



Overview of China leather industry

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Brief Introduction of CLIA

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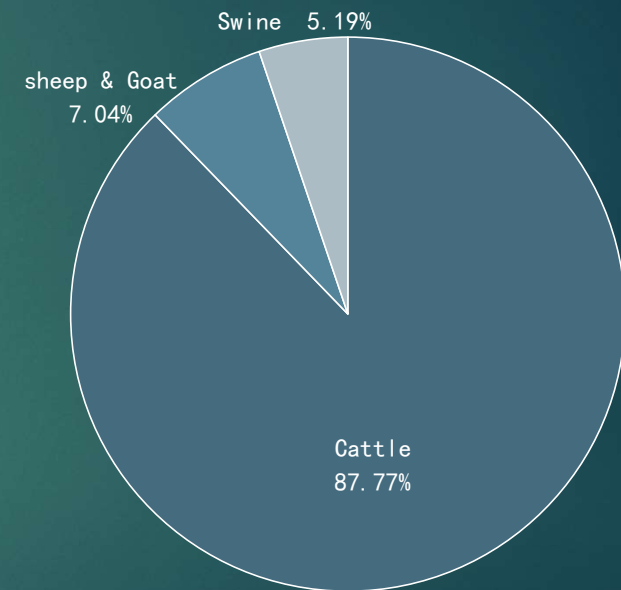
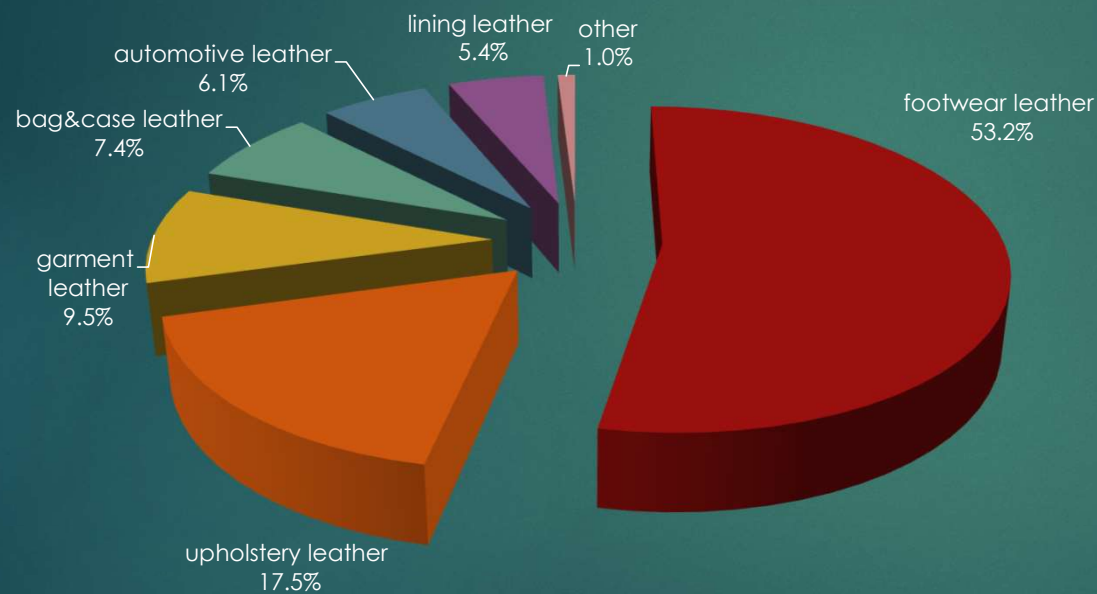
- ▶ Established in 1988
- ▶ 1300+ members
- ▶ Covering Tanning, Footwear, Bag and suitcase, Fur, Leather Garment, all the relevant industries related to Leather and Fur
- ▶ 15 Commissions
 - China Tanners Commission of CLIA
 - China Footwear Commission of CLIA
 - China Luggage & Bags Commission of CLIA
 - China Fur Breeders Commission of CLIA
 - China Leather and Fur Chemical Commission of CLIA
 - China Leather Science And Technology Commission of CLIA
 - China Designers Commission of CLIA
 - China Digital Intelligence Committee of CLIA
 - China Leather Hardware Commission of CLIA
 - China Young Entrepreneurs Commission of CLIA
 - China Market Circulation Commission of CLIA
 - China Leather & Shoe Machinery Commission of CLIA
 - China Fur Commission of CLIA
 - China Leather Garment Commission of CLIA
 - China Shoes Materials Commission of CLIA

- ▶ There are over 5 million direct employees in the entire industry, including indirect employees, and it is expected to exceed 12 million people.
- ▶ High correlation between upstream and downstream, complete industrial chain within the country.
- ▶ There are currently 43 leather manufacturing clusters throughout the country, with sales revenue accounting for over 50% of the total revenue of the leather industry in China.



