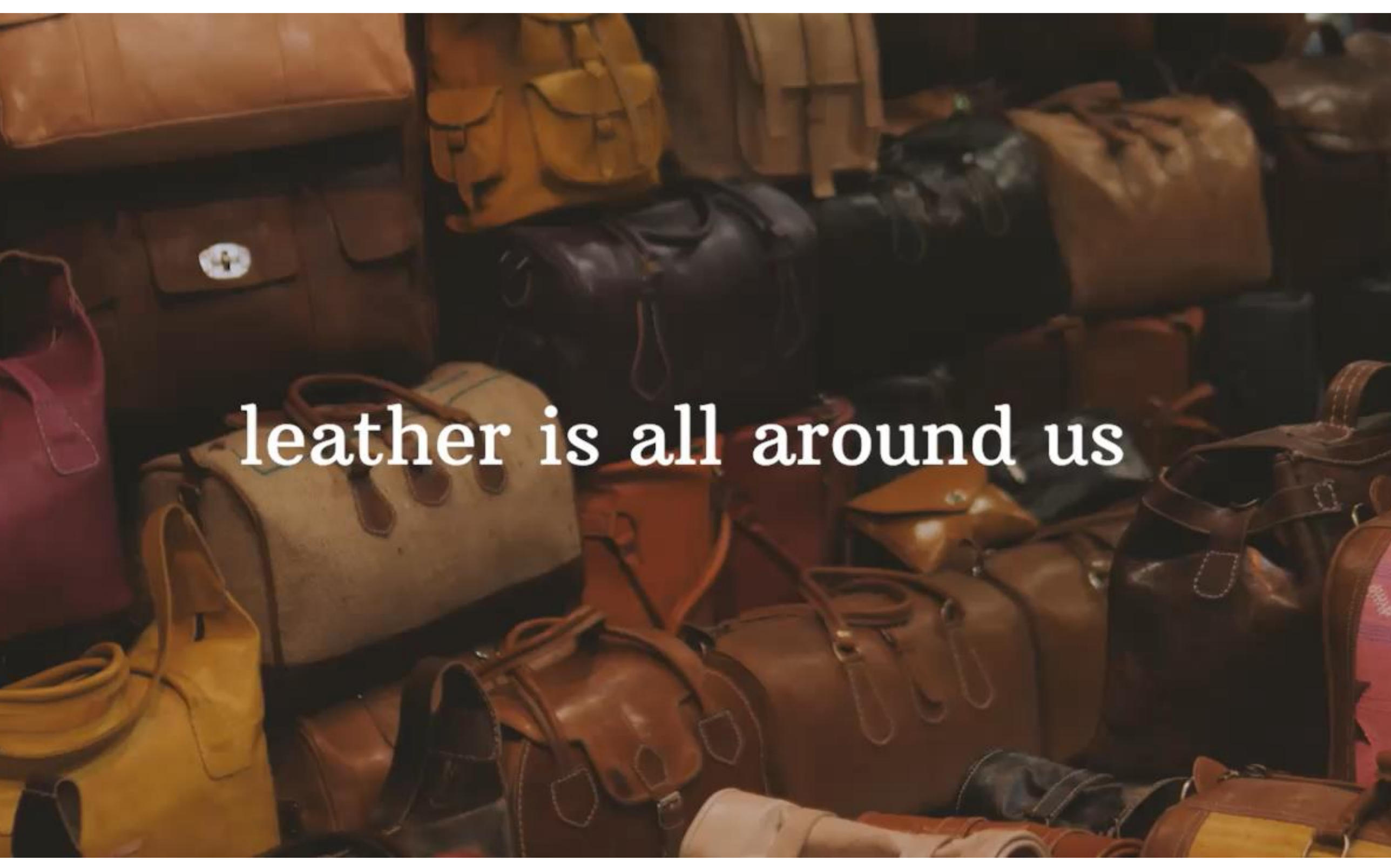
2026 LHCA Annual Meeting



LEATHER AND HIDE COUNCIL OF AMERICA

CELEBRATING 250 YEARS WHERE QUALITY ENDURES

Leather & Hide Council of America Guidelines 2026


leather is all around us

WHAT WE BELIEVE IN



VISION

100% utilization of the hides provided by the meat and dairy industries to make beautiful, durable and long-lasting consumer products



MISSION

We champion leather as a readily available, superior and sustainable material for footwear, automobile interiors, leather goods and furniture



VALUES

Integrity

Transparency

Innovation



MEETING AGENDA

01 Welcome and Call to Order
02 Sponsors
03 Anti-Trust Statement
04 Approve Meeting Minutes

01 General Association Business
02 Executive Committee and Board Business
03 Upcoming Meetings

01 Budget, Membership and Financial Report
02 LRL and Foundation Updates
03 Marketing Program Updates

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WHERE QUALITY ENDURES

Sponsors

Diamond

Prime Vessel

Platinum

Palmetto Industries, Tyson, Momentum/POD, JBS, Maxfield Report

Gold

National Beef Leathers, Cargill

Silver

TFL

LHCA Statement for Anti-Trust Compliance

There shall be no discussion or activities for the purpose of arriving at any understanding or agreement regarding price, the terms or conditions of sale, distribution, volume of production, territories, or customers.

There shall be no discussion or activity for the purpose of preventing any person or persons from gaining access to any market or customer for goods or services, not any agreement or understanding to refrain from purchasing or using any material, equipment, services, or supplies.

LHCA expects your consideration and full compliance with these guidelines, both while in attendance at this LHCA meeting and at all times in your business.

APRIL 2026 bod meeting minutes

LHCA’s Board of Directors met in a hybrid format on April 14, 2026.

key market updates

TM Monterrey, Mexico - 13 Mexico Tannery Buyers / Executives
RTM China and Mexico - 22 Buyers / Executives at Our AGM
TM Vietnam - November 9 - November 12, 2026
TM India - CLE is ready for us.
RTM Indonesia/Thailand and India
Time for your feedback - Where else should we go?!

Board Business

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Nominating Committee

The President of LHCA has requested that the co-chairs convene a Nominating Committee next summer. Rony Ayala will move into the Immediate Past Chair role following the 2027 annual meeting.

The Nominating Committee will also determine nominees for any openings on the Executive Committee and Foundation Board.

Board of Directors

Current Leadership

David Seaver, Co-Chair 2026

Rony Ayala, Co-Chair 2027

Sarah Drayna 2028

Bradley Grove 2026

David McCullough 2028

Shane O’Connell 2026

Mike York - Past Chair 2026

Executive Committee Nominations

Bradley Grove: Co-Chair 2029

Steve Schroeder- Treasurer 2029

Alex Luviano: At-large 2029

Betsy Hines: At-large 2029

EC Business/ BOD Vote

Elections

Nominated for Co-Chair:	Bradley Grove, (Twin City Hide)
Nominated for Treasurer:	Steve Schroeder, Jr. (Atlas Refinery)
Nominated for Executive Committee:	Alex Luviano (Harland Braun)
Nominated for Executive Committee:	Betsy Hines (SB Foot/Redwing)

New Members (2026)

Luxpel LLC

We’re moving



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Membership

Company	Representative
Moore and Giles	Beverly McAuley
Cargill Meat Solutions	Andrew Courtney
The Maxfield Report	Ken Maxfield
Southwide Hide	Addison Girdner
National Beef Packing	Janio Rocha
Tennessee Tanning/Rawlings	Mike York

Branding

Company	Representative
JBS	Adam Vrijhof
Mohawk Trading	Chris Mullally
Prime Vessel	Ryan Casey
S.B. Foot Tanning Co/RedWing	Betsy Hines
Tyson Foods, Inc.	Monica Gileta
Twin City Hide	Andrew Eilers

Checkoff

Company	Representative
Cargill Meat Solutions	David McCullough
JBS	Dave Seaver
National Beef Packing	John Hochstein
Tyson Foods, Inc.	Shane O’Connell
AJ Hollander	Mike Larson
Southwide Hide	Jay Jensen
Harland M. Braun	Alex Luviano
Twin City Hide	Brad Grove

POLICY UPDATE

EUDR

Leather is formally out of the EU Deforestation Regulation, effective September 14.

