



Trends in production and trade

## Leather products from Pakistan

Fact Sheet | April 2021

### 1 Introduction

Millions of people around the world work to produce leather garments, footwear and accessories. The leather-based garments, footwear and accessories value chain is complex, with many different actors involved – from farmers to slaughterhouses to leather tanners; from finishers to traders; from producers of leather components to producers of leather goods; and from buying agents to brands and retailers. Production units vary greatly in size and include tanneries, small leather workshops, home-based units, as well as large and small garment, footwear and leather goods factories.

South Asia is an important production hub, catering to the international market. Pakistan is a key supplier of leather apparel to the European market – holding a steady second place, after India. This overview of trends in the production of leather and leather goods in Pakistan bundles together information on key products produced in Pakistan, as well as key export markets for its leather and leather goods. The report maps key leather manufacturers and buying companies.

Research into production trends and exports and identifying relevant actors in the industry is essential to establish links between the leather industries in Pakistan, the export markets and all actors involved, as well as for demonstrating gaps in traceability and transparency in leather value chains generally. This mapping of the Pakistan leather and leather goods industry has been made as part of the Together for Decent Leather programme, which aims to improve working conditions and end labour rights abuses.

## Product groups featured

To analyse the types of leather products and trade values exported from Pakistan, this overview of trends in production and exports has looked into different sets of product groups and subgroups, as classified internationally using Harmonised System (HS) codes.

### **HS 41 – raw hides and skins (other than furskins) and leather**

- 4104 to 4115 include tanned hides and (semi) finished leather

### **HS 42 – articles of leather; saddlery and harness, travel goods, handbags and similar containers**

- 4202 – Trunks; suit, camera, jewellery, cutlery cases; travel, tool, similar bags; wholly or mainly covered by leather, composition leather, plastic sheeting, textile materials, vulcanised fibre, paperboard
- 4203 – Articles of apparel and clothing accessories, of leather or of composition leather

### **HS 64 – footwear; gaiters and the like; parts of such articles**

- 6403 – Footwear; with outer soles of rubber, plastics, leather or composition leather and uppers of leather

See: <https://www.foreign-trade.com/reference/hscod.htm>

## 2 Methodology

This overview of trends in the production and export of leather and leather goods from Pakistan is predominantly based on desk research. Public and private databases were accessed to gather information about export trends; export destinations; key manufacturers and buying companies, as well as establishing linkages between these exporting and importing companies.

The United Nations Comtrade database<sup>1</sup> was used to gather information about export trends and export destinations. At the time of writing, the UN Comtrade database includes data up to and including the year 2019. In order to provide some information on export trends, it was decided to look into a five-year period, from 2015 to 2019.

The Panjiva database<sup>2</sup> was used to gather information about key exporting manufacturers and their clients. Panjiva was also used to get preliminary insights into the impact of the corona pandemic on the export of leather and leather goods. To this end, shipment information available in this database has been analysed.

The Open Apparel Registry<sup>3</sup> was consulted to establish linkages between manufacturers in Pakistan and their international clients. In addition, other sources were used, including the Government of Pakistan's Economic Survey 2018-2019.

The leather goods industry comprises many different products such as apparel, footwear, bags, trunks, sporting goods, leather upholstery, and so on. The Together for Decent Leather programme focuses on the leather-based garment, footwear and accessories value chains. This paper therefore highlights the following product groups: leather (including semi-finished and finished leather); leather garments (jackets, trousers, gloves, and so on) and; leather footwear.

### 3 The leather goods supply chain

From slaughter to store shelves, leather undergoes a wide range of treatments to make it into a workable material that can be used as a basis for making final products such as shoes, garments, bags, gloves and so on.

#### Figure 1 Production phases of the leather goods supply chain

The Together for Decent Leather programme focuses on the brown steps



These different processes can take place in different countries. For instance, leather produced in Pakistan is not only used for the production of leather goods in Pakistan, but is also exported to countries such as China and Italy, which are big producers of shoes, bags and other leather goods that are often sold in the EU market. In most cases, for consumers as well as for civil society actors, lack of supply chain transparency makes it impossible to determine the origin of leather used in these end-products.

In addition to the many different production steps, there are many different actors involved. Due to lack of transparency of supply chain information, it is challenging to establish all the links in leather goods supply chains. A great range of production facilities is involved in the production of leather and leather goods: large vertically integrated leather and leather goods manufacturers that include tanneries; standalone tanneries; small leather workshops; home-based units; as well as large and small garment, footwear and leather goods factories. On top of that, traders, agents and buying houses are involved in this industry. Products are subsequently shipped and sold all over the world by brands or by retailers.

This complexity is also found when it comes to employment relationships. Workers may be hired directly by tanneries or leather goods factories. However, often there is a labour contractor in between. The leather industry is further characterised by a high level of informal labour and home working.

### 4 The Pakistan leather and leather goods industry at a glance

Pakistan produces leather made of cow, buffalo, sheep and goat skins.<sup>4</sup> These animals are mostly kept by small-scale herders for meat production.<sup>5</sup> After these animals are slaughtered, the hides and skins are transported to tanneries for further processing into leather. According to the Pakistan Tanners Association (PTA), there are around 800 tanneries in Pakistan.<sup>6</sup>

Many leather companies are vertically integrated companies that carry out the process of tanning as well as the the production of leather clothing and apparel.<sup>7</sup> Leather apparel factories are primarily based in Karachi and Sialkot. Production of leather footwear mainly takes place in the state of Punjab (in and around the cities of Sialkot and Lahore), but there is also a production hub in the greater Karachi area. According to the PTA, the Pakistan leather and leather goods industry is 95 per cent export-oriented.<sup>8</sup>

### Pakistan industry associations

Three industry associations represent an important share of formal leather and leather goods manufacturers:

- Pakistan Tanners Association (PTA), 159 members – [www.pakistantanners.org](http://www.pakistantanners.org)
- Pakistan Leather Garments Manufacturers and Exporters (PLGMEA), 169 members – <http://www.plgmea.pk/>
- Pakistan Footwear Manufacturers Association (PFMA), 195 members – [www.pakfootwear.org](http://www.pakfootwear.org)

Recent employment figures are hard to come by. A much-cited 2016 report states that more than 500,000 people are employed in the Pakistan leather industry.<sup>9</sup> Leather workers are often hired through labour contractors.<sup>10</sup>

