



AGRA—CENTRE OF THE INDIAN FOOTWEAR INDUSTRY

By Somenath Ganguly

While the city of Agra is chiefly famous for the Taj Mahal, it also has a long tradition of shoemaking stretching back to the early days of the Mughal Empire in the sixteenth century. By 1885, it had become a main centre for the production of footwear and opened its first mechanised factory in that year to produce military and civil officers' boots. Some exporting began in 1950 to several East African countries but, unfortunately at that time Agra's shoes were not known for their quality.

Hing is a spice used in Indian cooking and the word 'mandi' means market. These were combined to name Hing ki Mandi the biggest shoe market in India. The spice was imported from Afghanistan wrapped in leather which was then made available to local artisans at a cheap price for use in shoes. Today, Hing ki Mandi plays a vital role in marketing the footwear produced locally by individual artisans and micro enterprises for India's huge domestic market.

These shoemakers are poor and lack the money to supply shoes on credit. Instead, the Hing ki Mandi wholesalers give them a 'parchi' or hand-note confirming payment after two or three months. These are then sold to an agent for immediate cash less a small 2-3% discount. While one might debate the exploitation of the shoemakers in this fashion, the system does at least help them to run a business and earn their bread and butter.



TOUGH TIMES

Tiny production units are scattered throughout the narrow streets of the city without any proper infrastructure or common facilities. Most are not registered with the government and, as a result, are not eligible for bank loans or government grants. Despite this, the 1960s and 70s saw Agra supplying 90% of India's domestic footwear requirements.

Shoes were made exclusively by hand and featured a stitched vegetable tanned leather sole. It was a highly skilled job as, with the exception of BATA India Ltd in Kolkata, modern shoe machines were not used in India until the mid-1980s. Agra's monopoly of hand shoe making gradually disappeared with the introduction of modern technology and machines. However, between 1980 and 1990 it still satisfied some 80% of domestic shoe consumption with big brands such as Bata, Carona and Flex, opening warehouses and starting to produce shoes there.

Up until 1990, it was also the major production centre for shoe uppers for the former USSR. The break-up of the Soviet Union and the resulting change in buying patterns caused severe problems for Agra, with the loss of an Rs.400 crore (\$100 million) per annum export market for local manufacturers. This major set back compelled them to look elsewhere and to try to attract European buyers instead. This proved the turning point for Agra's shoe industry.

It was not an easy task as the quality of European shoes was far better than the shoe uppers that had been supplied to the USSR. But, by applying new design capabilities and upgrading employees' technical skills, the Agra shoe industry gradually succeeded in making shoes that met European standards. Today, 90% of shoes exported from Agra go to European countries.

MANY SHOEMAKERS

Agra's shoe industry can be divided into two main groups. First there are the well organised and fully mechanised export-oriented companies and, second, there are the unorganised manufacturing units working for the domestic market.

The latter can be subdivided into three further groups: semi-mechanised units producing 200 to 2,000 pairs per day; hand-made small units producing 50 to 200 pairs per day; and tiny cottage-based units producing 12 to 48 pairs per day.

The total number of shoe producers of all sizes can be broken down as follows: 50 are registered and fully mechanised; 200 are registered and semi-mechanised; 200 are non-registered small hand-made units and 4,500 non-registered cottage-based units.

Agra's daily output of footwear is between 250,000 and 300,000 pairs for both export and domestic markets. It satisfies around 55% of India's domestic requirement and 22% of footwear exports. Prices for local shoes vary from Rs.50 (\$1.25) to Rs.900 (\$22.50) per pair, while the 50 large-scale export producers average \$16.00 per pair. The importance of the footwear industry to Agra cannot be



A typical tiny cottage unit comprising a single small room containing a gas cylinder, cooking oven, sewing machine, tools and equipment together with the artisan, his wife and son who is stitching a closed upper for his father.

underestimated as up to 40% or 800,000 of the city's two million population are directly or indirectly dependent on it. Wages however are not high and a skilled worker only earns between \$90 and \$120 per month. If semi-skilled, this falls to \$60 to \$80 and, for unskilled labour to no more than \$50 to \$60 per month.

Working conditions are also often poor, with most cottage enterprises having the most unhygienic conditions. Use of isocyanides in PU adhesive is a must for modern sole units but inhaling it is injurious for people working in a small room with no proper ventilation or sanitation. A shoemaker usually works sitting on the ground and his body bent to last the shoe. After working like this for 40 years, some are unable to stand erect due to damage caused to the spine. Even in Agra's organised sector workers do not benefit properly as no trade union exists to support them, so for an average of \$60 to \$80 per month, they have to work 12 hours a day. It is not surprising that the next generation is reluctant to continue in this way.

