International Journal of Basic and Applied Sciences
INFORMATICS JOURNALS

We'Ken- International Journal of Basic and Applied Sciences
DOI: 10.18311/weken/2026/v11/i1/51987
Volume 11, Issue 1, June 2026, pp. 35-42

Review of Leather Industries in Bharat

Uday Raval and Vijay Pithadia*

Gujarat Technological University (GTU), Ahmedabad - 382424, Gujarat, India; drvijaypithadia1@gmail.com

Abstract

The Bharatia leather industry is an extensive contributor to the Bharatia economic system, recognised for its export capability and employment generation, especially within the rural areas. It's a major foreign exchange earner and a critical area for employment, specifically for women and people from marginalised communities. The enterprise encompasses tanning, shoes, leather-based garments, and leather goods, with a sturdy presence in both the small and large-scale sectors. The Bharatia leather, leather-based merchandise and shoes enterprise holds a distinguished position in the Bharatia economy. This quarter is known for its consistency in excessive export income, and it is among the top ten forex earners for the country. The export of shoes, leather-based and leather products from Bharat changed into to the track people $3.68 billion during 2020-21.

The enterprise is bestowed with an abundance of uncooked materials, as Bharat is endowed with 20% of worldwide farm animals and buffalo and 11% of the global goat and sheep population. Brought to this are the strengths of professional manpower, revolutionary generation, growing enterprise compliance with global environmental requirements, and the committed guidance of the allied industries. The leather-based industry is an employment-intensive quarter, providing employment to approximately 4.42 million human beings, typically from the weaker sections of society. Girl's employment is essential in the leather-based merchandise area, with about 30%. Bharat is the second largest exporter of leather clothes, the third largest exporter of Saddlery and Harness and 4th biggest exporter of leather items globally..

Keywords: *CETP, CLE, CLRI, FDI, Tanneries*

Received: 27-02-2026; **Revised:** 22-03-2026; **Accepted:** 25-03-2026

1. Introduction

Bharat accounts for approximately two per cent of the world's exchange in leather and leather merchandise. To be on the short song of boom and to have a larger cake within the worldwide commercial enterprise, non-stop technology upgrade and modernisation are the most powerful driving forces, like in any other production region that aims consistent boom and growth. With this being the number one objective, Bharat's Council for Leather Exports (CLE) has taken several projects[1]. To propel the combined efforts of the tanning and manufacturing sectors, Central Leather Research Institute (CLRI), the Fashion Generation and Development Institute and CLE as the primary cog within the wheel, an action plan has been chalked out. The growing worldwide calls for apart, the movement plan additionally recommended measures to face Bharatia leather's industry's essential competition in Asia: China, Indonesia, Korea and Taiwan.

Bharat is the second-largest producer of leather-based shoes and leather products globally. The leather-based and leather merchandise industry contributes less than 1% to Bharat's GDP, and the shoes industry contributes approximately 2% to Bharat's GDP. The world has over 2.5 million human beings and has the capacity to create 2 million jobs in the next five years. The government of

*Author for correspondence

Bharat has allowed one hundred per cent Foreign Direct Investment (FDI) in the region. The tanning industry has followed Zero Liquid Discharge (ZLD) systems to fulfil environmental guidelines. As a measure to reinforce manufacturing within the leather-based footwear phase, excise duty has been reduced from 12% to 6% for shoes costing between INR 500 and INR 1000. CII has a countrywide committee on leather-based, shoes and leather merchandise representing essential leather, footwear and leather products organisations and key stakeholders related to the industry.

