

LEATHER & LEATHER PRODUCT MARKET IN BAHRAIN



सत्यमेव जयते

Embassy Of India
Bahrain



FOREWORD



राजदूत
Ambassador

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Embassy of India, Bahrain

20th September 2021

It is my great pleasure to introduce the “**Research Report on Footwear & Leather Products Market in the Kingdom of Bahrain & Opportunities for Indian Companies**” to our readers.

The Indian leather & leather Products and footwear Industry holds a prominent place in the Indian Economy. The export of footwear, leather and leather products from India was to the tune of US\$3.68 billion during 2020-21. India is the second largest producer of footwear and leather garment in the world, third largest exporter of Saddlery & Harness and 4th largest exporter of Leather Goods in the world.

The Research Report is a pioneering piece of work and has brought to the fore all the aspects related to the footwear & leather Products sector in the Kingdom of Bahrain viz present scenario of the local footwear & leather market, trade data, major companies, opportunities & challenges. Detailed analysis of leather market in Bahrain, makes it a ready reckoner for those interested in this business especially Indian exporters to understand the Bahraini market. The report also highlights strength of Indian leather industry and give information about Indian leather exporters which will be useful for Bahraini importers.

The comprehensive research work undertaken is commendable and I extend my compliments to the Commerce team and M/s AVY Consultium WLL Bahrain for their collective efforts in bringing out this Research Report at this opportune time.

PSI

(Piyush Srivastava)

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LEATHER MARKET INDUSTRY

Bahrain leather market has a great potential as the growing population, in confluence with the inflating income levels of individuals, represents one of the key factors escalating the demand for leather goods in the country.

The Bahraini economy's post-Covid-19 recovery is currently underway; with leading indicators such as point of sales transactions showing a rebound in economic activity as market coming back into its track.

Simultaneously, for leather and leather products market, as these goods are functional, comfortable and cost-effective, their sales are increasing in Bahrain and other GCC Countries as well.