NO TANNERS

There are nine mechanised last-making factories with capacities of between 200 and 500 pairs per day of international standard plastic lasts. Total current production is around 1,500 pairs per day. More significant, however, are the 20-30 small units making wooden lasts by hand for domestic footwear producers. With a capacity of 30 to 50 pairs per day each, they produce a total of 1,000 pairs every day. While many shoe factories in other Indian states depend on these wooden lasts, the market is unfortunately ➤



Worker (left) sewing the welt of a Goodyear welted shoe by hand using his feet as a clamp and bent over in order to see what he is doing — a frequent cause of back trouble in later years — and (right) a shoemaker stitching the sole of a Goodyear welted shoe by hand under the same conditions.



shrinking rapidly. Having said this, Agra still has the capacity to produce around 600,000 pairs of lasts per year. The manufacture of wood lasts in Agra was covered in detail in the May/June 2007 issue of *World Footwear*.

Agra also has the supply companies needed for modern footwear production. There are, for instance, 200 sole making units producing PU, PVC and TPR unit soles with a total capacity of 400,000 pairs per day. There are also suppliers of the necessary moulds, with 100 producing by hand and a further 20 using CNC machining. Most shoes need insoles and there are 10 modern factories supplying this need also.

In India one can find many peculiarities. The fact that the largest leather shoe-making city has no tanneries is one of them, despite the fact that it lies close to Rajasthan which has the biggest cattle population in the country. A few tanneries did function in Agra during the 1960s but were then banned in order to preserve the Taj Mahal from pollution. Of the leather used in Agra, 90% is sourced from other parts of the country while the remaining 10% of high-quality leather is imported from Europe. Insole and counter materials, synthetic upper materials and, even fully stitched closed uppers, are now being imported from China, Taiwan, South Korea and Vietnam.

A KEY STRENGTH

Skilled manpower is Agra's main strength due to shoemaking being hereditary work. The traditional way to obtain a trained workforce was from child labour. Workers were mostly illiterate and would take their children as young as eight years old to the factories to work as helpers and also learn skills for the future.

A father would gradually impart his tricks and techniques to a son who, with this guidance, would become a good shoemaker while quite young. Instead of going to school, many still start working at home to bring in badly needed income and become capable of producing an excellent pair of Goodyear welted shoes even though they are unable to

write their own name.

This of course is no use to the modern mechanised factories. These look to technical institutions for the skilled employees they now require. The Central Footwear Training Institute (CFTI) is fully equipped for students to make a pair of shoes using modern machinery including computer cutting-tables, PU pouring, CNC milling and CAD shoe design. By the end of January this year 3,095 students had qualified from CFTI. There is a choice of nine short- or long-term courses to serve the basic needs of the industry in Agra and also a two-year diploma course in design and manufacture accredited by the UK's Textile Institute.

In addition, there are the Government Leather Institute and the Dayal Bagh Leather Institute, each training 30 candidates per year in traditional shoe making, plus the Khadi and Village Industries Commission which takes a further 60 per year. The Council for Leather Exports (CLE) is also planning a training centre to serve an ever-rising demand for skilled shoemakers.

The CLE has in fact played a vital role in developing the industry in Agra. It opened a branch office in 1997 and now organises group participation for its member exporters in major overseas fairs and exhibitions through funding and

TABLE 1: EXPORT GROWTH (Rs. CRORE)

Product	2004-05	2005-06	2006-07
1 Finished leather	1.04	0.98	0.19
2 Footwear	755.93	838.60	1066.66
3 Footwear components	66.48	40.66	44.53
4 Leather goods	0.19	0.52	0.33
5 Leather garments	0.83	-----	-----
6 Non-leather footwear	10.19	4.19	3.89
TOTAL	835.02	884.95	1115.60

Key: 1 crore = 10 million, USD1 = Rs.40

assistance from the Indian government.

There is regular participation in important fairs such as GDS in Germany, Expo Riva in Italy and WSA in the USA. Apart from this, exporters can also join in at trade delegation and buyer/seller meetings organised by CLE. As a result of these initiatives, Agra's footwear industry has established a significant presence in world markets. The CLE also acts as an effective catalyst between the industry and relevant government departments in solving day-to-day problems faced by member exporters.



Production line of a typical export orientated unit.

During the last reported financial year of 2006-2007, Agra's footwear industry exported some Rs.1400 crore worth of shoes with around Rs.1100 crore going directly from Agra and the remaining Rs.300 crore through other metropolitan cities. This represented a growth of approximately 23% compared to the previous year (see Table 1).

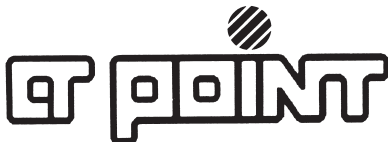
LOOKING TO THE FUTURE

As already explained, a major problem has been that of leather supplies. At present no leather processing is allowed within a 40 km radius of the Taj Mahal so, consequently, not a single tannery exists in Agra. A city producing 300,000 pairs of shoes per day clearly requires its own tanning capacity and so it has been suggested that 10 to 15 tanneries be established within a radius of 50-60 km of Agra. These would also be helpful for adjoining states such as Haryana and Delhi where leather-based industries are also growing rapidly.

In a further move to add to the infrastructure, a 'Footwear Components Park' will help the essential footwear components industry to develop. And, finally, a high-class design studio and an international standard footwear testing laboratory are to be created, together with further training centres to continue the improvement in labour skills, which has already proved so successful. 📍

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