Why it matters: The Delegate Act clearing hides, skins, and leather from EUDR scope completed its two-month parliamentary scrutiny period without objection and was published in the EU Official Journal on September 14, 2026, making the exclusion binding law. The decision follows two years of evidence-based engagement by COTANCE, UNIC, LHCA (USDA,USTR), and their partners, grounded in peer-reviewed science: an independent study using more than 94 million data records found no scientific evidence linking leather to deforestation.

Policy Updates

China:

Xi and Trump agreed to a one-year trade truce at a meeting in South Korea last October. The deal, which was set to expire in November, will now be extended to Jan. 10, Bessent said. He added that Beijing needs to fulfill more deliverables.

US, China unveil list of goods eligible for $60B in tariff cuts, but no timeline: U.S. agriculture products and Chinese-made toys are among the lists of products that could be eligible for tariffs cuts down the road, according to new U.S. and Chinese government statements released following President Donald Trump's

Canada:

Tariff Work

Mexico:

Negotiations Ongoing (Transshipment)

Budget, Membership and Financial Report

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MEMBERSHIP UPDATE

54 members - no net change when applications and drops are factored in

Membership applications - Luxpel LLC (- TexPac)

Dropped memberships - American Leather Direct

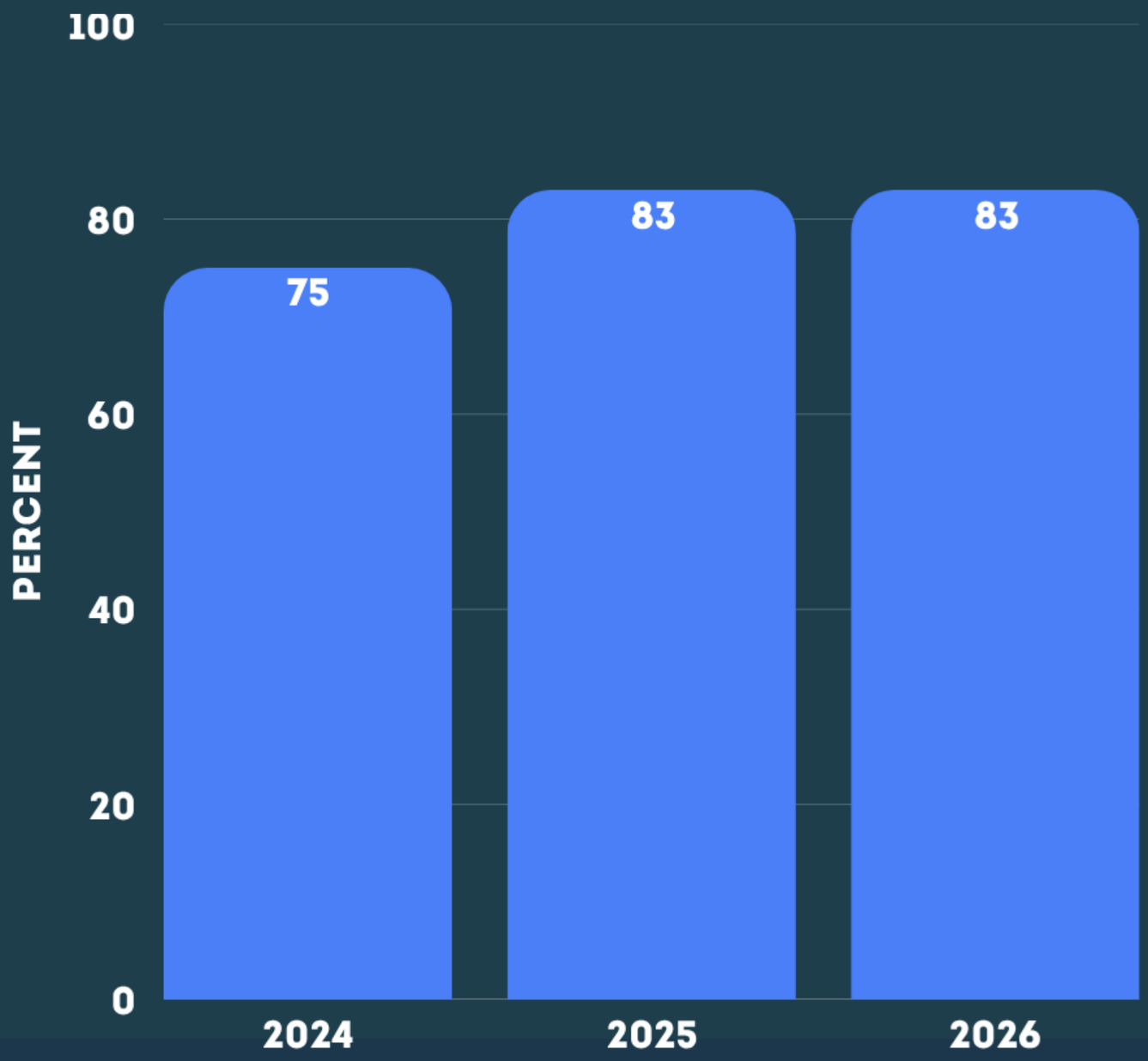
Membership composition

38 producer members

9 associate members

7 supporting members

Dues Collection (Cash Basis)



GROWTH MEMBERSHIP COMMITTEE

Prospective Members

- Portfolio International/Jesse Rector
- DR Diedrich & Co
- Seidel Tanning Corp.
- Thiele Tanning Co.
- Colonial
- Broleco
- Pergamina
- Pearl
- Perone
- Hide House
- Tandy
- Packers/processors?
- LRL course attendees
- Other ALCA Members



LHCA Financial Overview

YTD through August 31, 2026

Financial Snapshot

Total Revenue: $324,827

Total Expenses: $265,811

Change in Net Assets: +$59,016

Cash: $331,020

Accounts Receivable – USG: $615,883

Trade Accounts Payable: $783,384

Revenue & Expense Highlights

- Membership dues remain the primary revenue source at approximately $286,000 YTD.
- Meeting-related income totals approximately $38,500 YTD.
- Contract services represent the largest expense category at approximately $162,000.
- Office expenses total approximately $73,000.

Key Takeaway:

LHCA reports a positive YTD operating result of approximately $59,000 through August. Receivables and payables remain significant, making reimbursement, collection, and payment timing important to ongoing cash management.

Upcoming Meetings

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MEETINGS

Spring 2027 Meeting

March 26: Good Friday
March 28: Easter Sunday
April 15: Tax Day
April 19: Patriot's Day
April 21-29: Passover
April 22: Earth Day
May 2: Orthodox Easter
May 3-4: Yom HaShoh

Fall 2027 Meeting

Holidays and Events

ACLE: September 1-3
Lineapelle: TBC likely September 14-16 or 23-25
October 10-11: Yom Kippur
October 10: Chicago Marathon
October 11: Columbus Day
October 15-22: Sukkot
October 23-24: Simchat Torah

Have we missed anything?