## 5 Export trends

Currently, there are three sectors that together generate nearly 70 per cent of Pakistan's total export revenues: the cotton and cotton-based textile and garment industry; rice; and the leather and leather goods industry. While the leather and leather goods industry generates significant export revenues, these numbers come nowhere close to the export revenues of the cotton, textile (particularly house-linens) and garment industry, which accounted for nearly 57 per cent of export revenues in the year 2018-19.<sup>11 12</sup>

UN Comtrade data for the year 2019 show that the export value of leather and leather products amounted to US\$ 965 million, representing roughly 4 per cent of Pakistan's total exports.<sup>13</sup>

**Table 1 Pakistan Major Export Commodities 2014-2019 (in %)**

Commodity	2014	2015	2016	2017	2018	2019
Cotton, textiles and garments	53.1	54.4	55	59.4	56.9	56.7
Leather and leather goods	5.1	4.8	4.9	4.5	4.6	3.7
Rice	7.6	8.5	8.8	7.9	8.8	8.8
Subtotal	65.8	67.8	68.7	71.8	70.3	69.2
Other items	34.2	32.2	31.3	28.2	29.7	30.4
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

Source: Pakistan Economic Survey 2018-2019<sup>14</sup>

According to the data presented in the Government of Pakistan's Economic Survey 2018-2019, the export value of leather and leather goods has gradually decreased from a 5.1 per cent share of export revenues in 2014 to a 3.7 per cent share in export revenues in 2019.<sup>15</sup> Looking further back, the decline already started in the mid-1990s. In the early 1990s, the leather and leather goods accounted for 10 per cent of total exports. Analysts have cited various factors that have contributed to this decline, including:

- Reports about the use of child labour and debt bondage in the stitching of leather footballs that appeared in the global media in the mid-1990s, which would have led international brands to look for other sourcing countries.<sup>16</sup>

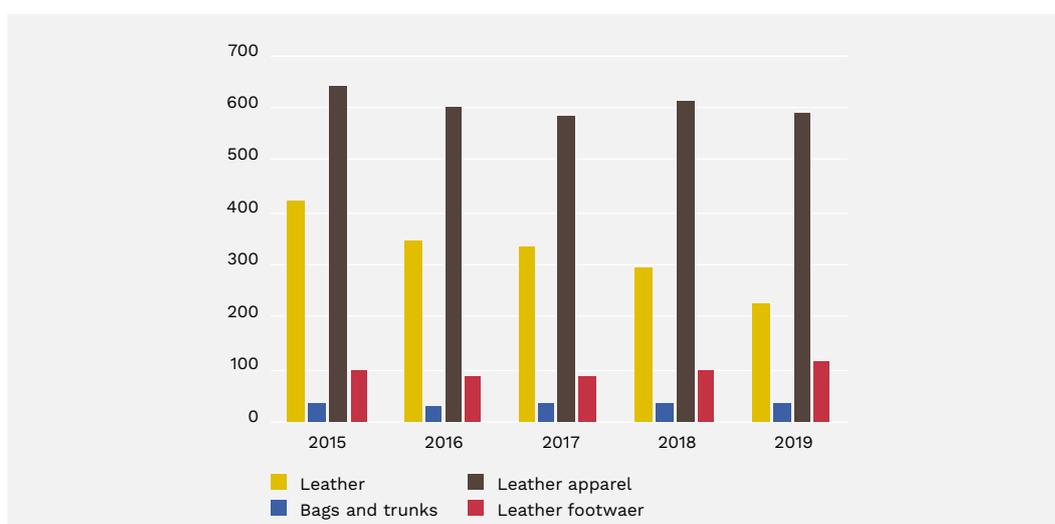
- Lack of sufficient raw material. Diseases, floods, illegal smuggling of hides to neighbouring countries as well as a decrease of the number of sacrificed animals during religious festivals are all mentioned as affecting the availability of raw materials.<sup>17</sup> As a consequence, Pakistan also has to import hides and skins, which has an effect on the cost of the end products.
- High cost of electricity, gas and water, high taxes as well as a lack of advanced technology that would put Pakistan at a disadvantage vis a vis competitors like China and India.<sup>18</sup>

Despite the apparent decline in export revenues, according to the Pakistan Ministry of Economic Affairs, leather and leather goods will continue to be one of five key export-oriented sectors (alongside textiles, sports goods, surgical goods and carpets) due to the fact that several of Pakistan’s export products, including leather goods, enjoy duty free access to the European Union under the EU’s Generalised Scheme of Preferences (GSP+).<sup>19</sup>

The GSP+ trade scheme has been initiated with the purpose of stimulating the protection of human rights by exempting companies exporting from specific developing countries to the EU to pay trade tariffs, on the condition that the countries ratify and implement core international conventions relating to human and labour rights, the environment and good governance.<sup>20</sup> Pakistan’s current GSP+ status is valid until 2023. Important competitors such as India and China are not beneficiaries of the EU GSP+ programme.

The three most relevant leather product groups exported by Pakistan are leather (such as hides and (semi-)finished leather), leather apparel and leather footwear. Bags and trunks do not play a significant role in Pakistan’s exports. Figure 2 shows exports for the years 2015-2019 for these product groups.<sup>21</sup> In 2019, the total export value of leather and leather products amounted to US\$ 965 million. While exports of leather – which include raw hides and skins, tanned hides and (semi)finished leather – have dropped from US\$ 425 million in 2015 to US\$ 228 million in 2019, exports of the different leather goods are relatively stable. Figure 2 clearly shows that exports of leather apparel generate most export revenues, fluctuating around US\$ 600 million. This product group includes leather gloves, representing 53 per cent of the export value within the broader product group of leather apparel.

