

# LEATHER APPAREL



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## 1. Disclaimer

This information memorandum is to introduce the subject matter and provide a general idea and information on the said matter. Although, the material included in this document is based on data/information gathered from various reliable sources; however, it is based upon certain assumptions, which may differ from case to case. The information has been provided on as is where is basis without any warranties or assertions as to the correctness or soundness thereof. Although, due care and diligence has been taken to compile this document, the contained information may vary due to any change in any of the concerned factors, and the actual results may differ substantially from the presented information. SMEDA, its employees or agents do not assume any liability for any financial or other loss resulting from this memorandum in consequence of undertaking this activity. The contained information does not preclude any further professional advice. The prospective user of this memorandum is encouraged to carry out additional diligence and gather any information which is necessary for making an informed decision, including taking professional advice from a qualified consultant/technical expert before taking any decision to act upon the information.

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## 2. Introduction to SMEDA

Small and Medium Enterprises Development Authority (SMEDA) is an apex SME development agency working under the Ministry of Industries and Production (MoI&P), Government of Pakistan. In pursuit of its mission, SMEDA has adopted an integrated strategy that comprises SME sectors & clusters development, Business Development Services (BDS), and Policy advocacy to protect and promote SME interests.

SMEDA offers a broad spectrum of business development services to SMEs which include prefeasibility studies, identification of experts and consultants, delivery of need based capacity building programs in addition to business guidance through help desk services.

### 3. Introduction to Leather Sector

The objective of this write-up is to provide the reader with an overview of the sector. The information covers global trade of leather products, status of Pakistan's exports and summary of industry structure. Trade information for global comparisons has been obtained from [www.trademap.org](http://www.trademap.org), International Trade Centre's Database.

Leather and leather products are some of the most widely traded products globally. It is estimated that international leather trade exceeds US\$ 80 billion annually, and this figure is expected to continue growing with increasing population and urbanization of developing and countries.

The production and supply of leather products has gradually moved from industrialized to developing and emerging economies. Many emerging economies can now manage the whole supply chain on their own and are fast becoming important suppliers of value-added finished products. For example, about 45% of footwear is made in China.

Pakistan, because of its large livestock resources, has remarkable growth potential in the leather sector. Unfortunately this potential remains mostly untapped due to the following reasons:

- lack of technical know-how
- Lack of access to information
- visibility
- In effective quality management,
- Poor Marketing
- Lack of investments
- Insufficient international industrial alliances

The leather industry of Pakistan is the second biggest export-oriented industry in the manufacturing sector and is third in its contribution towards the overall exports of Pakistan. The leather industry's core products in Pakistan are leather jackets, leather gloves, leather bags, leather garments, tanned leather and footwear.

#### 3.1. HS: Code Listing

The Harmonized System (HS) is an international nomenclature for the classification of products published by the World Customs Organization ([www.wcoomd.org](http://www.wcoomd.org)). It allows countries to classify traded goods on a common basis for customs purposes

For the purpose of studying international trade in Leather Sector with reference to Pakistan we will be looking at the following product HS codes;

Harmonized System Codes		
41	4101, 4102, 4103, 4104, 4105, 4106, 4107, 4112, 4113, 4114, 4115	
	6403	640420
	4201, 4202, 4203, 4205	420310, 420321, 420329, 420330, 420340

## 4. Pakistan's Trade in Leather Sector

### 4.1. Pakistan's Exports

The total US dollar value of Pakistan's exports in the leather sector in various categories from 2015 to 2019 is shown in the table below

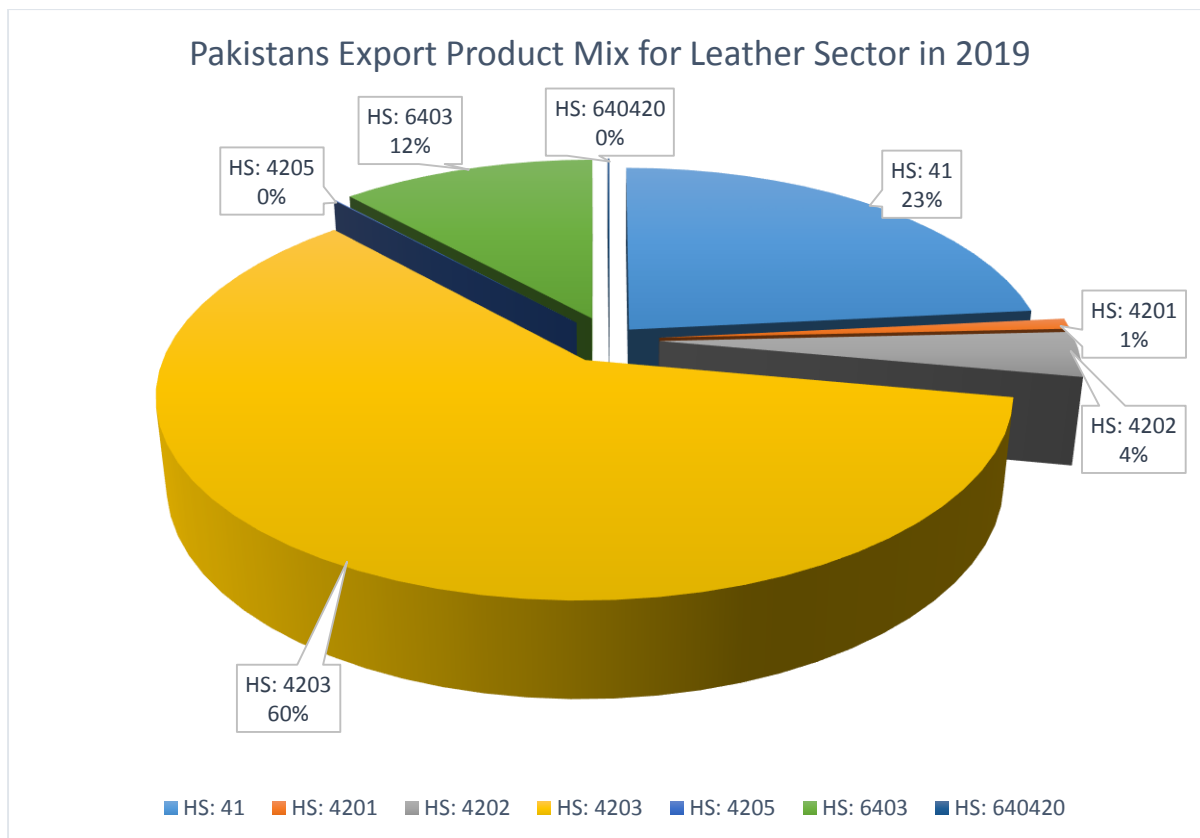
Pakistan's Exports in Leather Sector				US Dollar thousand	
Product Categories	Exported value in 2015	Exported value in 2016	Exported value in 2017	Exported value in 2018	Exported value in 2019
HS: 41 (All sub-categories)	425,085	349,003	335,863	298,629	228,614
HS: 4201	7,736	9,445	8,695	9,308	8,400
HS: 4202	34,206	32,243	35,503	37,204	35,801
HS: 4203	640,904	599,815	588,152	616,861	589,412
HS: 4205	4,772	3,424	576	1,170	667
HS: 6403	91,893	86,823	85,061	100,131	114,045
HS: 640420	1,425	910	1,049	1,253	936
<b>Total</b>	<b>1,206,021</b>	<b>1,081,663</b>	<b>1,054,889</b>	<b>1,064,556</b>	<b>977,875</b>

The following illustration shows total value of Pakistan's leather sector exports (in US dollar thousand) as a five year trend from 2015 to 2019. Also indicated is the percentage increase/decrease in sales value as compared to the previous year.



