



Trends in production and trade

Leather products from India

Fact Sheet | May 2021

1 Introduction

Millions of people around the world work to produce leather garments, footwear, and accessories. The leather-based garments, footwear and accessories value chain is complex, with many different actors involved – from farmers to slaughterhouses to leather tanners; from finishers to traders; from producers of leather components to producers of leather goods; and from buying agents to brands and retailers. Production units vary greatly in size and include tanneries, small leather workshops, home-based units, as well as large and small garment, footwear, and leather goods factories.

South Asia is an important production hub, catering to the international market. India holds a prominent place in the global leather industry and contributes substantially to the international market for leather and leather products. This mapping report provides a brief outline of the industry in general and shows export and import data to establish a more concrete overview of the industry, its key products, and its place in the international market. It holds information on the main receivers, country-wise as well as companies, and the main exporters of leather and leather products from India. The report briefly touches on the impact of the corona pandemic on the leather industry in India as well.

Research into production trend and exports and the identification of relevant actors in the industry are essential to establish links between the leather industry in India, the export markets, and all actors involved, as well as to demonstrate gaps in traceability and transparency in leather value chains in general. This mapping of the Indian leather industry has been completed as a part of the Together for Decent Leather programme, which aims to improve working conditions and to reduce labour rights abuses.

To gain a better insight into the leather industry in India, its export and production trends and its link to the international market, several areas of the leather industry are considered. First, a brief outline of the leather industry in India will be given. After this, export trends of the leather industry in India are shown, including a specific focus on export to the EU and the European buyers. The largest exporters of leather and leather products located in India are shown as well. Since the corona pandemic has been influencing various industries greatly, some insights are given on how the pandemic has influenced the leather sector in India, based on online information and export data.

2 Methodology

A variety of sources were tapped into while gathering information for this mapping. For the brief outline of the Indian leather industry, previous reports, industry associations' websites, newspaper articles, and several other online sources proved to be helpful to gain an understanding of the industry. Import and export data were retrieved from three specific databases. The global trade data platform Panjiva¹ was used to highlight trends in the export of leather and leather products from India. This particular feature of Panjiva is based on data extracted from the UN Comtrade Database.² In Panjiva, main exporters and buyers of leather and leather products shipped from India could also be identified. A cautious idea of the impact of the corona pandemic on the Indian export industry of leather and leather products was gained by comparing shipment data from 2019 and 2020. Next to Panjiva, the EU Market Access Database³ and UN Comtrade Database were used to display the link between India and the EU, based on import value of leather and leather goods into the EU.

In India, the Together for Decent Leather programme is implemented in the South Indian state of Tamil Nadu. Therefore, this mapping will sometimes zoom in on specific information and data related to this geographical area.

Searches on import and export data were done based on Harmonised System codes,⁴ or HS codes, that represent different product groups. The following HS codes were used for this report:

Product groups featured

To analyse the types of leather products and trade values exported from Pakistan, this overview of trends in production and exports has looked into different sets of product groups and subgroups, as classified internationally using HS codes.

HS 41 – raw hides and skins (other than fur skins) and leather

- 4104 to 4115 include tanned hides and finished or semi-finished leather

HS 42 – articles of leather; saddlery and harness, travel goods, handbags, and similar containers

- 4202 – Trunks; suit, camera, jewellery, cutlery cases; travel, tool, similar bags; wholly or mainly covered by leather, composition leather, plastic sheeting, textile materials, vulcanised fibre, paperboard
- 4203 – Articles of apparel and clothing accessories, of leather or of composition leather

HS 64 – footwear; gaiters and the like; parts of such articles

- 6403 – Footwear; with outer soles of rubber, plastics, leather or composition leather and uppers of leather
- 6404 – Footwear; with outer soles of rubber, plastics, leather or composition leather and uppers of textile materials

See: <https://www.foreign-trade.com/reference/hscodet.htm>

During analyses, the product group of footwear with textile uppers proved to be taking up a minimal share in the Indian leather export industry. In addition, the quantity of leather in these products is also low. Therefore, it was decided to leave this product group out of further analyses and consequently out of this mapping.

The report will refer to the description of the product group instead of their HS codes. The following descriptions will be used for the selected product groups:

- HS 41 → Raw hides and leather
- HS 4202 → Trunks, bags, and (suit)cases
- HS 4203 → Leather apparel
- HS 6403 → Leather footwear

3 The leather goods supply chain

From slaughter to store shelves, leather undergoes a wide range of treatments to make it into a workable material that can be used as a basis for the production of final articles such as shoes, garments, bags, gloves, and so on.

These different processes can take place in different countries. For instance, leather produced in India is not only used for the production of leather goods in India but is also exported to countries such as China and Italy, which are big producers of shoes, bags, and other leather goods often sold in the EU market. In most cases, for consumers as well as for civil society actors, lack of supply chain transparency makes it impossible to determine the origin of leather used in these end-products.

Besides the many different production steps, many different actors are involved as well. Due to lack of transparency of supply chain information, it is challenging to establish all the links in leather goods supply chains. A great range of production

facilities is involved in the production of leather and leather goods: large vertically integrated leather and leather goods manufacturers, tanneries, small leather workshops, home-based units, as well as large and small garment, footwear, and leather goods factories. On top of that, traders, agents and buying houses are involved in this industry. Products are subsequently shipped and sold all over the world by brands, directly or by (online) retailers.

This complexity is also found when it comes to employment relationships. Workers may be hired directly by tanneries or leather goods factories. However, often there is a labour contractor in between. The leather industry is further characterised by a high level of informal labour and home working.

Figure 1 Production phases of the leather goods supply chain

The Together for Decent Leather programme focuses on the brown steps



4 Brief outlook on the Indian leather industry

The leather sector in India takes up a prominent place in the country's economy. It is known for its high consistency in export earnings and is placed in the top 10 of foreign exchange earners for India.⁵ Raw materials are amply present, since 20% of the global cattle and buffalo population and 11% of the global goat and sheep population reside in India.⁶ About 80% of the leather industry in India consists of Medium and Small Enterprises (MSEs).⁷

There are several leather clusters in India that hold a clear presence of leather production and/or leather product manufacturing. The major leather clusters are located in the following states:⁸

- **Tamil Nadu** – Chennai, Ambur, Ranipet, Vaniyambadi, Vellore, Pernambut
- **West Bengal** – Kolkata
- **Uttar Pradesh** – Kanpur, Agra, Noida, Saharanpur

The clusters differ in size of factories or tanneries and of composition of workforce. The type of production varies for the different areas as well. For example, many tanneries can be found in Kanpur. In Agra, footwear is the most manufactured product, both for the domestic and the export market. Jalandhar in Punjab is famous for producing footballs for larger brands.⁹ The state of Tamil Nadu is the overall largest cluster, with about 60% of the Indian tanning capacity, making up for 70% of leather output in India, and holding 40-50% of total Indian leather export.¹⁰

For the Agra and Tamil Nadu cluster, the Centre for Education and Communication (CEC) points out in a working paper on the leather industry in India,¹¹ that, in general, the production units in both clusters range from vertically integrated enterprises where the complete production process is facilitated internally, to a large number of units engaged in parts of the production process and that are linked to each other vertically or horizontally.

Numbers on tanneries and leather units in Tamil Nadu

All the various stages of production can be found in Tamil Nadu, from tanneries to factories and workshops, and homeworkers.¹² In the report: ‘Watch your step!’,¹³ it was determined that there were 700 operating tanneries in Tamil Nadu in 2017. Next to tanneries, 497 units were identified as manufacturing shoe uppers and complete shoes, and 698 units were determined to produce leather garments and other leather goods.

Homeworkers make up a substantial part of the leather industry workforce in Tamil Nadu, mostly occupied with stitching leather uppers for shoes. They receive their work from intermediaries, who get the orders from workshops, sub-contractors, and factories (in or outside of India). The shoe uppers are partly exported, and partly made into complete shoes in India for domestic use or export.¹⁴

Indian Industry Associations

A non-exhaustive overview of industry associations active in the leather industry in India:

- 4104 to 4115 include tanned hides and finished or semi-finished leather
- Agra Footwear Manufacturers and Exporters Chamber (AFMEC) – <https://www.afmec.org/>
- All India Skin and Hide Tanners and Merchants (AISHTMA) – <http://www.aishtma.com/>
- Ambur Tanners Association (ATA) – (no website found)
- Confederation of Indian Footwear Industries (CIFI) – <https://www.cifi.in/>
- Council for Leather Exports (CLE) – <http://leatherindia.org/>
- Indian Finished Leather Manufacturers and Exporters Association (IFLMEA) – <https://www.iflmea.com/>
- Indian Footwear Components Manufacturers Association – <http://www.ifcoma.org/>
- Indian Leather Products Association (ILPA) – <https://www.ilpaindia.org/>
- Indian Shoe federation – <http://www.indianshoefederation.in/>
- Punjab Leather Federation – (no website found)
- South Indian Shoe Manufacturers Association (SISMA) – <http://www.sisma.org.in/>
- South India Tanners & Dealers Association (SITDA) – (no website found)
- Tamil Nadu Leather Tanners Exporters & Importers Association – <https://talteia.com/>
- Tanners federation of India – (no website found)
- UP Leather Industry Association – (no website found)

Workforce in the Indian leather industry

The Indian leather industry employs around 4.42 million people, of which 55% is below 35 years of age.¹⁵ It is estimated that about 30% of the workforce is female,¹⁶ although for the Tamil Nadu cluster, the All India Skin and Hide Tanners and Merchants Association states that almost 80% of leather workers are women.¹⁷ The report **Stitching our Shoes** from 2016 highlights the following ratio regarding male and female in different types of production unit in Tamil Nadu:¹⁸

Table 1 Share of women working in the Tamil Nadu leather industry in 2016

Type of unit	Share of women
Tanneries	20-30%
Factories	80-85%
Home based unit (homeworkers)	100%

The people working in the Indian leather sector come from marginalized and vulnerable communities. Social factors such as religion and caste continue to play a major role in the composition of the workforce.

