### ABOUT AUTHOR

**Dr. Foyasal Khan** is currently serving as the Assistant General Manager (Head of Research and Policy) at the Leathergoods and Footwear Manufacturers & Exporters Association of Bangladesh (LFMEAB). He has previously worked as a national consultant with UNDP Bangladesh on Islamic finance and with UNCDF. He also served as the Deputy Executive Secretary of the Research and Development Department at the Dhaka Chamber of Commerce and Industry. Dr. Khan holds Honours and Master's degrees in Economics from the University of Dhaka and earned his Ph.D. in Economics from the International Islamic University Malaysia. He brings a strong blend of academic insight and practical policy experience, particularly in trade, industry development, and economic strategy.



## ROUNDTABLE DISCUSSION REPORT WORLD LEATHER DAY 2025 – “BANGLADESH LEATHER: BEYOND THE SURFACE”

### BACKGROUND

World Leather Day is an annual global observance that aims to promote a deeper understanding of leather as a natural, sustainable, and durable material. Leather Naturally, the global organization that promotes leather craftsmanship and contributes to the development of the craft, encourages artisans to participate in World Leather Day, held every year on the 26th of April. Launched for the first time in 2022, World Leather Day is a global movement dedicated to celebrating leather as a material and promoting a deeper understanding of the leather industry. It is recognized by leather manufacturers, traders, chemical companies, brands and retailers, leather workers and craftsmen worldwide. The 2025 theme, “Beyond the Surface”, called on stakeholders across the world to look past long-held misconceptions and appreciate the transparency, longevity, and environmental value of responsibly produced leather.

### BEYOND THE SURFACE

This year, Leather Naturally aims to promote a deeper look at leather as a material and challenge prejudices and superficial judgments. The “Beyond the Surface” campaign is focused on three key pillars:

- 1. Transparency:** Transparent and compliant leather production relies on audited tanneries that process animal hides using strictly regulated chemicals. These facilities also adhere to rigorous hygiene and environmental standards. As a result, final leather products meet brand and NGO requirements by complying with Restricted Substances Lists (RSLs).
- 2. Sustainability:** Modern leather production prioritizes sustainability, with many tanneries certified by organizations like Leather Working Group and the Sustainable Leather Foundation. These certifications ensure adherence to strict environmental standards, including responsible

## REPORT

water and energy use, waste management, and chemical control. Additionally, many tanneries and leather industry organizations are conducting Life Cycle Assessments (LCA) to evaluate and reduce leather's environmental impact from raw material to finished product.

- 3. Longevity:** Leather has unique physical and chemical properties that make it a long-lasting material. Leather's exceptional durability allows it to be repaired, reused, and repurposed, making it a long-lasting material. Its unique combination of strength, breathability, and comfort sets it apart from synthetic alternatives. These qualities make leather a naturally resilient and sustainable choice.

In Bangladesh, the leather industry is one of the oldest and most promising economic sectors. It plays a significant role in export diversification, local value addition, and employment generation. However, challenges persist — ranging from outdated perceptions in global markets, environmental compliance concerns, and the absence of unified branding or visibility. Against this backdrop, **Footwear Exchange** hosted a roundtable discussion titled “*Bangladesh Leather – Beyond the Surface*” to engage key actors from industry, government, academia, and development agencies. The goal was to assess ongoing progress, identify persistent bottlenecks, and outline actionable strategies for a more competitive and transparent leather sector in Bangladesh.

### PROGRAM DETAIL:

**Date:** Saturday, April 26, 2025

**Time:** 10:30 AM – 1:00 PM

**Venue:** Seminar Hall, DTIEWTPCL, Savar Tannery Estate, Hemayetpur

**Organized by:** Footwear Exchange

**Welcome speaker:** Md. Golam Shahnewaz, MD, DTIEWTPCL

**Chief Guest:** Shaheen Ahmed, Chairman, BTA

**Moderator:** Mizanur Rahman, Founding Partner, Footwear Exchange



### ROUNDTABLE HIGHLIGHTS:



**MD. GOLAM SHAHNEWAZ**  
Managing Director,  
DTIEWTPCL

As the Managing Director of DTIEWTPCL, I opened the roundtable by sharing the journey of the Central Effluent Treatment Plant (CETP) at Savar. When I joined this project about one and a half years ago, the CETP was almost non-functional — it had been handed over with major design flaws by the Chinese contractor, and its promised 25,000 m<sup>3</sup> daily treatment capacity had never been reached. The system was in disrepair and nearly abandoned.

With the support of my internal engineering and operations team, we took up the challenge of reviving the system. We managed to reduce electricity consumption drastically — from over BDT 1 crore to around BDT 30–35 lakhs per month — saving approximately BDT 3.5–4 crore annually. The chrome recovery units, once entirely inactive, are now running at around 50% efficiency. We've brought down chrome levels in effluent from 30 ppm to below 10 ppm — even as low as 3–4 ppm in certain months.

We also repaired eight of the nine dewatering machines using internal resources. As a result, we're now managing solid waste much more effectively. I see solid waste as a goldmine — Bangladesh produces nearly 90,000 metric tons of it every year. We've already begun exporting trimmed leather waste to Vietnam for gelatin production, and we're working with a Chinese company to extract protein filler from chrome shaving dust. However, the cost of treating effluent is BDT 53 per cubic meter, but we're only receiving BDT 25. This financial gap poses a serious challenge.