#### 4.1.1. Pakistan's Export Product Mix for Leather Sector

The following chart indicates Pakistan's export product mix for leather sector, based on total value of products exported in the year 2019. Also indicated is the percentage of value that each product category contributes to the total value of leather sector exports of Pakistan. It can be seen that the major value contributor in Pakistan's leather sector exports is product category HS: 4203 which represents Leather Apparel. For HS codes reflecting 0%, please note that the values are rounded down and form a negligible portion of the Product Mix.

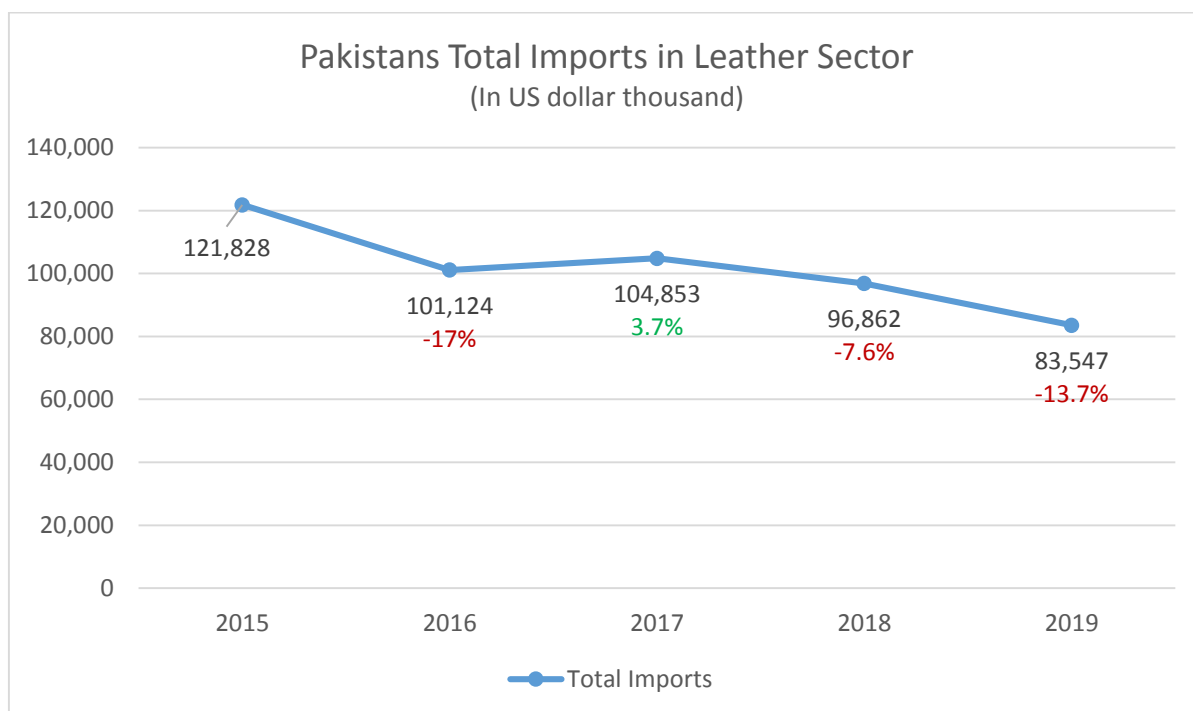


#### 4.2. Pakistan's Imports

The total US dollar value of Pakistan's imports in the leather sector in various categories from 2015 to 2019 is shown in the table below;

Pakistan's Imports in Leather Sector				US Dollar thousand	
Product Categories	Imported value in 2015	Imported value in 2016	Imported value in 2017	Imported value in 2018	Imported value in 2019
HS: 41 (All sub-categories)	73,915	57,236	56,991	56,858	52,045
HS: 4201	6	8	15	24	14
HS: 4202	24,296	24,609	32,646	28,883	25,881
HS: 4203	4,446	4,996	6,162	1,514	1,658
HS: 4205	115	113	156	217	167
HS: 6403	18,951	13,998	8,766	9,274	3,734
HS: 640420	99	164	117	92	48
<b>Total</b>	<b>121,828</b>	<b>101,124</b>	<b>104,853</b>	<b>96,862</b>	<b>83,547</b>

The following illustration shows total value of Pakistan’s leather sector Imports (in US dollar thousand) as a five year trend from 2015 to 2019. Also indicated is the percentage increase/decrease value of purchases as compared to the previous year.



## 5. Leather Apparel Global Perspective

In this section we will be looking at global trade of a leather subsector, namely leather apparel, and how Pakistan plays into it.

The HS product category **4203** covers trade in “Articles of apparel and clothing accessories, of leather or composition leather (excluding footwear and headgear and parts thereof, and goods of chapter 95, e.g. shin guards, fencing masks)”. This category is further sub divided into five sub categories as described below;