5 Indian leather export industry

Approximately 12.9% of the global leather production of hides and 9% of global production of footwear can be attributed to the Indian leather industry. Furthermore, it takes second place in the worldwide production of footwear and leather garments as well as in the exporting of leather garments.¹⁹

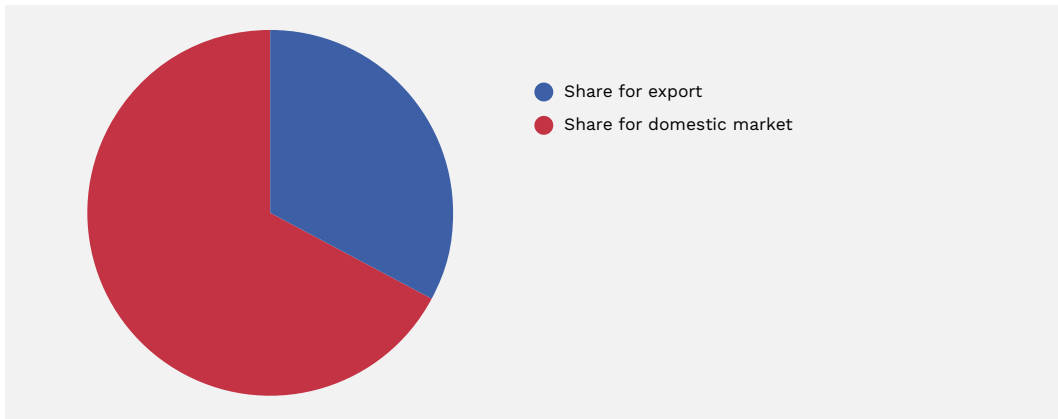
The Council for Leather Exports (CLE) lists leather footwear as taking 41.05% of export share for leather and leather products from India for the financial year 2019-2020, making this the largest product group for leather and leather products exported from India.

Regarding types of shoes that are being exported, Textilevaluechain.in indicates that of the footwear (leather and non-leather) exported in the financial year 2018-2019, 55% regarded men's shoes, 35% women's shoes, and 10% was taken up by children's shoes.²⁰

The financial year of 2019-2020 showed an export value of USD 5.07 billion for the export of leather and leather products.²¹ Since the total export industry for India in this same financial year was valued at USD 314.31 billion,²² leather and leather products take up a 1.61% share in the Indian export industry.

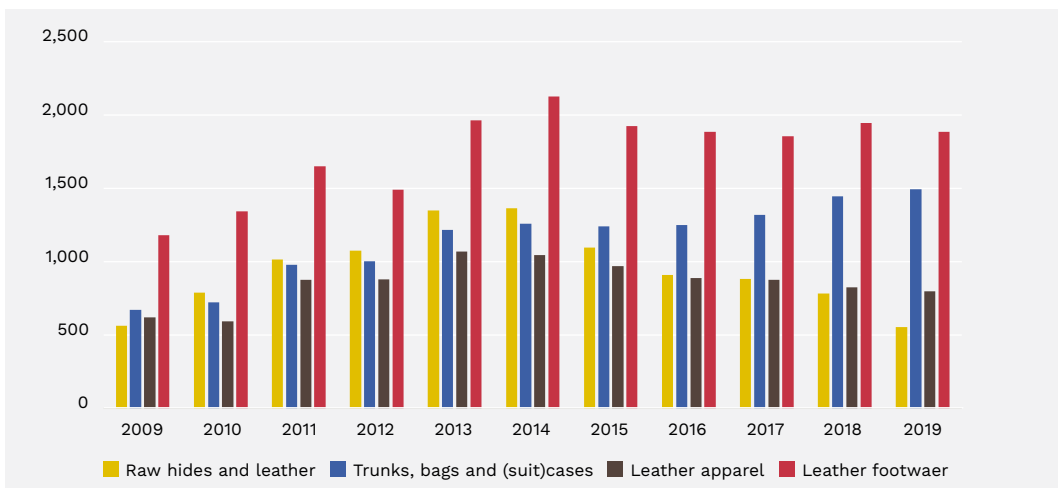
The most recent data on which part of the Indian leather industry can be linked to the domestic market, and which share accounts for the export market, could be extracted from the Leather Sector achievements report 2016. This report highlights that the Indian leather industry was valued at USD 17.85 billion for the financial year 2015-2016, of which USD 12 billion was attributed to the domestic market, and USD 5.85 billion accounted for export.²³

Figure 2 Indian leather industry – ratio domestic market and export
Financial year 2015-2016



An export data analyses based on UN Comtrade data shows the following course in export value for leather and leather products from India for the timeframe 2009 - 2019:

Figure 3 Course of export value per product group
In 1,000,000 USD



Graph by Arisa, based on UN Comtrade export data retrieved through Panjiva, 3 November 2020.

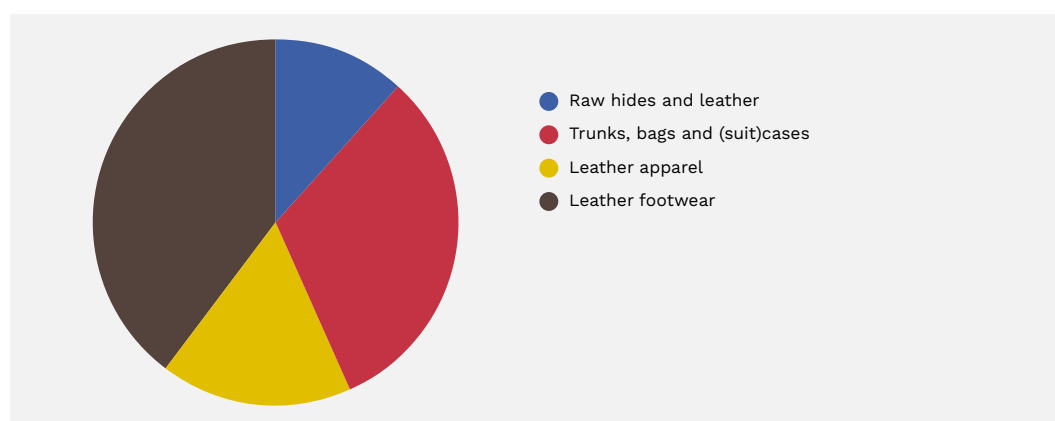
Based on export value, leather footwear is the overall largest product group exported from India for this timeframe. Raw hides and leather took second place for the timeframe 2010 - 2014, but then declined and ended on fourth place in 2019. Leather apparel followed a similar course, although the export value has remained somewhat stable in the last few years. An increase can be seen for trunks, bags, and (suit)cases, taking over second place and being the second largest product group exported from India from 2015 - 2019.

Focusing on the year 2019, comparisons were made to see which product groups took a prominent place in the Indian export industry, also zooming in on export value from Tamil Nadu and its share for the European Union. All values were retrieved through Panjiva.

Table 2 Export value for export from India in 2019

Product group	Value in USD
Raw hides and leather	554,800,715
Trunks, bags, and (suit)cases	1,492,435,657
Leather apparel	797,666,544
Leather footwear	1,886,425,141

Figure 4 Export from India in 2019



Graph by Arisa, based on export data retrieved through Panjiva, 3 November 2020.

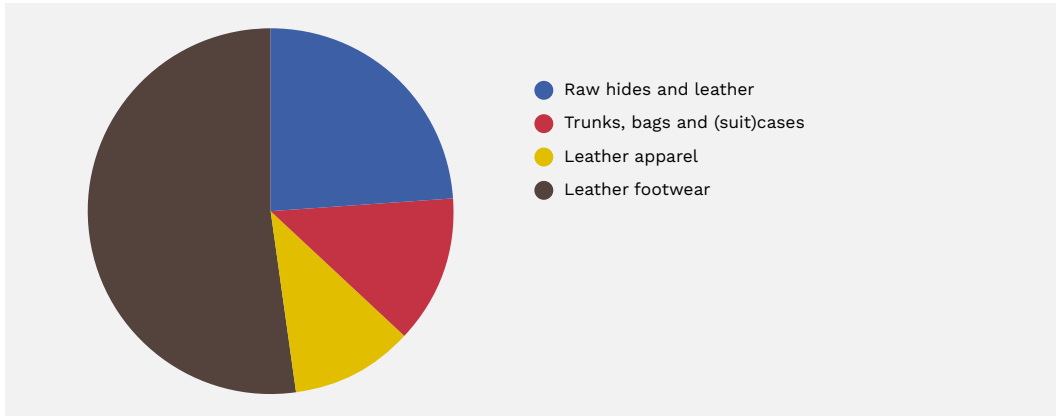
Based on these data, footwear with uppers of leather was the overall largest product group exported from India in 2019, followed by trunks, bags and (suit)cases. These two product groups made up about 70% of exports of leather products from India. Leather apparel came third, followed by raw hides and leather covering 12% of the export.