The centre has proposed a mega leather cluster in Ramaipur, Kanpur. This assignment seeks to rejuvenate the leather-based area, which was once crucial to the metropolis's identity and economic system, but now plagued through pollutants curbs, declining industry, and negative labour situations. Kanpur earned the title "leather metropolis of Bharat" because of its flourishing British-generation tanning industry, its proximity to the Ganga River, and abundant labour. The post-1857 increase created employment for over 1 lakh employees across 600 tanneries. CLE is attempting to make a dent in new markets. Cognisance international locations include the Latin American nations, Israel and Japan. Japan is the 5th largest importer of leather-based and leather merchandise internationally. Japan now imports over USD 15 million worth of leather-based and leather merchandise from Bharat. Consistent with today's available provisional facts, exports within the first 10 months of the financial year 2002-03 to Japan stood at USD 7.53 million, towards USD 7.30 million during the comparable length of 2001-02. CLE goals at raising Bharat's share in Japan's general imports of leather-based and leather-based merchandise to two per cent by 2005-06 from the current level of 0.5 percentage which in other words means foreign exchange income to the tune of us$ 70 MN in the subsequent 3 years from the 2001-02 degree of over USD 15 million[2].

In keeping with a CLE report, the home manufacturing of leather and leather merchandise in Japan is declining in large part because of excessive production costs. This has unfolded an awesome scope for growing Bharat's proportion in the leather-based marketplace. The Japanese marketplace gives notable scope for export of centre price stages of shoes, clothes and other add-ons as upper segments are already dominated by Italy and China. Bharat is the second-largest shoes manufacturer in the world. It accounts for 20 per cent of Bharat's total export of leather-based and leather-based merchandise. Most important markets include the UK, the United States, Germany, Italy, France, the Netherlands, Canada, Sweden and Russia. Of the total exports of shoes from Bharat, round sixty four percent is going to the United Kingdom, America and Germany. Bharatia leather-based enterprise can produce l776 million pairs; 112 million pairs of Shoe Uppers; Non-leather footwear - 960 million pairs of non-leather-based shoes, which includes footwear made of rubber, moulded per cent and different fabrics.

The lowering of price addition norms underneath the DFRC Scheme from 33% to 25% would benefit the exporters, and the enterprise feels that extending the advantage of the scheme to deem export is a proper step, encouraging the home suppliers of raw materials and inputs to the exporters. CLE is of the view that the obligation-free import entitlement advantage extended as a top rate to the popularity holders, achieving a better increase charge of greater than 25% in FOB cost of export in unfastened forex, will encourage the repute holders closer to attainment of the incremental performance. "The repute holders might now be able to obtain aggressive degrees of manufacturing by using such obligation-free entitlement", Kumar maintains, adding "allowing annual development licensing facility to the status holders will allow such units to go for deliberate procurement of raw materials and additives based on annual production programme".

2. Export Scenario

A delegation of over 20 leather quarter executives could be visiting Russia this month to try to find investments and tap developing export opportunities. The three-day visit will start on August 26th, 2025. Council for Leather Exports Executive Director R Selvam stated that at present Bharat is exporting leather-based items in the range of USD 60 million to USD 80 million; however, it is low, as large possibilities are there in Russia. "We are also able to participate in a worldwide honest Euro shoes choicest series in Moscow. We are taking a delegation intending to attract investments, generate collaboration in tannery and product production", Selvam informed PTI. He stated that huge export opportunities are there in areas like leather

garments, goods and footwear. Though there are billing problems in Russia because of Western nations sanctions due to the Russia-Ukraine conflict, exporters who deal in Rupee can ship the goods. The export of leather-based, leather-based merchandise and footwear rose from USD 44.84 million in 2022-23 to USD 62.48 million in 2023-24. But the exports have declined to USD 14.21 million throughout April-June this fiscal, from USD 16.34 million in the equal length final year[4].

The important issue for this decline is the price hassle that is non-issuance of BRC (Bank Realisation Certificate) through banks, he said, including that there had been sanctions on SEBR bank of Russia *via* US OFAC (Office of Foreign Assets Control). Due to the sanctions, many Bharatia banks aren't issuing BRC for the payments from Russia, he introduced. Bharat and Russia are discussing retaining alternate in local currencies and reducing non-tariff barriers by using Moscow to boost bilateral change. Bharat and Russia have focused to increase the bilateral trade to USD hundred billion by 2030. Bharat is focusing on various sectors like electronics, besides taking up troubles of non-exchange boundaries in areas like shrimp and pharma, to enhance exports to sanction-hit Russia and circulate closer to reaching this target. At present, the bilateral exchange stands at about USD sixty-seven billion. Bharat's exports to Russia stood at USD 4.3 billion in 2023-24, while imports had been USD 61.4 billion, pushed with the aid of crude oil. The exchange deficit changed to USD 57.1 billion. The proportion of crude oil and petroleum merchandise in imports changed to 88 per cent[5].

