

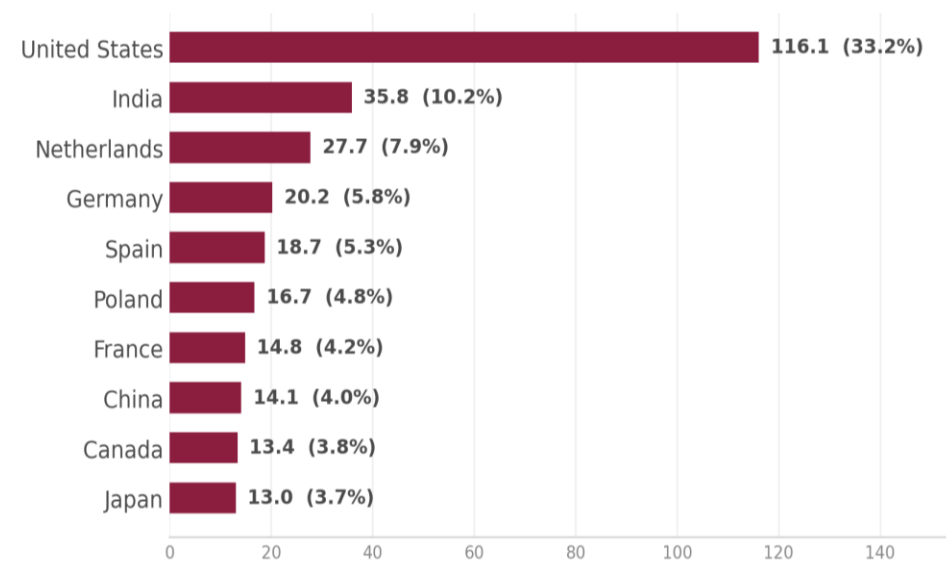
Footwear, Leathergoods & Leather

Mapping Global Trade

JULY – AUGUST FY'27

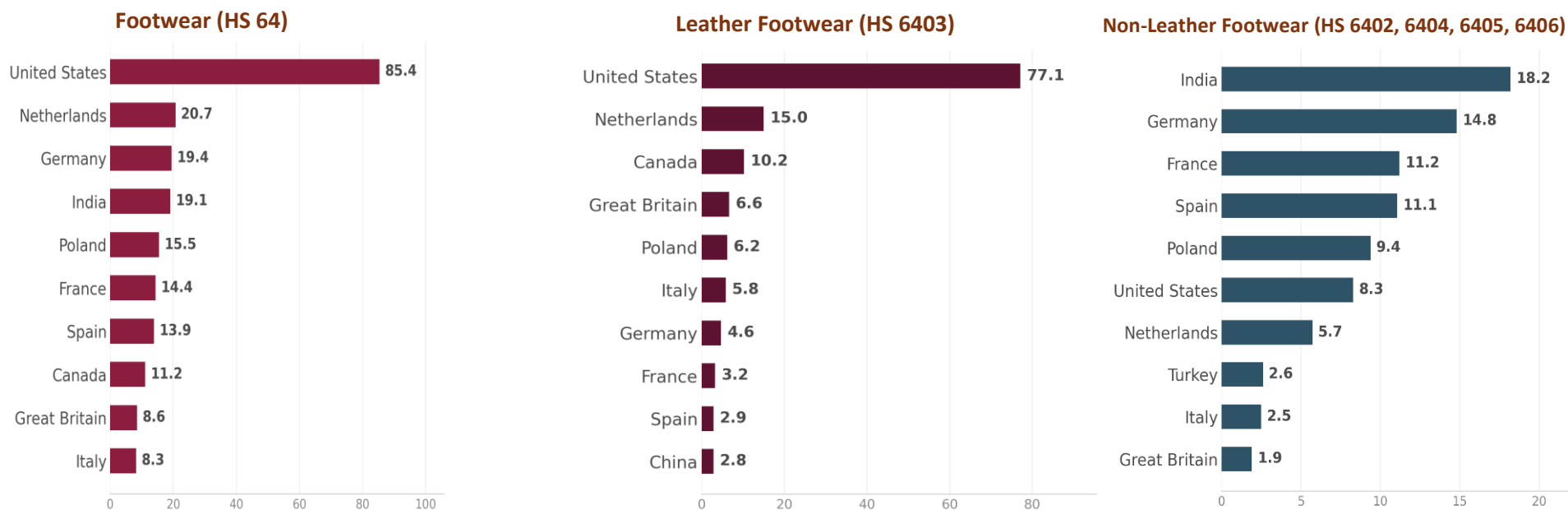
 USD 350.08 Mn TOTAL SECTORAL EXPORT <i>Jul–Aug FY'27</i>	 8.98% YoY Growth <i>Jul-Aug, FY'26</i> <i>USD 321.9 Mn</i>	 83 countries EXPORT DESTINATIONS <i>Global reach</i>	 83% Export goes in the TOP-10 COUNTRY <i>Concentration level</i>	 USA TOP EXPORT DESTINATION <i>USD 116.1 Mn (33.2%)</i>	 Footwear LARGEST SEGMENT <i>HS64: USD 250.3 Mn</i>
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Top 10 Export Destinations — Share of Total Sectoral Export (Jul–Aug Fy'27)