That's why I emphasize the need for upstream tannery compliance — better chemical handling, salt reduction, pre-treatment, and waste segregation. Without these, CETP alone cannot meet national or international standards. My message is simple: we've made progress, but we need everyone in the value chain to take responsibility.

**Table: CETP Efficiency Overview (Before vs After)**

Metric	Before (2023)	After (2025)
Chrome Level in Effluent	30 ppm	<10 ppm
Dewatering Units Active	0	8 of 9
Electricity Cost	BDT 1 crore/month	BDT 30-35 lakh/month
Solid Waste Exported	0%	30%



**MR. RAFIQUK ISLAM**  
Dysin Chemical Limited

I’m representing a chemical company that has been supplying chemicals to Bangladesh’s leather industry for over 23 years. From the beginning, we’ve focused on sustainable chemistry. Our journey wasn’t easy — we started with products that were later found to be environmentally harmful. But we adapted. Today, we proudly offer certified, AZO-free, heavy metal-free chemicals aligned with MRSL, RSL, and ZDHC protocols.

We’ve worked hard to ensure our chemicals comply with international standards, and we regularly update our formulas as regulations evolve. I can confidently say that many of our products now support LWG and ZDHC compliance requirements. We’re also focusing on synthetic fatliquors, which we’ve started developing to meet future demand.

I want to emphasize one point: sustainable chemicals may cost a bit more, but they offer long-term benefits. Buyers today don’t just look at price — they look at origin, impact, and compliance. As a supplier, I take full responsibility for helping tanneries access cleaner alternatives that protect both people and the planet. Our job is not just to sell, but to support a sustainable future for Bangladesh leather.

**SAIFUL AZAM KASHEM**  
Country & Sales Manager,  
Stahl India Pvt. Ltd.



I’ve been connected to this industry for many years,

and I’ve seen how perceptions of Bangladesh leather have shifted — sometimes unfairly. For a long time, many of us had lost confidence that any real change was possible. But today, after hearing the progress shared by Mr. Golam Shahnewaz regarding the CETP, I truly feel hopeful again.

As someone working with a global chemical company, I want to highlight the kind of solutions we’re bringing to the table. Our company has introduced the Pickle-Free System (PFS) — a tanning technology that reduces both total dissolved solids (TDS) and salt use by around 40%, without compromising on leather quality. I believe innovations like these are essential if we’re serious about sustainability.

We also need to think ahead. With anti-China tariffs rising in Western markets, countries like Bangladesh have a real opportunity to step in — but only if we’re ready with the right processes, certifications, and narratives. I believe value addition and readiness are key. We can’t just talk about compliance — we have to demonstrate it.

My appeal to the industry is this: we must remain open to new technologies and commit to continuous improvement. Bangladesh leather has potential — but it must act, innovate, and communicate strategically.



**MR. HASEM ALI**  
Country Managing Director,  
TUV Rheinland Bangladesh

As a representative of a testing company, In recent years, we’ve seen an increased demand for **ZDHC and MRSL compliance**, and many tanneries are stepping up. But there are still challenges. Improper storage of chemicals, poor labeling, and a lack of awareness at the operational level can lead to contamination risks and test failures — not just in exports, but even in domestic products.

Our goal is to support manufacturers in building the kind of traceability and documentation systems that global buyers demand. We test everything from raw materials to finished goods, including effluent water and air emissions. I often tell manufacturers:

**testing is not just a buyer requirement — it's a commitment to safety, quality, and credibility.**

One more thing I want to stress is the growing global attention on micro-pollutants. Even small residues from our industrial processes are now showing up in ecosystems and food chains. That's why we must go beyond compliance — we need to build a culture of responsibility.



**MOHAMMAD OMAR FARUQ**  
*Advisor,*  
GIZ Bangladesh

At GIZ, we've been supporting the leather sector in improving environmental and occupational safety standards. One of my biggest concerns is the misinformation that continues to shape the global image of Bangladesh leather. Reports still circulate citing high levels of arsenic or chromium in leather products, but many of these are outdated, based on poor data, or misinterpreted entirely.

Today, most chemicals used in our tanneries are imported and internationally certified. We no longer live in the era when anything could be used without consequence. The industry has moved forward, but the research and narratives haven't caught up. And that's a problem — because buyers often rely on what's written, not what's real.

I strongly urge academics and industry stakeholders to generate up-to-date, evidence-based research that reflects our current progress. The sector also needs stronger systems for safe chemical handling, better Personal Protective Equipment (PPE) training, and documentation that aligns with global audit expectations.

This is not just about compliance — it's about protecting livelihoods, restoring our reputation, and ensuring that Bangladesh has a rightful place in the global leather market. But for that, we need data, consistency, and collaboration across every level of the value chain.



**MOHAMMAD ALI BAPPY**  
*President,*  
Leather Engineers and  
Technologists Society,  
Bangladesh (LETSB)

As someone who has long worked within this industry and now represents the Leather Engineers & Technologists Society of Bangladesh, I must say that this discussion gave me renewed optimism. We dreamed of a functioning CETP at Savar for many years, and I'm pleased to see that it's finally showing results — not just operationally, but also in public perception. I sincerely appreciate the leadership of Mr. Shahnewaz and the DTIEWTPCL team.