To find out which share Tamil Nadu had in the Indian export leather industry, Tamil Nadu's export value was also determined, per product group.

Table 3 Export value for export from Tamil Nadu to worldwide destinations in 2019

Product group	Value in USD	% of total export value from India
Raw hides and leather	124,000,000	22%
Trunks, bags, and (suit)cases	70,000,000	5%
Leather apparel	59,300,000	7%
Leather footwear	274,000,000	15%

Figure 5 Export from Tamil Nadu in 2019



Graph by Arisa, based on export data retrieved through Panjiva, 3 November 2020.

The above table and graphic shows that of these particular product groups in 2019, footwear with leather uppers made up the largest export product from Tamil Nadu, with a little over half of the export consisting of this type of item. Nearly a quarter of the export value covered raw hides and leather.

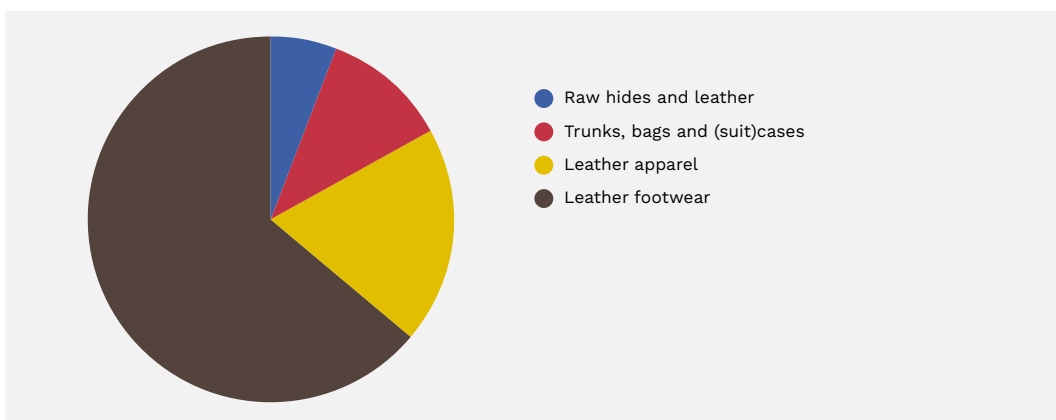
Compared to the nationwide export, Tamil Nadu is an important contributor to the export of raw hides and leather, based on export value, contributing to more than one-fifth of the nationwide export. Tamil Nadu is also a substantial sourcing area for footwear with leather uppers, taking up 15% of the India export for this product group.

Export from Tamil Nadu to the EU was taken separately, as the Together for Decent Leather programme is partly situated in the EU.

Table 4 Export value for export from Tamil Nadu to the EU in 2019

Product group	Value in USD	% of total export value from Tamil Nadu
Raw hides and leather	13,000,000	10%
Trunks, bags, and (suit)cases	23,000,000	33%
Leather apparel	40,000,000	67%
Leather footwear	131,000,000	48%

Figure 6 Export from Tamil Nadu to the EU in 2019



Graph by Arisa, based on export data retrieved through Panjiva, 3 November 2020.

Leather footwear was by far the largest product group exported from Tamil Nadu to the EU, with over 60% of the export share of the selected product groups in 2019. Leather apparel takes second place with a 20% share. This is different from Tamil Nadu's export to worldwide destinations, in which raw hides and leather take second place. Trunks, bags and (suit)cases hold third place, followed by raw hides and leather.

Of the leather apparel exported from Tamil Nadu, a large share is shown to end up in the EU, with 67% of the total export share for these product groups for Tamil Nadu. Almost half of the leather footwear exported from Tamil Nadu ends up in the EU, making this a well-sourced product for the EU from Tamil Nadu as well. Around a third of the value of exported items covered by the product group of trunks, bags and (suit)cases is received by EU countries.

According to the Council for Leather Exports (CLE),²⁴ the main countries receiving leather and leather products from India for the financial year 2019-2020 were:

Table 5 Leather and leather products exported from India

Country	Market share of leather and leather products exported from India
USA	17.22%
Germany	11.98%
UK	10.43%
Italy	6.33%
France	5.94%
Spain	5.01%
The Netherlands	3.52%
United Arab Emirates	3.35%
China	2.61%
Hong Kong	2.15%

These 10 countries account for nearly 70% of total export of leather and leather products from India.

6 Export destinations for leather, leather apparel, leather trunks and bags, and leather footwear

This section shows information on export trends, based on export value and number of shipments of the various product groups. Data were retrieved from Panjiva and at times from the EU Market Access Database. The main receiving countries, prominent European buying companies sourcing leather and leather products from India, and the largest Indian exporters are shown as well. A more extensive overview of the Indian exporters can be found in Annex I, adding information such as the types of product involved and a selection of the buyers. A non-exhaustive list of European buyers sourcing from Tamil Nadu is listed as Annex II.

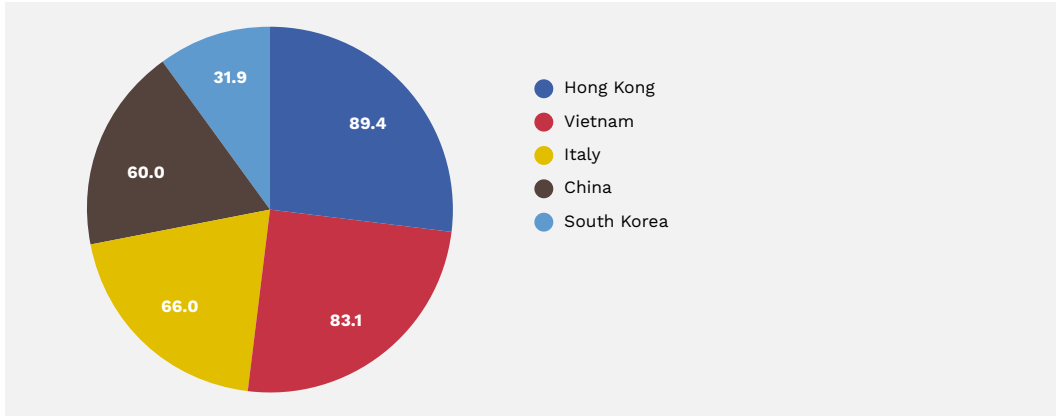


Raw hides and leather

For raw hides and leather, the main receiving country of the export goods from India in 2019 is Hong Kong. Vietnam, Italy, China, and South Korea are other main receiving countries. The main European buying countries are Italy, Spain, Germany, and The Netherlands. Export to Hong Kong has strongly declined from 2014 onwards.

Figure 7 Main export destinations in 2019 – raw hides and leather

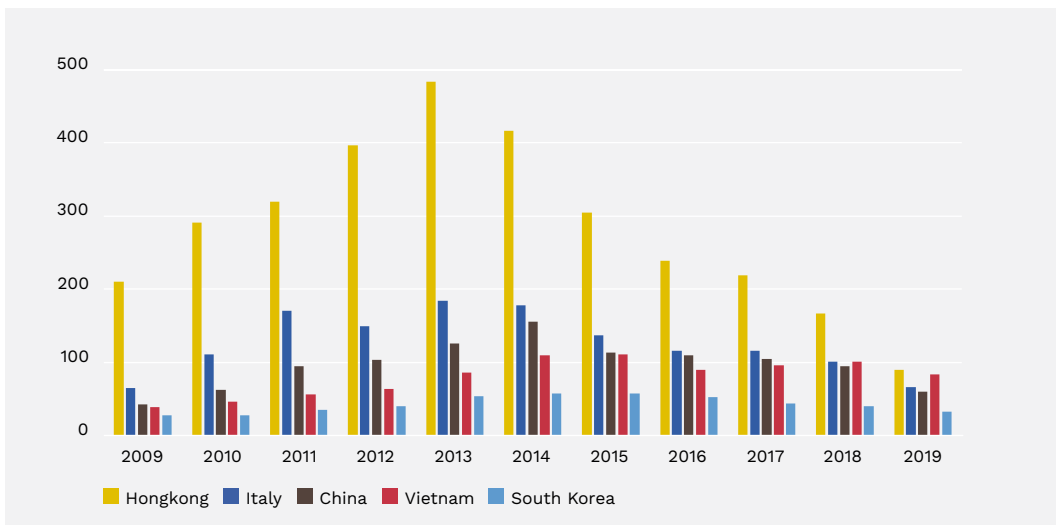
Value in 1,000,000 USD



Graph by Arisa, based on export data retrieved through Panjiva, 3 November 2020.