**Figure 2 Exports of leather and leather goods from Pakistan in US\$ millions**



Source: Graph elaborated by SOMO with data retrieved from UN Comtrade<sup>22</sup>

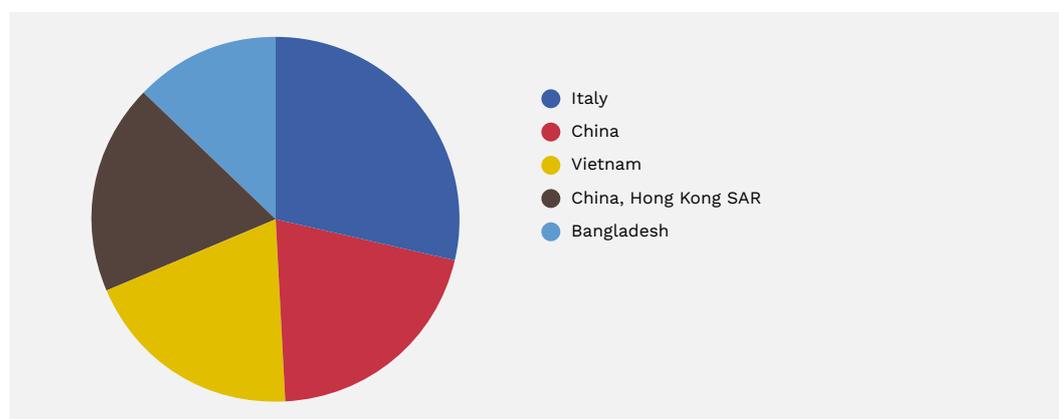
## 6 Export destinations for leather, leather apparel and footwear

### Production and export of leather

Leather produced in Pakistan is either used for further processing in Pakistan or is exported to other countries where further processing takes place. As mentioned above, leather exports have been decreasing.

In 2019, the top export destinations for leather produced in Pakistan were Italy, China and Vietnam. What should be noted is that a part of the leather exported from Pakistan, especially the tanned hides, is meant for further processing into shoes, clothing or other goods in the importing country before it is exported further.<sup>23</sup> See Table 2 for the top 10 export destinations of leather in 2019.<sup>24</sup>

**Figure 3 Leather export destinations from Pakistan 2019**



Source: Graph compiled by SOMO based on data retrieved from the UN Comtrade database<sup>25</sup>

**Table 2 Top 10 leather export destinations from Pakistan in US\$ in 2019**

Rank	Country	Value (US\$)
1	Italy	38,221,403
2	China	27,085,424
3	Vietnam	25,886,479
4	China, Hong Kong SAR	24,602,769
5	Bangladesh	16,952,450
6	Korea	10,820,946
7	Spain	9,776,973
8	Indonesia	9,139,398
9	Cambodia	8,283,123
10	Germany	6,313,884

Source: UN Comtrade<sup>26</sup>

For the EU as a whole, Pakistan is among the top 10 countries that it sources raw hides, skins and (semi)finished leather from. The country was holding up an 8<sup>th</sup> or 9<sup>th</sup> position between 2015-2018 but dropped to 10<sup>th</sup> position in 2019.<sup>27</sup>

**Table 3 Imports of raw hides and skins and leather into the EU-28, 2019**

	Total import value to the EU in (US\$)
	<b>2,458,265,898</b>
Top 10 Countries	Value per country (US\$)
Brazil	346,356,019
USA	330,343,701
India	157,538,293
Nigeria	118,161,133
Turkey	114,601,645
Argentina	101,367,527
South Africa	99,399,604
New Zealand	86,278,196
Serbia	74,806,379
<b>Pakistan</b>	<b>71,903,587</b>

Source: UN Comtrade<sup>28</sup>

Key leather manufacturers include:<sup>29</sup>

- Dada Enterprises (Pvt) Ltd. (Lahore)
- Din Leather Pvt Ltd (Karachi)
- Eastern Leather Co Pvt., Ltd. (Lahore)
- Hafiz Tannery (Karachi)
- H. Sadar Ali Akhtar Ali (Pvt) Ltd. (Lahore)
- Khawaja Tanneries (Pvt) Ltd. (Multan)
- Muhammad Shafi Tanneries (Karachi)
- Prime Tanning Industries Pvt., Ltd. (Muridke)
- Riaz Tanneries (Lahore)
- Royal Leather Industries Ltd (Lahore)

Key buying companies of Pakistan leather include:<sup>30</sup>

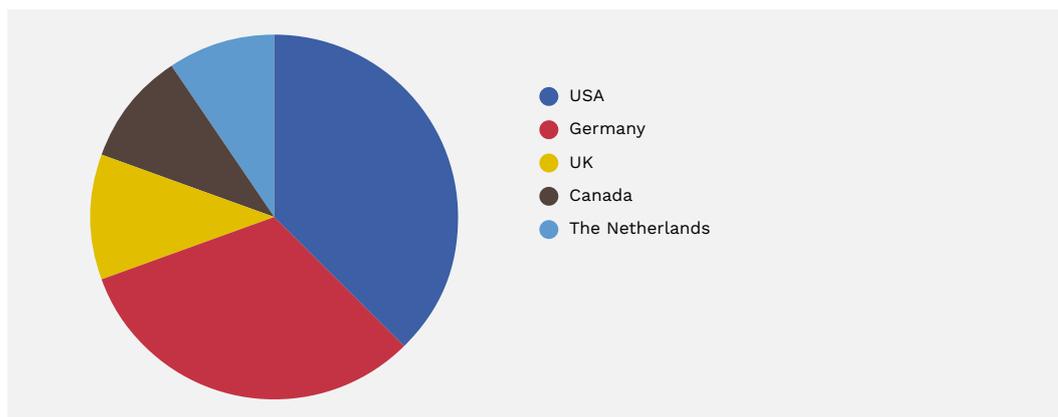
- Almansa Cuero Piel S.L. (Spain)
- Babi Industria Conciaria Srl (Italy)
- Apex Footwear (Bangladesh)
- F.B Footwear Ltd. (Bangladesh)
- Hai Viet Corporation (Vietnam)
- Pellami Due C Sp A (Italy)
- Rizzi Pellami Sp A (Italy)
- Shandong Aolong Footwear Co., Ltd. (China)
- Song Shin (Hk) Group Co., Ltd. (Hong Kong)
- Trion Corporation (Vietnam)

### **Production and export of leather apparel**

In 2019, Pakistan was the world's fifth exporter of leather apparel, after Italy, China, India and France.<sup>31</sup> A particular niche in the sector is the production of leather gloves, including safety gloves, sporting gloves (e.g. boxing) and motor gloves, generating more than half of export revenues of the overarching product group of leather apparel.