That said, infrastructure alone is not enough. Unless we ensure proper operation, maintenance, and coordination, this progress won't be sustainable. We often face communication gaps between CETP authorities and individual tanneries. These gaps lead to untreated or improperly segregated waste entering the system — which affects everyone.

Another issue we face is the lack of technical documentation and visibility. We have good stories, but we're not telling them the right way. Bangladesh needs a collective brand — one that highlights sustainable practices, environmental compliance, and technological advancement. We engineers are ready to support that effort. But we must move from isolated effort to unified, coordinated action



**DR. SABUR AHMED**  
*Professor,*  
Institute of Leather  
Engineering and Technology,  
University of Dhaka

As a professor and researcher, I've observed one persistent issue in our leather sector — the gap between actual improvements and public perception. It frustrates me that even today, global reports continue to cite dangerously high levels of heavy metals in Bangladeshi leather, based on research that's outdated, inaccurate, or lacking context.

Let me be clear: the chemicals used in our tanneries today are largely imported and certified. We've come a long way from the days of uncontrolled inputs. So why does the world still view us through an old lens? Because we haven't produced new research — or if we have, we're not presenting it on global platforms. That's where I believe academia must step up.

I call on my fellow researchers and institutions to generate scientific, peer-reviewed data that reflects what's happening now — not what happened ten years ago. If we want to rebuild the global narrative around Bangladesh leather, we must take ownership of the truth. That means doing the research, publishing the facts, and standing behind the progress we know is real.

We are ready to collaborate with industry and government — but we need a clear ask and a platform to contribute. Let's replace outdated myths with documented progress.

**A.K.M.  
MOSHPIQUR RAHMAN**  
*Managing Director,  
Accenture Footwear  
and Leather Products.  
Director, LFMEAB*



As a manufacturer and exporter in the leather and footwear sector, I can say from experience that buyers today are more cautious than ever. Even when a factory is compliant, they hesitate if there's a reputational concern about the country. This is where I see the biggest challenge for Bangladesh — and also our biggest opportunity.

I've seen how much work has gone into improving CETP operations, chemical use, and documentation. But unless we tell that story in a coordinated way, our efforts won't translate into global trust. Buyers now ask for traceability reports, chemical certifications, social audits — and they want consistency. One mistake or one outdated video can cost us a market.

I strongly believe that we need to build a national platform or industry portal where verified environmental and quality data are shared openly. This would allow buyers to see that Bangladesh has a functioning system, not just individual compliant factories. It's not enough to be compliant — we need to be visible.

At the same time, we must focus more on international representation. Our exporters and associations should be present in global leather fairs, advocacy panels, and sustainability forums. We must not let others define our story — we need to speak for ourselves.



**QUAZI SALAHUDDIN  
MAHMUD**  
*Chief Manufacturing Officer,  
Apex Footwear Ltd.*

As someone working at the marketing end of the leather and footwear value chain, I can tell you: perception is often more powerful than reality. And unfortunately, the perception of Bangladesh leather in global markets still lags far behind the actual improvements we've made.

At Apex, we've invested heavily in compliance, worker safety, and process transparency. But even with all that in place, we still have to constantly defend our reputation. The problem isn't always with the product — it's with the lack of communication about what we've achieved.

We need to think beyond internal audits and factory-level success. What we need now is a unified national branding approach, backed by data. For example, we could build a central dashboard or portal where performance indicators — like CETP discharge levels, audit certifications, or LWG/BSCI statuses — are made visible to the world. If we do that, we can move from defense to offense — we can start competing on trust, not just cost.

Also, we should be investing in new product categories that international buyers want — like waterproof leather, high-durability safety boots, or certified biodegradable finishes. These are the stories we should be telling. The world wants sustainable leather — and Bangladesh is capable of delivering it, if we speak with one voice.

**TARIQUL ISLAM KHAN**  
*Managing Director,*  
 Marsons Tannery Ltd.



I was one of the many who doubted whether this plant would ever function properly. But after seeing the improvements in chrome recovery and dewatering units, I can say that real change has started.

Still, I have to speak openly about the financial reality for tanners. Right now, it costs around BDT 53 per cubic meter to treat effluent, but we are only paying BDT 25. That gap is unsustainable. Small and medium tanneries simply can't cover that deficit without risking closure. We need a realistic and fair pricing model — one that takes into account both operational cost and the industry's current capacity.

Another issue we face is upstream awareness. Many workers and even some owners don't fully understand the importance of pre-treatment, chrome segregation, or chemical safety at the source. I believe this can be addressed through targeted training and stronger communication from CETP management and chemical suppliers.

Despite all challenges, I want to emphasize that we are willing to comply. But we can't do it alone. We need policy support, technical assistance, and, above all, a shared sense of responsibility. Environmental compliance is not a burden — it's an investment in our future.



**MD. SHAHEEN AHMED**  
*Chairman,*  
 Bangladesh Tanners  
 Association (BTA) –  
 Chief Guest

As Chairman of the Bangladesh Tanners Association, I am truly encouraged to see such a diverse and focused roundtable taking place on World Leather Day. I thank Footwear Exchange for organizing this dialogue — because these discussions are not just symbolic, they are strategic. They help us align,

reflect, and move forward as an industry.