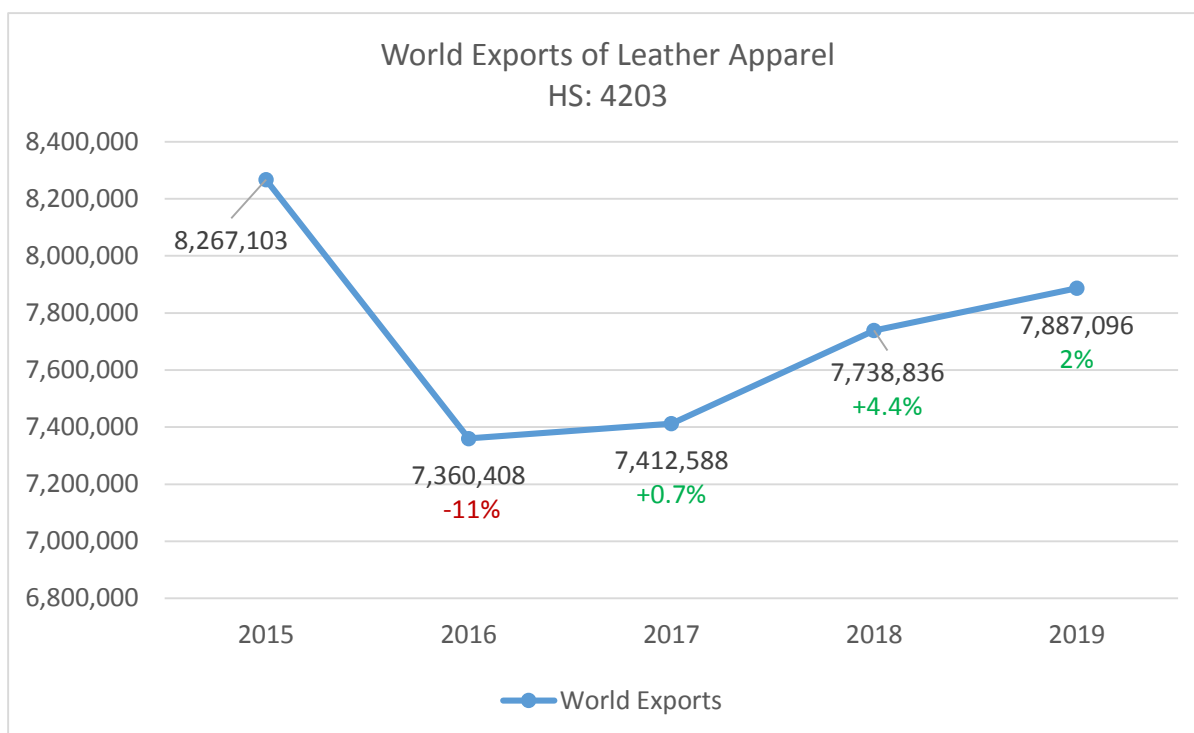
Harmonized System Code (HS Code)	Description of Goods
<b>420310</b>	Articles of apparel, of leather or composition leather (excluding clothing accessories, footwear and headgear and parts thereof, and goods of chapter 95, e.g. shin guards, fencing masks)
<b>420329</b>	Gloves, mittens and mitts, of leather or composition leather (excluding special sports gloves)
<b>420321</b>	Specially designed gloves for use in sport, of leather or composition leather
<b>420330</b>	Belts and bandoliers, of leather or composition leather
<b>420340</b>	Tanned or crust skins of sheep or lambs, without wool on, whether or not split (excluding further prepared)

## 5.1. World Exports

The total world exports for leather Apparel which falls under HS: 4203 stood at USD 7,887,096 thousand (USD 7,887 Million) in the year 2019. The table below shows a five year trend of world exports in HS: 4203 from year 2015 to 2019, along with percentage growth from previous years;

Leather Apparel (HS: 4203)		US Dollar thousand			
	Year 2015	Year 2016	Year 2017	Year 2018	Year 2019
<b>World Exports</b>	8,267,103	7,360,408	7,412,588	7,738,836	7,887,096
<b>Growth % (from previous year)</b>		-11%	0.7%	4.4%	2%

Based on data from the table above, the following illustration demonstrates the data on world exports under HS: 4203, along with percentage increase from previous years;





### 5.1.1. Product Subcategory wise Exports

In the table below world exports for each subcategory of product code HS: 4203 (leather apparel), between 2015 and 2019 are shown, along with percentage growth between 2018 and 2019;

Product Code HS: 4203		US Dollar thousand				
Sub-categories	Exported value in 2015	Exported value in 2016	Exported value in 2017	Exported value in 2018	Exported value in 2019	Percentage Growth 2018-19
HS:420310	3,385,044	3,077,536	3,048,517	3,004,151	2,841,681	-5.4%
HS:420329	1,921,217	1,594,449	1,573,499	1,610,718	1,521,236	-5.5%
HS:420321	562,788	514,549	504,888	543,843	541,452	-0.4%
HS:420330	2,206,896	1,978,988	2,087,368	2,355,338	2,747,668	17%
HS:420340	191,140	192,497	192,834	221,574	228,966	3.3%

### 5.1.2. Top Exporters

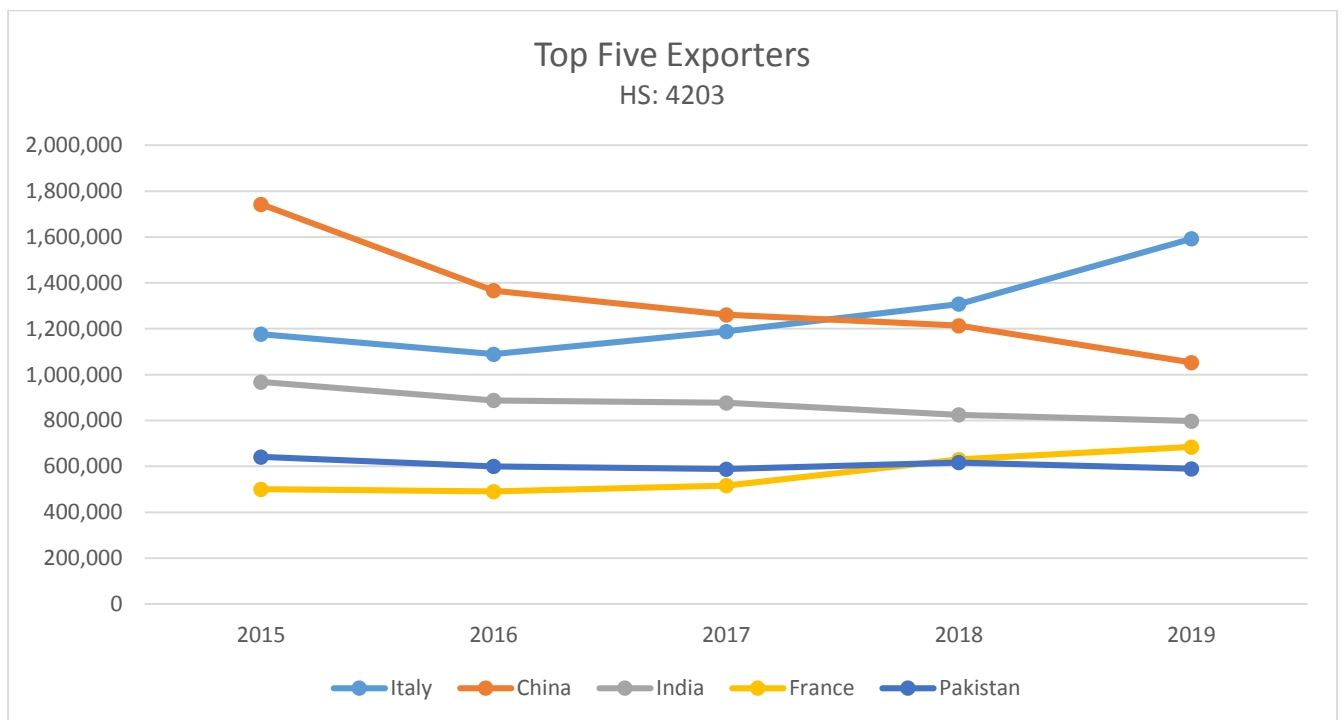
The table below shows dollar value of exports from top five exporters of leather apparel (HS: 4203) from 2015 to 2019. Also indicated is the percentage share of each top exporter with respect to total exports in 2019. Pakistan is one of the top five exporters in this category, preceded by France, India, China and Italy at the top respectively as shown;