LRL and Foundation Updates

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Foundation BOD

Current Leadership

Tim Ng Chair 2028

Steve Schroeder, Atlas, Treasurer 2027

Kerry Brozyna, Secretary

Paul Bell, Law 2026

John Thompson, Tannin 2028

Adam Simon, ISA 2028

Drew Gullick, Herman Oak 2028

Foundation BOD Nominations

LRL Financial Overview

Financial Snapshot

Total Revenue: $571,809
Total Expenses: $594,220
Change in Net Assets: –$22,411
Cash: $104,327
Trade Accounts Receivable: $73,721
Trade + AmEx Payables: approximately $126,000

Revenue & Expense Highlights

Research and testing revenue totals approximately $553,000 YTD.
Testing fees are the primary revenue source at approximately $506,000.
Major expenses include:

- Compensation: approximately $288,000
- Benefits: approximately $102,000
- Laboratory expenses: approximately $74,000
- Depreciation: approximately $50,000

Total revenue is approximately $572,000, compared with approximately $574,000 for 2025.

Key Takeaway:

LRL is reporting a modest YTD deficit of approximately $22,000 through August. Testing continues to drive the majority of laboratory revenue, while compensation, benefits, and laboratory operations represent the largest expense areas.

Foundation Investment

2024–2026
Jan–Sept 23

ENV# CEBTPMPWBBBTHBR_BBBBB
J.W. COLE FINANCIAL, INC
4301 ANCHOR PLAZA, SUITE 450
TAMPA, FL 33634

FORD FOWLER

Securities offered through J.W. Cole Financial, Inc. (JWC)Member FINRA/SIPC.
Advisory services offered through J.W. Cole Advisors, Inc. (JWCA)
Ford Fowler Wealth Management and JWC/JWCA are unaffiliated entities.

FOUN OF LEATHER RES LAB OF THE
TANNERS COU AMERICA
1150 CONNECTICUT AVE NW
12TH FLOOR
WASHINGTON DC 20036

STATEMENT FOR THE PERIOD AUGUST 1, 2026 TO AUGUST 31, 2026

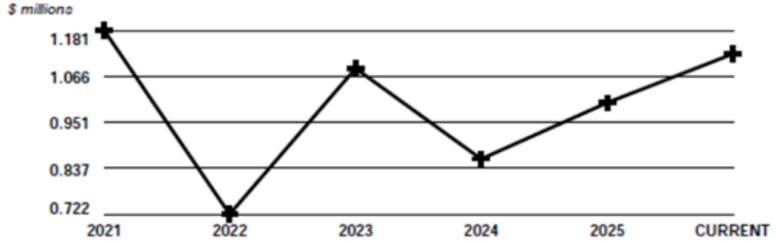
FOUN OF LEATHER RES LAB OF THE TANNERS COU AMERICA - Corporation
Account Number: DZN-005407

FINANCIAL PROFESSIONAL
Steven Ford/Robert Fowler
RR#: SFF

For questions about your accounts:
Local: 973 701 6161
In-State: 973 701 6161
National: 973 701 6161

BEGINNING VALUE OF YOUR PORTFOLIO	$1,099,834.80
TOTAL VALUE OF YOUR PORTFOLIO	$1,122,529.61

CHANGE IN VALUE OF YOUR PORTFOLIO



Change In Value Of Your Portfolio *information can be found in Miscellaneous Footnotes at the end of this statement.*

Account carried with National Financial Services LLC, Member NYSE, SIPC

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REVENUE BY MONTH

2024–2026 | January–September 23, 2026

Month	2024 ($)	2025 ($)	2026 ($)
January	$46,364	$64,237	$53,938
February	$96,449	$137,580	$150,356
March	$165,103	$213,339	$244,882
April	$244,371	$292,185	$340,507
May	$308,192	$379,550	$411,118
June	$404,503	$445,054	$467,466
July	$463,039	$504,169	$514,805
August	$531,613	$581,936	$567,010
September	$596,261	$644,864	$644,583
October	$669,945	$724,108	
November	$753,517	$767,044	
December	$824,767	$835,501	

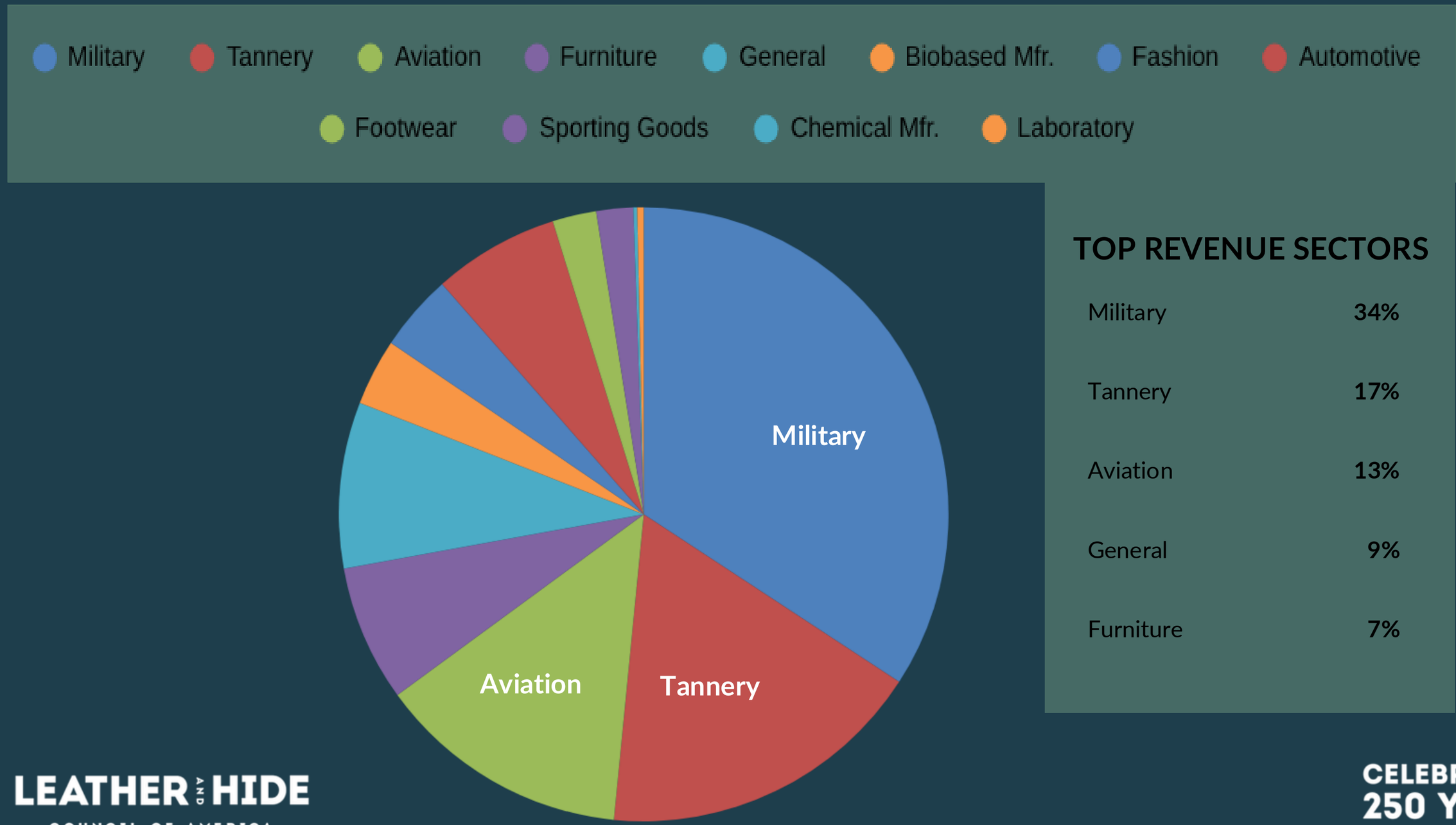
REVENUE BY SECTOR – 2026

January–August 2026

Sector	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Total
Military	$19,363	$24,916	$35,480	$36,481	$33,562	$15,545	$16,234	$12,287	$193,866
Tannery	$10,965	$9,635	$28,516	$16,818	$7,048	$19,118	$4,113	$2,298	$98,510
Aviation	$2,717	$29,571	$16,596	$22,123	–	$3,217	$1,250	$609	$76,083
Furniture	$1,542	$1,584	$1,445	$6,195	$13,757	$9,395	$6,369	$464	$40,750
General	$6,318	$8,569	$2,171	$609	$5,111	$2,400	$4,971	$19,452	$49,601
Misc	$19,351	$30,712	$12,490	$14,008	$16,313	$9,004	$19,373	$36,547	$157,801
GRAND TOTAL	$53,938	$96,418	$94,527	$95,625	$70,680	$56,279	$47,339	$52,205	$567,010