I want to acknowledge the efforts made at the CETP in Savar. For years, we were criticized for environmental non-compliance, and frankly, some of that criticism was justified. But today, under the leadership of Mr. Shahnewaz and his team, we see functional chrome separation, sludge management, and cost-saving measures being implemented. That's progress we can't ignore — and must now build upon.

But this is only the beginning. We need to create industry-wide alignment, not isolated success stories. Our tannery owners must take initiative on pre-treatment and proper waste management. Chemical suppliers must educate their clients. Testing agencies must provide transparent and timely support. And the government must stand with us — not just with regulations, but with resources and realistic standards.

I also want to stress the need for stronger international positioning. Bangladesh leather has the quality, the workforce, and the ambition — but we need branding, visibility, and structured market access. We cannot rely only on LWG certification or one export destination. We must look to Africa, Latin America, Russia, and our own growing domestic market. And we must support one another in that journey — not compete in silos.

In closing, I remind everyone here: sustainability is no longer optional, and transformation cannot be delayed. Let's act — together — to make Bangladesh leather truly competitive and globally respected.

**CONCLUDING REMARKS BY**

**MD. GOLAM SHAHNEWAZ**

I want to thank everyone who participated today — not just for attending, but for speaking frankly. Many valuable points were raised — from protein recovery and innovation to certification gaps and market diversification — and I appreciate them all. I want to clarify that several of these ideas are already being acted on. For example, the chrome shaving dust protein filler project is no longer an idea — it's operational. We've partnered with a Chinese company and secured 15,000 metric tons of material that will be fully processed and exported.

I also want to recognize the EU-funded redesign of our CETP.

This is happening now — we have an Italian consultancy working with us, and it won't cost the estate anything. This reflects what is possible when we combine local intent with international support. Still, we face challenges. The current discharge standard of 30 BOD was abruptly lowered from 100 — a level the CETP was originally designed for. I urge policymakers to revisit this, along with chloride thresholds, so we can realistically comply without compromising treatment quality.

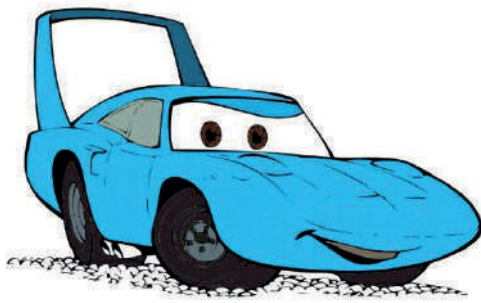
I must also stress: LWG is not the only path. Many certified tanneries are still operating below capacity. We must look at short-, mid-, and long-term strategies.

We must look at short-, mid-, and long-term strategies — including markets like Russia, Latin America, and our own domestic demand, which remains underdeveloped. We import thousands of crores worth of shoes every year that we could make here.

Finally, we need to build real structures for R&D, marketing, and innovation. One person cannot handle everything. And we must stop thinking that someone else — the CETP, the MD, the government — will fix it alone. This industry belongs to all of us. Let's own it, improve it, and tell our story with confidence.

## MEDIA COVERAGE





# WHEN TENSIONS RISE ON THE FLOOR: HOW TO DE-ESCALATE WITH CARS

Mizanur Rahman

Let's be honest—if you've worked a single month in a manufacturing plant, you've seen conflict. Maybe it's two operators arguing over machine priority. A line supervisor frustrated because the maintenance team hasn't responded quickly enough. Or tension building between shifts over leftover work.

Conflict on the floor is real, and it's not just noise—it slows production, creates safety risks, and eats away at morale.

I've worked shoulder to shoulder with technicians, shift leaders, engineers, and packers for more than 15 years, and one thing I've learned is this: **resolving conflict isn't a soft skill—it's a survival skill.**

That's where the **CARS technique** comes in. CARS stands for **Connecting, Analyzing, Responding, and Setting Limits**. It's not theory—it's a practical approach I've used to turn heated moments into productive outcomes. Let me walk you through it, with examples straight from the production floor.



## 1. CONNECTING: START BY ACKNOWLEDGING, NOT ARGUING

### Real scenario:

Last month, two machine operators were at odds. One accused the other of jumping ahead in the job queue, causing delays. Voices were raised, and production halted.

I stepped in—not with authority, but with empathy. I said to the frustrated operator:

*"I can tell you're upset. I would be too if I felt my work was being overlooked. Let's figure this out."*

That sentence alone lowered the temperature. When people feel heard, they stop fighting to be louder.

**Key Tip:** Connecting isn't agreeing—it's showing that you respect their frustration enough to listen.

- Use open body language—face them, no crossed arms.
- Acknowledge emotions before addressing logic.
- Say things like:
  - “I hear what you're saying.”
  - “It seems like this is really frustrating for you.”
  - “Let's figure this out together.”
- Don't interrupt—let the person speak first.
- Avoid saying “Calm down” — it usually has the opposite effect.





## 2. ANALYZING: STEP BACK AND LOOK AT THE FULL PICTURE

Once emotions are down, it's time to understand what's really going on.

In this case, when we reviewed the job list, it turned out both operators had valid reasons. One had priority due to a customer deadline, the other hadn't received the updated job order. It was a communication gap, not a personal attack.

### We analyzed:

- Who knew what, and when?
- Was the process clear?
- How can we avoid this next time?