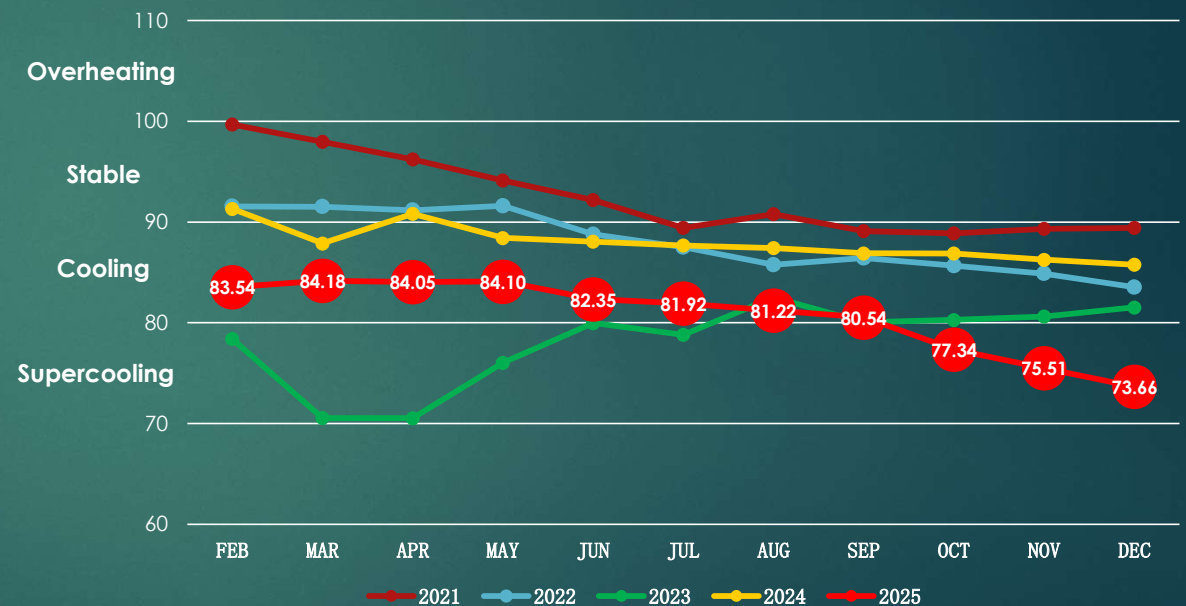
Structure of raw material and end use of Leather in China

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Economic operation of China leather industry in 2025

- ▶ In 2021, the prosperity index saw a significant rebound, with the mean entering a stable range.
- ▶ However, after 2021, it fluctuated downwards, and for most of the past four years, it has been in a cooling range.
- ▶ Among them, in 2023 and 2025, some periods were in a supercooling range.



Sales revenue

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- ▶ In 2025, China's leather industry achieved a sales revenue of 750 billion rmb, a year-on-year decrease of 13.1%.

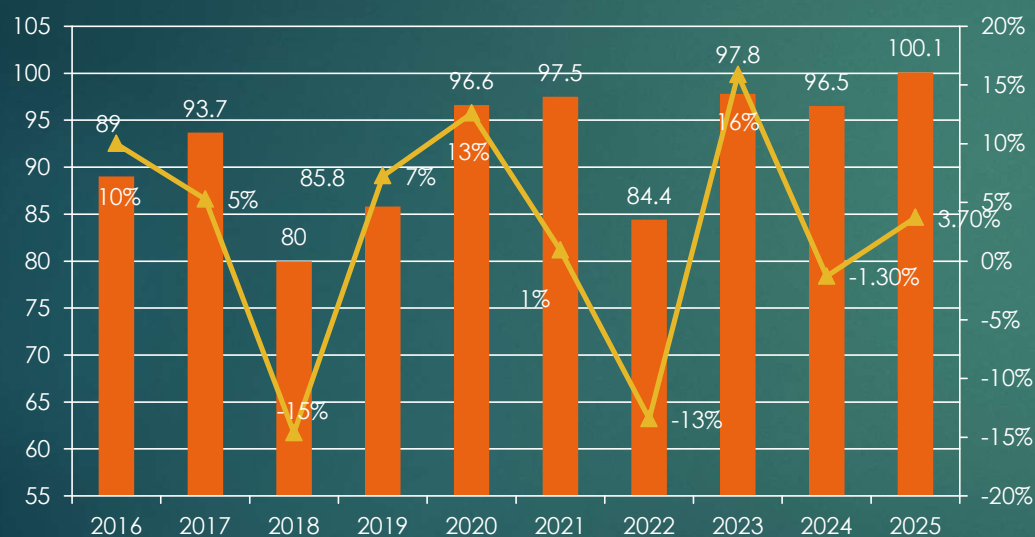


Sub-industry	Sales Revenue (100 million RMB)	
	Value	Growth %
Tanning	526	-9.8%
Leather Footwear	2,138.2	-19.3%
Leather Garment	61.7	-9.9%

