

I. INDIAN LEATHER INDUSTRY – OVERVIEW, EXPORT PERFORMANCE & PROSPECTS

- The Indian Leather, Leather Products and Footwear Industry holds a prominent place in the Indian economy. This sector is known for its consistency in high export earnings and it is among the top ten foreign exchange earners for the Country.
- The export of footwear, leather and leather products from India was to the tune of US \$ 4.75 billion during 2025-26.
- The industry is bestowed with an affluence of raw materials as India is endowed with 20% of world cattle & buffalo and 11% of world goat & sheep population. Added to this are the strengths of skilled manpower, innovative technology, increasing industry compliance to international environmental standards, and the dedicated support of the allied industries.
- The leather industry is an employment intensive sector, providing job to about 4.42 million people, mostly from the weaker sections of the society. Women employment is predominant in leather products sector with about 40% share.
- India is the 2nd largest exporter of leather garments, 2nd largest exporter of Saddlery & Harness and 5th largest exporter of Leather Goods in the world.
- The major production centers for footwear, leather and leather products in India are located in the States of **Tamil Nadu** - Chennai, Ambur, Ranipet, Vaniyambadi, Vellore, Pernambut, Trichy, Dindigul and Erode; **West Bengal** – Kolkata; **Uttar Pradesh** – Kanpur, Agra, Noida, Saharanpur; **Maharashtra** – Mumbai; **Punjab** – Jalandhar; **Karnataka** – Bengaluru; **Telengana** Hyderabad; **Haryana** - Ambala, Gurgaon, Panchkula, Karnal and Faridabad; **Delhi**; **Madhya Pradesh** – Dewas; **Kerala** – Kozhikode and Ernakulam / Cochin; **Rajasthan**; Jaipur; **Jammu & Kashmir**; Srinagar.

Strengths of Indian leather sector

- Own raw material source – About 3 billion sq ft of leather produced annually
- Some varieties of goat / calf / sheep skins command premium position
- Strong and eco-sustainable tanning base
- Modernized manufacturing units
- Trained / skilled manpower at competitive wage levels

- World-class institutional support for Design & Product Development, HRD and R & D.
- Presence of support industries like leather chemicals and finishing auxiliaries
- Presence in major markets – Long Europe experience
- Strategic location in the Asian landmass

Emerging strengths

- Design development initiatives by institutions and individuals
- Continuous modernization and technology up-gradation
- Economic size of manufacturing units
- Constant human resource development programme to enhance productivity
- Increasing use of quality components
- Shorter prototype development time
- Delivery compliance
- Growing domestic market for footwear and leather articles

Highlights of Product Segments of Indian Leather and Footwear Industry

Tanning Sector

- Annual availability of leathers in India is about 3 billion sq.ft.
- India accounts for 13% of world leather production of leathers.
- Indian leather trends/colors are continuously being selected at the MODEUROPE Congress.

Footwear Sector

- India is Second largest footwear producer after China, with Annual Production of 2.58 billion pairs (2018).
- India is also the second largest consumer of footwear after China, with a consumption of 2.60 billion pairs.
- Footwear (leather and non-leather) export accounts for about 52% share in Indian leather and footwear industry's export (2025-26).

Leather Garments Sector

- India is the second largest global exporter of Leather Garments.
- Accounts for 8.76% share of India's total export from leather sector (2025-26).

Leather Goods & Accessories Sector including Saddlery & Harness

- India is the fifth largest global exporter of Leather Goods & Accessories and second largest exporter of Saddlery and Harness items.
- Accounts for 31% share of India's total export from leather sector (2025-26).