**Key Tip:** Remove emotion from the analysis. Look at facts, timelines, processes, and potential fixes.

- Ask neutral questions:

*“When did this start?”*

*“Who was involved?”*

*“What changed recently?”*

- Involve the right people—sometimes the conflict isn't just between the visible parties.
- Use tools like visual boards or job tracking logs to verify facts.
- Separate the person from the problem—focus on the issue, not personalities.
- Document what you find—this builds transparency and avoids repeat confusion.



## 3. RESPONDING: KEEP IT BIFF – BRIEF, INFORMATIVE, FRIENDLY, AND FIRM

When dealing with conflict, especially if misinformation is spreading, it's important to respond in a BIFF way—**Brief, Informative, Friendly, Firm.**

### Another example:

A line leader once complained loudly on the floor, claiming that “Quality always blames production!”

Rather than retaliate, I responded:

*“Let’s clarify this calmly. The defect was detected at packing, but our job is to work as one team. Let’s trace the root cause and fix it together.”*

That’s a BIFF response—short, factual, collaborative, but not passive. We need to show leadership in how we speak, especially when others are reacting emotionally.

**Key Tip:** Never respond to shouting with shouting. Control the tone, and you’ll control the outcome.

- Avoid sarcasm or jokes when tensions are high.
- Stick to facts, not feelings or assumptions.
- Stay calm—even if the other person isn't.
- Use phrases like:
  - “Here’s what I understand from both sides...”*
  - “Let’s go through this together so we don’t miss anything.”*
- Don't try to "win" the argument—try to resolve it.



## 4. SETTING LIMITS: DEFINE BOUNDARIES AND ENFORCE RESPECT

There are times when a line must be drawn.

### Case in point:

An employee repeatedly interrupted morning briefings, making sarcastic remarks. After one warning, it happened again.

I spoke privately:

*“I value your input, but these meetings need to be respectful and focused. If this continues, we’ll need to take formal steps. I’d rather have you as a contributor, not a disruptor.”*

The interruptions stopped—not because I was aggressive, but because I was **clear and consistent**.

**Key Tip:** Setting limits isn’t about punishment—it’s about preserving the working environment for everyone.

- Be clear on what is acceptable and what is not—don’t leave it open-ended.
- Set limits in private—correcting someone publicly may escalate the situation.
- Follow up if the behavior continues—consistency builds credibility.
- Use assertive language, not aggressive:

*“This behavior is disruptive, and it needs to stop.”*

*“We’ll revisit this issue formally if it happens again.”*

- Reinforce the reason behind limits: to protect team performance, safety, and respect.



### FINAL THOUGHT: DON’T LET CONFLICT FESTER

In manufacturing, if you ignore a small problem—whether it's a leaking valve or a team disagreement—it becomes a bigger problem. Addressing conflict early with the **CARS technique** can protect team culture, uphold discipline, and most importantly—keep the lines running.

So next time tension rises on your floor, don’t avoid it. **Connect, Analyze, Respond, and Set Limits.** You'll not only solve the conflict—you’ll build trust, one conversation at a time.



### ABOUT AUTHOR

**Mizanur Rahman** has been driving growth and innovation in the footwear industry for nearly 20 years, leading strategic initiatives across production, sourcing, and retail. With a foundation in shoe design and factory operations, his expertise evolved into managing large-scale footwear programs, optimizing supply chains, and strengthening market positioning. His experience is defined by a commitment to strategic growth, operational excellence, and shaping the future of the footwear sector.



## BANGLADESH'S LWG-CERTIFIED TANNERIES: A STEP TOWARDS RESPONSIBLE LEATHER SOLUTIONS

L&F Hive Desk

In the global leather arena, sustainability is no longer a choice—it's a necessity. As international brands tighten their environmental and social governance (ESG) requirements, suppliers are expected to meet globally recognized standards. One of the most prominent benchmarks today is the **Leather Working Group (LWG)** certification, awarded to tanneries that demonstrate excellence in environmental stewardship, chemical management, and operational transparency.

Bangladesh, known for its rich heritage in leather processing, is now emerging as a serious contender in responsible leather production. With an increasing number of LWG-certified tanneries, the country is making visible progress in aligning with sustainable global supply chains. This transformation reflects the resilience and adaptability of the sector, even in the face of legacy challenges.

### FROM HAZARIBAGH TO SAVAR: A SECTOR IN TRANSITION

The relocation of tanneries from the congested Hazaribagh area to the Savar Leather Industrial Park

was a turning point for the industry. The move, though fraught with delays and infrastructural limitations—particularly regarding the Central Effluent Treatment Plant (CETP)—was essential to improving environmental compliance and positioning Bangladesh as a reliable sourcing destination.

Today, the leather sector contributes over USD 1 billion in annual exports, employing nearly a million people and supplying finished and semi-finished leather to markets in Europe, East Asia, and North America. Yet, despite its size, the industry has often been viewed with skepticism due to its environmental track record—something LWG certification is actively helping to change.

### LWG CERTIFICATION & ITS ENVIRONMENTAL ROLE

The Leather Working Group (LWG) is a global multi-stakeholder initiative that promotes environmental best practices in the leather industry. Through rigorous audits and certification protocols, LWG assesses tanneries on key sustainability metrics such as water and energy use, chemical

## INDUSTRY

management, waste handling, and traceability. Its certification has become a leading global benchmark, widely recognized by international brands seeking to source responsibly produced leather.