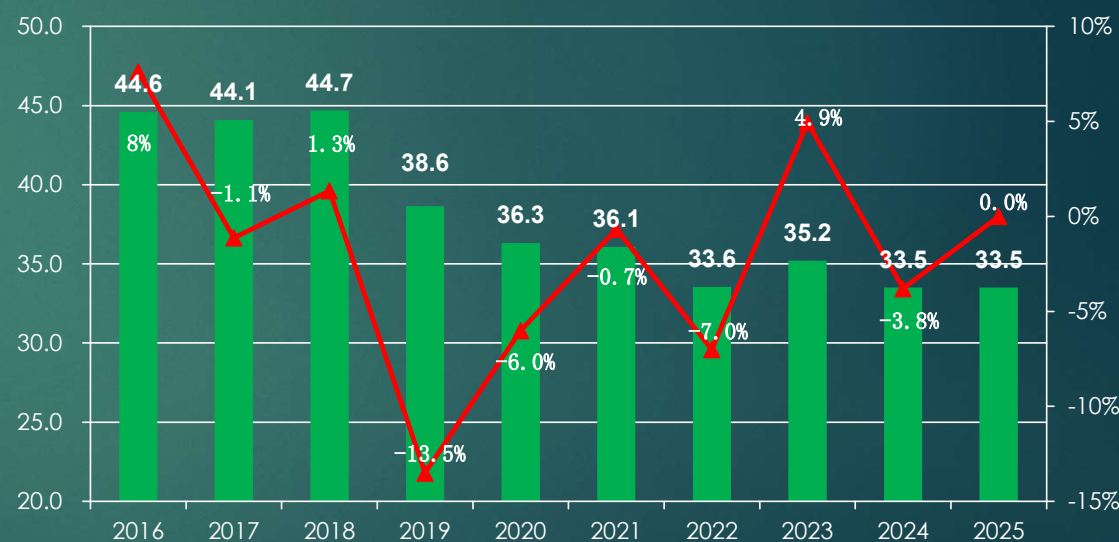
Important variables

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**2016-2025 Yield of upholstery leather
(Million SQM)**