Pakistan is a key supplier of leather apparel to the European market. With an export value of US\$ 316 million, it holds a steady second place, after India.<sup>32 33</sup>

**Figure 4 Leather apparel export destinations from Pakistan 2019**



Source: Graph compiled by SOMO based on data retrieved from the UN Comtrade database<sup>34</sup>

**Table 6 Top 10 export destinations for leather apparel in 2019**

Rank	Country	Value (US\$)
1	USA	123,634,991
2	Germany	104,408,887
3	UK	36,961,124
4	Canada	33,300,016
5	Netherlands	29,699,505
6	France	28,437,557
7	Spain	26,851, 897
8	Poland	22,439,772
9	Belgium	18,796,616
10	Italy	18,252,194

Source: UN Comtrade<sup>35</sup>

**Table 4 Imports of leather apparel into the EU-28, 2019**

Total import value to the EU in (US\$)	
<b>1,566,543,120</b>	
Top 10 Countries	Value per country (US\$)
India	471,429,781
<b>Pakistan</b>	<b>316,709,632</b>
China	276,353,228
Switzerland	191,181,037
Turkey	94,679,937
Vietnam	44,826,257
Indonesia	22,953,790
USA	19,200,174
Tunisia	18,057,526
Ukraine	12,885,036

Source: UN Comtrade<sup>36</sup>

**Table 5 Import value EU-28 for Pakistan leather apparel, 2015-2019**

Year	Import value in US\$ per year from Pakistan HS 4203
2015	369,213,832
2016	347,506,706
2017	332,872,073
2018	334,145,712
2019	316,709,632

Source: UN Comtrade<sup>37</sup>

The top export destinations of leather apparel produced in Pakistan are the United States, Germany, the United Kingdom, Canada and the Netherlands. See Table 6 for the top 10 export destinations for leather apparel in 2019.<sup>38</sup>

Key manufacturers of leather apparel include:<sup>39</sup>

- A.R Yousaf (Kasur)
- Aqr Traders Regd. (Lahore)
- Fine Grip Imp. Exp. (Karachi)
- Hafiz Tannery (Karachi)
- Leather Field (Pvt) Ltd. (Sialkot)
- Libermann International (Sialkot)
- Muhammad Ashraf & Sons (Karachi)
- Noor Leather Garments (Pvt) Ltd. (Karachi)
- Nova Leathers (Karachi)
- Sheikh Of Sialkot (Pvt) Ltd. (Sialkot)

Key buying companies of leather apparel include:<sup>40</sup>

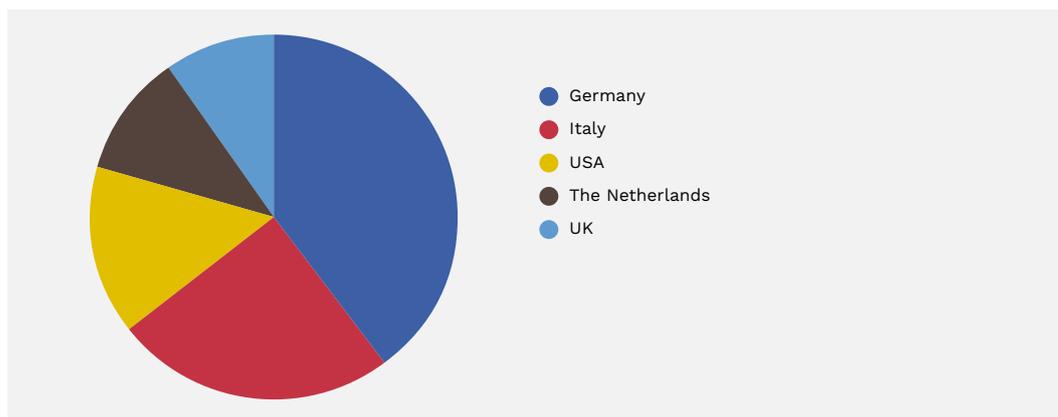
- Bikers Gear Australia Ltd. (Australia)
- H&M (Sweden)
- HM Moden (Germany)
- Itx Trading (Spain), subsidiary of Inditex
- Magid Glove And Safety Mfg. Co. Llc (US)
- Mauritius GmbH International Fashion (Germany)
- Upperclass Fashions Ltd. (UK)
- Walmart (US)

### **Production and export of leather footwear**

The production and export of footwear is of less significance than the leather apparel sub-sector. In the year 2019, exports of (leather) footwear amounted to nearly \$114 million. There appears to be a specific niche of biker boots and footwear for heavier use (work boots, safety boots).

The top export destinations of leather footwear produced in Pakistan are Germany, Italy, the United States, the Netherlands and the United Kingdom. For the EU, Pakistan has taken 16th place since 2015 through 2019 in the list of top countries the EU sources (leather) footwear from. The export value of leather footwear from Pakistan to the EU fluctuated between US\$ 65-82 million in the period 2015-2019.<sup>41</sup>

**Figure 5 Leather apparel export destinations from Pakistan 2019**



Source: Graph compiled by SOMO based on data retrieved from the UN Comtrade database<sup>42</sup>

**Table 7 Top 10 export destinations for leather footwear in 2019**

Rank	Country	Value (US\$)
1	Germany	32,848,696
2	Italy	20,310,017
3	USA	12,280,794
4	Netherlands	8,840,562
5	United Kingdom	7,883,009
6	Spain	4,901,483
7	France	4,629,030
8	Belgium	2,832,783
9	Afghanistan	2,352,818
10	Australia	1,907,761

Source: UN Comtrade<sup>43</sup>

Key manufacturers of leather footwear include:<sup>44</sup>

- Ajwa Industries Pvt Ltd
- Firhaj Footwear Pvt Ltd
- H. Sadar Ali Akhtar Ali (Pvt.) Ltd. (part of Halloki Tanner)
- Service Industries
- Simba Enterprises
- Shafi Lifestyle Pvt Ltd

Key buying companies of leather apparel include:<sup>45</sup>

- Carrefour (France)
- Deichmann (Germany)
- Genesco In (US)
- La Halle (France)
- Levi Strauss & Co (US)
- Novi Footwear (Germany)
- Sterling & Hunt (UK)