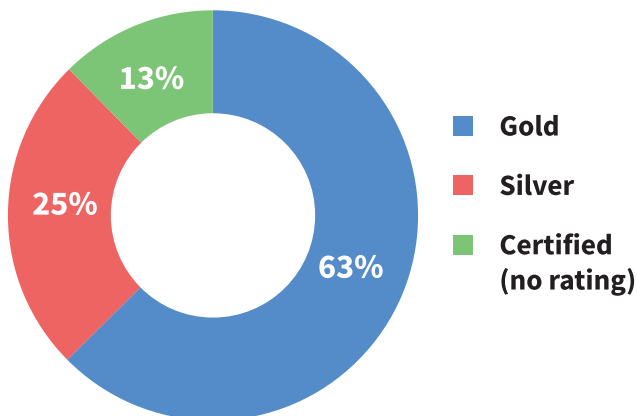
### (LWG)'S ROLE IN PROMOTING ENVIRONMENTAL BEST PRACTICES:

- Develops and maintains environmental auditing protocols for leather manufacturers.
- Promotes responsible water and energy usage across the leather supply chain.
- Ensures proper chemical management, including restricted substances and safe handling.
- Supports waste management and effluent treatment compliance.
- Encourages traceability of raw materials to support ethical sourcing.
- Provides a global certification standard recognized by major footwear and fashion brands.
- Drives continuous improvement through transparent performance scoring and re-audits.

### LWG CERTIFICATION: STATUS AND TRENDS IN BANGLADESH

According to the Leather Working Group (LWG) database (as of June 2025), 8 Bangladeshi tanneries are currently LWG-certified, indicating a focused but promising move toward sustainable leather production.

Certification Level	Number of Tanneries
Gold	5
Silver	2
Certified (No Rating Yet)	1
<b>Total</b>	<b>8</b>



This represents approximately 5.3% of Bangladesh's 150+ operational tanneries as LWG-certified.

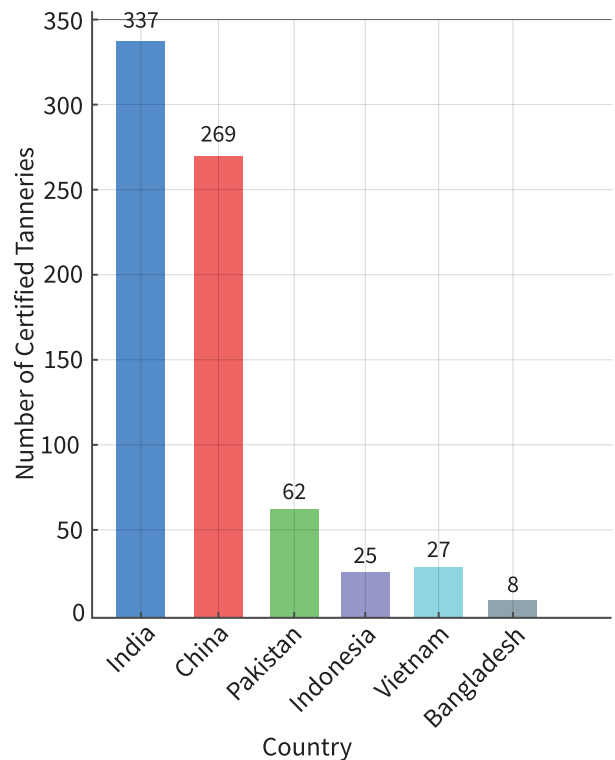
### LWG-CERTIFIED TANNERIES IN BANGLADESH INCLUDE:

- **Apex Footwear Ltd.** (Gold)
- **Simona Tanning Inc. (Bangladesh)** (Gold)
- **ABC Leather Ltd.** (Silver)
- **Austan Tannery Ltd.** (Certified without rating)
- **Riff Leather Ltd.** (Gold)
- **SAF Industries Ltd.** (Gold)
- **Superex Leather Ltd.** (Silver)
- **Song Shin Leather BD Co. Ltd.** (Gold)

### WHY BANGLADESH LAGS BEHIND IN LWG CERTIFICATIONS:

As of June 2025, Bangladesh holds just 1.1% of the LWG-certified tannery count (8 out of 728), compared to India: 337 tanneries (46.3%), China: 269 tanneries (36.9%), Pakistan: 62 tanneries (8.5%), Vietnam: 27 tanneries (3.7%) and Indonesia: 25 tanneries (3.4%)

LWG-Certified Tanneries by Country (2025)



(Verified from LWG Certified Supplier Profiles)

### KEY REASONS OF LAGGING:

- **Partial CETP Functionality:** Limits tanneries' compliance at Savar Estate.
- **High Audit Costs:** Smaller tanneries face financial barriers.
- **Slow ESG Integration:** National policy and buyer pressure still developing.
- **Infrastructure Gaps:** Many units yet to upgrade to meet LWG environmental standards.

### IN CONTRAST: WHY OTHERS ARE ADVANCING

- India and China benefit from strong domestic leather sectors backed by export-driven demand from LWG-member brands (like Adidas, Timberland, and H&M).
- Pakistan has invested significantly in environmental standards through GSP+ incentives and international donor support.
- Vietnam and Indonesia have integrated LWG requirements into their national leather clusters and receive strong FDI from footwear giants.