Figure 8 Export value per receiving country in USD – raw hides and leather

In 1,000,000 USD

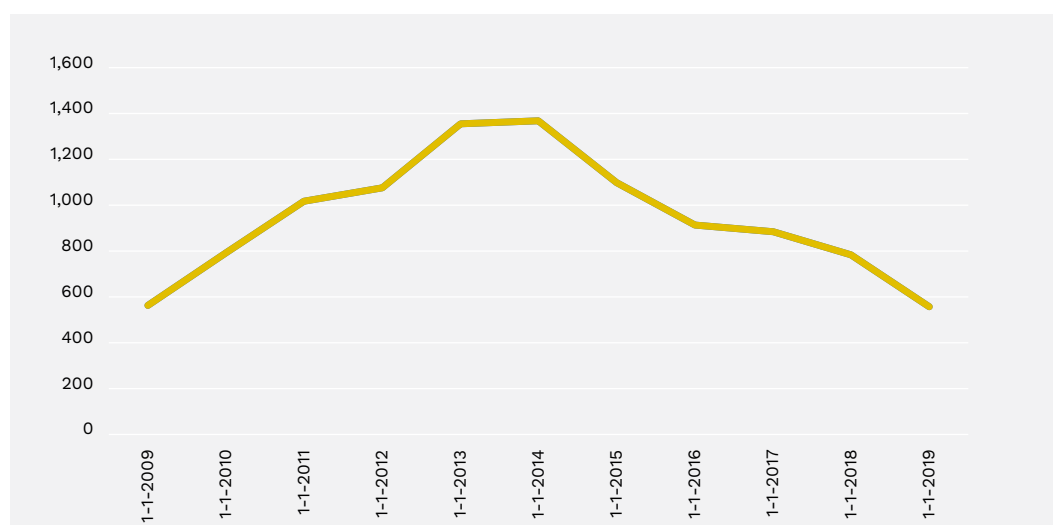


Graph by Arisa, based on export data retrieved through Panjiva, 3 November 2020.

When looking at export data, raw hides and leather experienced a strong increase until 2014 with a clear fall thereafter. In the other selected product groups this trend did not occur, although leather apparel experienced a slight decrease from 2014 onwards. In addition, leather footwear remained quite stable after 2014, while until 2014, both of these product groups experienced a growth in export.

Figure 9 Total export value from India per year – raw hides and leather

In 1,000,000 USD



Graph by Arisa, based on export data retrieved through Panjiva, 3 November 2020.

Looking at import into the EU, the top three supplying countries of raw hides and leather to the EU has been steady from 2015 to 2019, with India in third place. Brazil and the United States are the largest supplying countries.

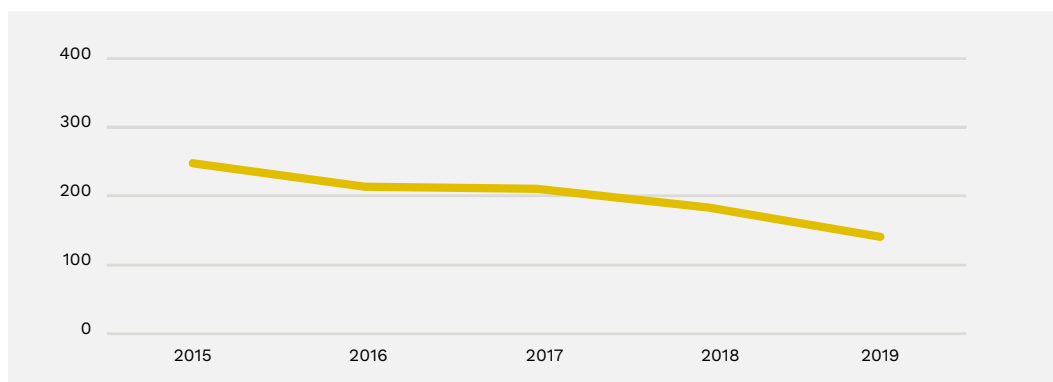
Table 6 Import value and main supplying countries for raw hides and leather to the EU-28 in 2019

Total import value to the EU in (USD)	
2,458,265,898	
Top 10 Countries	Value per country (USD)
Brazil	346,356,019
United States	330,343,701
India	157,538,293
Nigeria	118,161,133
Turkey	114,601,645
Argentina	101,367,527
South Africa	99,399,604
New Zealand	86,278,196
Serbia	74,806,379
Pakistan	71,903,587

Table based on export data retrieved through the UN Comtrade Database, 17 March 2021.

There is a clear decline in import value from India to the EU from 2015 to 2019. This matches the findings above, where an overall decrease for the export value of raw hides and leather from India started after 2014.

Figure 10 Import value in Euros from India to the EU - raw hides and leather
In 1,000,000 Euro



Graph by Arisa, based on export data retrieved through EU Market Access Database, 29 July 2020:

https://madb.europa.eu/madb/statistical_form.htm

Main European buyers of raw hides and leather exported from India in 2019 include:²⁵

- Cassa Di Risparmio del Veneto (Italy)
- G.A. Maasleder BV (The Netherlands)
- Intesa Sanpaolo Sp A (Italy)
- Is International Sourcing Ag (Switzerland)
- Lorenz Shoe Group GmbH (Austria)
- Magazzini Generali Doganali Srl (Italy)
- Marelle Spedizioni Srl (Italy)
- Relax Shoes Srl (Italy)
- S.C. Italsofa Romania Srl (Romania)
- Unicredit (Italy)

Main exporting companies of raw hides and leather from India in 2019 include:²⁶

- Alina Private Ltd. (Chennai - Tamil Nadu)
- Farida Prime Tannery Private Ltd. (Chennai - Tamil Nadu)
- Good Leather Co. (Chennai - Tamil Nadu)
- Kamil Leathers (Chennai - Tamil Nadu)
- Prara Leathers Pvt., Ltd. (Ranipet/Vellore - Tamil Nadu)
- Prime International India Pvt., Ltd. (Tamil Nadu)
- Tata International Ltd. (Mumbai - Maharashtra)

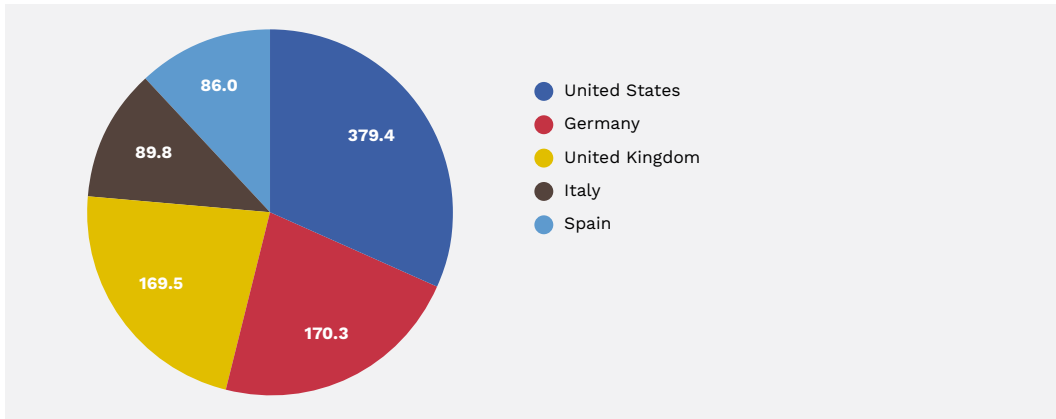


Trunks, bags, and (suit)cases

The main receiving countries for trunks, bags, and (suit)cases are the United States, United Kingdom, Germany, and Spain, as well as Italy and The Netherlands.

Figure 11 Main export destinations in 2019 – trunks, bags, and (suit)cases

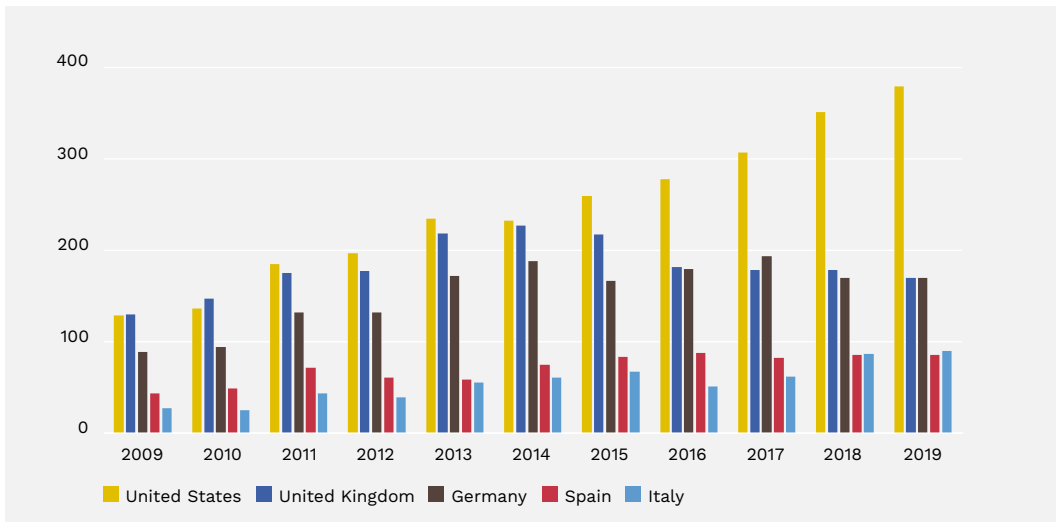
Value in 1,000,000 USD



Graph by Arisa, based on export data retrieved through Panjiva, 3 November 2020.

