



**PAKISTAN  
LEATHER GARMENTS  
MANUFACTURERS & EXPORTERS  
ASSOCIATION**

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**TO GETHER  
FOR  
LEATHER**

## PAKISTAN LEATHER GOODS EXPORTS

Pakistan's exports of leather goods increased by 2.99% in the first three months of the current fiscal year (2022-23) as compared to the corresponding period of 2021-22, according to Pakistan Bureau of Statistics (PBS).

As per PBS data, the leather products exports were recorded at \$159.046 million in July-September 2022-23 against the exports of \$154.427 million in July-September 2021-22. On year-on-year (YoY) basis, leather manufactures exports increased by 15.10% and remained at \$53.370 million in September 2022, compared to \$48.108 million in September 2021. The country's monthly leather products exports increased by 3.62% in September 2022, compared to \$53.437 million in August 2022. The exports of leather garments increased by 0.29% to \$80.724 million in the first three months of the fiscal year 2022-23, compared to \$80.487 million in the same period of the last fiscal year. On YoY basis, leather garments exports increased by 17.95% in September 2022 compared to the same month last year. Exports in September 2022 were recorded at \$27.721 million against the exports of \$23.503 million in September 2021.

Pakistan's leather garments exports increased by 1.14% on month-on-month (MoM) basis to \$26.692 million in September 2022, as compared to \$26.390 million in August 2022.

Pakistan's leather industry currently is one of the country's major earners of foreign exchange. Thousands of jobs are supported by this sector, which contributes 4% to national income from exports. There is a noticeable growth in Asian economies such as China and India despite changing circumstances around the world. It is also possible for Pakistan to grow at a faster rate, but the political scenario, socio-economic environment, and lack of updated technologies are the main obstacles.

The Pakistan Business Council's (PBC's) Make-in-Pakistan initiative aims to revive manufacturing in Pakistan, leading to jobs, an increase in value-added exports, import-substitution initially of labor-intensive products and an increase in tax collection. This report titled "Enhancing the Competitiveness of Pakistan's Leather Garment Industry" has been prepared in collaboration with the Pakistan Leather Garments Manufacturers & Exporter Association (PLGMEA).

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## PAKISTAN LEATHER GARMENTS INDUSTRY

Pakistan's leather industry, is the second largest export industry after textiles, contributing around 5.4% to exports. At HS-06 level, "Articles of apparel, of leather or composition leather" was the highest export under the leather industry, with market share of almost 28.0% which indicates the importance of leather garments in the Pakis-

tan economy. However, Pakistan's CAGR for the export of such garments was -4.8% for the last ten years.

Comparing Pakistan's leather garment export performance to other top competitors shows that Pakistan's leather garment exports had a higher ten-year CAGR (-4.83%) and annual growth rate (-8.17%) than the world average. These growth rates are higher than those for both Italy and India.

The government of Pakistan provides support to the leather garment industry by exempting custom duties on imports, enhancing duty drawback rates on leather garments, decreasing regulatory duties and initiating the project of Sialkot Tannery Zone. Automation of customs procedure has also been a welcome step by the industry. However, there is still a lot of work that needs to be done before the industry is able to flourish again.

Pakistan's exports of leather-made products jumped by 8.5 percent during the first nine months of the current fiscal year 2021-22 compared to the corresponding period of last year.

As per PBS data, the leather products exports were recorded at \$464 million in July-March 2021-22 against the exports of \$428 million in July-March 2020-21. The leather commodities that contributed to trade growth included leather garments, the exports of which increased by 7.95 percent from \$219.592 million last year to \$237.055 million this year and other leathers product increase

by 13.08 percent from \$12.261 million last year to \$13.865 million this year.

Meanwhile, leather commodities exports decreased by 9.12 percent in March 2022 compared to the same month of last year. The exports in March 2022

were recorded at \$41.528 million against exports of \$45.696 million in March 2021.

Leather garments exports decreased by 6.54 percent from \$19.799 million last year to \$18.505 million this year. Exports of leather goods witnessed a

decrease of 18.74 percent in March 2022 compared to exports of \$51.107 million in February 2022.

## LEATHER JACKET EXPORTS FROM WORLD

As per Volza's Global Export data, Leather jacket export shipments stood from World at 414.6K, exported by 6,137 World Exporters to 16,916 Buyers.

World exports most of its Leather jacket to Germany, United States and Italy.

The top 3 exporters of Leather jacket are India with 348,375 shipments followed by Pakistan with 24,190 and China at the 3rd spot with 13,484 shipments.

## Visit PLGMEA official website

All Members of PLGMEA can log on to PLGMEA website [www.plgmea.pk](http://www.plgmea.pk) and can make their mini website is Search Engine Optimized (SEO) like Google, Yahoo etc. The salient features of our website are as following:

- Update Members Directory
- Visa Recommendatory Letter
- Current Rebates SEOs & Circular
- Inter-member Trading

### DO YOU HAVE SOMETHING TO SHARE ?

All members are cordially invited to share their personal experiences tips, useful websites, articles or anything beneficial to our members.