REVENUE BY SECTOR

January–August 2026 | $567,010 total revenue



TOP REVENUE SECTORS

Military	34%
Tannery	17%
Aviation	13%
General	9%
Furniture	7%

LEATHER AND HIDE COUNCIL OF AMERICA

CELEBRATING 250 YEARS WHERE QUALITY ENDURES

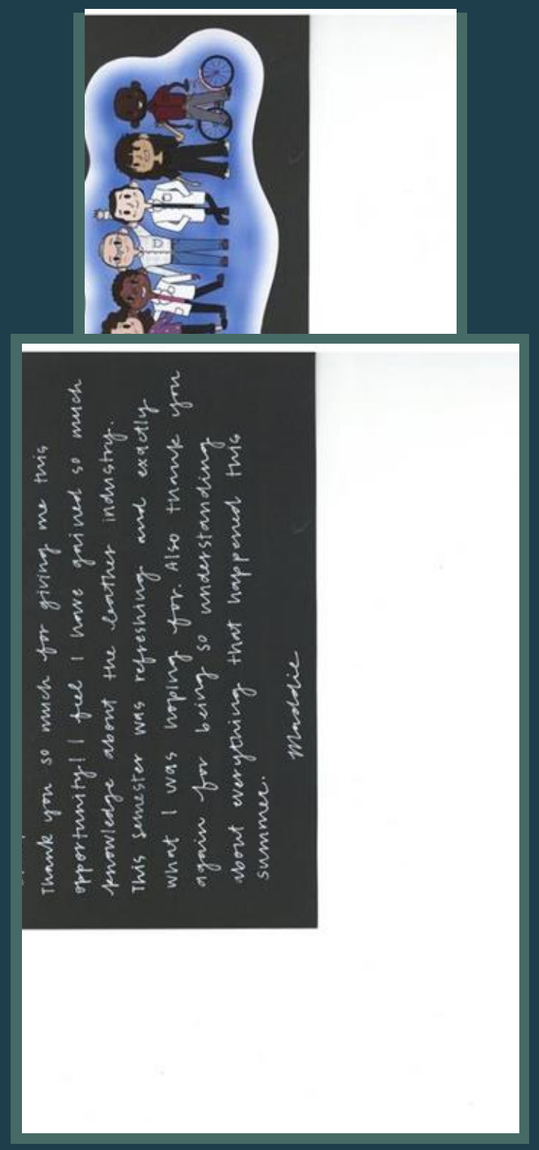
EDUCATIONAL EFFORTS

Fall LOC Registrations

Company	Job Title	Location
FORD	Seat Trim Engineer	Birmingham, MI
Canada Border Services Agency	Scientific Advisor	Ottawa, Canada
ICHCare Inc.	Principal Consultant	Orlando, FL
Kabarnet University College	Deputy Principal Academic and Student Affairs	Kabarnet, Kenya
Kabarnet University College	Principal	Kabarnet, Kenya
LION First Responder PPE	Senior Product Developer	Dayton, Ohio
Dassault Falcon Jet	Leather and Material Specialist Engineer	Little Rock, AR
HONDA HDMA	Product Engineer	Marysville, OH
HONDA HDMA	Product Engineer	Marysville, OH
HONDA HDMA	Product Principal	Greensburg, IN
HONDA HDMA	Product Engineer	Greensburg, IN
HONDA HDMA	Product Engineer	Marysville, OH

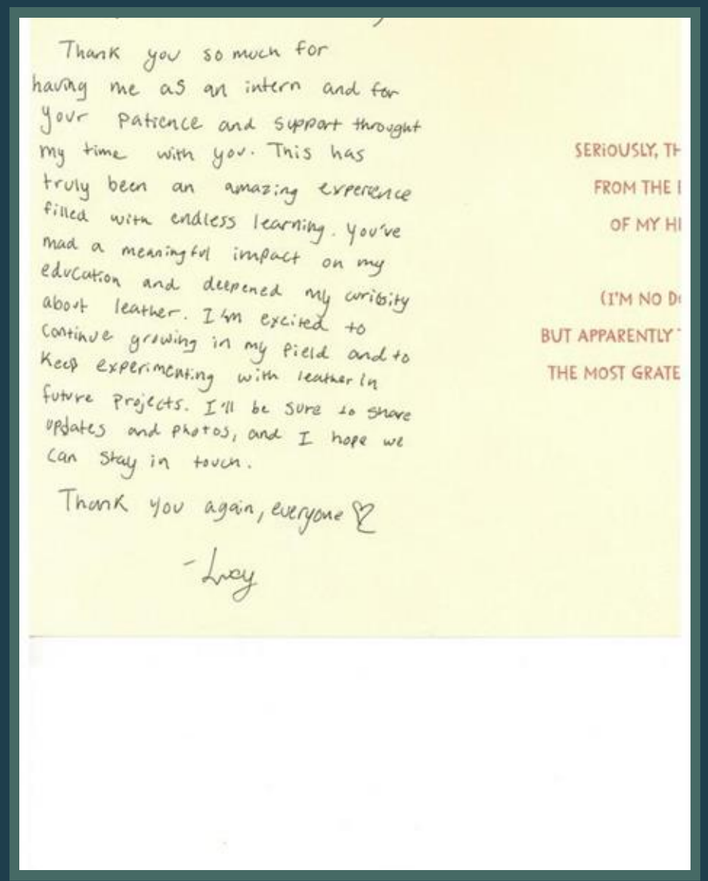
CO-OP STUDENT THANK YOU NOTES

Student reflections and appreciation



Thank you so much for giving me this opportunity! I feel I have gained so much knowledge about the leather industry. This semester was refreshing and exactly what I was hoping for. Also thank you again for being so understanding about everything that happened this summer.

Madelie



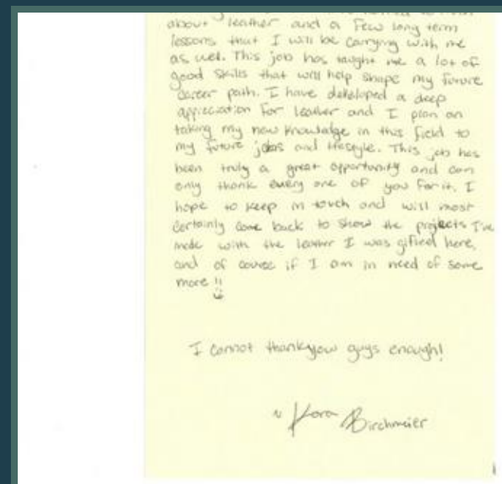
Thank you so much for having me as an intern and for your patience and support throughout my time with you. This has truly been an amazing experience filled with endless learning. You've had a meaningful impact on my education and deepened my curiosity about leather. I'm excited to continue growing in my field and to keep experimenting with leather in future projects. I'll be sure to share updates and photos, and I hope we can stay in touch.