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LEATHER MARKET IN BAHRAIN

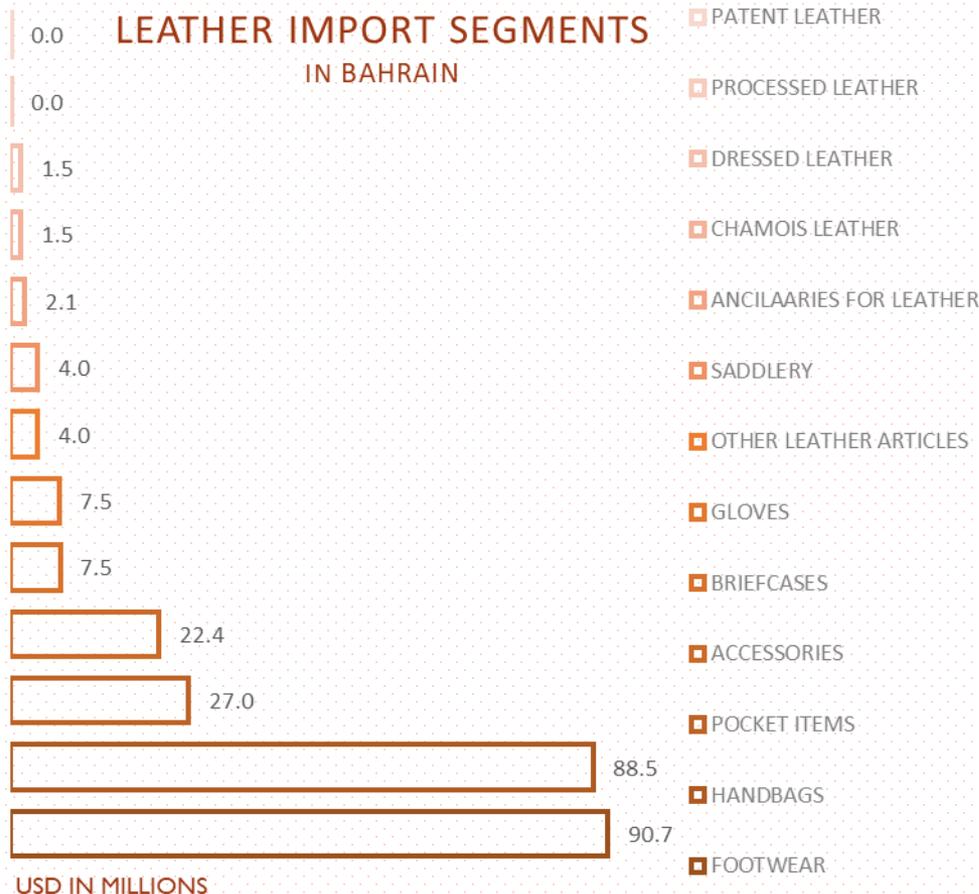


LEATHER MARKET IN BAHRAIN

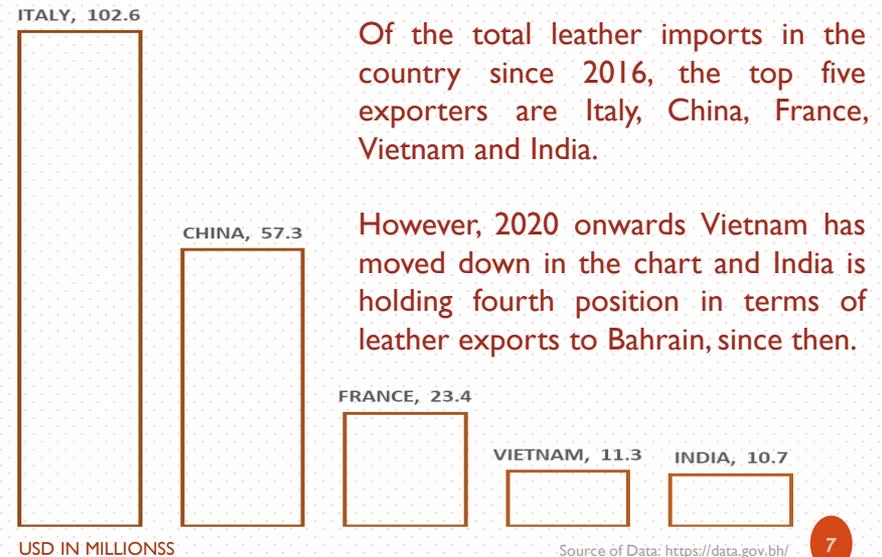
The global leather goods market size was valued at \$ 394 billion in 2020 and is expected to grow at a compound annual growth rate (CAGR) of 5.9% from 2021 to 2028. The market is mainly driven by rising consumer disposable income, improved living standards, changing fashion trends, and growing domestic and international tourism.

The rising demand for comfortable, trendy, and fancy leather apparel, footwear, and accessories, along with growing brand awareness, is expected to have a positive impact on the market. Attractive and luxurious leather products are often viewed as a style statement and status symbol.

Source of Data: <https://data.gov.bh/>



In Bahrain, the leather is consumed by the population of the country, as part of Footwear & Handbags, along with Pocket Items, Leather Accessories, Briefcases, Gloves, Saddleries and other leather articles. Of this Footwear and Handbags, forms the majority of 70% of total leather imports in the country, based on data since 2016.



Of the total leather imports in the country since 2016, the top five exporters are Italy, China, France, Vietnam and India.

However, 2020 onwards Vietnam has moved down in the chart and India is holding fourth position in terms of leather exports to Bahrain, since then.