Figure 12 Export value per receiving country in USD – trunks, bags, and (suit)cases

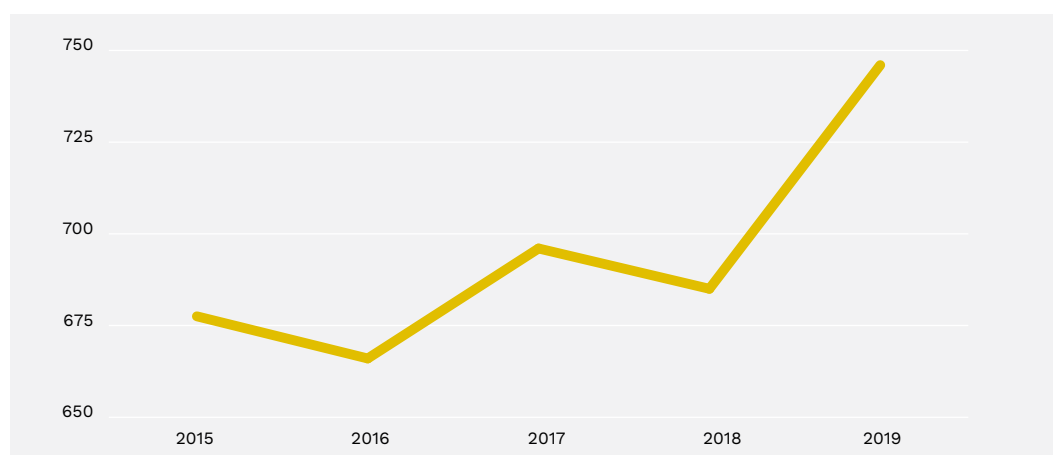
In 1,000,000 USD



Graph by Arisa, based on export data retrieved through Panjiva, 3 November 2020.

An overall increase in export value from 2009 for this product group can be seen, ending in 2019 with 1.49 billion USD. This same increase is also visible when focusing on export to the EU.

Figure 13 Import value in Euros from India to the EU - trunks, bags, and (suit)cases
In 1,000,000 Euro



Graph by Arisa, based on export data retrieved through EU Market Access Database, 29 July 2020:
https://madb.europa.eu/madb/statistical_form.htm

India takes fourth place in the largest supplying countries for trunks, bags, and (suit) cases to the EU in 2019. The top four remained the same from 2015 to 2019, with China being the overall largest sourcing country for these types of product, followed by Switzerland and Vietnam. In 2013, 2014, and 2015, India alternately took third, second, and third place.

Table 7 Import value and main supplying countries for trunks, bags, and (suit)cases to the EU-28 in 2019

	Total import value to the EU in (USD)
	11,853,231,043
Top 10 Countries	Value per country (USD)
China	6,833,880,219
Switzerland	1,625,074,289
Vietnam	1,046,321,493
India	835,353,436
Indonesia	156,560,372
Cambodia	155,024,543
United States	149,564,478
Hong Kong	147,061,755
Turkey	127,414,810
Myanmar	109,466,222

Table based on export data retrieved through the UN Comtrade Database, 17 March 2021

Main European buyers of trunks, bags, and (suit)cases exported from India in 2019 include:²⁷

- Cache Artesano (Spain)
- El Corte Ingles (Spain)
- Lloyd Baker Leather Ltd. (UK)
- Marks & Spencer (UK)
- Monsoon Accessorize Ltd. (UK)
- Motorola Solutions Germany GmbH
- Next Retail Ltd. (UK)
- Prada Sp A (Italy)
- Samsonite Europe N.V. (Belgium)
- Tempe S.A. (Spain)

Main exporting companies of trunks, bags, and (suit)cases from India in 2019 include:²⁸

- Aee Overseas (Noida - Uttar Pradesh)
- K H Exp. India Private Ltd. (Chennai - Tamil Nadu)
- Khemchand Handicraft (Jodhpur - Rajasthan)
- Krishna Handicrafts (Udaipur - Rajasthan)
- Mahi India (Kanpur - Uttar Pradesh)
- Painted Leaf Designs (Udaipur - Rajasthan)
- Safa Exp.

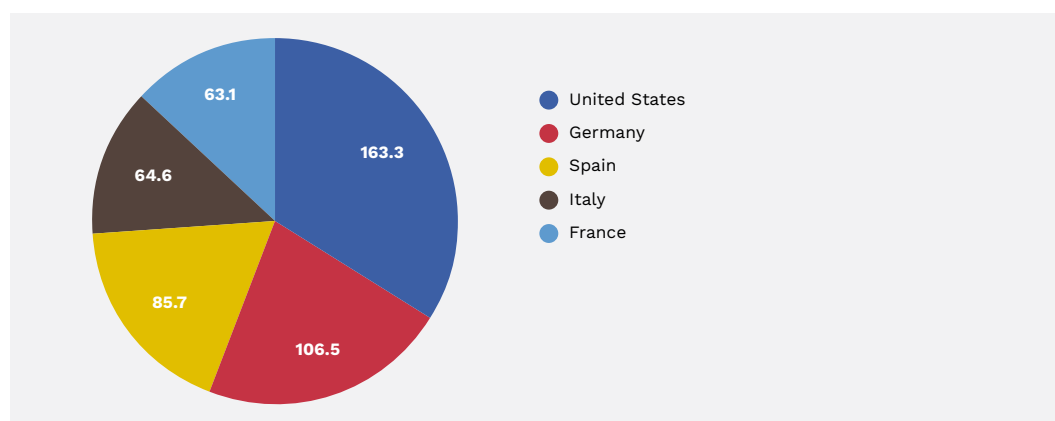


Leather apparel

For leather apparel, the United States is the overall largest receiving country. Germany, Spain, Italy, and France can be added as other main receiving countries. Seven of the ten main receiving countries are European countries, holding a combined export share of 61%. This shows that Europe takes a prominent place in the export market of leather apparel from India.

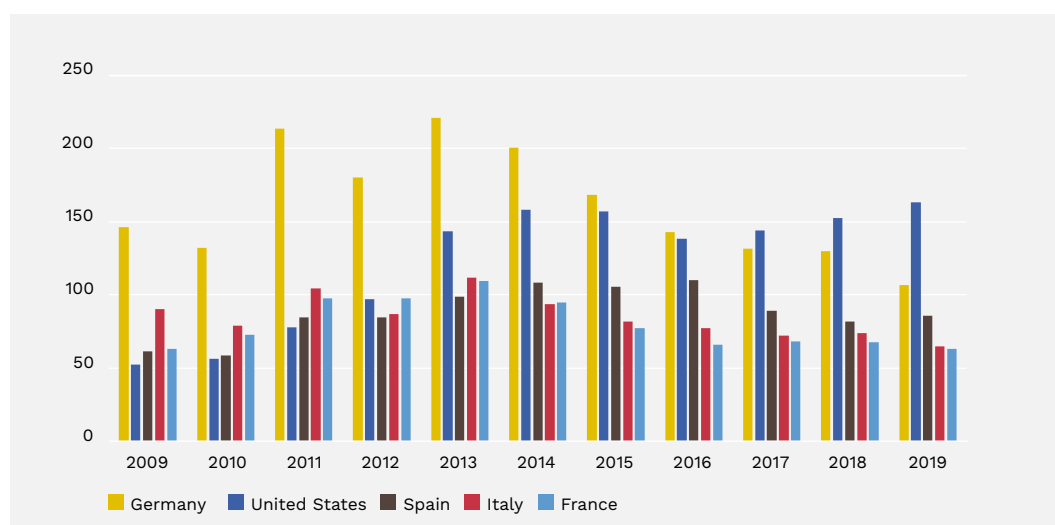
Figure 14 Main export destinations in 2019 – leather apparel

Value in USD



Graph by Arisa, based on export data retrieved through Panjiva, 3 November 2020.

Figure 15 Export value by receiving country in USD – leather apparel
In 1,000,000 USD



Graph by Arisa, based on export data retrieved through Panjiva, 3 November 2020.

India is the main supplying country for leather apparel to the EU for 2019 and has been that at least since 2015.

Table 8 Import value and main supplying countries for leather apparel to the EU-28 in 2019

Total import value to the EU in (USD)	
1,566,543,120	
Top 10 Countries	Value per country (USD)
India	471,429,781
Pakistan	316,709,632
China	276,353,228
Switzerland	191,181,037
Turkey	94,679,937
Vietnam	44,826,257
Indonesia	22,953,790
United States	19,200,174
Tunisia	18,057,526
Ukraine	12,885,036

Table based on export data retrieved through the UN Comtrade Database, 17 March 2021.

Main European buyers of leather apparel exported from India in 2019 include:²⁹

- All Saints Retail Ltd. (UK)
- Bestseller A/S (Denmark)
- Dk Co. A/S (Denmark)
- Grupo Massimo Dutti S.A. (Spain)
- Hugo Boss Ag (Germany)
- Marks & Spencer (UK)
- Naf Naf S.A.S. (France)
- Punto Fa S.L. (Spain)
- Ralph Lauren (Italy)
- Trovels Sa (Spain)

Main exporting companies of leather apparel from India in 2019 include:³⁰

- Apollo International (Delhi)
- Bhartiya International Ltd. (Delhi/Gurgaon - Haryana)
- Jak Group Pvt., Ltd. (Gurgaon - Haryana)
- K H Exp. India Private Ltd. (Chennai - Tamil Nadu)
- Savi Leathers (Noida - Uttar Pradesh)
- Tangerine Design Pvt., Ltd. (Delhi/Gurgaon - Haryana)
- Yes Leather (Kolkata - West Bengal)

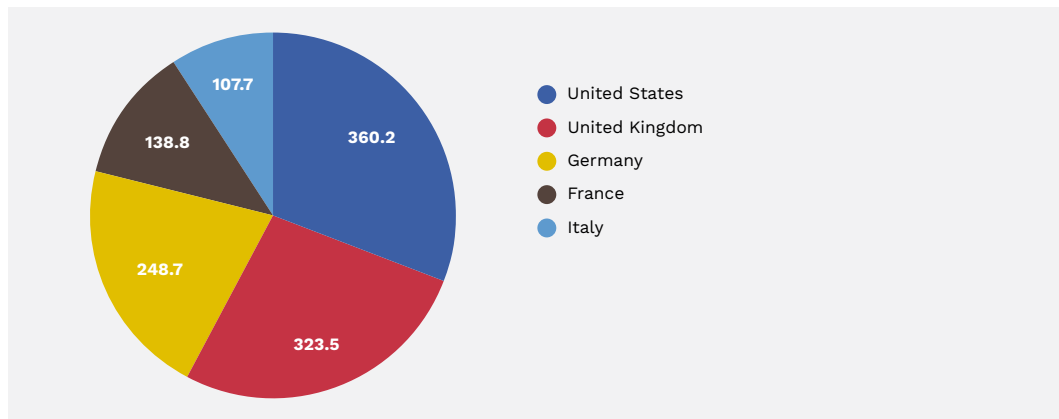


Leather footwear

Similar to trunks, bags and (suit)cases, and leather apparel, the United States receives the largest part of exported leather footwear from India, based on export value. The United Kingdom, Germany, France, and Italy are other main receiving countries.