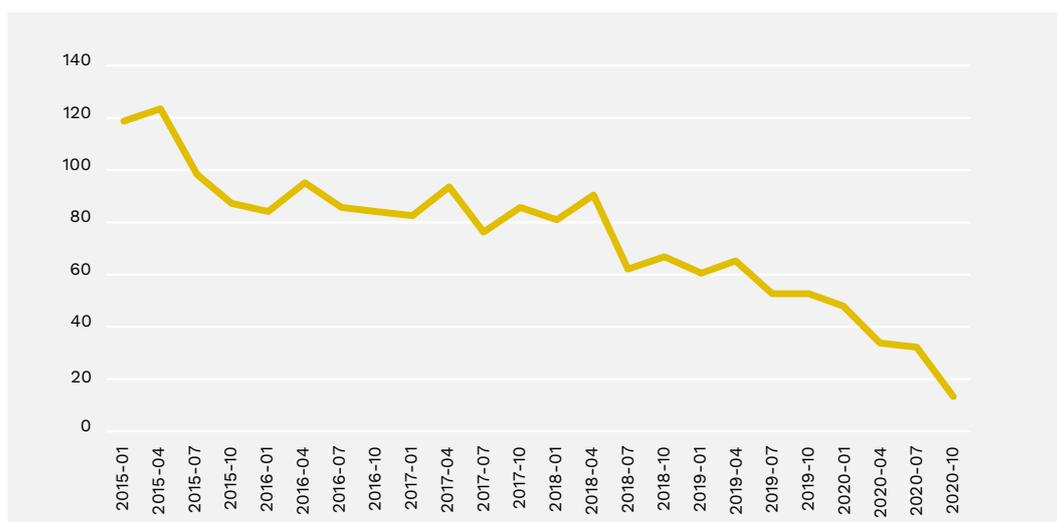
## 7 Impact of the corona pandemic on production and export trends

In 2020, Pakistan's economy was hit by the corona pandemic. End of March 2020 the country was put under a nation-wide lockdown. As of 1 May 2020, measures were partially relaxed, followed by a complete relaxation on the 22nd of May 2020. In order to get an impression of the impact of the corona pandemic on the Pakistan leather industry, shipment information was analysed using the Panjiva database. Data was gathered on quarterly shipments between 2015-2020 to obtain preliminary insights on the influence of the corona pandemic on the export activity of the leather industry in Pakistan. Shipment data shows that, due to the corona pandemic, the Pakistan leather and leather goods sector took a hit as the export value of all leather products took a dive in 2020.

### Corona virus impact on leather exports

Although the export value of hides and (semi)finished leather has never been as low as in 2015, the shipment data shows a steady decline since 2015. The corona pandemic may have exacerbated the dip in export value, but it cannot by itself be the explanation of a yearlong decline in exports.

**Figure 6 Pakistan exports of leather, 2015-2020**

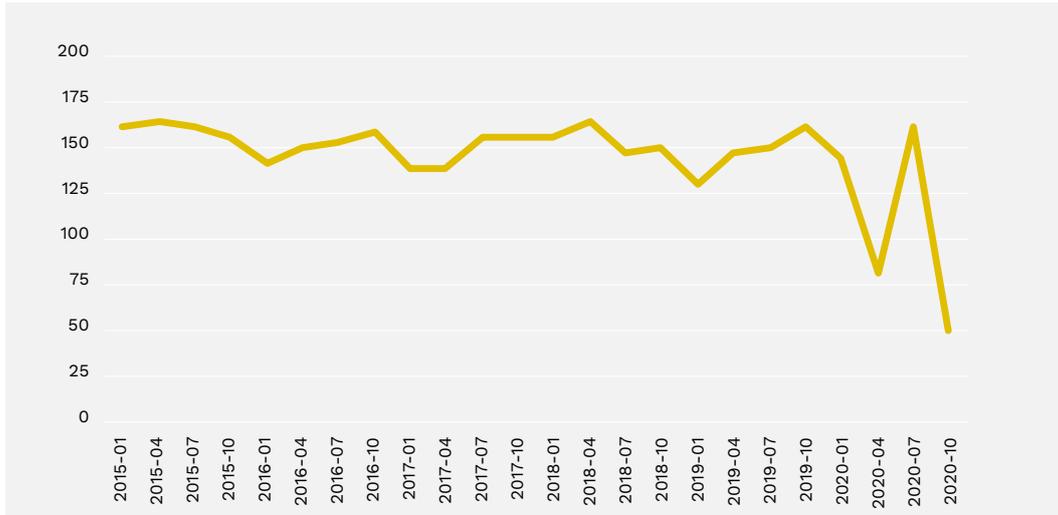


Source: Graph produced by SOMO based on data derived from Panjiva<sup>46</sup>

### Corona virus impact on leather apparel exports

Between 2015 and 2019, the export of leather apparel from Pakistan was quite stable. Shipment data shows that goods were exported with a value of around US\$ 150 million per quarter. This has changed in 2020. There has been a sharp decline in export value in the first quarter of 2020. This was followed by a quarter during which shipments went back to their original stable volume. However, the decline of export shipments resumed in the third quarter with an even steeper drop in shipment value. Given the impact of the corona virus on the world economy, this decline in the export value of leather apparel from Pakistan in 2020, resulting in an all-time low value of shipments, may not be surprising.