Any such information should be sent to PLGMEA NZ office which shall be scrutinized and the published in the next bulletin.

#### TARIQ ISMAIL

Secretary PLGMEA (NZ)

[plgmeaskt@gmail.com](mailto:plgmeaskt@gmail.com)

## Pakistan Mega Leather Show 2023

BE A PART OF PAKISTAN'S MEGA LEATHER SHOW

8<sup>th</sup> PAKISTAN MEGA LEATHER SHOW  
INTERNATIONAL EXPO CENTER LAHORE, PAKISTAN  
01-03<sup>rd</sup> FEBRUARY 2023  
LEATHER - FOOTWEAR - GARMENTS - GLOVES - GOODS  
[www.megaleathershow.pk](http://www.megaleathershow.pk)  
[pmls@pakistantanners.org](mailto:pmls@pakistantanners.org)

FINISHED LEATHER  
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TDAP  
pakistan tanners association  
PFMA  
Pakistan Federation of Leather Manufacturers & Exporters Association  
PLGMEA  
Pakistan Leather Goods Manufacturers & Exporters Association

8th Pakistan Mega Leather Show will be held from 1st-3rd February, 2023 at Lahore Expo Centre. About 400 booths are booked for display of finest quality of leather. 400 buyers and visitors from all over the world are expected to attend the leather show. This fair is supported by government agencies such as the Trade Development Authority of Pakistan (TDAP), the Ministry of Finance, and the Ministry of Industries.

## Collector Customs Mr. Muhammad Nayyer Shafiq Visited PLGMEA on November 22, 2023



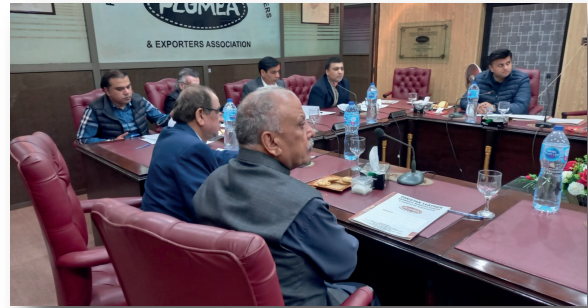
## Leather Sector Exports

July - Nov. 2021-22, July - Nov. 2021-23

Value = (Rupees in Million)  
(US Dollars in Thousands)

	July - Nov. 2021	July - Nov. 2022	% Change
Leather Tanned	078,944	075,425	- 04.46%
Leather Garments	139,105	129,577	- 06.85%
Leather Gloves	119,554	125,098	04.64%
Leather Footwear	047,654	061,212	28.45%
Leather Manufactures	007,978	06,878	-13.79%
<b>Total Leather Products</b>	<b>314,291</b>	<b>322,765</b>	<b>02.70%</b>

## The meeting of Central & Northern Zone Held on December 22, 2022



## PLGMEA Delegation Meeting with Mr. Zubair Motiwala Chief Executive of TDAP Held on January 04, 2023



### LEATHER SECTOR DELEGATION VISITED INDONESIA

A 11- member's delegation headed by Chief Executive Officer (CEO), National Productivity organization (NPO) Muhammad Alamgir Chaudhry visited Indonesia for the Promotion of Green Productivity and Sustainable Economic Growth of Pakistani Leather Sector. The delegation was comprising of leather manufacturers (tanners), representative of leather garments and footwear, industrial trade bodies. The delegation was arranged by NPO Pakistan in collaboration with WWF Pakistan through APO Japan

tance. The visit was sponsored by APO Japan along with partial funding from WWF Pakistan. The representatives of trade Associations, Sialkot Tannery Association (Guarantee) Limited (STGAL), Pakistan Leather Garments Manufacturers and Exporters Association (PLGMEA) and Pakistan Gloves Manufacturers and Exporters Association (PGMEA) comprising the delegation promoted better links and communication in Indonesia and exchanged information on new techniques and technologies in leather tanning. Leather sector is one the most important export sectors of -

Pakistan. The overall Pakistan leather sector's exports are stagnant as the leather tanneries mostly rely on conventional processes and technologies leading to lower productivity, mediocre product quality and significant impact on ecosystem. After a comprehensive need analysis, the revival of this sector was targeted through implementation of best practices learned from the leaders in the leather sector.

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# The First Meeting of the Leather & Footwear Council Held on December 14, 2022



## Central & Southern Zone

- 📍 ST#20, Central Avenue, Sector 7/A Korangi Industrial Area, Karachi
- 📞 0092-21-35116821, 36022403
- 📠 0092-21-35116822
- ✉️ plgmea.iq57yahoo.com

## Northern Zone

- 📍 BASF Building, Main Defence Road Sialkot, Pakistan
- 📞 0092-52-3254401, 3254403
- 📠 0092-52-3254400
- ✉️ plgmeaskt@gmail.com

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