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PUBLICATION FROM THE ECONOMIC OBSERVATORY OF THE CONSEIL NATIONAL DU CUIR REPORT ON WORLD TRADE IN THE LEATHER INDUSTRY IN 2015

The Economic Observatory of the Conseil National du Cuir (CNC) has published its 2015 report on *World Trade in the Leather Industry**.

World trade in the Leather Industry in 2015:

- France is the world's fourth largest exporter, taking all sectors into account.
- Vietnam is increasingly dynamic in the Asia region.

As the fourth largest exporter, taking all sectors into account, the French Leather Sector comes in at the foot of the podium just behind China, Italy and Vietnam. This position is the result of the dynamism of the French leather and raw hides sector (third largest exporter in the world, representing 5.6% of global exports), the leather goods sector (third largest exporter in the world with 8.9% of global exports) and leather clothing and accessories sector (fifth largest exporter in the world, representing 5.5% of global exports).

Within the leading trio in the world leather trade, Vietnam is the most dynamic exporter.

In 2015, Vietnam represented 9.4% of global exports and increased its market share by four percentage points, while China lost six points!

Nevertheless, China remains the world's largest exporter, with 38.2% of global exports. Although its market share fell by 6.5 percentage points between 2010 and 2014, the situation stabilised in 2015.

Italy, in second place, had a worrying 2015, seeing its market share fall by 0.8 percentage points.

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The global tannery sector: continuing decline from Italy, although it remains the world leader, and progress from Brazil, the United States and India, with 20.5%, 11.6%, 5.2% and 5.6% of global exports, respectively.

The global leather and hides sector: the United States is in first place on this sector, increasing its market share by one percentage point, while Australia, France and Germany declined. These four countries represented 29.1%, 10.9%, 5.6% and 4.2% of global exports respectively.

The global leather goods sector: France maintains its position as the world's third largest exporter with 8.9% of global exports, while Vietnam made rapid and strong progress.

In value terms, 63% of all leather goods items exported around the world come from Asia (not including re-exports), and 34% come from Europe.

European exports are mainly divided between Italy (13.0%), France (8.9%), Germany (2.0%) and Spain (2.0%).

The global footwear sector: strong growth from Vietnam and Indonesia. China lost market share and Italy stayed relatively stable. In value terms, 69% of the footwear exported around the world comes from Asia (not including re-exports).

Leather clothing and accessories sector: France is the fifth largest exporter in the world, with 5.5% of market share. Over the long term, the trend shows a clear drop for China and growth for Italy, India and France.

*This document refers to trade in 2015. All statistics are calculated according to the value of the trade. This report can be downloaded from conseilnationaldu cuir.org

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The Economic Observatory of the Conseil National Du Cuir:

The Observatory carries out monthly surveys of the leather industry in the following sectors: tanning, footwear and leather goods. It also carries out monthly and annual surveys of collectors of leathers and raw hides.

The Economic Observatory processes and disseminates the external trade data provided by the French Customs authorities, the results of annual production surveys and data relating to global trade.

The publications produced by the Economic Observatory contain statistics on imports and exports, herd size, controlled slaughter, the collection of raw hides, production, deliveries, invoicing, headcount and payroll in the various sectors of the leather industry.

The Economic Observatory also works on the monthly, seasonal and annual surveys of the Fédération des Enseignes de la Chaussure (French footwear retailers).

All this data is published on the Conseil National du Cuir website: www.conseilnationalducuir.org

The Conseil National du Cuir

The confederation brings together 20 federations and professional unions from the French leather industry, ranging from the farming of livestock through to the finished products.

The French leather industry

- ◆ 9,400 companies
- ◆ 25 billion euros turnover
- ◆ 130,000 people employed in the leather, tanning, footwear, leather goods and glove making and leather goods retail industries.
- ◆ One of the world leaders for finished calf leather and exotic leather
- ◆ 3rd largest exporter of leathers and raw hides
- ◆ 13th largest exporter of finished leathers
- ◆ World's third largest exporter of leather goods

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