



# Leather & Footwear: India Overview



# Overview - Indian Leather Industry

**USD 18 billion**  
Annual Turnover

**USD 12 billion**  
Annual Domestic Sales

**13%**  
Of Global Leather  
Production

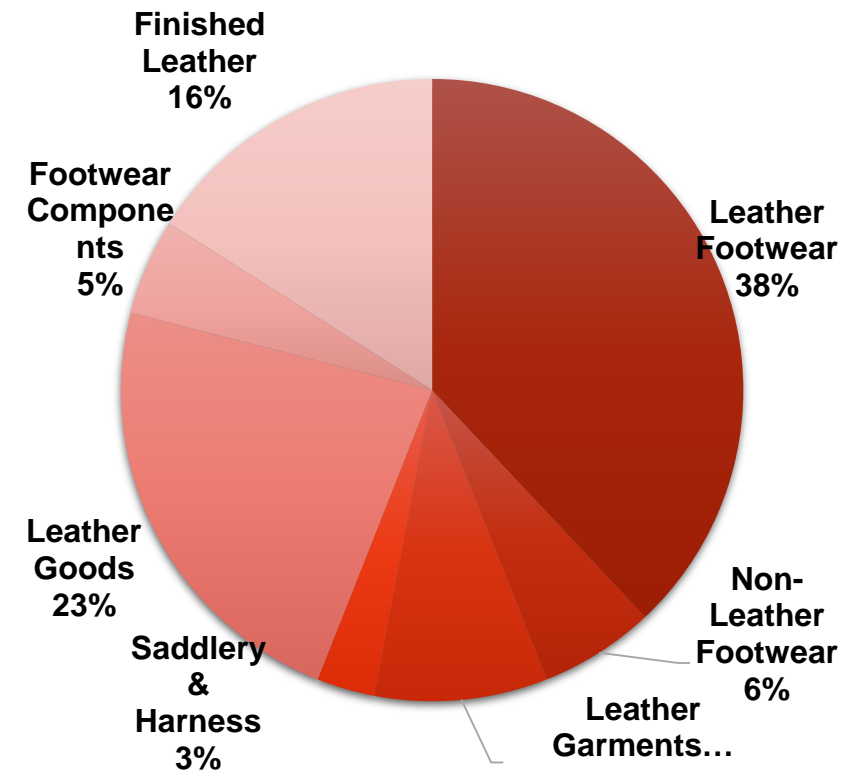
**8<sup>th</sup> Global Export Ranking**

**2<sup>nd</sup> Largest Exporter of Leather  
Garments**

**5<sup>th</sup> Global ranking in Export of  
Finished Leather**

**5<sup>th</sup> Global ranking in Export of  
Leather Accessories & Goods**

## Production Segmentation



# India manufactures a Diversified Product Mix



# India is the 2<sup>nd</sup> Largest Footwear Manufacturer in the World

#1 Sourcing Point for Global Brands

Footwear has a share of 49% in Indian Leather sector exports

India accounts for about 9.5% of global footwear production of 23 billion pairs.