HS: 4203		US Dollar thousand				
Top Exporters	Exported value in 2015	Exported value in 2016	Exported value in 2017	Exported value in 2018	Exported value in 2019	Market Share in 2019
Italy	1,176,782	1,089,268	1,188,431	1,307,889	1,592,958	20.2%
China	1,742,378	1,366,777	1,261,098	1,213,462	1,053,025	13.4%
India	968,113	887,380	876,805	824,956	797,667	10.1%
France	500,367	490,125	515,970	630,062	684,695	8.7%
Pakistan	640,904	599,815	588,152	616,861	589,412	7.5%

The illustration below represents shares of top exporting countries in the global export of leather apparel, based on the dollar export value in 2019.



The following illustration demonstrates dollar export value of the top five leather apparel exporting countries from 2015 to 2019

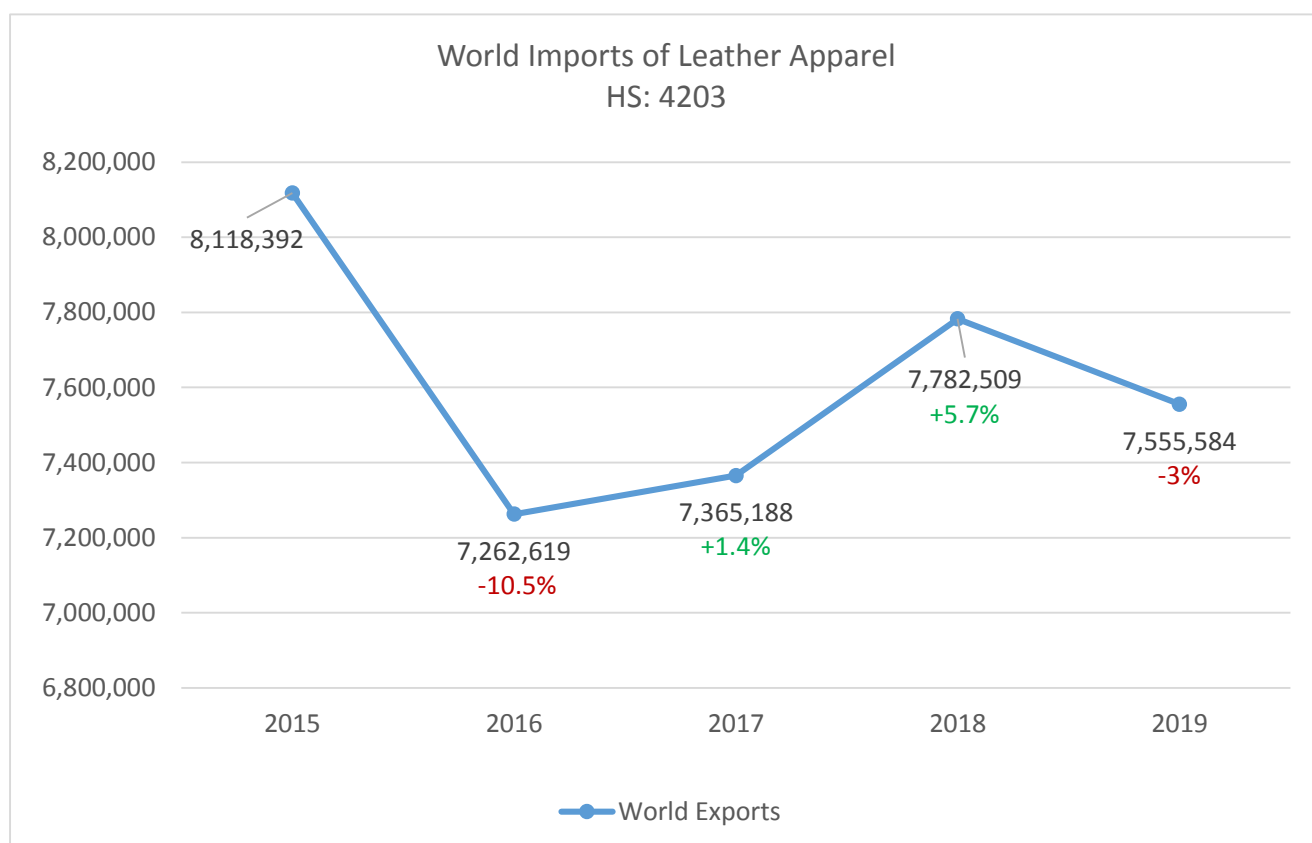


## 5.2. World Imports

World imports for leather apparel which falls under product category HS: 4203 stood at USD 7,555,584 thousand (USD 7,555 million) in the year 2019. The following table shows total world imports in HS: 4203 from 2015 to 2019, along with percentage increase from previous years;

Leather Apparel World Imports (HS: 4203)					US Dollar thousand
	Year 2015	Year 2016	Year 2017	Year 2018	Year 2019
<b>World Imports</b>	8,118,392	7,262,619	7,365,188	7,782,509	7,555,584
<b>Growth % (from previous year)</b>		-10.5%	1.4%	5.7%	-3%

Based on data from the table above, the following illustration demonstrates the data on world exports under HS: 4203, along with percentage increase from previous years;



### 5.2.1. Product Sub-category wise Imports

World Imports for each of the subcategories of product code HS: 41, between 2015 and 2019 are shown in the following table. Also indicated is the percentage growth in trade value for each subcategory from 2018 to 2019.