2.1 Key Aspects of the Bharatia Leather Industry

Bharat possesses a large cattle population, including cattle, buffalo, goats, and sheep, presenting a massive uncooked fabric base for the industry.

Export powerhouse: Bharat is a chief exporter of leather-based and leather products, mainly in garments, saddlery, and footwear.

Employment in depth: The enterprise provides vast employment possibilities, with a large staff, such as a massive percentage of girls.

Local clusters: Key leather-based manufacturing centres are positioned in Tamil Nadu (Chennai, Ambur, Ranipet, and so forth) Uttar Pradesh (Kanpur, Agra, and so forth) and West Bengal (Kolkata)[3].

Authorities support: The Bharatia government is actively concerned in modernising the industry through tasks like organising era centres in leather clusters and selling skill development.

Attention on sustainability: There is an increasing emphasis on environmentally friendly practices and compliance with international standards.

Growth and destiny prospects: The industry is experiencing an increase, driven by increasing demand and the authorities assistance for modernisation and technological improvements.

3. Highlights of Product Segments of Bharatia Leather-Based and Footwear Enterprise

Tanning sector - Annual availability of leather in Bharat is ready 3 billion. Bharat money owed for 13% of the world's leather manufacturing. Bharatia leather tendencies/ colours are continuously being decided on at the global level. Shoes area- Bharat is the second biggest footwear producer after China, with an annual manufacturing of 2.58 billion pairs (2018). Bharat is likewise the second largest consumer of shoes after China, with a consumption of 2.60 billion pairs.

Footwear (leather-based and non-leather) export bills for about 45.62% proportion in Bharatia's leather-based and shoes industry's export (2020-21). Leather-based clothes area- Bharat is the second biggest global exporter. Bills for 8.03% percentage of Bharat's general export from the leather-based sector (2020-21). Leather items and add-ons zone inclusive of Saddlery and Harness- Bharat is the 5th largest worldwide exporter of leather items and accessories, and the 1/3 largest exporter of Saddlery and Harness items[6].

4. Main Production Centres

The principal manufacturing centres for shoes, leather-based and leather-based merchandise in Bharat are positioned 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; Telangana- Hyderabad; Haryana- Ambala, Gurgaon, Panchkula, Karnal and Faridabad; Delhi; Madhya Pradesh- Dewas; Kerala- Kozhikode and Ernakulum/ Cochin; Rajasthan; Jaipur; Jammu and Kashmir; Srinagar.

5. Sub-segments of the Bharatia Leather Industry

The Bharatia leather-based industry may be extensively categorised into numerous sub-segments, each with its own specific characteristics and price chain. Here are a number of the key sub-segments:

5.1 Raw Fabric Providers

The raw cloth providers are the first hyperlink in the leather-based industry cost chain. They supply raw hides and skins to the tanneries, which can then be processed into leather. The uncooked cloth suppliers may be additionally categorised into two sub-segments:

Disguise and pores and skin providers: Those suppliers offer raw hides and skins to the tanneries. They supply their raw substances from slaughterhouses, farms, and other suppliers.

Raw fabric buyers: Those investors buy and promote uncooked hides and skins, acting as intermediaries between the providers and the tanneries.

5.2 Tanneries

The tanneries are the second one hyperlink within the leather industry cost chain. They process the raw hides and skins into leather, the usage of various chemical compounds and treatments. The tanneries can be, in addition, labelled into sub-segments:

Chrome tanneries: These tanneries use chrome-based tanning solutions to prepare the uncooked hides and skins into leather.

Vegetable tanneries: These tanneries use plant-based tanning agents to process the raw hides and skins into leather.

5.3 Leather-based Goods Producers

The leather goods producers are the 0.33 link inside the leather-based enterprise fee chain. They use the leather produced by means of the tanneries to fabricate various leather goods consisting of shoes, purses, belts, and wallets. The leather goods manufacturers can be in addition categorised into numerous sub-segments:

Shoe producers: Those producers produce shoes the usage of leather-based, rubber, and other materials.