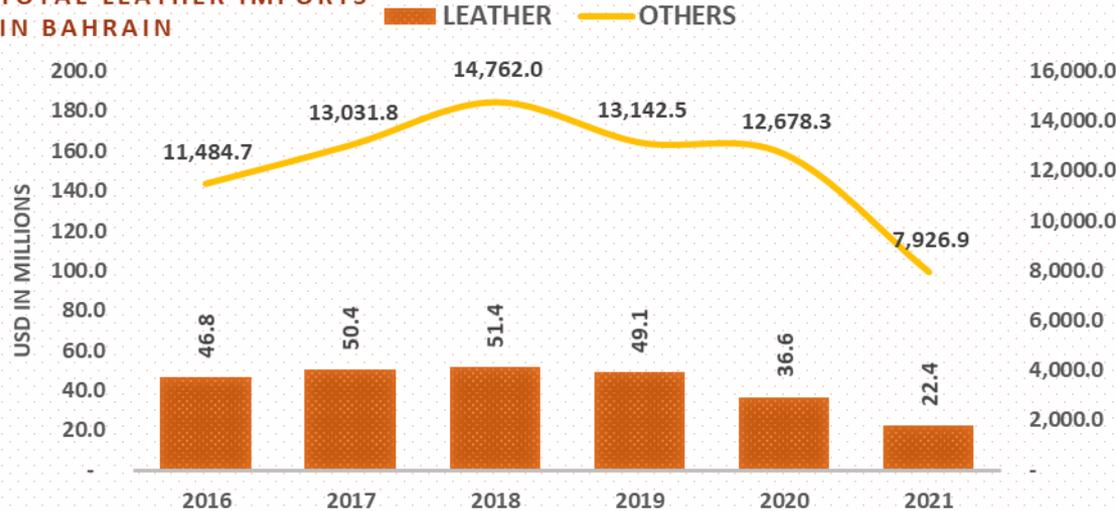
Source of Data: <https://data.gov.bh/>

LEATHER MARKET IN BAHRAIN



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TOTAL LEATHER IMPORTS IN BAHRAIN



Source of Data: <https://data.gov.bh/>

The Leather is being used for the making of artifacts ever since early days, and is used in contemporary design for footwear, dresses, handbags. Since 2016, the Kingdom of Bahrain has imported \$ 257 million of leather and leather related products, like, polish, machinery used for making leather, footwear and so on.

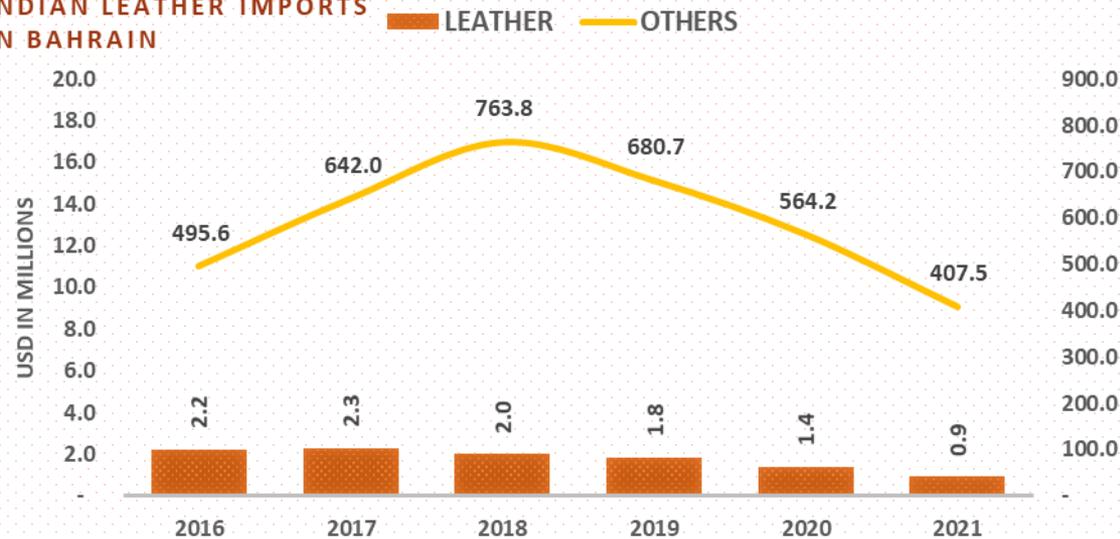
Overall the leather and the related products are being imported into Bahrain classified into 50 categories.

Out of total import of leather and related products in the country, **India exported just about leather amounting to \$ 11 million over the period since 2016**, and just \$ 1 Million in 2021. This represents 4% of the total leather and related products imports in the country.

The primary segment of leather imports is denominated in footwear.

Also, since January 2016 till July 2021, the leather based footwear imports amounted to \$ 91 million, where as, non-leather based footwear imports amounted to \$ 321 million.

INDIAN LEATHER IMPORTS IN BAHRAIN



Source of Data: <https://data.gov.bh/>



KINGDOM OF BAHRAIN

- + MARKET OVERVIEW
- + LEATHER IMPORTS IN BAHRAIN
- + GENDER BASED LEATHER IMPORTS
- + FOOTWEAR IMPORTS IN BAHRAIN
- + RE-EXPORT FROM BAHRAIN
- + CUSTOMS, REGULATIONS AND STANDARDS



After previously ranking 62nd in 2019, Bahrain strengthened business climate conditions and improved to 43rd out of 190 countries in the World Bank's "Doing Business 2020" report.

The World Bank recognized Bahrain as one of the top 10 most improved economies after implementing the highest number of regulatory reforms, improving in almost every area measured by the Doing Business report.