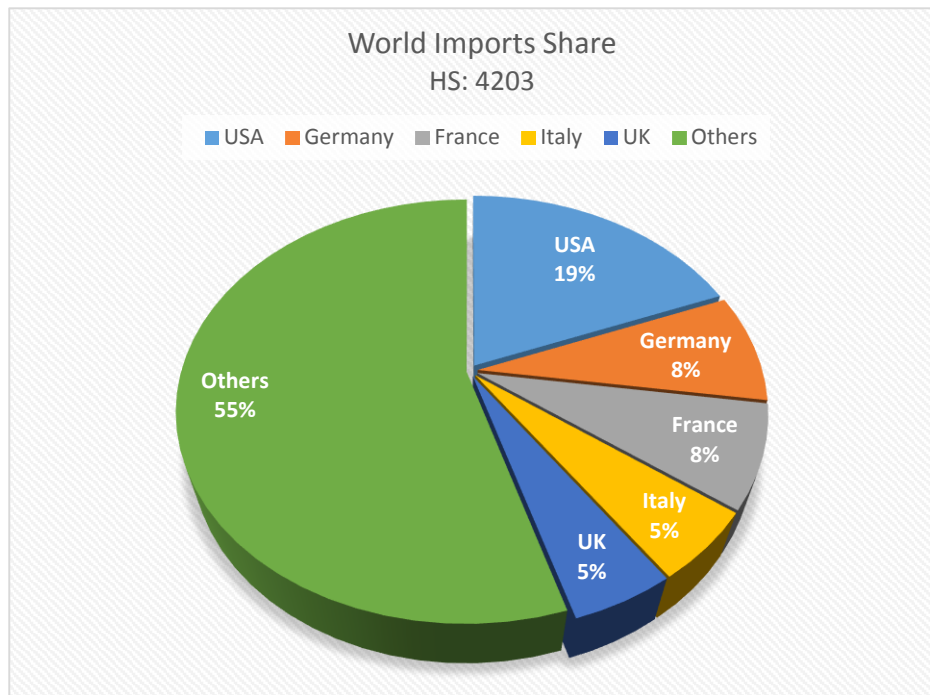
Product Code HS: 4203		US Dollar thousand				
Sub-categories	Imported value in 2015	Imported value in 2016	Imported value in 2017	Imported value in 2018	Imported value in 2019	% Growth 2018-19
HS:420310	3,352,041	3,030,404	2,956,191	2,997,051	2,707,576	-9.7%
HS:420329	1,869,368	1,561,676	1,575,866	1,638,985	1,557,512	-5%
HS:420321	508,635	451,911	459,671	484,982	494,409	2%
HS:420330	2,231,648	2,055,899	2,187,446	2,485,046	2,625,368	5.6%
HS:420340	156,671	160,146	182,984	173,386	164,290	-5%

### 5.2.2. Top Importers

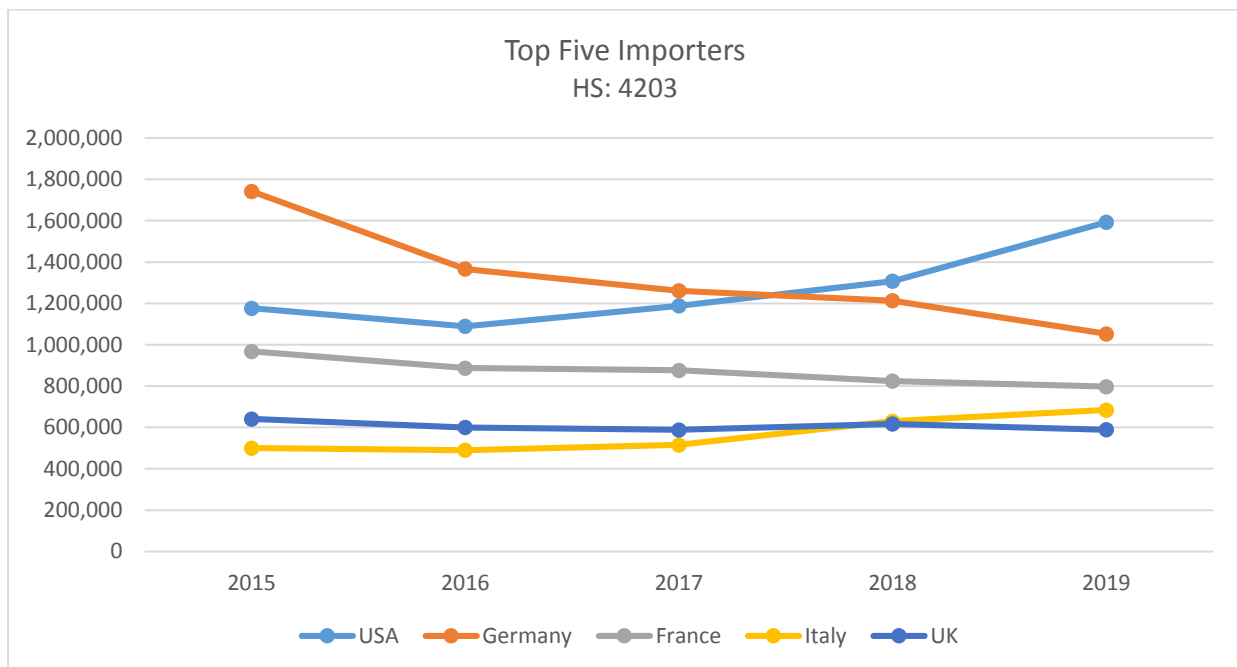
The table below shows dollar value of Imports from top five Importers of leather apparel (HS: 4203) between 2015 and 2019. Also indicated is percentage growth/decline in value of products imported in 2019, compared to the previous year;

HS: 4203	US Dollar thousand					
Top Importers	Imported value in 2015	Imported value in 2016	Imported value in 2017	Imported value in 2018	Imported value in 2019	Market Share in 2019
USA	1,760,684	1,454,169	1,452,810	1,541,383	1,434,026	19%
Germany	734,537	667,706	647,945	668,226	624,516	8.3%
France	556,948	508,084	549,184	582,208	590,694	7.8%
Italy	364,505	347,264	364,341	395,616	402,847	5.3%
UK	407,303	344,402	344,196	382,252	372,992	4.9%

The illustration below represents shares of top importing countries in the global import of leather apparel, based on the dollar import value in 2019;



The following illustration demonstrates dollar value spent by top five importers of leather apparel (HS: 4203) from 2015 up to 2019.