Purse and wallet producers: These manufacturers produce purses and wallets the usage of leather-based and other materials.

Belt and accessory manufacturers: Those manufacturers produce belts and other add-ons using leather-based and other substances.

5.4 Leather Chemical Compounds and Equipment Suppliers

The leather-based chemical substances and equipment providers provide the essential inputs to the tanneries and leather goods producers. They supply chemical substances, dyes, and equipment required to produce leather-based and leather items.

The price chain analysis of the Bharatia leather-based enterprise:

The value chain analysis of the Bharatia leather-based industry includes figuring out the diverse sports involved in the manufacturing of leather and leather items, and analysing their contribution to the overall value of the product.

Raw material sourcing: The uncooked material suppliers supply raw hides and skins from slaughterhouses, farms, and different suppliers.

Tanning and processing: The tanneries process the uncooked hides and skins into leather the use of numerous chemical substances and treatments.

Leather-based goods manufacturing: The leather-based items manufacturers use the leather produced by the tanneries to fabricate various leather items such as footwear, purses, belts, and wallets.

Completing and remedies: The leather goods manufacturers apply diverse finishes and remedies

to the leather-based goods to decorate their look and sturdiness.

Marketing and distribution: The leather-based goods manufacturers market and distribute their products to shops and purchasers through diverse channels, including wholesale markets, retail shops, and e-commerce systems.

The price chain analysis of the Bharatia leather-based industry highlights the significance of each interest in the production of leather-based and leather-based goods and identifies opportunities for improvement and innovation in each level of the price chain.

5.5 Demanding Situations Going Through Bharat's Leather-based Enterprise

Decline in exports: Leather and leather-based goods exports dropped almost 10% in FY24 due to subdued demand from important markets like the US and Europe. Tamil Nadu, the largest leather exporter, noticed an 18% decline, considerably affecting the country-wide figures. The Russia-Ukraine conflict has disrupted the Eurozone economy, lowering global demand. Danger from synthetic leather-based substitutes and innovation gap: The upward push of options like faux leather, cork leather, ocean leather, microfiber, and vegan leather is eroding leather's market share. These substitutes are cheaper, cruelty-free, and more typical in global markets, in particular in environmentally conscious economies. While Bharat's leather enterprise's slow innovation and absence of R and D restrict its competitiveness[7].

Environmental rules and compliance burden: Tanning is inherently polluting because it generates high chemical and natural waste, including risky materials like hexavalent chromium. Many tanneries lack the capability for effluent remediation and operate in unhygienic conditions, exposing workers to critical health dangers. Employees are exposed to risky chemical compounds without good enough protection or consciousness, leading to occupational fitness risks and bad labour welfare. Regulatory demanding situations: Ban on slaughterhouses and regulations on cattle change have significantly impacted raw material availability. The Goods and Services Tax (GST) regime multiplied fees by means of 6–7 %, specifically hurting Micro, Small and Medium Enterprises (MSMEs). Stricter norms by means of the NGT and UPPCB have brought about closure of devices, mainly in hubs like Kanpur and Unnao. Labour problems and skill gaps: A big phase of the personnel is untrained and illiterate, leading to low productivity, poor recognition of fitness and safety practices and restricted access to new technology

6. Suggestions To Restore the Leather-based Enterprise

Transform Common Effluent Treatment Plants (CETPs) to Clean Integrated Resource-Conserving Leather Ecosystems (CIRCLES)

Fund decentralised Zero Liquid Discharge (ZLD) micro-treatment plant life through Viability Gap Funding (VGF). Mandate digital effluent metering and traceability, connected to a vital green leather Compliance Dashboard (much like the PARIVESH portal for environment clearances). Position Bharat 'China plus One': Bharat can strategically position itself as a "China plus One" hub within the international leather cost chain amid growing US-China exchange tensions.

Bharat can appeal to international buyers looking for reliable alternatives. Strengthening eco-compliance and design innovation will make Bharat a favoured sourcing destination.