**Figure 7 Pakistan exports of leather apparel, 2015-2020**

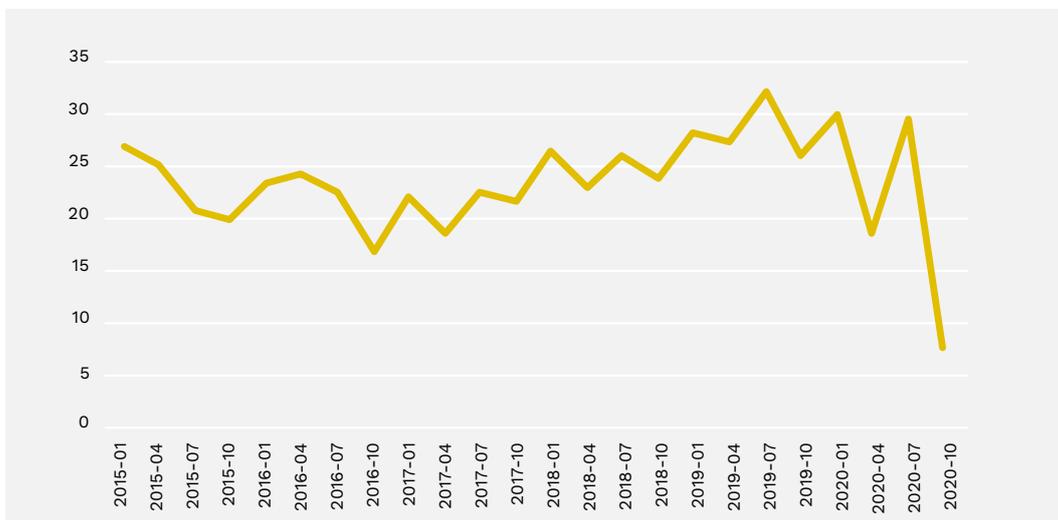


Source: Graph produced by SOMO based on data derived from Panjiva<sup>47</sup>

### **Corona virus impact on leather footwear exports**

Between 2015 and 2019, the export of leather footwear from Pakistan fluctuated. Shipment data shows that, since 2017, a small upward trend in the export of leather footwear could be observed. This trend was broken in 2020. There was a decline in export value in the first quarter of 2020. This was followed by a quarter during which shipments went back to the export volume before the corona pandemic. Yet shipment data from the third quarter of 2020 shows a steep drop in export volume. Given the impact of the corona virus on the world economy, it may very well be this has caused a halt in the upward trend and subsequent decline in shipment value.

**Figure 8 Pakistan exports of leather footwear, 2015-2020**



Source: Graph produced by SOMO based on data derived from Panjiva<sup>48</sup>

## 8 Concluding remarks

This mapping on the Pakistan leather and leather goods industry has shown that this industry is of considerable importance to the Pakistan economy. It is one of the three most important export sectors, generating 4% of export revenues and providing jobs for hundreds of thousands of people.

This research focuses in on production and export trends and looked into three specific sub-sectors: the production of (semi-)finished leather, leather apparel and leather footwear. Particularly the leather apparel sub-sector is an important export revenue generator, with Pakistan holding the 5<sup>th</sup> position worldwide as largest exporter of leather apparel. Within this sub-sector, leather gloves form a specific niche.

The analysis of export trends further zooms in on the impact of the corona pandemic. In 2020, Pakistan's economy was severely hit by the corona pandemic. Shipment data shows that, due to the corona pandemic, the Pakistan leather sector was significantly impacted as the export value of all leather products took a dive in 2020.

This mapping also provides some information on important manufacturers and foreign importers. However, due to the lack of supply chain information it is highly challenging to establish all links – from tanneries to leather goods manufacturers to brands and retailers.

## Annex Manufacturers in Pakistan and international buyers

This overview shows a non-exhaustive list of leather and leather goods manufacturers exporting from Pakistan and their international clients.<sup>49</sup> The overview includes a selection of buyers for each of the manufacturers included in the list. In most cases, this information was retrieved from Panjiva. In some cases, the source of information was the Open Apparel Registry (OAR). In such cases, OAR is mentioned as a source.

Manufacturer name / website	Location	Products	Selection of buyers
<b>Ajwa International</b>	Multan	Leather footwear, leather apparel	Najah Hammoud Foundation Khalaf (Saudi Arabia), Najah Hammoud Foundation Khalaf Al Shammari (Saudi Arabia)
<b>Aqr Traders Regd.</b> <a href="https://www.aqrtrds.com/">https://www.aqrtrds.com/</a>	Lahore	Safety gear, gloves	Superior Glove (Canada), Seiz GmbH (Germany), Tectrader Llc (Canda and USA), Seoz Technical Gloves GmbH (Germany), Top Skin Gloves S.L.(Spain),
<b>AR Yousaf</b>	Lahore		C&A, Shop Direct, John Lewis (OAR)
<b>Cobija Industries</b> <a href="https://www.cobija.biz">https://www.cobija.biz</a>	Sialkot	Leather garments, boots, gloves (motor)	Maximomoto (Spain), Inter Cars SA (Poland), The Merlin Partnership (UK), Tucano Urbano (Italy), Powerbike SA (Poland)
<b>Dada Enterprises (Private) Limited</b> <a href="http://www.dada.com.pk/">http://www.dada.com.pk/</a>	Lahore	Finished leather skins, shoe leather, athletic shoe leather, lining, leather goods, wet-white	Clarks (Clarks tannery list)
<b>Din Leather Pvt Ltd</b> <a href="http://dinleather.dingroup.com/">http://dinleather.dingroup.com/</a>		Goat leather	Da Woo Leahter (South Korea), Conceria Stefania Sp A (Italy), Martin Magnusson & Co Ab (Sweden)
<b>Dk Industries (Pvt) Ltd</b>	Sialkot	Sports gear (incl gloves)	Banks as customers...
<b>Eastern Leather Company Pvt, Ltd.</b> <a href="http://www.easterngroup-pk.com">http://www.easterngroup-pk.com</a>	Lahore	Wet blue producers	Apex Footwear (Bangladesh), Relax Shoes Srl (Italy), Calzaturificio Dei Colli Srl (Italy), Verdi Fashion SpA. (Italy)
<b>Fine Grip Imp. Exp.</b> <a href="http://www.finegripgloves.com">http://www.finegripgloves.com</a>	Karachi	Gloves	Global Love And Safety Mfg. Inc (USA), Performance Fabrics (USA), Marken Mfg (HK), P.H.P.U. Semex Fertacz & Huszno Spj (Germany), Roxy Service Ab (Sweden);
<b>Firhaj Footwear Pvt Ltd</b> <a href="http://www.umergroup.com/firhaj-footwear.html">http://www.umergroup.com/firhaj-footwear.html</a>	Lahore	footwear	Genesco In (US), La Halle (France), Carrefour (France), Sterling & Hunt (UK) - Panjiva, Levi Strauss & Co - OAR
<b>First American Corporation</b> <a href="https://www.facsports.com/">https://www.facsports.com/</a>	Sialkot	Sports apparel and sports gear	Walmart (US - panjiva), VF Corporation (US - OAR)
GM Leather Industries	Karachi	Workwear, safety gear	Leipold + Dohle (Germany, workwear), Revco Industries (US), Stennevad (Denmark), Panjiva
<b>Gold Panel International</b> <a href="https://goldpanelgroup.com/">https://goldpanelgroup.com/</a>	Sialkot	Leather garments, boots, gloves (motor)	Bretta (Austria), Suzuki
<b>H. Sadar Ali Akhtar Ali (Pvt.) Ltd.</b> (part of Halloki Tanner) <a href="http://www.hsaleather.com">http://www.hsaleather.com</a>	Lahore	Footwear leather, bags, garment, gloving leather, footwear leather, split leather suede	Plume Footwear Corporation (China), Groupe Psa (France), Almansa Cuero Piel S.L. (Spain), Pellami Due
<b>Hafiz Tannery</b> <a href="http://www.hafiztannery.com/">http://www.hafiztannery.com/</a>	Karachi	Leather, Leather Garments, Leather bags and accessories	El Corte Ingles (Spain), Mauritius (Germany), Panjiva
<b>Hub Leather</b> <a href="https://www.hub.com.pk/">https://www.hub.com.pk/</a>	Karachi	Leather garments	Just Brands BV (Netherlands), Goose Craft (Netherlands), Mauritius (Germany, Debenhams (UK, OAR), Shop Direct (= The Very Group, UK, OAR)