**2016-2025 Yield of automotive leather
(Million SQM)**



Total profit

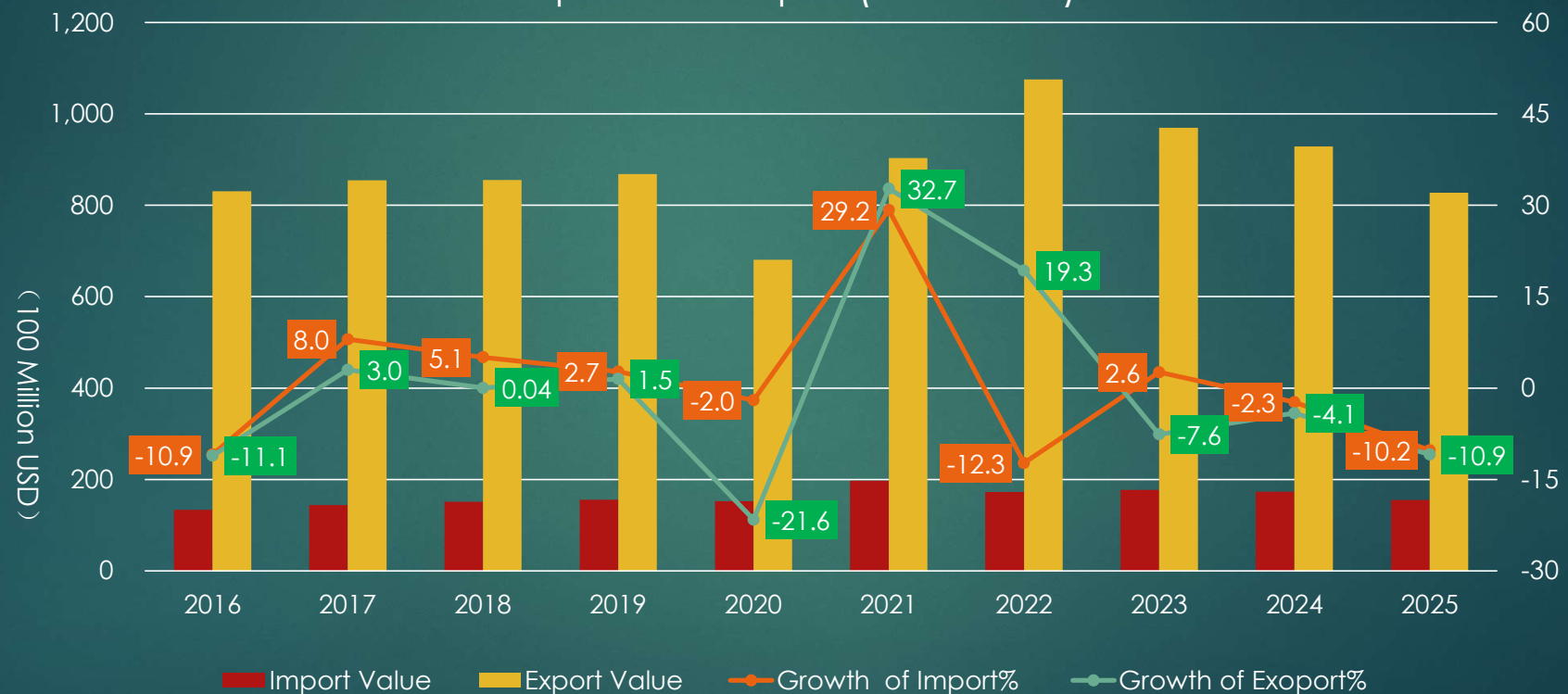
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Industry	Profit Margin %	
	Margin	Growth %
Tanning	3.10%	-0.74
Leather Footwear	7.79%	0.22
Leather Garment	3.51%	0.92
leather industry	5%	-0.3%

2016-2025 Importation and Exportation10

Growth of Value and Percentage of China Leather Industry
Import and Export(2016-2025)



Importation of raw hide & skins in 2025

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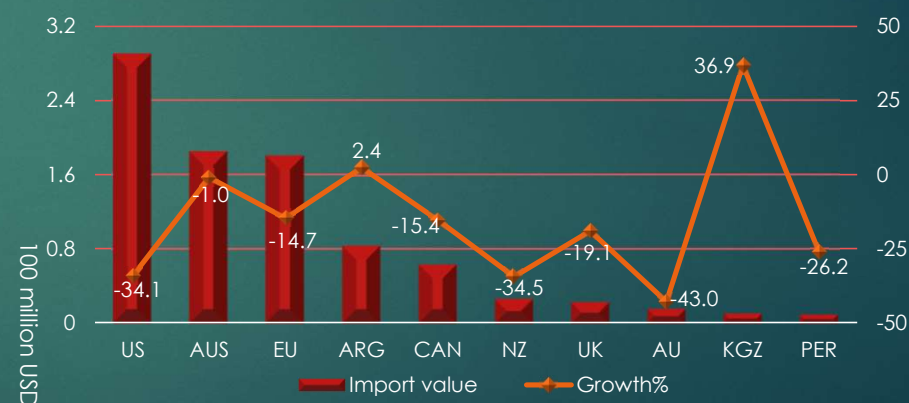
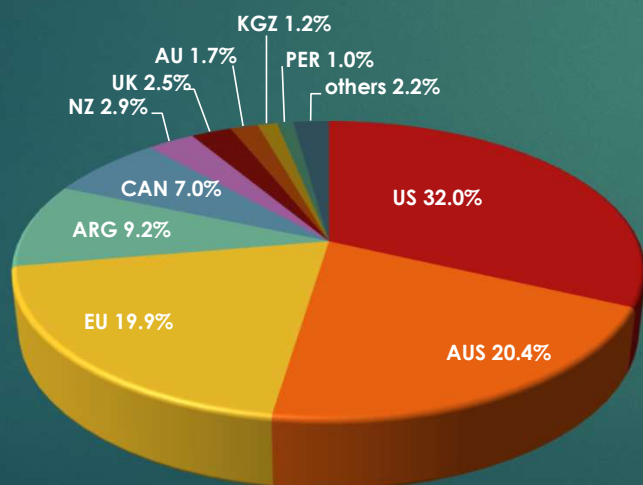
- ▶ In 2025, China imported 1.13 billion US dollars of raw hides, a year-on-year **decrease** of 15.8;
- ▶ The average unit price of imported products **decreased** by 12.2% year-on-year.
- ▶ The main types of imported raw hides in China are cowhide and sheepskin, which together account for 99.3% and 99.2% of the total value of raw hides imports.