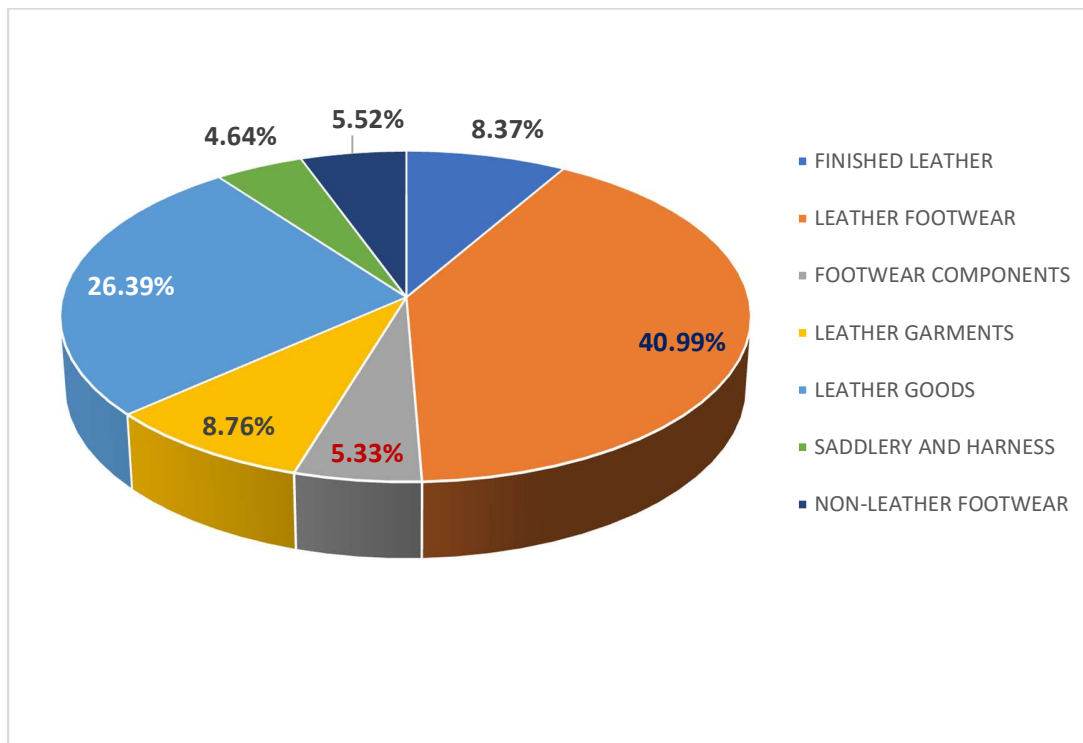
INDIA'S EXPORT OF LEATHER & LEATHER PRODUCTS 2025-26 VIS-À-VIS 2024-25

(Value in Million US\$)

PRODUCT	APR - MAR	APR - MAR	% VARIATION	% Share	% Share
	2024-25	2025-26		2024-25	2025-26
FINISHED LEATHER	445.32	397.63	-10.71%	9.22%	8.37%
LEATHER FOOTWEAR	2007.76	1946.86	-3.03%	41.58%	40.99%
FOOTWEAR COMPONENTS	244.17	253.38	3.77%	5.06%	5.33%
LEATHER GARMENTS	353.82	416.29	17.66%	7.33%	8.76%
LEATHER GOODS	1319.6	1253.6	-5.00%	27.33%	26.39%
SADDLERY AND HARNESS	205.39	220.38	7.30%	4.25%	4.64%
NON-LEATHER FOOTWEAR	252.91	261.97	3.58%	5.24%	5.52%
TOTAL	4828.97	4750.11	-1.63%	100.00%	100.00%

Source: DGCI&S

% SHARE OF LEATHER & LEATHER PRODUCTS FY 2025-26



COUNTRY WISE EXPORT PERFORMANCE OF LEATHER, LEATHER PRODUCTS & FOOTWEAR FROM INDIA DURING APRIL-MARCH 2025-26 VIS-A-VIS APRIL-MARCH 2024-25