Manufacturer name / website	Location	Products	Selection of buyers
<b>Ideal Private Ltd</b> <a href="https://ideal-leather.com/">https://ideal-leather.com/</a>	Karachi	Leather garments and leather goods	Pariante (France), Conance (UK), Muuba (UK)
Khawaja Tanneries Private Limited <a href="http://www.ktmleather.com/">http://www.ktmleather.com/</a>	Multan	Shoe, automotive, aviation, upholstery, WB-Split, wet-white, washable leather, garment	Khawaja Ledermoden GmbH (Germany), Youngone Sports Shoes Industries Ltd. (Bangladesh), Shandong Aolong Footwear Co., Ltd. (China)
<b>Leader Tanneries</b> <a href="https://leadertanneries.com/">https://leadertanneries.com/</a>	Kasur	Leather, leather garments, leather bags, leather shoes, leather gloves	Babi Industria Conciaria Srl (Italy)
<b>Leather Coordinator</b> <a href="http://www.leathercoordinator.com">http://www.leathercoordinator.com</a>	Sahiwal	Leather, Leather garments	Mauritius (Germany), JCC Ledermoden Vertrieb (Germany), Upperclass Fashions Ltd (UK), La Bella (Germany), Mainpol (Germany), Adamex SA (France), Pellami Due (Italy)
<b>Leather Crop</b>	Sialkot	Sports gear	B2 Fitness UK Ltd (UK), RDX Sports LLC (US)
<b>Leather Field (Pvt) Ltd</b> <a href="http://leatherfield.com">http://leatherfield.com</a>	Sialkot	leather garments and leather accessories	H&M (Sweden), Bestseller (Denmark), OAR
<b>Leather Stuff</b> <a href="https://www.leatherstuff.com/">https://www.leatherstuff.com/</a>	Sialkot	Leather garments & accessories (motor)	Bikers Gear Australia Ltd. (Australia), Xxr Sports & Garments (UK), Panjiva
<b>Leathertex Group</b> (Leathertex Gloving, Leathertex Tanneries) <a href="https://www.leathertex.com.pk/">https://www.leathertex.com.pk/</a>	Lahore	Leather, Leather gloves, shoes, bags	Leathertex Group: Leathertex Gloving, Jah GmbH (Germany), Honeywell Safety (France), Baca Safety (UK), Beeswift Ltd (UK), Sir Safety Systems Spa (Italy), Leathertex Tanneries: Apex Footwear (Bangladesh), Tusting & Burnett 1938 Ltd (UK), Dawoo Leather (South Korea)
<b>Libermann International</b>	Sialkot	Leather gloves	Wells Lamont Industries (USA), Smi Groups (UK), Clas Ohlson Ab (Sweden), Birchwood (UK), Ab Safety Nv Nv (Germany)
<b>Little Wood Corp. (Pvt) Ltd.</b>	Pasrur	safety apparel, motor gloves	Heino Büse Mx Imp. GmbH (Germany), Motodirect Ltd (UK)
<b>Madina Oasis</b> <a href="https://madinaoasis.com/">https://madinaoasis.com/</a>	Karachi	Leather and leather garments	R&D Leather Ltd. (UK) ...
<b>Manawar Industries</b> <a href="http://www.manawarind.com/">http://www.manawarind.com/</a>	Sialkot	leather and leather garments	Milestone Sportswear Handels GmbH (Germany), Khawaja Ledermoden (Germany), Donders BV (Netherlands)
<b>Muhammad Ashraf &amp; Sons</b>	Karachi	Leather apparel	Mauritius GmbH International (Germany), Punto Fa SL (aka Mango) (Spain), G Lii Apparel Group (USA), Sq Trade Ltd (Latvia), Conbipel SpA (Italy), Fonz Leather Styles Ltd (UK), Khawaja Ledermoden GmbH (Germany)
<b>Muhammad 'Shafi' Tanneries (Pvt) Limited</b> <a href="https://www.leathernaturally.org/Our-Story/Our-members/Shafi">https://www.leathernaturally.org/Our-Story/Our-members/Shafi</a>	Karachi	Chamois leather, athletic footwear leather, lining leather, vegetable tanner, chrome free	Clarks (Clarks tannery list), Young Tree Industries (part of Stella International), Golden Step Indonesia, Golden Star Co (part of Stella International), Lorenz Shoe Group (Hungary)
<b>Noor Leather Garments Ltd.</b> <a href="https://www.noorleather.com/">https://www.noorleather.com/</a>	Karachi	Leather, leather garments, leather accessories	Lanka Leather Fashion Ltd. (Sri Lanka), Cop Vertriebs GmbH (Germany), Mauritius GmbH International Fashion (Germany), Pepe Jeans (Spain), Cop Vertriebs GmbH (Germany), Mauritius (Germany), Pepe Jeans (Spain), Zeeman (Netherlands), Arma Leder B.V. (Netherlands), Panjiva
<b>Nova Leather Pvt Ltd</b> <a href="http://www.nova.pk">www.nova.pk</a>	Karachi	Leather, leather garments, leather accessories	Inditex (Spain), El Corte Ingles (Spain), DK Company (Denmark), ITX Trading, Panjiva
<b>Pakistan Tannery</b> <a href="http://www.pakistantannery.com/html/company_profile.html">http://www.pakistantannery.com/html/company_profile.html</a>	Lahore & Gujranwala	Leather, leather garments, leather	Member(s) of the Dutch Agreement on Sustainable Garments and Textile (OAR)