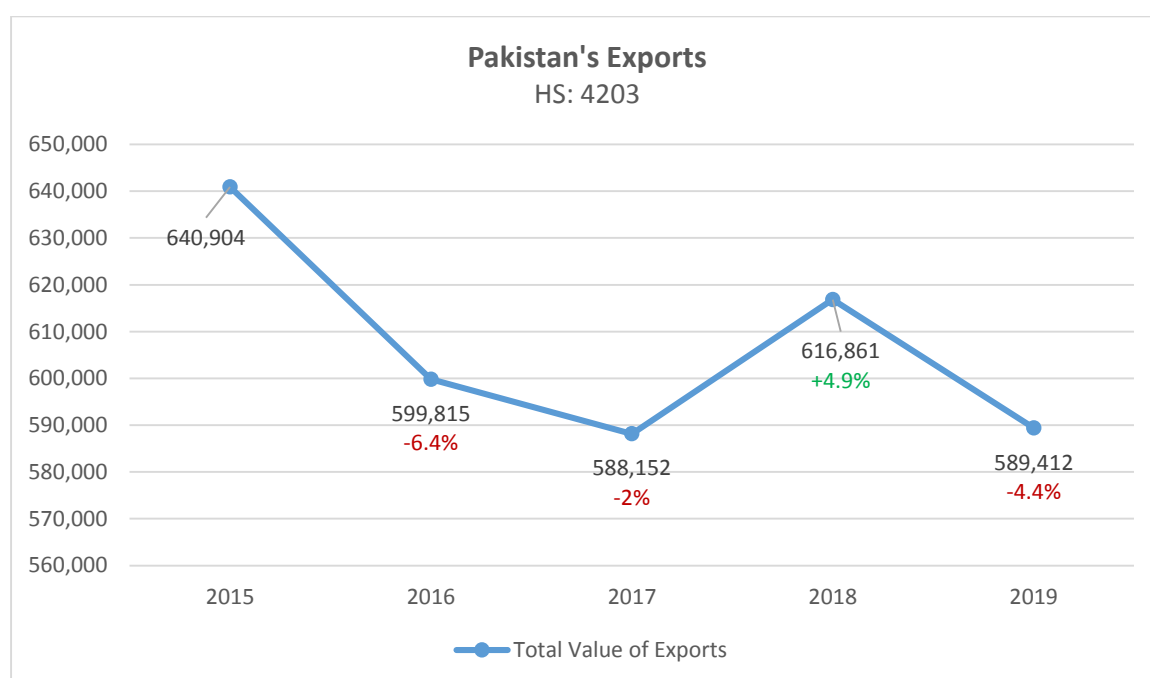
## 6. Pakistan's Trade of Leather Apparel (HS: 4203)

### 6.1. Pakistan's Exports

The table below shows Pakistan's total exports for HS: 4203 along with percentage growth from previous years.

Pakistan's Exports of Product code HS: 4203					
Year	2015	2016	2017	2018	2019
Export Value(in \$ thousand)	640,904	599,815	588,152	616,861	589,412
% Growth (from previous year)		-6.4%	-2%	4.9%	-4.4%

Data from the table above is graphically represented below;



Pakistan's share in global exports of leather Apparel (HS: 4203) is around 7.5% as of 2019, as shown in table below.

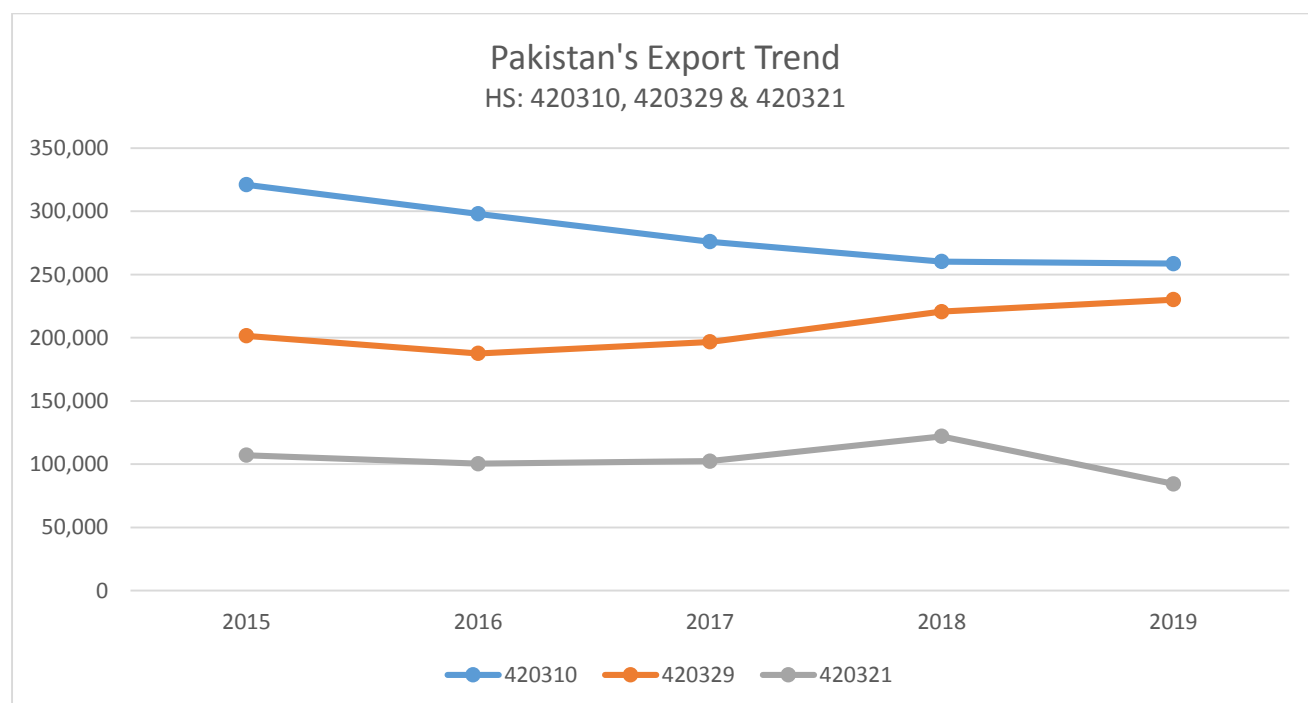
Pakistan's Share in World Exports of HS: 4203			
Product HS Code	World Exports in 2019	Pakistan's Exports in 2019	Pakistan's % Share in World Exports
HS: 4203	7,887,117	589,412	7.5%

### 6.1.1. Pakistan's Subcategory wise Exports

Pakistan's exports in all subcategories for product code HS: 41, from 2015 to 2019 are shown below. Also indicated is the percentage growth in trade value for each subcategory (2018-19) as well as Pakistan's share in world exports of each product subcategory. It can be seen that although the total value of export value in HS: 420330 & 420340 is comparatively low, but there has been significant growth in exports in each of those categories

Pakistan's Exports of Leather Apparel (HS: 4203)						In US Dollar thousand	
Sub-categories (HS Codes)	Exported value in 2015	Exported value in 2016	Exported value in 2017	Exported value in 2018	Exported value in 2019	% Growth 2018-19	Share in World Exports 2019
HS:420310	320,981	297,991	276,009	260,265	258,664	-0.6%	9.1%
HS:420329	201,507	187,615	196,706	220,702	230,084	4.3%	15.1%
HS:420321	107,124	100,342	102,363	121,979	84,386	-30.8%	15.6%
HS:420330	6,929	8,694	7,784	8,442	10,050	19%	0.4%
HS:420340	4,363	5,174	5,290	5,473	6,228	13.8%	2.7%

The illustration below shows Pakistan's export trend from 2015 to 2019 for the top three sub-categories (values wise) under leather apparel, (HS: 4203).



### 6.1.2. Top Trading Partners for Pakistan

Following table shows data about major leather Apparel (HS: 4203) importing countries from Pakistan between 2015 and 2019.