#2 Spread Across the Globe

Major Markets: European Union & USA

Potential Markets: Middle East, North Africa, Latin America

#3 Huge Domestic Market

Present per capita consumption: 2 pairs

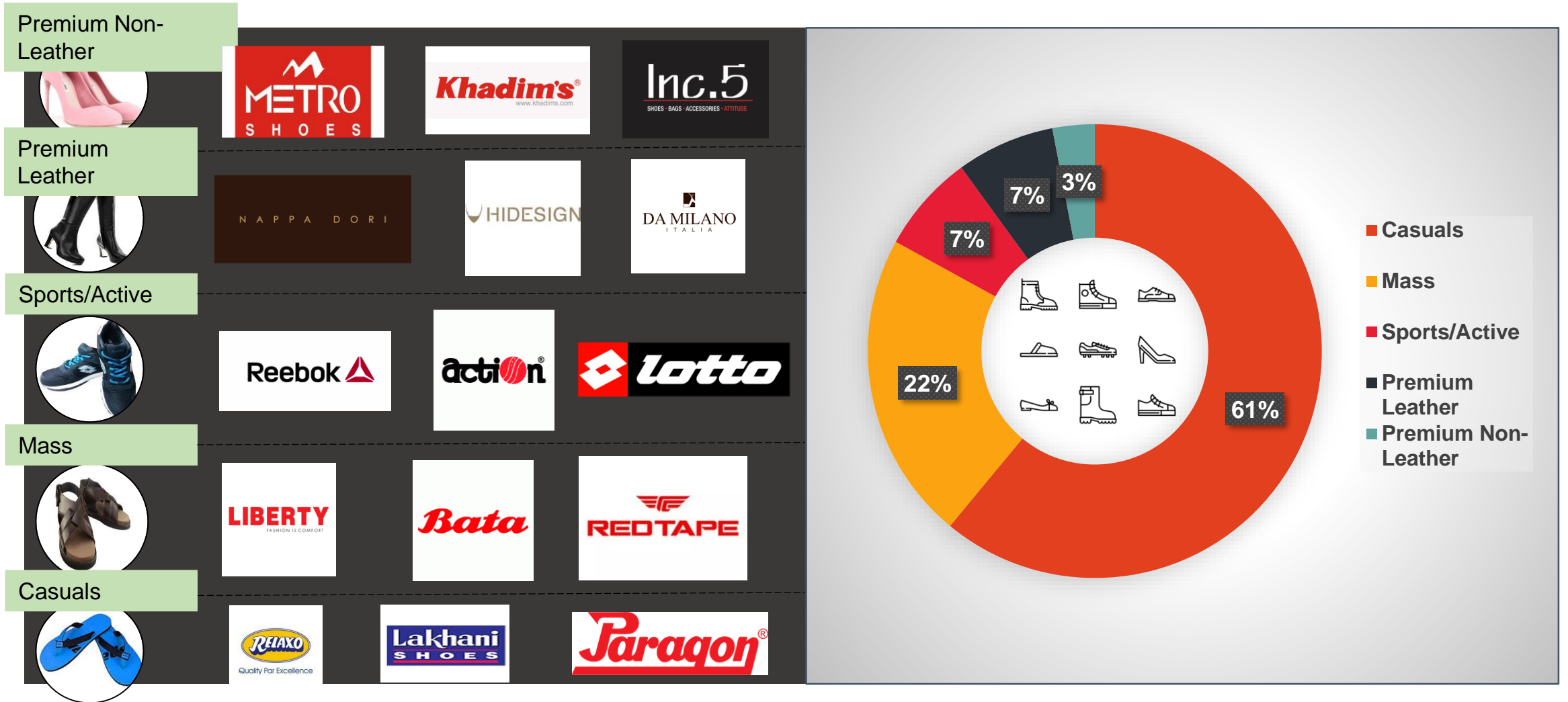
Expected per capita consumption in the next 5 years: 4.5 pairs

#4 Booming Retail Industry

~1950 million pairs of footwear are sold in India annually.

Annual growth in both domestic and export markets is estimated at more than 15%.