Thank you again, everyone ♡

- Lucy

SERIOUSLY, TH
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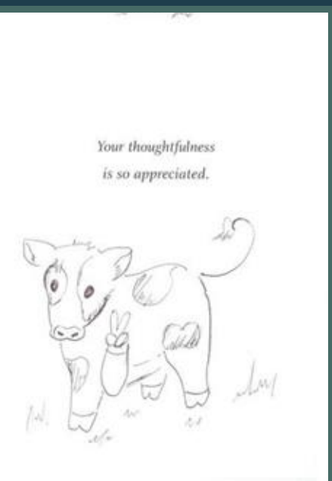
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BUT APPARENTLY
THE MOST GRATE



about leather and a few long term lessons that I will be carrying with me as well. This job has taught me a lot of good skills that will help shape my future career path. I have developed a deep appreciation for leather and I plan on taking my new knowledge in this field to my future jobs and lifestyle. This job has been truly a great opportunity and am only thank every one of you for it. I hope to keep in touch and will most certainly come back to show the projects I've made with the leather I was gifted here, and of course if I am in need of some more !!

I cannot thankyou guys enough!

- Kara Birchmeier



Your thoughtfulness
is so appreciated.

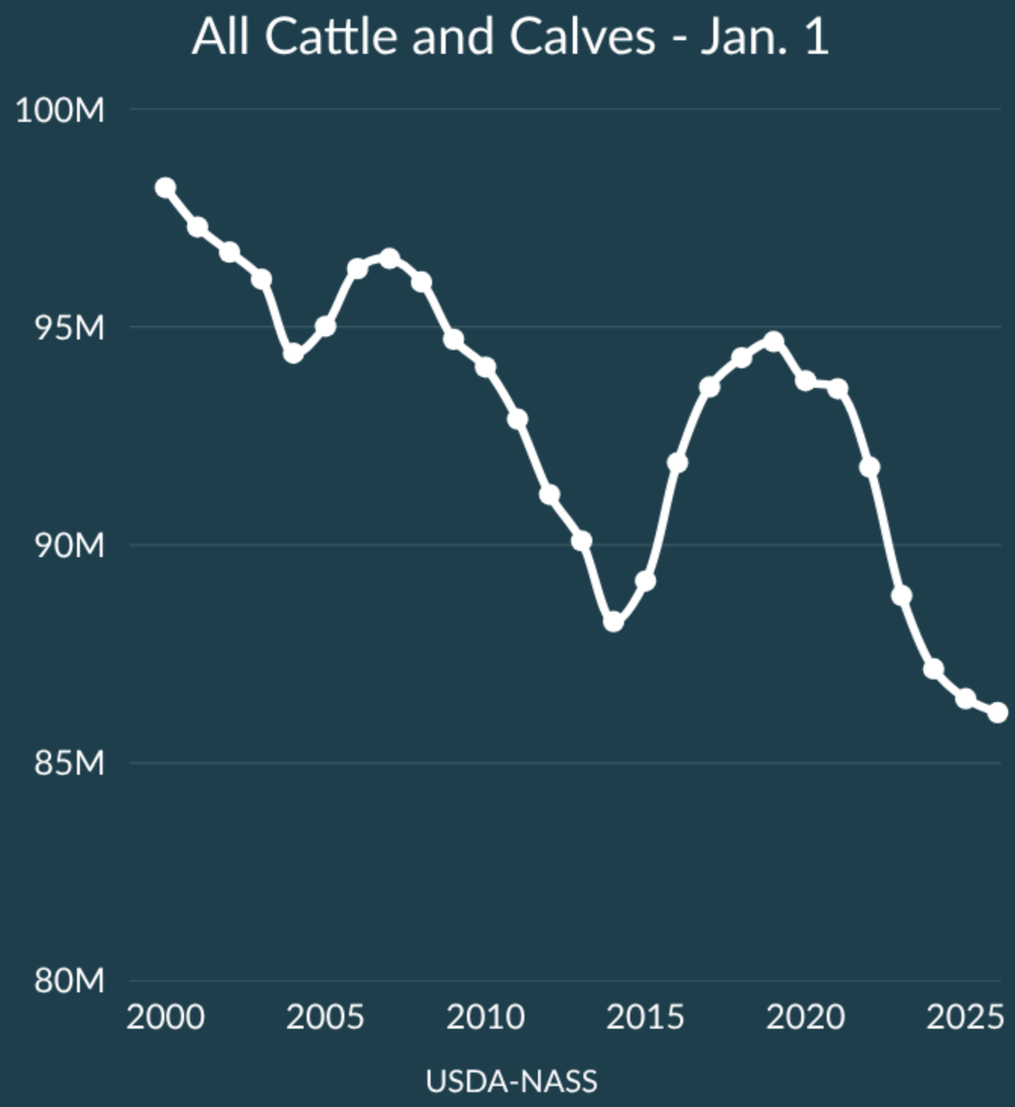
MaCRo and demand

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u.s. cattle and beef update

July 2026 - year to date



Cattle herd totaled 86.2m head on Jan. 1, 2026, a new low.

Drought has returned and further delayed the prospect of a herd rebuild.

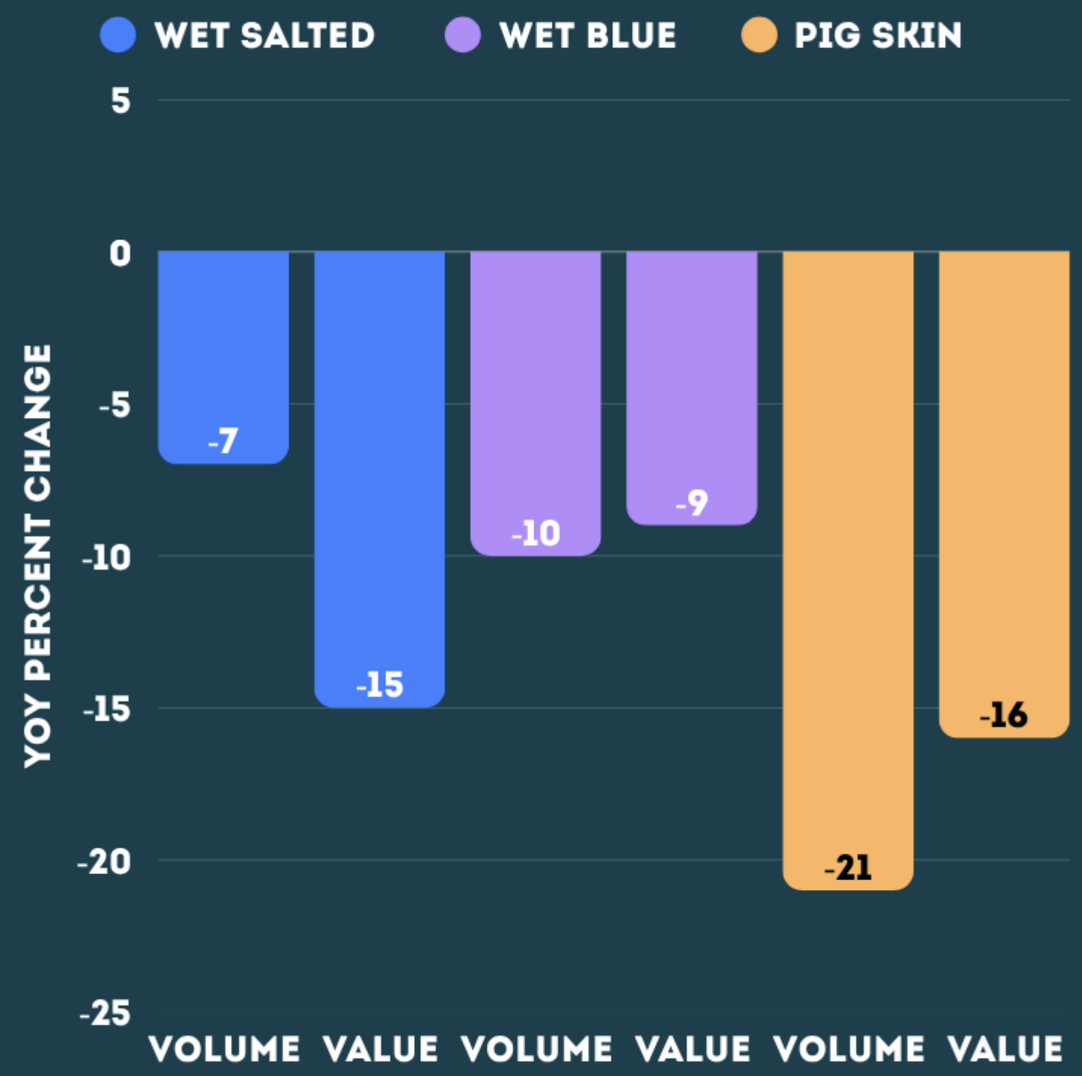
Political intervention in cattle/beef markets