<b>HS: 4203</b>		<b>Top Importers from Pakistan in 2019</b>				in US Dollar thousand
<b>Country</b>	Exported value in 2015	Exported value in 2016	Exported value in 2017	Exported value in 2018	Exported value in 2019	
USA	114,097	106,043	101,932	115,693	124,000	
Germany	124,189	113,344	113,913	115,323	104,717	
UK	48,936	41,977	43,278	46,160	37,070	
Canada	27,767	22,591	25,647	30,960	33,398	
Netherlands	39,301	33,786	33,290	34,148	29,787	
France	36,233	35,282	34,115	37,005	28,522	
Spain	50,949	53,701	45,064	27,071	26,931	

Data on top exporters of Leather Apparel (HS: 4203) to Pakistan from 2015 to 2019 is shown below;

<b>HS: 4203</b>		<b>Top Exporters to Pakistan</b>				in US Dollar thousand
<b>Country</b>	Imported value in 2015	Imported value in 2016	Imported value in 2017	Imported value in 2018	Imported value in 2019	
China	2,931	2,994	3,893	1,089	855	
Germany	283	196	236	73	126	
France	47	47	53	20	77	

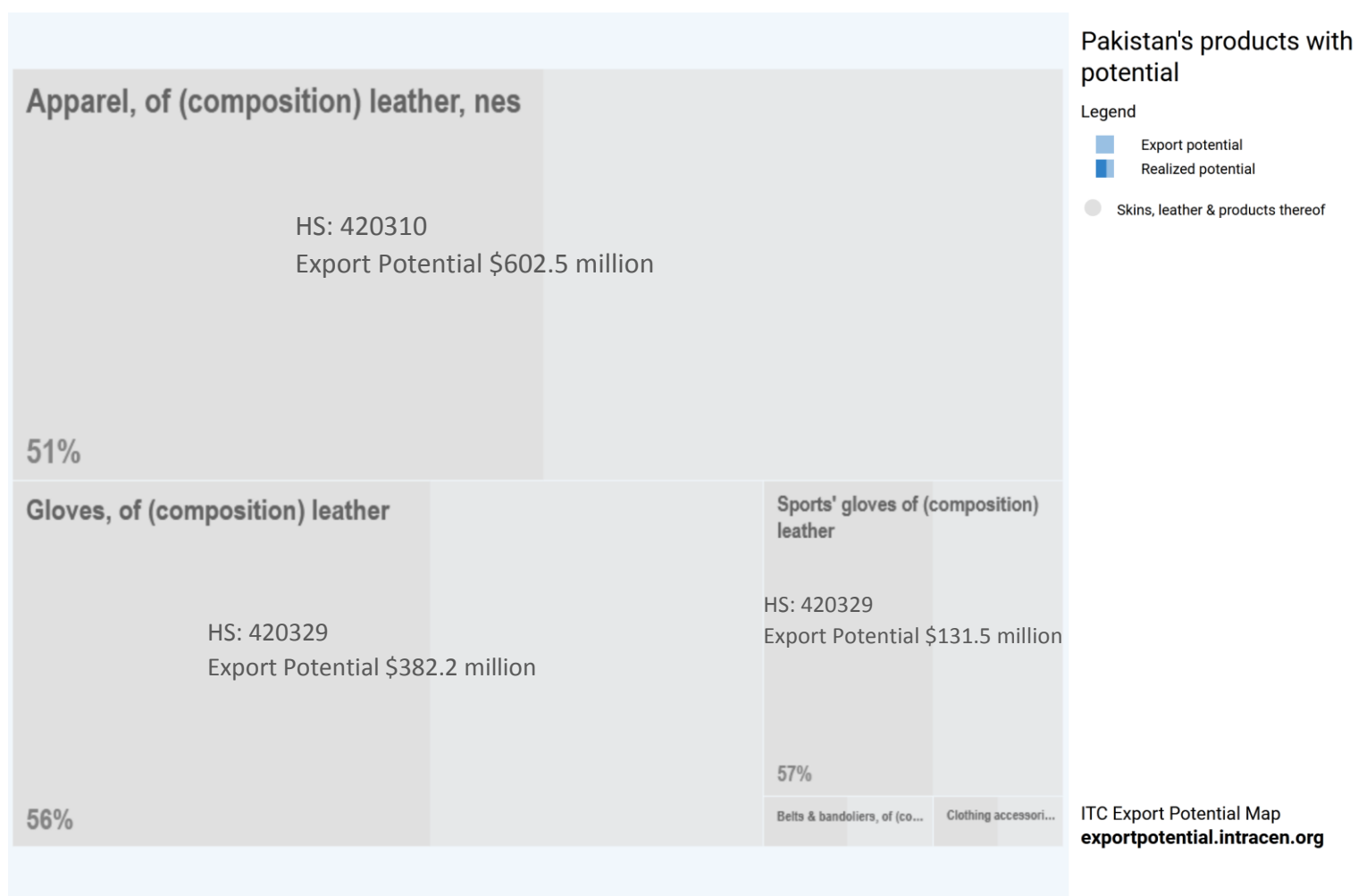


## 7. Pakistan's Untapped Export Potential for HS: 4203

Based on the ITC Export Potential Map tool, the following subcategories/products falling under the parent category HS: 4203 have untapped export potential, as shown in table below

Pakistan's Untapped Export Potential for HS: 4203			
Product Code	Export Potential	Actual Exports	Untapped Potential
420310	\$602.5 mn	\$306.7 mn	\$297.9 mn
420329	\$ 382.2 mn	\$222 mn	\$169 mn
420321	\$131.5 mn	\$81.4 mn	\$57.1 mn
420330	\$12.4 mn	\$7 mn	\$6 mn
420340	\$9.1 mn	\$5.1 mn	\$4.5 mn

The above data is graphically represented in the figure below



It should be noted that the data in ITC's "Export Potential Map" is quite different from data in the "Trade Maps" tool from which the rest of the figures in this document have been obtained. For example the "Actual Exports" section represents an average of the last five years of exports in that category to only those countries where Pakistan has export potential.

It is therefore requested that the figures above are looked at independently from the Import/export data provided in the rest of the document. For further details on the data listed above please copy paste the following link in your browser

<https://exportpotential.intracen.org/en/products/treemap?fromMarker=i&exporter=586&toMarker=w&market=w&whatMarker=k>

## 8. Annexures

### 8.1. Annexure-1: Leather Sector Associations

Following are some active associations representing the leather sector in Pakistan

#### **Pakistan Tanners Association**

##### **Central Office**

46-C, 21st Commercial Street, Phase II, Extension. Defence Housing Authority  
Karachi-75500, Pakistan.