### KEY AUDIT METRICS: PERFORMANCE OF CERTIFIED TANNERIES

Based on LWG protocol standards and on-site interviews conducted by IFC-UNIDO's Sustainable Leather Project:

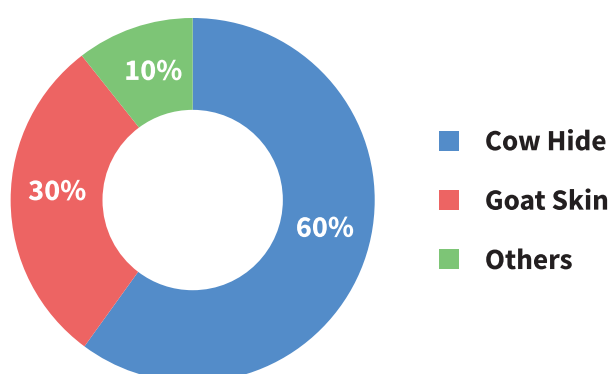
- **Water Usage:** Up to 35–40% reduction in post-certification operations
- **Energy Efficiency:** ~25% lower energy use due to improved drum and drying systems
- **Effluent Treatment Compliance:** Over 95% of discharged water treated, far higher than non-certified units
- **Chemical Management:** Full traceability of tanning chemicals; digital input/output logs in place
- **Traceability Scores:** Majority of certified tanneries score above 85%

### WHY THIS MATTERS

- 85% of global branded leather buyers now mandate LWG-certified sourcing
- Brands sourcing from Bangladesh include: Clarks, Picard, Timberland, Puma, H&M, Adidas
- Certified Bangladeshi tanneries report 15–20% average rise in export orders post-certification
- Access to green finance (IFC, UNIDO, GCF) is increasingly tied to ESG and LWG performance

### PRODUCTION AND CAPABILITY SNAPSHOT

- **Savar Leather Estate Tanning Capacity:** Approx. 300 million sq. ft/year
- **Leather Type Distribution:**



- **Certified Tanneries Output (Monthly Averages):**

Wet Blue: ~4 million sq. ft

Finished Leather: ~1.8 million sq. ft

- **Tech Investments (2021–24):** Over USD 30 million across LWG-certified units in automation, effluent treatment, and process control

### THE CETP BOTTLENECK

Despite progress, the Central Effluent Treatment Plant (CETP) at Savar remains only 60–70% functional, limiting further certification potential. Experts estimate that if CETP becomes fully compliant, 30–40 more tanneries could achieve LWG certification within 2–3 years.

### OUTLOOK: SCALING LWG AND ESG INTEGRATION

**Goals by 2027** (proposed by BTA & Ministry of Industries):

- 50 LWG-certified tanneries (1/3 of the industry)
- 100% CETP functionality with separate chrome recovery systems
- Establishment of Leather ESG Compliance Cell
- Launch of Leather Certification Fund to subsidize audit and upgrade costs

If achieved, these steps could push export earnings above USD 2 billion/year by FY2028.

Bangladesh's shift toward responsible leather production is now statistically evident. With more factories investing in environmental upgrades and top brands demanding LWG-certified supply, the sector stands at a turning point.

But scaling from 8 to 50 certified tanneries will require stronger government backing, full CETP readiness, and buyer engagement.

**For Bangladesh, the numbers are clear: Responsible leather isn't just ethical—it's economically smart.**

### Sources:

Bangladesh Tanners Association

IFC/UNIDO Leather Sector Sustainability Project Bangladesh, 2023–24

Savar Estate Records, BTA 2024; individual tannery disclosures

DoE Audit Summary 2023, Bangladesh Ministry of Industries

BTA Forecast, EPB Data 2024

# NAVIGATING SEASONALITY IN SHOE MANUFACTURING: KEY CONSIDERATIONS FOR INVESTORS

L&F Hive Desk

## PREFACE

The global footwear industry is a dynamic and competitive landscape, driven by changing consumer preferences, emerging markets, and rapid advancements in technology. For investors and entrepreneurs, setting up a footwear manufacturing business offers immense opportunities—but it also comes with unique challenges. Success in this industry requires strategic planning, informed decision-making, and a deep understanding of various interconnected factors that influence manufacturing operations and market outcomes.

In this series of articles, we will explore the critical elements of footwear manufacturing investment, breaking them down into actionable insights. Each article will focus on a specific topic, offering practical guidance and industry perspectives to help you make well-informed decisions.

From selecting the right location for your factory to understanding the seasonality of product demand, from crafting the perfect product mix to ensuring regulatory compliance and sustainability, this series will cover the full spectrum of considerations. We will also delve into supply chain management, workforce training, capital planning, branding strategies, risk management, and the importance of industry collaboration.

Whether you are a seasoned investor, a business professional venturing into the footwear industry, or an entrepreneur looking to bring your vision to life, this series is designed to provide you with a comprehensive roadmap to navigate the complexities of footwear manufacturing. Stay tuned as we embark on this journey to unravel the building blocks of a successful footwear manufacturing enterprise—one article at a time.