Value in US\$ Million

COUNTRY	TOTAL			Share in total export 2024-25	Share in total export 2025-26
	APR-MAR 2024-25	APR-MAR 2025-26	% Change 2025-26		
U.S.A.	1045.27	975.88	-6.64%	21.65%	20.54%
GERMANY	542.86	521.18	-3.99%	11.24%	10.97%
U.K.	437.94	419.68	-4.17%	9.07%	8.84%
ITALY	301.13	295.56	-1.85%	6.24%	6.22%
FRANCE	233.18	221.06	-5.20%	4.83%	4.65%
SPAIN	245.53	259.95	5.87%	5.08%	5.47%
U.A.E.	125.51	141.83	13.00%	2.60%	2.99%
NETHERLANDS	247.31	290.18	17.33%	5.12%	6.11%
HONG KONG	54.31	46.25	-14.84%	1.12%	0.97%
CHINA	116.18	100.04	-13.89%	2.41%	2.11%
POLAND	94.32	91.75	-2.73%	1.95%	1.93%
BELGIUM	109.49	72.13	-34.12%	2.27%	1.52%
SOMALIA	28.71	30.62	6.67%	0.59%	0.64%
VIETNAM	91.61	75.72	-17.35%	1.90%	1.59%
AUSTRALIA	73.86	74.26	0.54%	1.53%	1.56%
PORTUGAL	49.78	62.08	24.72%	1.03%	1.31%
DENMARK	55.56	55.11	-0.82%	1.15%	1.16%
KOREA REP.	42.44	46.80	10.27%	0.88%	0.99%
JAPAN	70.46	78.89	11.96%	1.46%	1.66%
RUSSIA	53.58	67.01	25.07%	1.11%	1.41%
S. AFRICA	29.14	28.88	-0.88%	0.60%	0.61%
CHILE	40.56	46.51	14.66%	0.84%	0.98%
MALAYSIA	35.10	28.22	-19.59%	0.73%	0.59%
AUSTRIA	39.13	43.28	10.59%	0.81%	0.91%
CANADA	52.10	54.77	5.13%	1.08%	1.15%
SWEDEN	27.39	26.27	-4.08%	0.57%	0.55%
NIGERIA	11.58	13.57	17.20%	0.24%	0.29%
INDONESIA	34.48	34.66	0.53%	0.71%	0.73%
MEXICO	38.54	37.98	-1.45%	0.80%	0.80%
SAUDI ARABIA	41.53	37.74	-9.12%	0.86%	0.79%
KENYA	8.31	8.54	2.83%	0.17%	0.18%
SWITZERLAND	15.39	14.29	-7.16%	0.32%	0.30%
SLOVAK REP	4.60	1.04	-77.47%	0.10%	0.02%
HUNGARY	20.98	29.06	38.52%	0.43%	0.61%

THAILAND	19.21	18.32	-4.65%	0.40%	0.39%
BANGLADESH	20.28	20.37	0.45%	0.42%	0.43%
FINLAND	10.57	11.22	6.17%	0.22%	0.24%
TURKEY	26.77	23.12	-13.63%	0.55%	0.49%
ISRAEL	18.32	18.14	-0.97%	0.38%	0.38%
CAMBODIA	12.50	12.97	3.76%	0.26%	0.27%
CZECH REPUBLIC	16.14	13.27	-17.79%	0.33%	0.28%
GREECE	8.81	8.22	-6.70%	0.18%	0.17%
NEW ZEALAND	6.34	6.39	0.84%	0.13%	0.13%
OMAN	7.09	7.17	1.12%	0.15%	0.15%
SRI LANKA DES	10.86	10.96	0.90%	0.22%	0.23%
SINGAPORE	14.55	13.35	-8.23%	0.30%	0.28%
SUDAN	0.14	2.83	1924.79%	0.00%	0.06%
TAIWAN	6.33	4.68	-26.06%	0.13%	0.10%
NORWAY	15.73	20.70	31.60%	0.33%	0.44%
DJIBOUTI	3.27	1.92	-41.30%	0.07%	0.04%
OTHERS	214.20	226.71	5.84%	4.44%	4.77%
TOTAL	4828.97	4750.11	-1.63%	100.00%	100.00%

The **Top 15 countries** together account about 77.58% of India's total leather & leather products export during April-March 2025-26 with export value of US \$ 3685.12 Mn.

Major Markets:

- The major markets for Indian Leather & Leather Products are USA with a share of 20.54%, Germany 10.97%, UK 8.84%, Italy 6.22%, Netherlands 6.11%, Spain 5.47%, France 4.65%, UAE 2.99%, China 2.11%, Poland 1.93%, Vietnam 1.59% and Belgium 1.52%.
- The **Top 15 countries** together account about 77.58% of India's total leather & leather products export during April-March 2025-26 with export value of US \$ 3685.12 Mn.