Climate patterns: El Niño may bring needed precipitation to parts of cattle country

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Exports (Jan. - July 2025 & 2026)

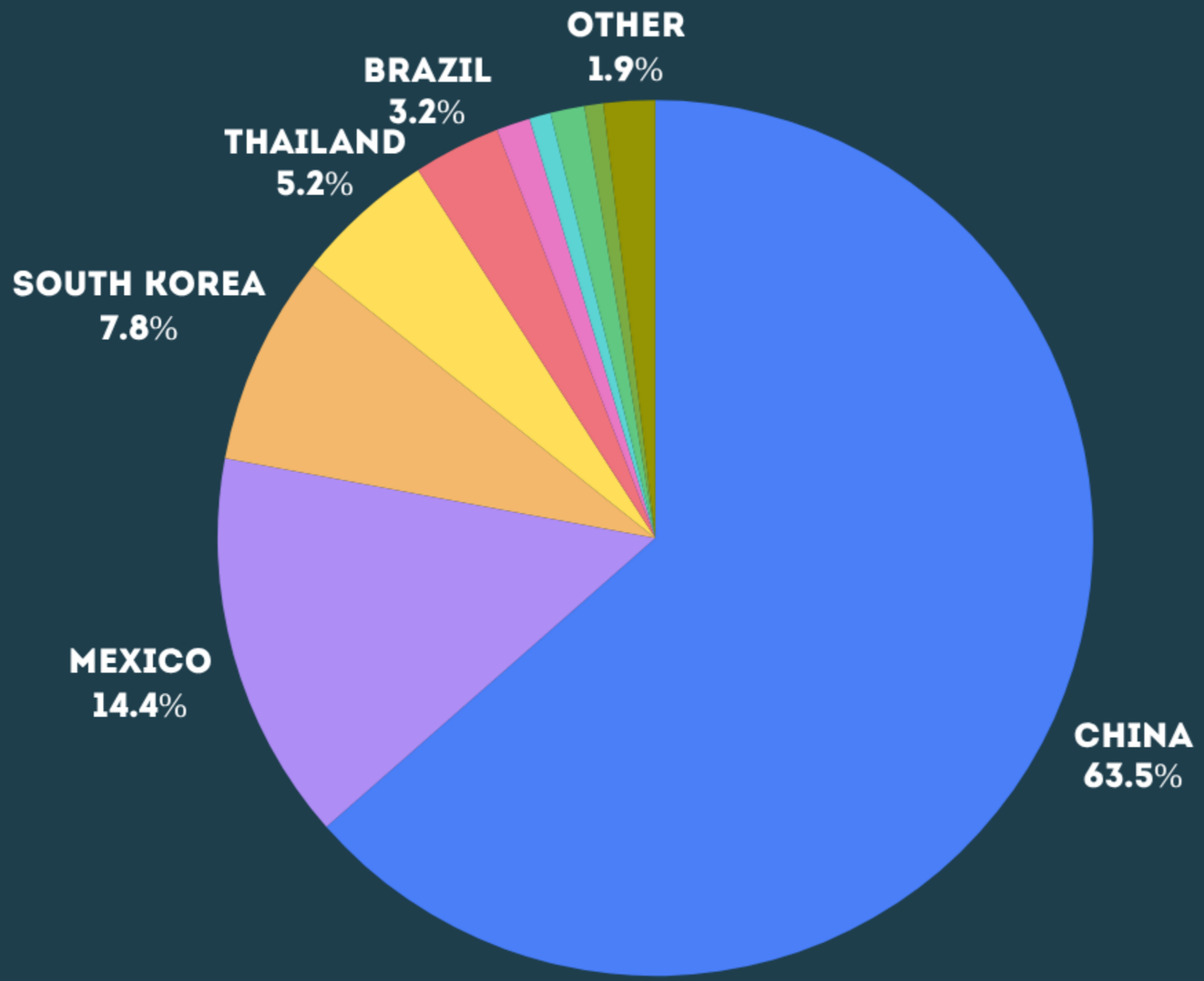


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2026 Wet Salted Exports by Market (Pieces)