# Indian Footwear Sector - Diverse in Consumption & Manufacturing





**India-  
Manufacturing &  
Export Advantage**



**INVEST INDIA**  
NATIONAL INVESTMENT PROMOTION  
& FACILITATION AGENCY



# Strong Manufacturing Presence

**US\$ 18 Bn**

*India's total production of  
Leather & Footwear*

**2.1 billion  
pairs**

*India's annual production out of  
which 90% was consumed  
internally*

 **2<sup>nd</sup>**

**Largest footwear producer**  
India is the 2<sup>nd</sup> largest footwear producer (behind  
China)

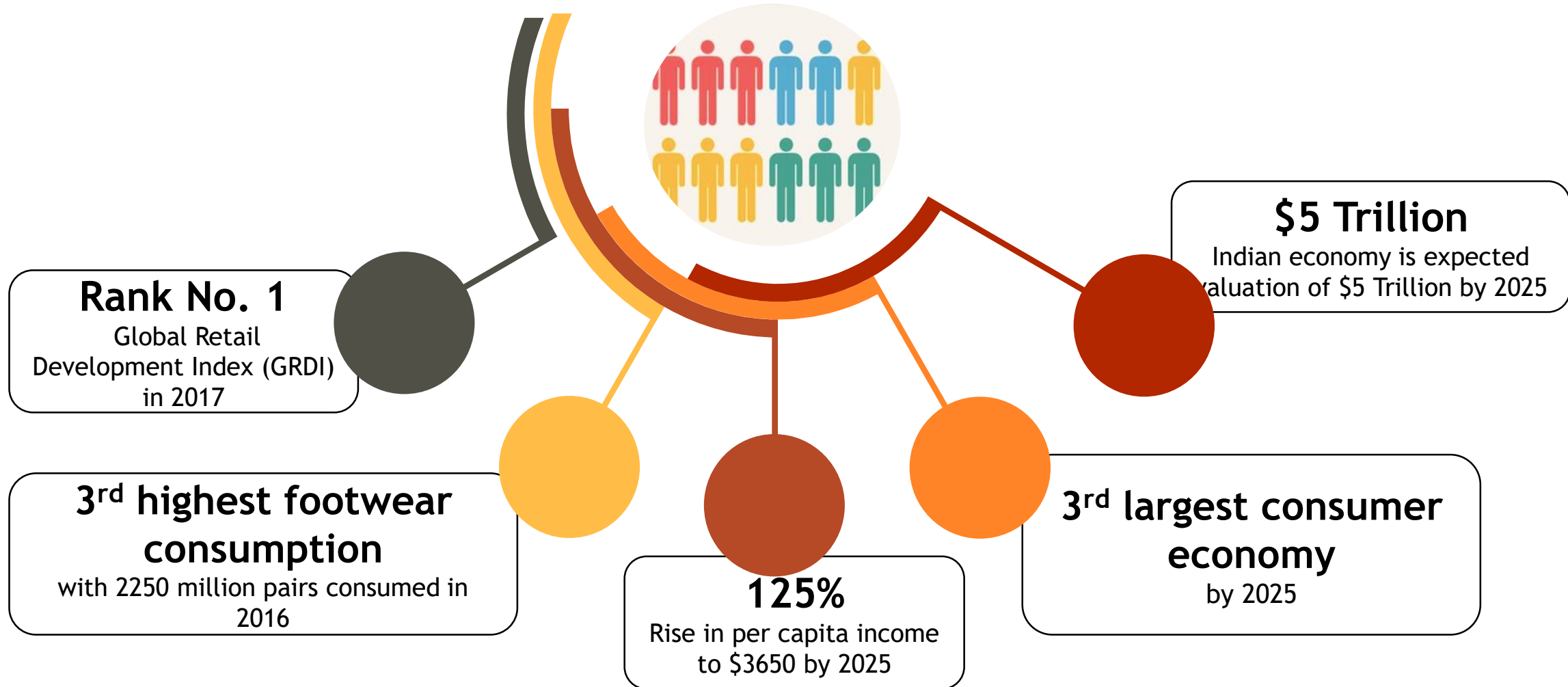
 **9.6%**

**of the total footwear  
output**

India accounts for about 9.6% of the total global  
footwear output per year

# High Domestic Demand in India

*Consumption expenditure in India will rise by a factor of 3 to reach \$5 trillion by 2025*



# India is a Sourcing Point for Global Brands

*India's High quality products are sought after by leading global brands*

FLORSHEIM  
ESTABLISHED 1892

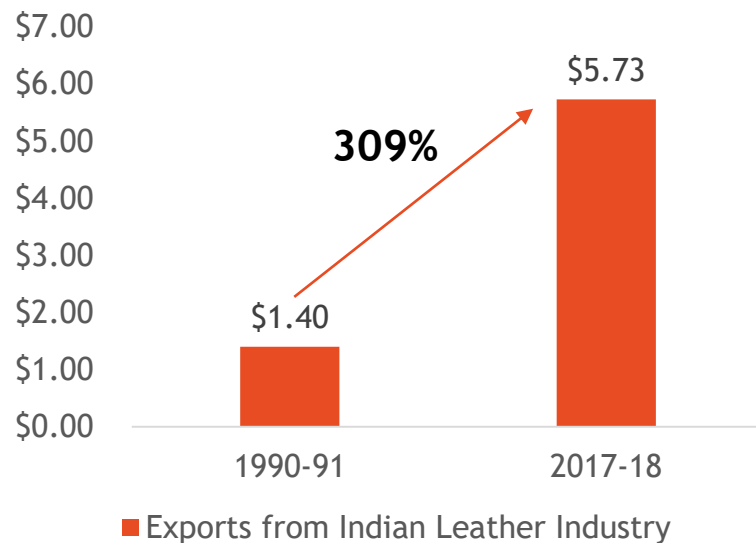


Hush Puppies<sup>®</sup>  
apparel



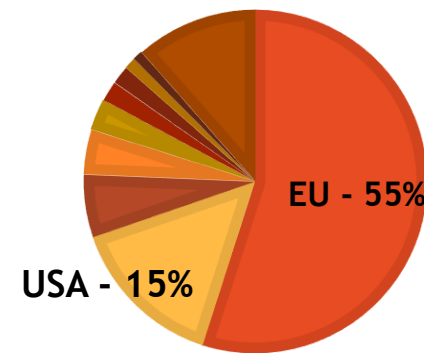
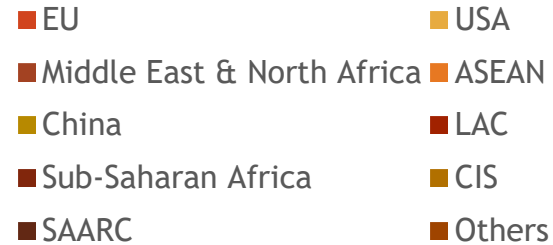
# Ideal location for exports in Leather & Footwear

Leather & Footwear Exports from India are Increasing



India exports Globally and exports 70% of products to USA and EU

## EXPORTING SEGMENTS



Increasing market share in USA  
Exports to USA grew from USD 359 mn in 2008-09 to USD 847 mn in 2017-18.