- ★ The USA was the single dominant destination, absorbing USD 116.1 Mn, one third (33.2%) of total sectoral value.
- ★ India, Netherlands and Germany followed, together adding a further 23.9% of sectoral value.
- ★ The top-10 destinations combined held 83% share of total export - demand remains highly concentrated.
- ★ Footwear (HS64) was the largest export segment, contributing over 71% of sectoral value (USD 250.3 Mn).

Hs 64 — Footwear: Total, Leather & Non-Leather — Top 10 Markets (USD Mn)



★ **Footwear (HS64) is the sector's largest segment with USD 250.3 Mn (71.5% of total export value). The USA dominates overall footwear and leather footwear demand, while India leads non-leather footwear imports, highlighting two distinct, high-value market.**

TOTAL FOOTWEAR

USD 250.3 Mn

Leading market: **United States**

LEATHER FOOTWEAR

USD 151.0 Mn

Leading market: **United States**

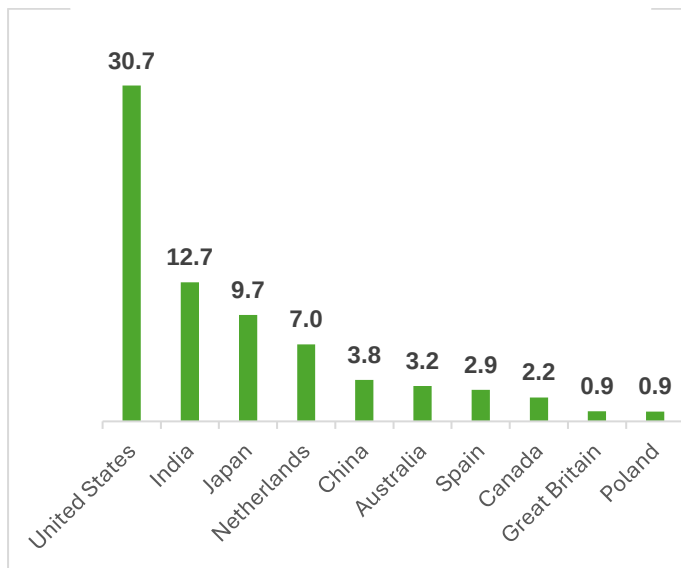
NON-LEATHER FOOTWEAR

USD 99.3 Mn

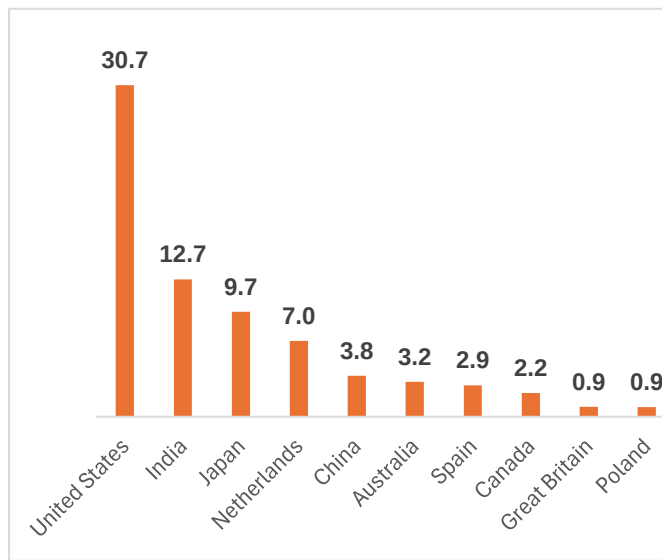
Leading market: **India**

HS 42 — Leather & Non Leather Products: Total, Leather & Non-Leather — Top 10 Markets (USD Mn)

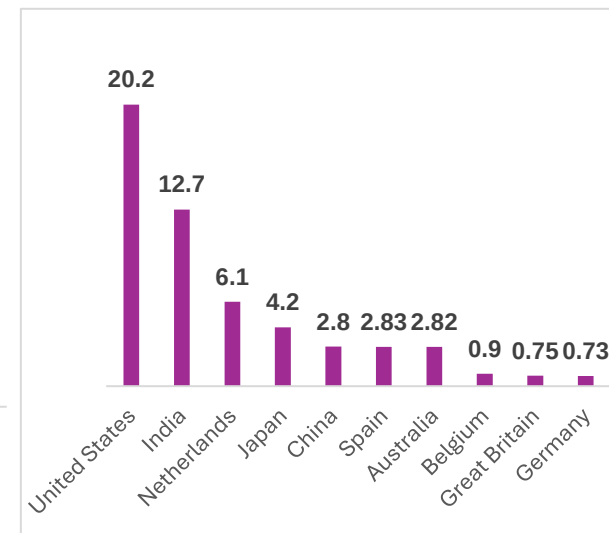
Travel goods, Bags, Products (HS 42)