Phones: 0213-5880180-84, 5899819

Fax: 92-21-5880093

E-mail: info@pakistantanners.org

##### **Southern Zone Office**

Plot # ST-7, Sector 7-A, Korangi Industrial Area, Karachi-74900, Pakistan

Phones: 0213-50620778

Fax: 92-21-5060323

E-mail: ptasz@pakistantanners.org

##### **Northern Zone Office**

1-Basement, Gulberg Heights,

Near Sherpao Bridge, Ghaus-e-Azam Raod, Gulberg II, Lahore-54660, Pakistan

Phones: 0423-5763204, 5876702

Fax: 0423-5758749

E-mail: ptanz@pakistantanners.org

#### **Pakistan Gloves Manufacturers & Exporters Association**

PGMEA Building, Kashmir Road, P.O.Box: 1330, Sialkot – Pakistan

Phones: 052-4273870 / 4272959

Fax: 052-4274860.

Email: pgmea@brain.net.pk / pgmea\_skt@yahoo.com

#### **Pakistan Leather Garments Manufacturers & Exporters Association**

##### **PLGMEA Central & Southern Zone**

C/o National Institute of Leather Technology ST#20, Sector 7/A, Korangi Industrial Area –  
KARACHI

Phone : (021) 35116821

Email : plgmea.iq57@yahoo.com

##### **Northern Zone**

BASF Building, Main Defence Road, Sialkot - Pakistan

Phone: (052) 3254401-3

Fax: (052) 3254400

Email: plgmeaskt@gmail.com

#### **Pakistan Footwear Manufacturers Association**

6-F, Rehman Business Center, 32-B III, Gulberg III, Lahore 54660

Phone: 0423-5750051

Email: pfma@pakfootwear.org

## 8.2. Annexure-2: HS Codes Key for Leather Sector

Harmonized System Code (HS Code)	Description of Goods
<b>41</b>	Raw hides and skins (other than furskins) and leather
<b>4101</b>	Raw hides and skins of bovine "incl. buffalo" or equine animals, fresh, or salted, dried, limed, pickled or otherwise preserved, whether or not dehaired or split (excluding tanned, parchment-dressed or further prepared)
<b>4102</b>	Raw skins of sheep or lambs, fresh, or salted, dried, limed, pickled or otherwise preserved, whether or not dehaired or split (excluding those with wool on, fleeces of Astrakhan, Caracul, Persian, Broadtail or similar lambs, or of Indian, Chinese, Mongolian or Tibetan lambs and tanned, parchment-dressed or further prepared)
<b>4103</b>	Other raw hides and skins, fresh, or salted, dried, limed, pickled or otherwise preserved, whether or not dehaired or split (excluding those of bovine animals, equine animals, sheep and lambs, those with wool on and those of goats or kids from Yemen, Mongolia or Tibet and tanned, parchment-dressed or further prepared)
<b>4104</b>	Tanned or crust hides and skins of bovine "incl. buffalo" or equine animals, without hair on, whether or not split (excluding further prepared)
<b>4105</b>	Tanned or crust skins of sheep or lambs, without wool on, whether or not split (excluding further prepared)
<b>4106</b>	Tanned or crust hides and skins of goats or kids, pigs, reptiles and other animals, without wool on, and leather of hairless animals, whether or not split (excluding further prepared and leather of bovine and equine animals, sheep and lambs)
<b>4107</b>	Leather further prepared after tanning or crusting "incl. parchment-dressed leather", of bovine "incl. buffalo" or equine animals, without hair on, whether or not split (excluding chamois leather, patent leather and patent laminated leather, and metallised leather)
<b>4112</b>	Leather further prepared after tanning or crusting incl. parchment-dressed leather", of sheep or lambs, without wool on, whether or not split (excluding chamois leather, patent leather and patent laminated leather, and metallised leather)"
<b>4113</b>	Leather further prepared after tanning or crusting "incl. parchment-dressed leather", of goats or kids, pigs, reptiles and other animals, without wool or hair on, and leather of hairless animals, whether or not split (excluding leather of bovine and equine animals, sheep and lambs, and chamois leather, patent leather and patent laminated leather, and metallised leather)
<b>4114</b>	Chamois leather, incl. combination chamois leather (excluding glacé-tanned leather subsequently treated with formaldehyde and leather stuffed with oil only after tanning); patent leather and patent laminated leather; metallised leather (excluding lacquered or metallised reconstituted leather)
<b>4115</b>	Composition leather with a basis of leather or leather fibre, in slabs, sheets or strip, whether or not in rolls; parings and other waste of leather

	or of composition leather, not suitable for the manufacture of leather articles; leather dust, powder and flour
<b>4201</b>	Saddlery and harness for any animal, incl. traces, leads, knee pads, muzzles, saddle cloths, saddlebags, dog coats and the like, of any material (excluding harnesses for children and adults, riding whips and other goods of heading 6602)
<b>4202</b>	Trunks, suitcases, vanity cases, executive-cases, briefcases, school satchels, spectacle cases, binocular cases, camera cases, musical instrument cases, gun cases, holsters and similar containers; travelling-bags, insulated food or beverage bags, toilet bags, rucksacks, handbags, shopping-bags, wallets, purses, map-cases, cigarette-cases, tobacco-pouches, tool bags, sports bags, bottle-cases, jewellery boxes, powder-boxes, cutlery cases and similar containers, of leather or of composition leather, of sheeting of plastics, of textile materials, of vulcanised fibre or of paperboard, or wholly or mainly covered with such materials or with paper
<b>4205</b>	Articles of leather or composition leather (excluding saddlery and harness bags; cases and similar containers; apparel and clothing accessories; whips, riding-crops and similar of heading 6602; furniture; lighting appliances; toys; games; sports articles; buttons and parts thereof; cuff links, bracelets or other imitation jewellery; made-up articles of netting of heading 5608; and articles of plaiting materials
<b>4203</b>	Articles of apparel and clothing accessories, of leather or composition leather (excluding footwear and headgear and parts thereof, and goods of chapter 95, e.g. shin guards, fencing masks
<b>420310</b>	Articles of apparel, of leather or composition leather (excluding clothing accessories, footwear and headgear and parts thereof, and goods of chapter 95, e.g. shin guards, fencing masks
<b>420321</b>	Specially designed gloves for use in sport, of leather or composition leather
<b>420329</b>	Gloves, mittens and mitts, of leather or composition leather (excluding special sports gloves
<b>420330</b>	Belts and bandoliers, of leather or composition leather
<b>420340</b>	Clothing accessories of leather or composition leather (excluding gloves, mittens and mitts, belts, bandoliers, footwear and headgear and parts thereof, and goods of chapter 95 [e.g. shin guards, fencing masks])
<b>6403</b>	Footwear with outer soles of rubber, plastics, leather or composition leather and uppers of leather (excluding orthopaedic footwear, skating boots with ice or roller skates attached, and toy footwear
<b>640420</b>	Footwear with outer soles of leather or composition leather and uppers of textile materials (excluding toy footwear