Manufacturer name / website	Location	Products	Selection of buyers
<b>Perfect Gloves Manufacturer Co</b> <a href="https://perfectglovesmfg.com">https://perfectglovesmfg.com</a>	Karachi	Safety gloves	Granbert AS (Norway), Magid Glove and Safety Manufacturing (US)
<b>Prime Tanning Industries</b> <a href="https://www.prime.com.pk/">https://www.prime.com.pk/</a>	Muridke	Cow and buffalo leather	FB Footwear (Bangladesh), Top Logistics ( Hong Kong ) Ltd., Alpina Tovarna Obutve D.O.O. (Slovenia)
<b>R&amp;D Leather Karachi</b>	Karachi	Leather, leather garments	Next (OAR), Felldale Retail (UK), R&D Leather (UK), Panjiva
<b>Ratra Leather Field (Pvt) Ltd</b>	Sialkot	Leather garments	H&M (Panjiva), AGT (OAR, 3x)
<b>Riaz Tanneries</b> <a href="https://www.riaztanneries.com/">https://www.riaztanneries.com/</a>	Lahore	Leather garments	Partnership for Sustainable Textiles (OAR), Mainpol GmbH (Germany), Goose Craft (The Netherlands), Fracopel Sp A (Italy), Khawaja Ledermoden GmbH (Germany), Kadena Sportswear (Bangladesh), Ricano Lederbekleidung GmbH, AGT (OAR), Goose Craft (Netherlands), Mainpol (Germany), Khawaja Ledermoden (Germany), Trion Corporation (vietnam), Rizzi Pellami SpA (Italy)
<b>Richa Leathers</b>	Karachi	Leather garments & gloves (motor)	Detlev Louis Motorrad-Vertriebsgesellschaft mbH (Germany), Polo Motorrad und Sportswear (Germany), Racer Outdoor (Austria)
<b>Royal Leather Industries Ltd.</b> <a href="https://royalleatherind.com/">https://royalleatherind.com/</a>	Lahore	Leather, leather rugs, leather cushions, jackets, bags	Hai Viet Corporation (Vietnam), Hai Vina Co., Ltd., Da Woo Leather (South Korea), Harald Meisenbach GmbH+Co (HM Moden, Germany)
<b>Service Industries</b> <a href="http://www.servisgroup.com/">http://www.servisgroup.com/</a>	Gujrat and Muridke	footwear	Deichmann (Germany)
<b>Shafi Pvt Ltd / Shafi Lifestyle Pvt LTD</b> <a href="http://www.shafishoes.com">http://www.shafishoes.com</a>	Lahore	footwear	Shafi: Novi Footwear (Germany, Wortman Group), La Halle (France), Carrefour (France), Shafi Lifestyle: Deichmann SE
<b>Sheikh Of Sialkot (Pvt) Ltd.</b> <a href="http://sheikhofsialkot.com">http://sheikhofsialkot.com</a>	Sialkot	Leather and leather apparel	El Corte Ingles (Spain), Inditex Avenida de la Diputacion (Spain), Inditex S.A. (Spain), Mauritius GmbH (Germany), PT Shou Fong Lastindo (Indonesia), Esprit Europe Services GmbH (Germany), Sq Trade Ltd (Russia),
<b>Siddiq Leather Works (Pvt) Ltd.</b> <a href="http://www.siddiqleather.com">http://www.siddiqleather.com</a>	Lahore	Footwear leather, lining leather, automotive, upholstery, leather suede	Golden Step Indonesia, Marubeni Corporation (Japan), Luher (Spain)
<b>Simba Enterprises</b> <a href="https://simbaentp.com.pk/">https://simbaentp.com.pk/</a>	Karachi	Leather footwear, leather apparel	Shalimar Shoes Gs Ltd (UK), Societe Saffron SARL (Madagascar)
<b>Sincere International</b> <a href="https://sincereinternational.com/">https://sincereinternational.com/</a>	Karachi	Leather garments	Bestseller (Denmark – OAR), Cph Fashion (Denmark), Mos Mosh (Denmark), Minimum (Denmark), Printemps (France) - Panjiva
<b>VIP Group / VIP Wears Pvt (Ltd)</b> – tannery unit <a href="https://www.vipgroup.com/">https://www.vipgroup.com/</a>	Karachi	Leather, leather apparel, garments, and motorbike,	VIP Group: C&A (C&A supplier list) VIP Tannery Unit: Tchibo (OAR), DKNY, C&A, Zara,
<b>Vivify International</b> <a href="www.vivifyintl.com">www.vivifyintl.com</a>	Sialkot	Leather garments and gloves	Goose Craft (Netherlands - Panjiva), Ibana BV (Netherlands, Panjiva) AGT (2x), WE (Netherlands) - OAR
<b>Yousaf Tanneries</b>	Kasur	leather, leather garments	Karya Idaman Bersama (Indonesia), Song Shin (Hk) Group Co., Ltd. (Hong Kong)

## Endnotes

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- 15 Pakistan Economic Survey 2018-2019 Finance Division: Government of Pakistan, <[http://www.finance.gov.pk/survey/chapters\\_19/Economic\\_Survey\\_2018\\_19.pdf](http://www.finance.gov.pk/survey/chapters_19/Economic_Survey_2018_19.pdf)>, p. 127.
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- 27 This data does not include trade between EU-28 countries
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- 30 Based on data retrieved from Panjiva. Companies that source leather (with HS code 41) from Pakistan, in the period 1 January to 30 November. ordered on export value.
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## Colophon

### Trends in production and trade Leather products from Pakistan

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#### **Together for Decent Leather**

Together for Decent Leather is a three-year programme, carried out by a European-Asian consortium of seven civil society organisations. Our goal is to improve working conditions and to reduce labour rights abuses, focusing on production hubs for leather products in South Asia – in particular in Vellore and Chennai districts in Tamil Nadu, India; greater Karachi in Pakistan; and the greater Dhaka region in Bangladesh.

Together for Decent Leather works to secure increased commitment from companies to fulfil their human rights due diligence obligations and governments to put in place safeguards and regulation to improve adherence to international labour standards.

For more information, see [www.togetherfordecentleather.org](http://www.togetherfordecentleather.org)