Figure 16 Main export destinations in 2019 – leather footwear

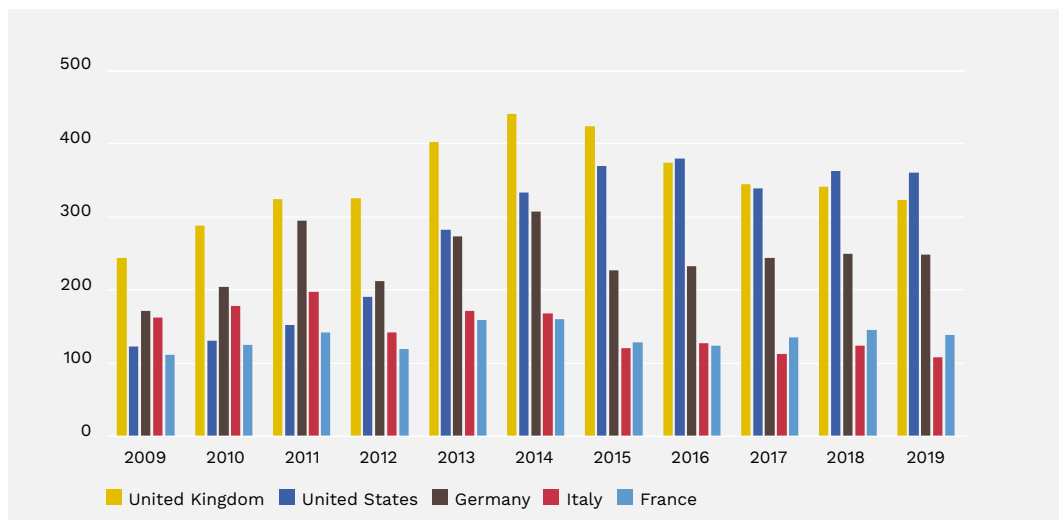
In 1,000,000 USD



Graph by Arisa, based on export data retrieved through Panjiva, 3 November 2020.

Figure 17 Export value by country – leather footwear

In 1,000,000 USD



Graph by Arisa, based on export data retrieved through Panjiva, 3 November 2020.

India has been in the top four of supplying countries for the earlier product groups. The same prominent place can be seen for leather footwear, where in 2019, India was the third largest supplier to the EU. The same order of main supplying countries can be found in the timeframe of 2015 to 2019.

Table 9 Import value and main supplying countries for leather footwear to the EU-28 in 2019

	Total import value to the EU in (USD)
	8,883,267,642
Top 10 Countries	Value per country (USD)
China	2,229,817,066
Vietnam	1,611,498,031
India	1,188,216,559
Indonesia	752,847,438
Switzerland	707,515,651
Cambodia	282,610,181
Bangladesh	273,623,587
Tunisia	269,459,458
Albania	241,634,767
Turkey	190,613,786

Table based on export data retrieved through the UN Comtrade Database, 17 March 2021.

Main European buyers of leather footwear exported from India in 2019 include:³¹

- Asos (UK)
- Bugatti Shoes Man Ag (Germany)
- C&J Clark (UK)
- CCC S.A. (Poland)
- Deichmann (Germany)
- Geox S.P.A. (Italy)
- H&M (Sweden)
- Marks & Spencer (UK)
- Next Retail Ltd. (UK)
- Tempe S.A. (Spain)

Main exporting companies of leather footwear from India in 2019 include:³²

- Farida Shoes Private Ltd. (Ambur - Tamil Nadu)
- Gupta H.C. Overseas (I) Pvt., Ltd. (Bengalore - Karnataka)
- K H Exp. India Private Ltd. (Chennai - Tamil Nadu)
- Mirza International Ltd. (Kanpur - Uttar Pradesh)
- Mohib India Shoes Private Ltd. (Chennai - Tamil Nadu)
- Superhouse Limited (Kanpur - Uttar Pradesh)
- Tata International Ltd. (Mumbai - Maharashtra)

7 Impact of the corona pandemic on the Indian leather industry

The measures taken to combat the corona virus have widely influenced the worldwide economy, including the leather industry in India. Already in the beginning of March 2020, the Hindustan Times reported that the outbreak of the corona virus in China had led to a stop of the import of certain chemicals needed to process raw hides.³³ It takes at least 64 articles to process raw hide into a finished shoe, including buttons, zippers, and adhesives, and most of these are usually imported from China. In addition, they highlight how shipments of finished products already

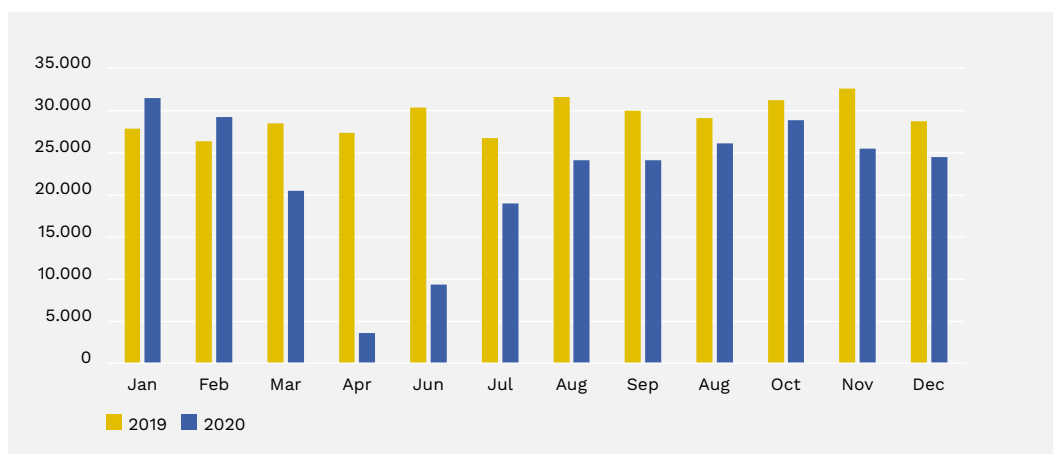
sent to China, Germany, Italy, and the US got stuck at the seaports and airports, as the importers were not able to reach the ports to collect them.

On 23 March 2020, India imposed a nationwide lockdown to slow down the growth rate of corona infections, which halted activities for the leather industry. Measures to curb corona virus infections were also taken in the buying countries, leading fashion shops to temporarily close their doors and facing a decline of sales. As a result, international fashion brands and retailers started to cancel orders to production countries in an attempt to deal with their financial difficulties. The chairman of the CLE indicated that at the beginning of May 2020, a total of USD 1 billion in export orders from India had been cancelled by the international buyers since 17 March 2020.³⁴ For April and May 2020, a decline of 83% in export value of leather and leather products was recorded compared to the preceding year.³⁵

A phased ‘unlocking’ in India started mid-May, and leather units slowly started to re-open. However, due to the cancellation of orders, only partial resumption was possible. A report by Cividep shows that in Vellore, a leather hub in Tamil Nadu, many small-scale tanneries and factories could not recover from the situation and closed down permanently.³⁶

The effects of the corona pandemic related measures on the leather sector’s export industry in India can be seen in the shipping activity. The following graph shows the number of shipments per month, comparing the years 2019 and 2020, covering all product groups:

Figure 18 Number of shipments per month – export of leather and leather products from India



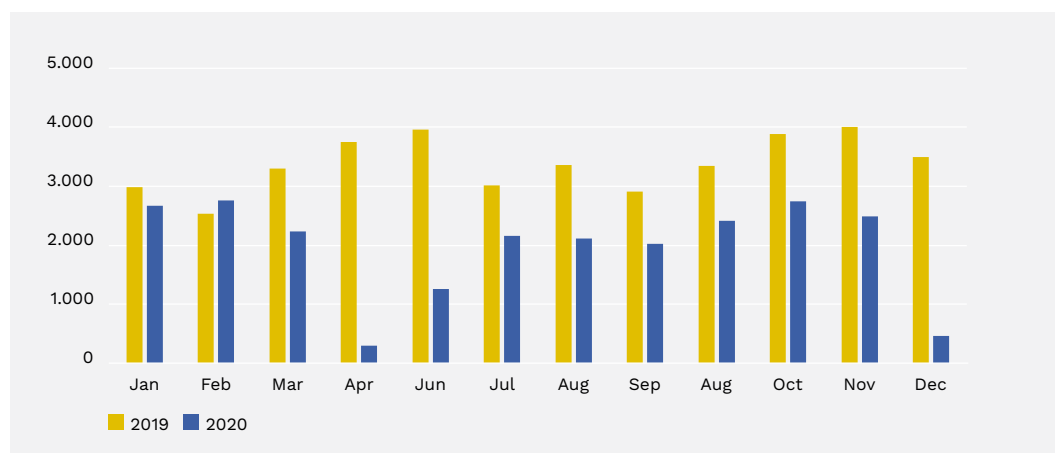
Graph by Arisa, based on export data retrieved through Panjiva, 17 March, 2021.