Category	Import Value (100 million USD)	Growth %
Cattle hide	9.1	-20.4
Sheep skin	2.1	10.6

Importation of Cattle hide in 2025

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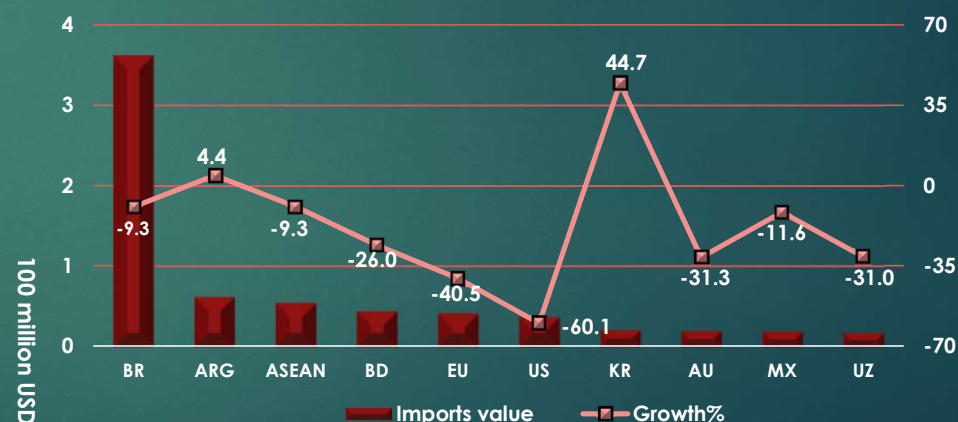
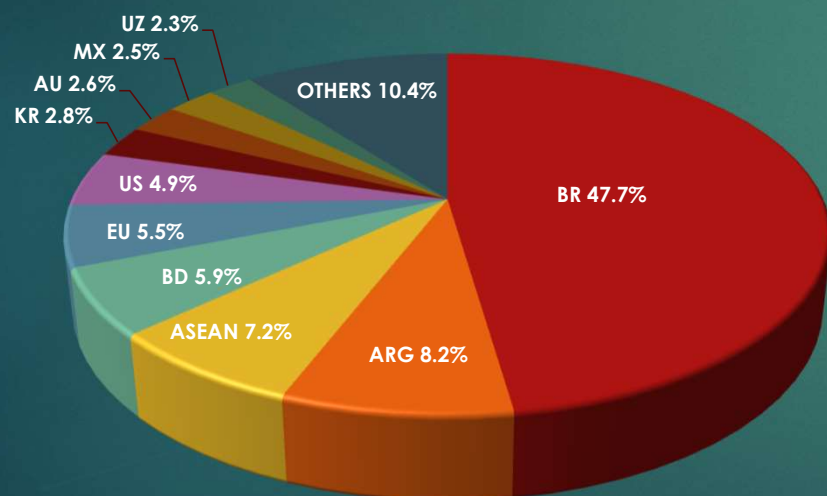
- ▶ In 2025, China's imports of cattle hide reached 910 million US dollars, a year-on-year **decrease** of 20.4%.
- ▶ The average import unit price of the product is 0.82 US dollars per kilogram, a year-on-year **decrease** of 15.5%.



Imports of Semi-finished cattle leather in 2025

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- ▶ In 2025, China's imports of semi-finished leather reached 760 million US dollars, a year-on-year **decrease** of 19.1%.
- ▶ The average unit price of imported products **decreased** by 13.6% year-on-year.



Economic operation of China leather industry in the first half of 2026

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- ▶ Completed sales revenue of over 329 billion yuan, a year-on-year **decrease** of 5.0%;
- ▶ Achieve a total profit of 10.9 billion yuan, a year-on-year **decrease** of nearly 16%;
- ▶ The main business profit margin was 3.3%, a **decrease** of 0.43 percentage points compared to the same period last year.

Economic operation of China leather industry in the first half of 2026

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- ▶ The total output of light leather was 140 million square meters, a year-on-year **decrease** of 6.5%. Completed sales revenue of 20.5 billion yuan, a year-on-year **decrease** of 12.8%.
- ▶ The total export value was 40.9 billion US dollars, a year-on-year **decrease** of 5.4%; The total import value was 7.9 billion US dollars, a year-on-year **increase** of 4.9%.
- ▶ Imported 749,000 tons of raw hides with an import value of 600 million US dollars, with year-on-year growth rates of **7.0% and 2.9%**, respectively.

Thank you for your attention!

Thank you very much for your kind invitation!