Addressing the innovation gap: A National leather-based Tech Hub can be established under the Council of Scientific and Industrial Research- Central Leather Research Institute (CSIR-CLRI) and the Atal Innovation Mission to foster innovation in the leather sector. This hub can collaborate with start-ups and MSMEs to co-expand biodegradable tanning marketers, chrome-free options, and clever wearable leather composites. Unencumber moral luxurious Branding for Bharatia leather-based: Introduce a "Bharat leather-based Mark", sponsored through sustainable sourcing and moral labour audits.

Encourage luxury collaboration with global style homes below Make in Bharat. Formalise the informal: Provide virtual Udyog cards for each tannery worker to ensure they get right of entry to skilling, fitness benefits, and coincidence coverage[8].

Skill the world, heal the worker: A dedicated employee wellbeing task needs to provide mobile fitness labs in leather clusters. By integrating the PM Vishwakarma Yojana, artisans can be upskilled in modern, sustainable

techniques. This could reduce attrition and improve productivity by means of 30-35 %, securing a healthier and more resilient group of workers[8].

7. Conclusion

The leather and footwear enterprise in Bharat performs a pivotal function in economic growth, supplying employment, and maintaining cultural background, making it an essential zone as a growth engine. Using more than four million humans, the leather-based industry serves as an essential livelihood method for a sizeable majority of women in towns. Endowed with 20% of the world's livestock and buffalo and 11% of the world's goats and sheep, Bharat serves as a beneficial destination for leather merchandise that has been greater with skilled manpower, progressive era, and elevated enterprise compliance with requirements.

Being the second largest exporter of leather clothes, 1/3 biggest of saddlery and harnesses and the fourth largest of leather goods globally, the leather-based industry of Bharat is a big contributor to international supply chains and financial empowerment, similarly to the problematic craftsmanship and high-quality[7]. Because of rich, numerous records, best craftsmanship, and availability of local uncooked materials, articles like Kolhapuri footwear of Maharashtra and Mojari footwear of Rajasthan are an enchantment for global buyers[9].

To reach a turnover of $47 billion. By 2030, the authorities of Bharat have launched the Bharatia Footwear and Leather Development Programme (IFLDP) with an allocation of INR 1,700 Cr. to enhance the contemporary infrastructure and dispense numerous incentives to the industries and manufacturing units engaged within the zone. Bharat seeks to set itself up as a hub to satisfy the increasing demand for leather-based products through various sub-schemes, consisting of the established order of leather-based shoes and add-ons clusters, institutional facilities, and the promotion of Bharatia manufacturers within the area.

That is being achieved by means of setting up design studios across the state through various business collaborations like CSIR-CLRI and offering shoe/garment designing publications. Enterprises are more and more adopting tanning techniques and waste reduction tasks, embracing innovation and sustainable practices to minimise environmental impact. Being an important pillar of the garments and footwear industry, the leather sector, combining way of life, innovation, and financial sustainability, remains a driving force in Bharat's boom adventure, presenting widespread opportunities for development[10].

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Annexure 1

ANALYSIS – COUNTRY WISE EXPORT PERFORMANCE OF LEATHER, LEATHER PRODUCTS&FOOTWEAR FROM INDIA DURING APRIL-MARCH 2022-23 VIS-A-VIS APRIL-MARCH 2021-22