A clear drop in shipping activity is visible, particularly in April and May in 2020 compared to 2019, with April showing the lowest point in export activity. Once factories began to open up again at the end of May, the number of shipments rose again in June, after which the number of shipments settled a little below the level of 2019 for the last months of 2020. The data for Tamil Nadu showed a similar trend.

Looking at the different product groups separately, the months of April and May showed the same drop and recovery. Raw hides and leather were a minor exception: the number of shipments for the last month of 2020 showed a wider gap compared to the shipment activity in 2019. Maybe not all export data for December have been processed in the data platform yet, and the number of shipments will be adjusted in time. For leather apparel, the gap for December was smaller than the overall

average, and for the product group that holds trunks, bags and (suit)cases, a slight increase in the number of shipments compared to this particular month in 2019 can be seen, which raised the overall average number of shipments for December.

Figure 19 Number of shipments from India per month – raw hides and leather



Graph by Arisa, based on export data retrieved through Panjiva, 17 March 2021.

8 Concluding remarks



This mapping of the Indian leather and leather goods industry shows that this industry contributes substantially to the Indian economy, taking up a 1.61% share in the Indian export industry for the financial year 2019-2020. It is the second largest producer of footwear and leather garments in the world and the second largest exporter of leather garments in the world.³⁷ Three main leather clusters could be determined, of which Tamil Nadu is the overall largest. The industry employs more than 4 million people. Homeworkers make up a large part of the leather workforce in Tamil Nadu.

Four specific subsectors were set apart and zoomed in on with regard to export and production trends: raw hides and leather; trunks, bags and (suit)cases; leather apparel, and leather footwear. Leather footwear was identified as the main exported leather product from India, taking over 40% of the leather industry export value share for the financial year 2019-2020. In addition, almost half of the leather footwear exported from Tamil Nadu ended up in the EU. Leather items such as trunks and bags took second place.

Particular attention was given to the impact of the corona pandemic on the Indian leather industry. The Indian economy was severely affected due to measures taken to combat the corona virus, which included a nationwide lockdown. By reviewing shipment data, a clear drop in export activity for leather and leather products from India can be seen, particularly for the months of April and May 2020.

This mapping also provides some information on important manufacturers and foreign importers. Due to lack of supply chain transparency, however, it is quite a challenge to establish all links from tanneries to leather goods manufacturers to brands and retailers.

Annex I A more extensive overview of the main exporters identified for 2019

Exporting company	Location	Main products	Selection of buyers
Raw hides and leather			
			
Alina Private Ltd. No website. Info via: https://www.indiamart.com/alina-limited/	Chennai - Tamil Nadu	Belts, handbags, accessories. Cases or containers normally used for carrying in the pocket or in the handbag, leather, footwear with uppers of leather	Geox (Italy), De Foster Parents (US), Fossil Group Europe (Germany), Next Retail (UK)
Farida Prime Tannery Private Ltd. https://www.farida.co.in/	Chennai - Tamil Nadu	Footwear and finished leather	Buyers mainly located in Vietnam, Hongkong, Indonesia, also Bangladesh
Good Leather Co. http://www.goodleathergroup.com/	Chennai - Tamil Nadu	Leather, leather shoes	Buyers mainly located in Hongkong, Indonesia, Vietnam, Cambodia
Kamil Leathers No website. Info via: https://in.kompass.com/c/kamil-leathers/in769596/	Chennai - Tamil Nadu	Leather	Buyers mainly located in Hongkong, Indonesia, Vietnam, Cambodia, also Bangladesh
Prara Leathers Pvt., Ltd. https://praraleathers.in/	Ranipet/Vellore - Tamil Nadu	Finished leather	Buyers mainly located in Vietnam, Hongkong, Relax Shoes (Italy)
Prime International India Pvt., Ltd. http://www.prime-international.in/#!/page_Intro (status of 'Star Export house' by the Govt.)	Tamil Nadu	Leather	Mainly located in Hongkong, Indonesia, Vietnam, Diana Srl (Italy), Gabor Shoes (Germany)
Tata International Ltd. https://tatainternational.com/leather-and-leather-products/	Mumbai - Maharashtra	Finished leather, footwear, apparel, handbags, accessories (gents, leather jacket, leather shoes, boots, footwear)	Deichmann (Germany), Tempe S.A. (Spain), Clarks retail (UK), Start Rite shoes (UK), Dosenbach Ochsner (Switzerland), Geox (Italy), Gabor Shoes (Germany)
Trunks, bags, and (suit)cases			
			
Aee Overseas http://aeeigroup.in/	Noida - Uttar Pradesh	Website: bags, wallets, belts, utility cases, public safety products (such as cases for radio-cases and holsters), hotel supplies (trays, dustbins, etc)	Motorola Solutions (Germany), Motorola Solutions (US), Motorola Solutions Malaysia, Sanmina Sci Systems (Malaysia), Cut Rate Batteries (US)
K H Exp. India Private Ltd. http://www.khindia.com/	Chennai - Tamil Nadu	Website: leather, footwear, bags, belts, gloves. Panjiva: cases or containers for pocket or handbag, handbags, footwear with leather uppers, gloves	H&M, Genesco (US), Cole Haan (US), Prada (Italy), Sioux GmbH (Germany), Michael Aram (US), Lorenz Shoe Group GmbH (Austria), Tommy Hilfiger (Netherlands), Michael Kors (US), Tony Burch Far East (Netherlands), Ralph Lauren (US)

Exporting company	Location	Main products	Selection of buyers
Khemchand Handicraft http://khemchand.in/	Jodhpur - Rajasthan	Website: furniture (leather chairs, stools covered with leather), bags Panjiva: furniture items, leather	Gordon Brothers Group (US), Playfully Ever After (US), The Goodrich Group (US), Colonial Gift/ Artisa Owl (US), Janet Mccann (US)
Krishna Handicrafts No website. Info via: https://www.indiamart.com/krishna-handicrafts-udaipur/	Udaipur - Rajasthan	Website: office bags, leather bags, wallets Panjiva: trunks, suitcases, school satchels, account book, notebooks, diaries, handbags	Amazon.com (US)
Mahi India https://mahileather.com/	Kanpur - Uttar Pradesh	Website: travel bags, backpack, handbags, satchels, portfolio cases, passport covers, wallets, laptop/tablet sleeves Panjiva: handbags, trunks, suitcases, cases or containers for in pocket of handbag, footwear with leather uppers, leather apparel	Michael Aram (US)
Painted Leaf Designs https://passionleather.com/	Udaipur - Rajasthan	Website: tote bags, messenger bags, backpacks, duffel bags, toiletry bags, dopp kits, leather journals, leather folders, leather briefcases, wallets Panjiva: leather bags	Amazon.com (US), Komal's Passion Leather (US)
Safa Exp. http://safainternationalexports.com/ • Exporting company, not a manufacturer or supplier			
Leather apparel			
Apollo International Possible website: http://apollofashioncompany.com/ Info via: https://www.indiamart.com/apollointernational-noida/products.html	Delhi	Website: leather jackets, leather skirts, leather coat, leather bags Panjiva: jacket, leather garment, leather belt, leather goods, boot	Urban Outfitters (US), All Saints (UK), River Island (UK), Banque Populaire du Nord (France), Free People (US), Monsoon Accessorize (UK), La Redoute (France), IKKS Women (France), Bestseller (Denmark), Asos (UK)
Bhartiya International Ltd. https://www.bhartiya.com/	Delhi/Gurgaon - Haryana Manufactured in South India: Leather outerwear: Bangalore/Chennai region Leather accessories: Chennai (Finished) leather: Chennai From website: 'Bhartiya's industrial park for leather and leather products is being promoted as a Special Economic Zone (SEZ). It is India's first dedicated leather product SEZ.'	Website: leather outerwear, bags, belts, wallets Panjiva: leather, suede, backpack, garment	All Saints (UK), Ralph Lauren (US), Asos (UK), VF Corporation (US), Richemont (Switzerland), Barclays (UK), G-Star (Netherlands & US), Levi Strauss (US), Falabella de Colombia, Esprit (Germany), French Connection (UK), Marks & Spencer (UK)