July 2026

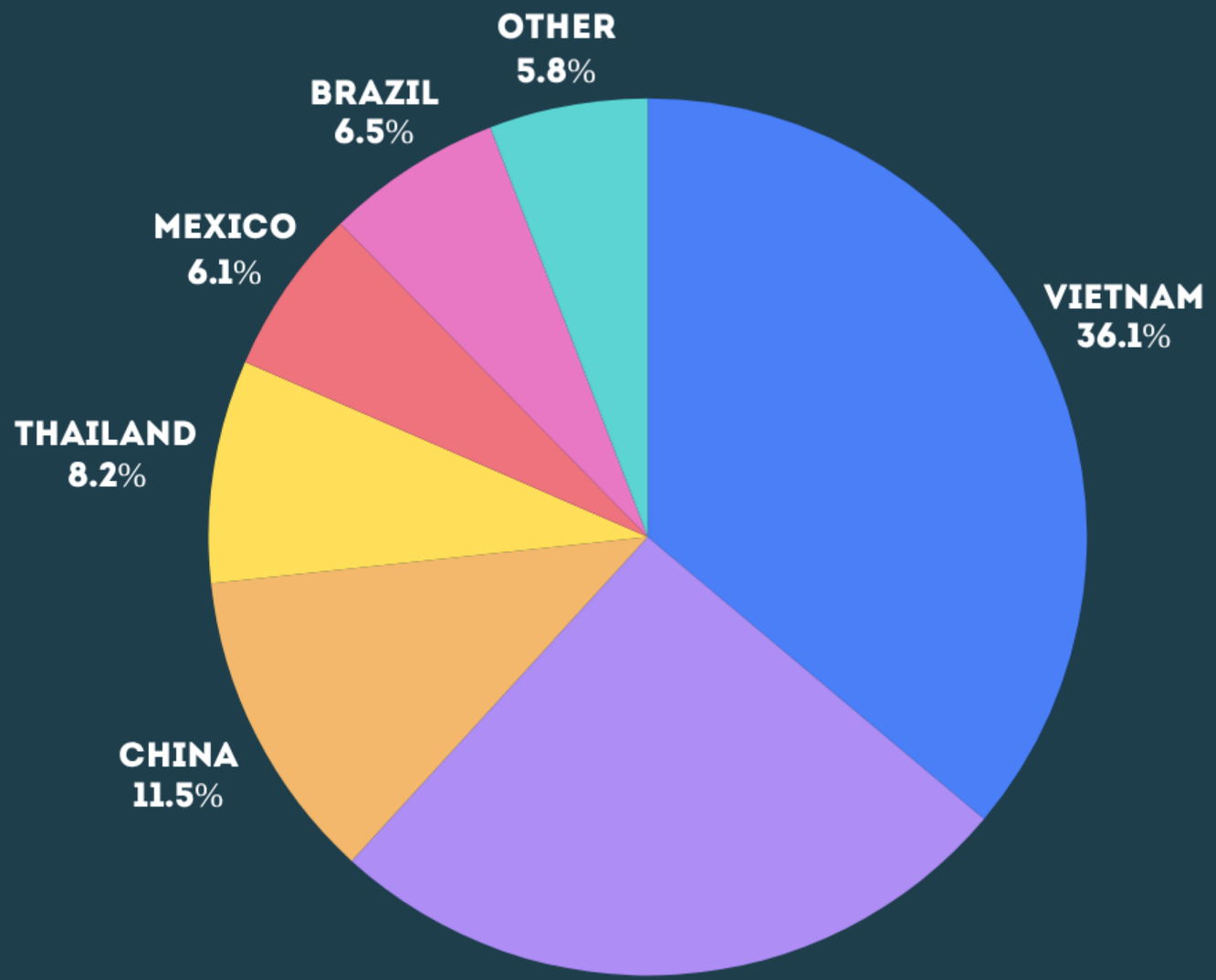


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2026 Wet Blue Exports by Market (Pieces)

July 2026

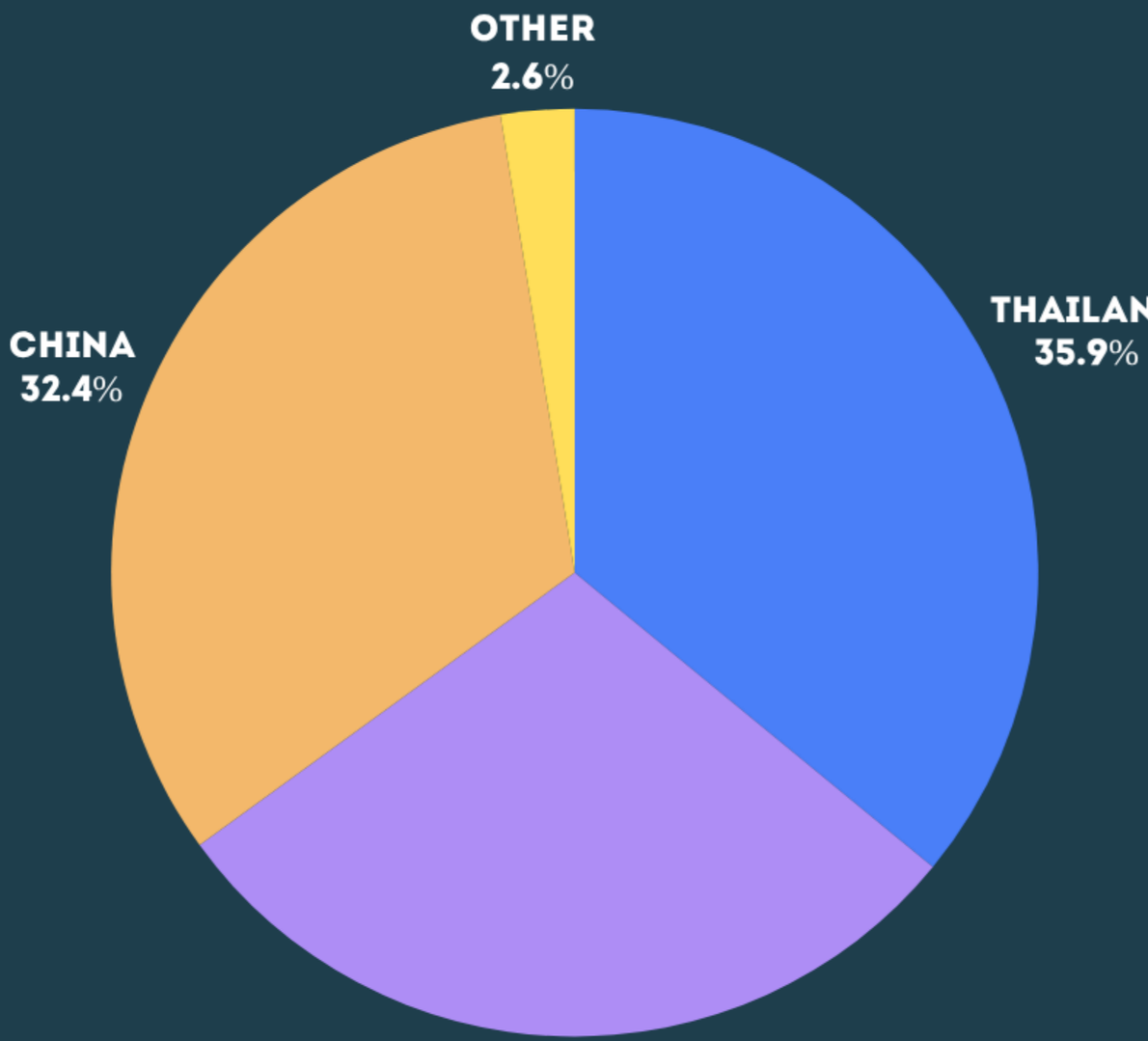


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2026 Pig Skin Exports by Market (Pieces)

July 2026



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WHERE QUALITY ENDURES

PROGRAM UPDATES

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COUNCIL OF AMERICA

CELEBRATING
250 YEARS
WHERE QUALITY ENDURES

program funds

Market Access Program - **$900k**

Foreign Market Development Program - **$600k**

Regional Agricultural Promotion Program 2024 - **$5.5 mill**

Regional Agricultural Promotion Program 2025 - **$5 mill**

American First Trade Promotion Program - **$1.65 mil**

Emerging Market Program - **2026 India Project**

what LHCA Does:

Delivering Goals through Implementation

Increase demand for, and the value of, US hide exports to protect the global leather market.

Demonstrate value.

Training and Education	Policy	Research	Communications
trade missions, trade shows, training, education	sustainability standards, traceability, import requirements, port problems Tariffs	life cycle assessments, materials testing, ROI test, other metrics	trade government supply chain consumer

what we face:

The Times, They are changing.

Decline in the view of leather in the eyes of the consumer

Unprecedented, low hide prices and a sticky, soft demand for leather

Global slowdown in the demand for premium products

Continued communications from animal activists protesting the use of animals for animal care and environmental reasons.

Trade policy challenges (tariffs, EUDR)

Sustainability requirements

Challenges from the synthetics industry

How we do it:

Aligning Goals to VMV

Bring together LHCA activities into a coherent and cohesive industry program and market campaign. Integrating programs to ensure the program is more than the sum of its parts and linking objectives aligned to member needs and market

Increase demand for and value of US hide exports

1) Increase volume

Promote US industry to global market as trusted supplier

- protect and grow slice of cake –

Champion US leather to global market as material of choice

- maintain and grow demand; protect and grow the cake –

Increase demand for, and the value of, US hide exports

2) Increase value

Establish U.S. hides as a premium product

- champion points of difference and value to buyer and consumer -

Establish U.S. as the world's leading hide supplier

- communicate demand and scarcity: % hides used and export nos.-

Achieving Objectives Through Implementation

How to address our market ambition – how do we building on ongoing activities.

