GLOBAL TRADE IN THE LEATHER SECTOR IN 2016: THE KEY FIGURES

A stable situation for Europe, whose leather sector exports represent one third of the global total. Italy and France, in 2nd and 4th place respectively in terms of global exports of all products, remain the leaders on the European market. Meanwhile, China continues to lose market share each year. Between 2010 and 2016, Chinese exports as a percentage of the global total fell from 45% to 36% with a significant reduction in footwear, leather goods and leather clothing.


A third of global leather exports come from Europe, half of which originate in France and Italy (16%). Italy (12%) is the second largest global export of leather behind China (36%), exporting mainly to France, the United States, Hong Kong, China and Germany.

France (4%) maintained its position as the fourth largest exporter in the world, behind Vietnam (10.5%). In certain sectors, such as leathers and raw hides or leather goods, France holds third place for global exports. As a result of the strong demand for luxury handbags, France exports 10% of the leather goods items sold around the world. With the largest bovine herd in Europe (19.5 million head of cattle including 5.5 million calves), France exports 6% of the global total of leathers and raw hides. France also gave a strong performance in leather goods and leather accessories (gloves) holding 5th place in the list of global exporters, with some 4.5% of total global exports.

THE AMERICAN CONTINENT, LEADING SUPPLIER OF RAW MATERIALS.

For the entire leather sector, exports from the American continent only represent 5% of global exports. The Americas export few finished products but have a very substantial herd, so mainly export raw materials: leathers and raw hides (37%), and prepared leathers (25% of wet-blue and finished leathers).

Among the main exporters of leathers and raw hides on this continent, the United States takes first place with just under a quarter of global exports, with Canada in 6th place.

With regard to prepared leathers, three countries in the Americas appear in the top five global suppliers: Brazil (2nd largest global exporter), the United States (4th) and Argentina (5th).
CHINA, A GIANT IN DECLINE.

China is still the largest exporter in the global leather sector (36% of global exports) ahead of Italy (12%), Vietnam (11%), France (4%) and Indonesia (3%). However, between 2010 and 2016, China’s market share fell from 45% to 36% while, at the same time, Vietnam (the world’s third largest exporter) gained five percentage points of the market share.

This shrinkage is even more pronounced for finished products. China’s loss of market share over the period 2010-2016 stands at 11 points for footwear, 13 points for leather goods and 11 points for leather clothing and accessories. The countries that benefited the most from this fall are Vietnam and Indonesia for footwear, Italy and Vietnam for leather goods, Italy and India for leather clothing. China is facing competition from countries with cheaper workforces, as well as from countries exporting luxury articles. The country’s main clients are the United States (30% of Chinese exports), Japan, Hong Kong, Germany and the United Kingdom.

THE UNITED STATES. THE WORLD’S LARGEST IMPORTER OF FINISHED GOODS.

Whatever the article (footwear, leather goods or clothing), the United States heads the list of global importers of finished goods in leather. Depending on the sector, US imports represent between 19% and 22% of global imports.

In the footwear sector, six European countries appear among the eight largest importers, behind the US; namely Germany, France, the UK, Italy, the Netherlands and Belgium. Japan is the sixth largest importer of footwear in the world (4.5%).

The European market remains the world’s largest market for imports of finished goods in leather. In value terms, half the footwear exported around the world is bought by European countries, against 29% for America, 20% for Asia and 1% for Africa.

For leather goods, Japan and Hong Kong are respectively the second and third largest global importers with 8.5% and 7% of the market, behind the US (19%) but ahead of France and Germany (6%). As for exports, 39% of leather goods in the world are destined for European countries, ahead of Asia, America and Africa which take respectively 35%, 25% and 1%.

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