



CÁMARA DE LA INDUSTRIA
DE CURTIDURÍA DEL
ESTADO DE GUANAJUATO

LEATHER AND HIDE

COUNCIL OF AMERICA



CICUR

OCTOBER 1, 2026



Importance of the Tanning Sector in Mexico

940

Tanneries
in Mexico

751

Tanneries
in Guanajuato

732

Tanneries
in Leon

50,000

hides
processed daily in
Mexico

12,000

direct jobs
generated by the tanning
industry

130,000

indirect jobs
across the supply chain and
related industries

80%

of leather production
in Guanajuato

The tanning industry supplies key sectors such as footwear, leather goods, clothing, furniture, automotive, aeronautics, and aerospace.





Mexico is one of
North America's
major **tanning**
and the leather -
processing hubs.

SUSTAINABILITY IN THE TANNING INDUSTRY



Recycling Industry

By-products for other industries



Water Efficiency

0.59%

Potable water supplied by SAPAL

2.8%

First-use water: SAPAL, wells, and tanker trucks

10–12 L/kg

In other parts of the world: 18–20 L/kg



Water Reuse

1.07 million m³

of treated water reused in 2025

Environmental and Quality Certifications

More than 40 companies certified by the Leather Working Group



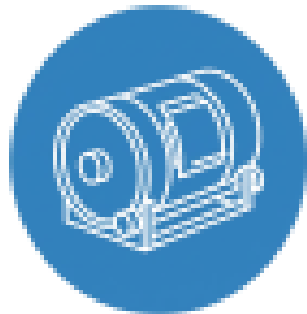
Circular Economy

By-products for other industries:

- Biostimulants
- Animal feed
- Gelatin
- Recovered leather

PATREP

Treatment and disposal of tannery sludge



Technological Innovation

Cantilever-type drums and greater capacity

High-exhaustion chemicals

Photovoltaic and solar thermal systems

2025 Leather Import and Export Analysis – Mexican Tanning Industry

2025 Imports: **10,300,502** hides

-  Raw: 3,900,109
-  Wet Blue: 1,459,712
-  Crust: 921,763
-  Finished: 4,018,918

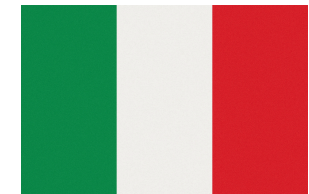
Main Suppliers of Leather to Mexico – 2025



USA: 4,092,009



Brazil: 3,620,159



Italy: 560,146



Argentina: 304,446



Uruguay: 274,308



Nicaragua: 251,867



China: 211,189



Guatemala: 196,830



Mexico: 173,764



Sweden: 166,730



Canada: 97,370

**South Africa, Bolivia, Vietnam,
etc.**



The Opportunity: Mexico–U.S. Complementarity

United States

- Raw materials and supply of raw hides.
- Mexico's main supplier in 2025.
- Potential to strengthen regional supply.

Complementarity

more processing in North America

Mexico

- Installed capacity and infrastructure.
- Experience in leather processing.
- Supply chain serving high-value sectors.

The goal is to create value together.

Greater value added + competitive supply + stronger regional supply chain

2025 Exports: 5,685,477 hides

 **Raw: 448,370**

 **Wet Blue: 2,787,619**

 **Crust: 96,066**

 **Finished: 2,353,422**

A STRATEGIC OPPORTUNITY FOR U.S.-MEXICO HIDE TRADE

MEXICO'S PRODUCTION CAPACITY

NEARLY 20 MILLION HIDES AND LEATHER

9 MILLION

Domestic raw hides

+

10.3 MILLION

imported hides and leather



**U.S.
RAW HIDES**



**MEXICO'S
TANNING INDUSTRY**



**WET
BLUE**

CRUST

**FINISHED
LEATHER**

HIGH-VALUE PRODUCTS




FOOTWEAR




**LEATHER
GOODS**




AUTOMOTIVE




APPAREL



Together, the U.S. and Mexico can transform more North American hides into higher-value products within the region.

What can we build together moving forward?

A more integrated, competitive leather and hide value chain prepared for globalization.

- 01 More U.S. raw hides processed in Mexico**
Leverage the complementarity between raw materials, capacity, and infrastructure.
- 02 Greater utilization of installed capacity**
Turn Mexico's capacity into a regional processing platform.
- 03 Reliable competitive, long - term supply**
Build more predictable relationships based on continuity, consistent quality and long - term collaboration.
- 04 Greater value added within North America**
Drive further processing and strengthen the regional value chain.
- 05 Real partnerships to navigate globalization**
Each party contributes its strengths to build a mutually sustainable business.

Changing our mindset and the way we work to move forward together.