Leather Products



Non-Leather Products



★ **HS42 totaled USD 80.3 Mn. The USA is the top buyer across all three views; Japan and Canada stand out specifically for leather products, while India and Netherlands feature more strongly in non-leather product demand.**

TOTAL PRODUCTS

USD 80.3 Mn

Leading market: **United States**

LEATHER PRODUCTS

USD 21.7 Mn

Leading market: **United States**

NON-LEATHER PRODUCTS

USD 58.6 Mn

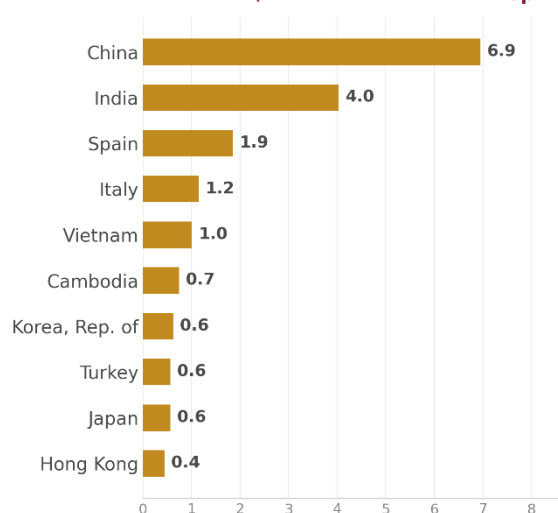
Leading market: **United States**

Note: Leather Product HS codes are: 42010000, 42021100, 42022100, 42023100, 42029100, 42031000, 42032100, 42032900, 42033000, 42034000, 42050090

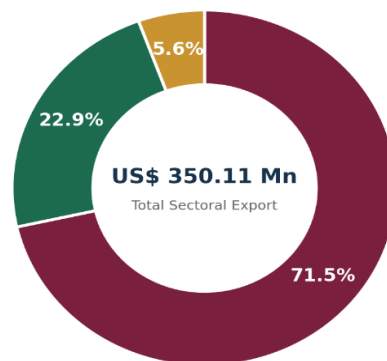
Non-leather Product HS codes are: 42021200, 42021900, 42022200, 42022900, 42023200, 42023900, 42029200, 42029900

41 — Raw Leather & Leather Vs Non-Leather — Strategic View & Overall Sectoral Performance

41 — RAW/TANNED LEATHER — Top 10

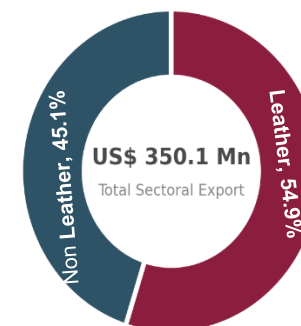


Sectoral Export Composition



■ Footwear (64) – USD 250.3 Mn
■ Leather & Non leather Products (42)- USD 80.3 Mn
■ Leather (41) – USD 19.51 Mn

LEATHER vs NON-LEATHER — Sectoral Contribution



■ Leather, Leather Footwear and Products – 54.9% (USD 192.3 Mn)
■ Non-Leather footwear and Products – 45.1% (USD 157.8 Mn)

41 - Raw & Tanned Leather

★ **Total export value USD 19.51 Mn** & China led leather exports with USD 6.94 Mn, ahead of India (USD 4.03 Mn) & Spain (USD 1.85 Mn).

Key Insights:

- Total sectoral export stood at **USD 350.08 Mn, 8.98% higher YoY** (Jul–Aug FY'26: USD 321.9 Mn)
- Exports reached **83 countries**, with the top 10 destinations absorbing **83%** of total export
- **USA was the dominant market**, taking USD 116.1 Mn (33.2%), followed by India, Netherlands, and Germany
- **Footwear (HS64)** was the largest segment at USD 250.3 Mn (71.5% of total), led by the USA in both total and leather footwear, while **India led non-leather footwear**.
- **Leather Products (HS42)** totaled USD 80.3 Mn, with the USA the top buyer across all sub-categories; Japan and Canada stood out for leather products, Australia and China for non-leather
- **Raw/Tanned Leather (HS41)** exports totaled USD 19.51 Mn, led by China (USD 6.94 Mn)
- **Non-leather products** already contribute **USD 157.8 Mn (45.1%)** of sectoral value, nearing parity with leather products (USD 192.3 Mn, 54.9%) signaling strong growth opportunity for non-leather/synthetic lines