Exporting company	Location	Main products	Selection of buyers
Jak Group Pvt., Ltd. http://jakgroup.in/	Gurgaon - Haryana	Website: leather bags, leather belts leather wallets, leather toilet bags Panjiva: leather belts and bandoliers, leather cases or containers for in pocket or handbag, leather handbags	Esprit (Germany), Marks & Spencer (UK), Westport Corporation (US), Centric Accessories Group (US), Tommy Hilfiger (Netherlands), Liebeskind GmbH (Germany), Boot barn (US), Promod (France), Blue Star (US), Westpoint (US), NewYork Belt Corp. (US), American Eagle Outfitters (US), Tjx UK, Pvh Corp. (US)
K H Exp. India Private Ltd. http://www.khindia.com/	Chennai - Tamil Nadu	Website: leather, footwear, bags, belts, gloves. Panjiva: cases or containers for pocket or handbag, handbags, footwear with leather uppers, gloves	H&M (Sweden), Genesco (US), Cole Haan (US), Prada (Italy), Sioux GmbH (Germany), Michael Aram (US), Lorenz Shoe Group GmbH (Austria), Tommy Hilfiger (Netherlands), Michael Kors (US), Tony Burch Far East (Netherlands), Ralph Lauren (US)
Savi Leathers https://www.savileathers.in/	Noida - Uttar Pradesh	Website: belts, bags, wallets, garments Panjiva: lamb leather, leather bag, jacket, backpack	Ralph Lauren (US), Aunts and Uncles (Germany), Urban Outfitters (US), Kookai (Austria), Michael Kors (US)
Tangerine Design Pvt., Ltd. No website. Info via: https://www.tradeindia.com/Seller-13109123-Tangerine-Design-Pvt-Ltd-/	Delhi/Gurgaon - Haryana	Website: leather bags, leather handbags, office bags, belts Panjiva: leather belts, handbag, footwear, wallet, tassel	Randa Accessories (US), Centric Accessories (US), Chico's Retail Services (US), Lucky Brand Dungarees (US), Michael Aram (US), Abercrombie & Fitch (US), Michael Kors (US), Ann Taylor (US) American Eagle Outfitters (Canada), Monsoon (UK)
Yes Leather https://yes-leather.business.site/	Kolkata - West Bengal	Website: various leather bags (waist bags, office bags, handbags, travel bags, backpacks), pencil cases, pouches, wallets, card cases, portfolios, laptop bags Panjiva: leather apparel, leather footwear	Ecco (Denmark), Ralph Lauren (US), Mephisto (France), Madras (Japan), Genesco (US), Sioux GmbH (Germany), Michael Aram (US), Tommy Hilfiger (Netherlands), Michael Kors (US), Eurofiel Confeccion (Spain), Hugo Boss (Germany)
Leather footwear			
Farida Shoes Private Ltd. Part of: https://www.farida.co.in/ https://www.farida.co.in/vasrnd.html	Ambur - Tamil Nadu	Website: finished leather and leather footwear Panjiva: leather footwear	Marks & Spencer (UK), The Rockport (US), Weyco Group (US), C&J Clark (UK), Caleres Inc (US), Tempe S.A. (Spain), Next retail (UK), River Island (UK)



Exporting company	Location	Main products	Selection of buyers
Gupta H.C. Overseas (I) Pvt., Ltd. Only Gupta Overseas in Agra - Uttar Pradesh found: https://www.guptaoverseas.com/	Bangalore - Karnataka	Website: ladies high fashion leather footwear Panjiva: sandals, leather boots, sole, shoes, footwear	H&M (Sweden), Asos (UK & Germany), Bocage S.A.S. (France), Dynasty Footwear (US), Zlabels GmbH (Germany), Monoprix Exploitation (France), Marks & Spencer (UK), Urban Outfitters (US)
K H Exp. India Private Ltd. http://www.khindia.com/	Chennai - Tamil Nadu	Website: leather, footwear, bags, belts, gloves. Panjiva: cases or containers for pocket or handbag, handbags, footwear with leather uppers, gloves	H&M (Sweden), Genesco (US), Cole Haan (US), Prada (Italy), Sioux GmbH (Germany), Michael Aram (US), Lorenz Shoe Group GmbH (Austria), Tommy Hilfiger (Netherlands), Michael Kors (US), Tony Burch Far East (Netherlands), Ralph Lauren (US)
Mirza International Ltd. https://www.mirza.co.in/	Kanpur - Uttar Pradesh	Website: leather footwear Panjiva: boots, sole, footwear, shoes, sandals	Mirza (UK), Asos (UK), Next Retail (UK), Marks & Spencer (UK), Asda Stores (UK), Elan Polo (US), Steve Madden Retail (US), Lloyd Shoe (UK), Saddle Creek (US), Debenhams retail (UK), New Look (UK), Tjx (UK), River Island (UK)
Mohib India Shoes Private Ltd. No website found. Info via: https://www.indiamart.com/ mohib-shoes-ltd/products.html	Chennai - Tamil Nadu	Website: leather shoes Panjiva: leather footwear, footwear parts, soles	Deichmann (Germany), Geox (Italy), Sportsdirect.com Retail (UK), Volksbank Karnten (Germany), Bugatti Shoes (Germany), Airborne Footwear (UK), Van Haren Schoenen (Netherlands), Ecco (Denmark), Dosenbach Ochsner (Germany), Rack Room Shoes (US)
Superhouse Limited https://superhousegroup.com/	Kanpur - Uttar Pradesh	Website: finished leather, fashion footwear, safety footwear, sports footwear, bags portfolio's wallets, business cases, trolley bags, duffels, backpacks, shaving kits, equestrian (products for horseback riding) Panjiva: sole, boots, leather shoes, sandals	Asos (UK), Sainsbury's Supermarkets (UK), Debenhams Retail (UK), Zlables GmbH (Germany), Richard Kraemer Pferdesport (Germany), Ariat International (US), Next Retail (UK), United Sportsproducts (Germany), Briggs Industrial Footwear (UK), Patrick Shoes (UK), Bon Prix (Germany), Bestseller (Denmark)
Tata International Ltd. https://tatainternational.com/ leather-and-leather-products/	Mumbai - Maharashtra	Finished leather, footwear, apparel, handbags, accessories (gents, leather jacket, leather shoes, boots, footwear)	Deichmann (Germany), Tempe S.A. (Spain), Clarks retail (UK), Start Rite shoes (UK), Dosenbach Ochsner (Switzerland), Geox (Italy), Gabor Shoes (Germany)

Table based on export data retrieved from Panjiva and online searches, 23 February 2021.

Annex II Non-exhaustive list of European buyers sourcing leather and leather products from Tamil Nadu in 2019³⁸

Raw hides and leather

- Ara Shoes (Germany)
- Banco Comercial Portugues
- Caixa Geral De Depósitos (Portugal)
- Ecco'Let (Portugal)
- G.A. Maasleder BV (Netherlands)
- Gino Rossi (Poland)
- IS International Sourcing Ag (Switzerland)
- Lorentz Shoe Group GmbH (Austria)
- Novo Banco (Portugal)
- Unicredit (Italy)

Trunks, bags, and (suit)cases

- BAER (Germany)
- Commerzbank (Germany)
- Loake Bros Ltd. (UK)
- Neutral.com (Denmark)
- Pf Concept International BV (Netherlands)
- Primark (US)
- Santiago Pons Quintana S.A. (Spain)
- Stadtsparkasse (Germany)

Leather apparel

- E. Oettinger GmbH (Germany)
- G&P S.r.l. (Italy)
- G.A. Operations S.P.A. (Italy)
- Grupo Massimo Dutti S.A. (Spain)
- Hugo Boss Ag (Germany)
- Manifatture Del Nord S.r.l. (Italy)
- Max Mara (Italy)
- Riani (Germany)
- Tom Tailor (Germany)

Leather footwear

- BAER (Germany)
- C&J Clark (UK)
- CCC S.A. (Poland)
- Deichmann (Germany)
- Geox S.P.A. (Italy)
- Lloyd Shoes (Germany)
- Loake Bros Ltd. (UK)
- Marks & Spencer (UK)
- Place Vendome GmbH (Germany)
- Sportsdirect.com Retail (UK)

Endnotes

- 1 <https://panjiva.com/>
- 2 <https://comtrade.un.org/>
- 3 https://madb.europa.eu/madb/statistical_form.htm
- 4 **HS-codes, or Harmonized System codes, refers to an internationally standardised system of names and numbers to classify traded products. See:** <https://www.foreign-trade.com/reference/hscod.htm>
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- 9 **Stitching our shoes, page 2:** <http://labourbehindthelabel.net/wp-content/uploads/2016/03/Homeworkers-Documents-2016-03-01-01.pdf>
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- 25 <https://panjiva.com/>, **accessed 2 November 2020.**
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- 38 **Identified through Panjiva:** <https://panjiva.com/>, **accessed 2 November 2020.**

Colophon

Trends in production and trade Leather products from India

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Arisa (Advocating Rights in South Asia) is an independent non-governmental human rights organisation aiming to support and strengthen the defence of human rights in South Asia with local NGOs and trade unions. The work focuses on labour rights of vulnerable groups in international supply chains. To achieve this, Arisa has adopted the following strategies: strengthening cooperation and networking; knowledge building through research and focussing on specific long-term thematic issues, and advocacy towards policy makers and companies. Arisa is an active member of networks such as the Stop Child Labour coalition, the Clean Clothes Campaign, the International Dalit Solidarity Network and the Dutch CSR Platform.



Together for Decent Leather

Together for Decent Leather is a three-year programme, carried out by a European-Asian consortium of seven civil society organisations. Our goal is to improve working conditions and to reduce labour rights abuses, focusing on production hubs for leather products in South Asia – in particular in Vellore and Chennai districts in Tamil Nadu, India; greater Karachi in Pakistan; and the greater Dhaka region in Bangladesh.

Together for Decent Leather works to secure increased commitment from companies to fulfil their human rights due diligence obligations and governments to put in place safeguards and regulation to improve adherence to international labour standards.

For more information, see
www.togetherfordecentleather.org