Value in Million US $

COUNTRY	TOTAL			Share in total export	Share in total export
	APR-MAR 2021-22	APR-MAR 2022-23	% Change 2022-23	2021-22	2022-23
U.S.A	1158.24	1173.08	1.28%	23.77%	22.30%
GERMANY	536.02	579.33	8.08%	11.00%	11.01%
U.K.	456.75	481.55	5.43%	9.37%	9.16%
ITALY	287.95	354.82	23.22%	5.91%	6.75%
FRANCE	278.93	281.28	0.84%	5.72%	5.35%
SPAIN	212.68	228.54	7.46%	4.36%	4.35%
U.A.E.	105.48	123.87	17.43%	2.16%	2.36%
NETHERLANDS	216.82	219.80	1.37%	4.45%	4.18%
HONG KONG	68.03	57.52	-15.45%	1.40%	1.09%
CHINA	136.59	147.24	7.80%	2.80%	2.80%
POLAND	82.32	81.48	-1.02%	1.69%	1.55%
BELGIUM	115.71	135.79	17.35%	2.37%	2.58%
SOMALIA	29.66	41.97	41.50%	0.61%	0.80%
VIETNAM	60.40	64.78	7.25%	1.24%	1.23%
AUSTRALIA	91.23	94.01	3.05%	1.87%	1.79%
PORTUGAL	59.43	71.37	20.09%	1.22%	1.36%
DENMARK	67.36	81.52	21.02%	1.38%	1.55%
KOREA REP.	40.37	46.74	15.78%	0.83%	0.89%
JAPAN	64.60	77.88	20.56%	1.33%	1.48%
RUSSIA	42.79	44.84	4.79%	0.88%	0.85%
S. AFRICA	33.40	36.76	10.06%	0.69%	0.70%
CHILE	47.07	41.39	-12.07%	0.97%	0.79%
MALAYSIA	29.75	29.86	0.37%	0.61%	0.57%
AUSTRIA	37.96	55.65	46.60%	0.78%	1.06%
CANADA	60.92	70.34	15.46%	1.25%	1.34%

Source : DGCI&S

COUNTRY	TOTAL			Share in total export 2021-22	Share in total export 2022-23
	APR-MAR 2021-22	APR-MAR 2022-23	% Change 2022-23		
SWEDEN	31.83	27.04	-15.05%	0.65%	0.51%
NIGERIA	16.50	15.05	-8.79%	0.34%	0.29%
INDONESIA	21.28	23.47	10.29%	0.44%	0.45%
MEXICO	32.35	37.85	17.00%	0.66%	0.72%
SAUDI ARABIA	28.56	43.36	51.82%	0.59%	0.82%
KENYA	7.49	10.34	38.05%	0.15%	0.20%
SWITZERLAND	20.35	22.54	10.76%	0.42%	0.43%
SLOVAK REP	18.12	19.26	6.29%	0.37%	0.37%
HUNGARY	18.98	11.42	-39.83%	0.39%	0.22%
THAILAND	15.63	16.39	4.86%	0.32%	0.31%
BANGLADESH	17.68	17.54	-0.79%	0.36%	0.33%
FINLAND	14.08	18.76	33.24%	0.29%	0.36%
TURKEY	17.23	24.29	40.98%	0.35%	0.46%
ISRAEL	16.99	17.55	3.30%	0.35%	0.33%
CAMBODIA	6.27	8.41	34.13%	0.13%	0.16%
CZECH REPUBLIC	12.27	11.17	-8.96%	0.25%	0.21%
GREECE	7.15	9.77	36.64%	0.15%	0.19%
NEW ZEALAND	10.74	9.49	-11.64%	0.22%	0.18%
OMAN	7.01	9.63	37.38%	0.14%	0.18%
SRI LANKA DSR	7.15	6.66	-6.85%	0.15%	0.13%
SINGAPORE	10.8	10.93	1.20%	0.22%	0.21%
SUDAN	3.67	2.89	-21.25%	0.08%	0.05%
TAIWAN	6.65	6.67	0.30%	0.14%	0.13%
NORWAY	5.99	7.71	28.71%	0.12%	0.15%
DJIBOUTI	2.56	2.32	-9.38%	0.05%	0.04%
OTHERS	194.86	247.58	27.06%	4.00%	4.71%
TOTAL	4872.70	5259.53	7.94%	100.00%	100.00%

Source : DGCI&S

Major Markets:

- The major markets for Indian Leather & Leather Products are USA with a share of 22.30%, Germany 11.01%, UK 9.16%, Italy 6.75%, France 5.35%, Netherlands 4.18%, Spain 4.35%, China 2.80%, Poland 1.55%, Belgium 2.58%, UAE 2.36% and Hong Kong 1.09%.

- The Top 15 countries together account about 78.55% of India's total leather, leather products & footwear export during April-March 2022-23 with export value of US $ 4131.56 Mn.