Training and Education	Policy	Research	Communications
Promote US industry to global supply chain as trusted supplier	**Protect and expand US access to foreign markets**	**Lead credible science-based product and process innovation**	**Drive the supply chain, brand and consumer narrative**
APLF ACLE Training: Indonesia, Africa Trade Missions: Turkey, Vietnam, Thailand Reverse Trade Missions: Turkey, Thailand What's Next	EU Deforestation Regulation Vietnam Tariffs What's Next: Traceability LWG's new 'Standard' CSDDD CSRD	Institute for Data Integrity Life Cycle Inventory Life Cycle Assessment Return on Investment analysis Science support for exports Leather Research Laboratory Other Research Animal Care	Trade Communications Government Relations Real Leather. Stay Different. Is It Leather The Leather Hub

CONSUMER COMMUNICATION:
THREE PROGRAMS. WITH A SHARED VISION.

- To create trade opportunities today, to ensure a future for leather tomorrow.
- To deliver a strategy to build presence for leather and to create trade and consumer leather advocates
- To use events and showcases that opens doors for leather and the US industry
- To ensure that advocacy for leather is built into the next generation of designers
- To use our work to create an ecosystem that challenges synthetics and puts us, naturally, first
- With an audience in the 100s of millions.

REAL LEATHER. STAY DIFFERENT.

ON

the leather hub.online


REAL
LEATHER.
STAY
DIFFERENT.
LEATHER AND HIDE
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LEATHER SELLER

Finding the world's best young designers, educating in leather, and placing them into fashion and footwear brands

Attracting entries from more than 400 colleges around the world - building a unique marketing network

Working with brands from New Balance to Mulberry and in export markets to create US trade opportunities

Entrant designs lead marketing views to more than 250 million fashion-conscious consumers since January

Launching new automotive and aviation strands alongside interiors for 2027 to target key verticals

Hitting more consumers with a simple education message and one call to action – Choose Real Leather

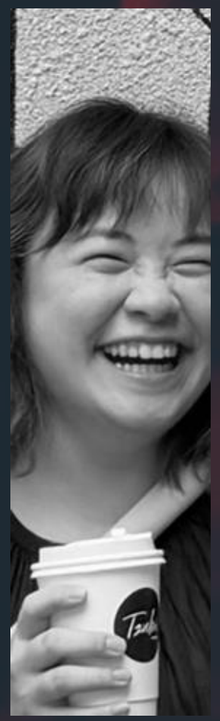
Going 'viral' with more than one million views on posts from leather in fashion to leather and sustainability

1	GLOBAL CAMPAIGN
8	STUDENT DESIGN COMPETITIONS
11	COMMUNICATION CHANNELS
48	DESIGNER NATIONALITIES
1,221	STUDENT COMPETITION ENTRIES
14,454	NEWSLETTER SUBSCRIBERS
118,307	SOCIAL MEDIA FOLLOWING
2.3M	SOCIAL MEDIA ENGAGEMENTS
249M	SOCIAL MEDIA IMPRESSIONS

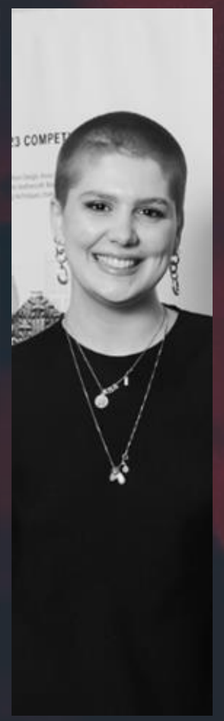
2026 DATA YTD

LEATHER CHAMPION

COACH ANA DEL RIO ULLA JOHNSON Forbes the toolbox new balance Jaded London BALMAIN PARIS Christian Louboutin Dior LOEWE



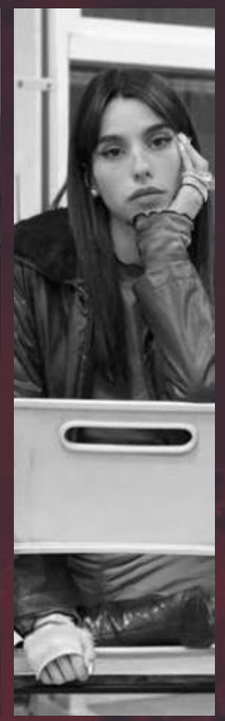
Chia Lee
Accessories Designer
Coach



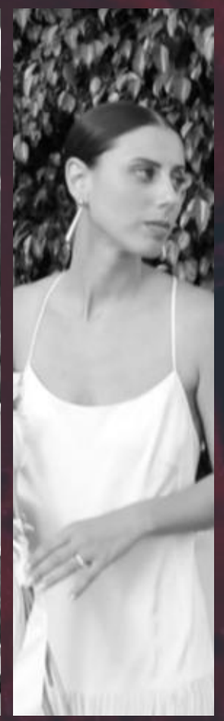
Ana Del Rio
Founder
Ana Del Rio



Emily Omesi
Associate Designer
Ulla Johnson



Tamar Elbaz
Fashion Designer
Forbes 30 under 30



Astrid Heisterberg
Footwear Designer
Loewe



Jamie Unlu O'grady
Footwear Designer
New Balance



Oriol Clavell
Womenswear Designer
Jaded London



Sara Morandini
Fashion Internship
Balmain



Anna Melegh
Care & Repair Specialist
Christian Louboutin



Brigida Aiello
Leather Goods Designer
Dior



Astrid Heisterberg
Footwear Designer
Loewe


ON
LEATHER AND HIDE
COUNCIL OF AMERICA

ONLY NATURAL

A first in the material sector – bringing together commercial entities with the ability to shape markets – and securing audiences due to commercial credibility

Promotes understanding and trial of natural materials in fashion, furniture and interiors and champions outstanding new talent through an international competition

Profiles US leather alongside partner co-operators as the sustainable and trusted scaling partners

Engages a trade audience of architects, interior designers and manufacturers at key material shows in UK and Europe

Promotes natural fibers as a preferred technical solution attracting entries from 300 plus universities

Delivers education with 90% saying campaign informs on natural fibers and 100% success rate on desire to use

APPAREL | FOOTWEAR | ACCESSORIES | FURNITURE | INTERIORS

ON | ONLY NATURAL

STUDENT DESIGN COMPETITION

2	STUDENT DESIGN COMPETITIONS
6	U.S. NATURAL MATERIAL COOPERATORS
60+	COUNTRIES IN GLOBAL NETWORK
350+	2026 ENTRY PROFILES CREATED
3,000+	COMPETITION PLATFORM PROFILES
1.2M	VIEWS ACROSS INSTAGRAM & FACEBOOK [2025]
80%	MORE LIKELY TO PICK NATURAL MATERIALS ONCE LEARNING ABOUT ON*
3.3M	PAID MEDIA IMPRESSIONS

*A research survey, conducted at the 2025 London Design Festival

institute for data integrity

iDi proposal for LCA+ community

What are we building?

Construction foundations - very little showing above ground

Data Governance

The rulebook for how we create, accept and manage data. Boring? Yes. Essential? Absolutely.

Foundation

The Platform

A digital hub where data can be stored, accessed and used — by tanneries, brands, LCA practitioners, and anyone who

Foundation

Tannery Data Tool

A streamlined collection tool — asking only the right questions, in the right order.

Foundation

COLLABORATION & PARTNERSHIP

THANK YOU



LEATHER AND HIDE COUNCIL OF AMERICA

CELEBRATING 250 YEARS WHERE QUALITY ENDURES

Leather & Hide Guidelines 2020