## INTRODUCTION

The footwear industry, like many others, is heavily influenced by seasonality. From summer sandals to winter boots, consumer demand for footwear varies throughout the year, posing both challenges and opportunities for manufacturers. For investors looking to fund or expand a shoe manufacturing facility, understanding and planning for seasonality is essential to optimizing factory operations and ensuring long-term profitability.

## UNDERSTANDING SEASONALITY IN FOOTWEAR

Seasonality profoundly affects every aspect of footwear manufacturing, from design and production to inventory management and marketing. Each season brings distinct product demands:

- **Spring/Summer:** Demand peaks for sandals, flip-flops, and lightweight sneakers as consumers prioritize comfort and breathability.
- **Fall/Winter:** The focus shifts to boots, insulated shoes, and waterproof footwear to accommodate colder weather and outdoor activities.
- **Special Occasions:** Beyond seasonal trends, events such as back-to-school, weddings, and holiday seasons drive demand for specific styles like formal shoes or children's footwear.
- **Geographic Markets:** Different regions experience varying climatic conditions and fashion calendars, adding complexity to manufacturing plans.

## 5 STRATEGIC CONSIDERATIONS FOR INVESTORS

Investors need to account for seasonality during the planning and operational stages of their shoe-manufacturing ventures. Here are key factors to consider:

### 1. Diversify Product Lines

- Manufacturers can create a mix of seasonal and non-seasonal products. For instance, alongside winter boots and summer sandals, they can produce year-round essentials like sneakers, formal shoes, and work boots. By offering products that are in demand across seasons, companies can ensure a steady revenue stream.
- Machines that can be reconfigured or adjusted to handle different materials and designs reduce the need for specialized equipment. For example,

a single stitching machine might be used for leatherboots and canvas sneakers with minor adjustments.

- Quick-change tooling systems allow manufacturers to switch between different styles, sizes, and materials efficiently. For example, producing high heels and flat sandals in the same facility becomes feasible with the right setup.

### 2. Target Multiple Markets

- Expand into markets with complementary seasonal patterns. For example, while it may be summer in the northern hemisphere, countries in the southern hemisphere, such as Australia and Brazil, are experiencing winter. Manufacturers can offset seasonal imbalances by strategically targeting markets across hemispheres and maintain year-round production.
- A factory producing snow boots for North America in December can pivot to manufacturing lightweight sneakers for Southeast Asia by January. This requires machines that can handle different materials, patterns, and assembly techniques seamlessly.
- Flexible systems also support small-batch production, which is essential for catering to niche markets or testing new designs in specific regions without committing to large-scale production.

### 3. Flexible Manufacturing Systems

- A Flexible Manufacturing System is an approach to manufacturing that allows for producing different products with minimal downtime for reconfiguration. With FMS, manufacturers can seamlessly switch between producing summer sandals, winter boots, and everything. For example, a factory equipped with automated stitching machines and programmable cutting tools can shift from producing lightweight sneakers to leather boots within hours, minimizing downtime.
- Equipment that can be reprogrammed to produce different designs or sizes without requiring significant manual intervention. Tools and setups designed for rapid switching between product lines.

## NEWS & VIEWS

- Proper setup and utilization of machines are crucial to maintaining efficiency. Versatile machine configurations allow manufacturers to produce different types of footwear on the same assembly line, reducing idle time and enhancing productivity.
- Automation can help increase production efficiency and reduce downtime during seasonal transitions.

### 4. Capacity and People Planning

- Use advanced forecasting tools and market analysis to predict demand patterns accurately.
- Capacity planning ensures that production levels can be scaled up or down based on demand forecasts. This flexibility helps prevent underproduction during peak seasons and overproduction during off-peak periods.
- Skilled labor is indispensable in footwear manufacturing, especially for processes like cutting, stitching, and finishing. Effective people planning involves not only ensuring adequate staffing during peak periods but also retaining talent during slower seasons through cross-training and diversified job roles.
- Employ a mix of permanent and temporary workers to adapt to seasonal needs. For example, during peak demand periods, temporary workers can be hired to support core staff. During off-peak

seasons, employees can be trained in multiple roles, such as transitioning from cutting to quality control, ensuring their continued engagement.

### 5. Off-Season Opportunities

- Utilize off-peak months for maintenance, training, and R&D activities.
- Explore opportunities to produce related products, such as accessories or private-label footwear, during slow seasons.

### CONCLUSION

Seasonality is a double-edged sword in the shoe manufacturing industry. While it creates challenges in capacity utilization and inventory management, it also offers opportunities for growth and innovation. For investors, a well-rounded strategy that addresses seasonality can enhance factory efficiency, reduce risks, and maximize returns. By diversifying product lines, targeting multiple markets, and adopting flexible manufacturing practices, investors can ensure their ventures remain competitive year-round. In a dynamic industry like footwear, the ability to adapt to seasonal shifts is not just an advantage—it's a necessity.

#### References:

<https://fastercapital.com/topics/introduction-to-seasonality-in-fashion.html>

<https://growbydata.com/seasonal-trend-and-pattern-analysis-online-shoe-shopping/>



# Seasonality

[,sē-zə-'na-lə-te]

**Predictable changes that occur over a one-year period in a business or economy based on the season**

Adhesive can use in footwear, bag and suitcase, house decoration, construction, furniture, sport equipment, internal decoration of automobiles, electronic device and toys.  
**HENGBAO** is a high-tech corporation integrating.



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