MARKET OVERVIEW

- Bahrain is one of the most open countries in Middle East region.
- With several free trade agreements, excellent infrastructure, and strong financial institutions, Bahrain is well positioned to provide traders and investors access to regional and international markets.
- Bahrain's real gross domestic product (GDP) grew by 1.8 percent in 2019, on par with 2018 growth rates, while nominal GDP grew by 2.4 percent for the same year. 2019 marked positive real GDP growth rates in both the oil and the non-oil sectors of 2.2 percent and 1.7 percent, respectively.
- Bahrain's economic freedom score is 69.9, making its economy the 40th freest in the 2021 Index. Its overall score has increased by 3.6 points, primarily because of an improvement in judicial effectiveness. Bahrain is ranked 4th among 14 countries in the Middle East and North Africa region, and its overall score is above the regional and world averages.
- Oil and natural gas play a dominant role in Bahrain's economy. Despite efforts to diversify the economy, according to the CIA World Fact Book: oil still comprises 85% of Bahraini budget revenues, meaning throughout the last few years lower world energy prices have generated sizeable budget deficits - about 10% of GDP in 2017 alone.

LEATHER IMPORTS IN BAHRAIN

Based on the import figures as reported by the Bahrain government, the total leather imports in the country since January 2016 till July 2021 amounted to \$ 257 million. On an aggregate level, the top five exporter countries for leather and related products are Italy, China, France, Vietnam and India.

LIST OF MAJOR LEATHER EXPORTERS TO BAHRAIN

USD IN MILLIONS	2016	2017	2018	2019	2020	2021*	TOTAL
ITALY	20.4	18.0	19.3	19.5	15.5	10.0	102.6
CHINA	10.4	12.4	11.0	11.3	7.9	4.3	57.3
FRANCE	3.8	3.5	4.6	4.5	4.0	3.1	23.4
VIETNAM	1.2	4.2	3.0	1.6	0.9	0.5	11.3
INDIA	2.2	2.3	2.0	1.8	1.4	0.9	10.7
SPAIN	1.7	1.4	2.1	2.5	1.2	0.7	9.7
UNITED STATES OF AMERICA	0.3	1.4	2.4	1.0	0.8	0.2	6.0
UNITED KINGDOM	1.0	0.8	0.6	0.6	0.6	0.4	3.9
PAKISTAN	0.6	0.6	0.6	0.6	0.6	0.3	3.5
OTHERS	4.0	4.9	4.9	5.1	3.2	1.7	23.8

Source of Data: <https://data.gov.bh/>

*Till July 31, 2021

During recent years, Vietnam has moved down the chart pushing India ahead as fourth largest importer of the leather products to Bahrain.

Howsoever, since 2016 India has exported leather and related products to Bahrain, aggregating to \$ 10.7 million, which is 4% of the total leather imports over the aforementioned period of years.

Also, Spain is striving to keep up with the competition with gradual increase in the value of exports.

LEATHER IMPORTS IN BAHRAIN



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In Bahrain, the leather is consumed by the population of the country, primarily in the form of Footwear & Handbags, along with products belonging to the categories of Pocket Items, Leather Accessories, Briefcases, Gloves, Saddleries and other leather articles. List of import categories aggregated based on product segments is provided below.

LIST OF LEATHER PRODUCTS CONSUMED IN BAHRAIN

USD IN MILLIONS	2016	2017	2018	2019	2020	2021*	TOTAL
FOOTWEAR	16.6	17.6	18.0	17.1	13.7	7.7	90.7
HANDBAGS	16.0	17.2	17.3	16.5	13.2	8.3	88.5
POCKET ITEMS	4.2	5.2	5.4	6.7	3.5	2.0	27.0
ACCESSORIES	4.3	4.7	4.8	4.1	2.7	1.8	22.4
BRIEFCASES	1.5	1.4	1.8	1.6	0.8	0.5	7.5
GLOVES	1.6	1.6	1.5	1.1	1.0	0.6	7.5
OTHER LEATHER ARTICLES	0.9	0.6	0.8	0.6	0.6	0.6	4.0
SADDLERY	0.5	0.8	0.9	0.6	0.6	0.5	4.0
ANCILARIES FOR LEATHER	0.4	0.6	0.5	0.4	0.2	0.1	2.1
CHAMOIS LEATHER	0.4	0.4	0.3	0.2	0.2	0.0	1.5
DRESSED LEATHER	0.4	0.3	0.3	0.2	0.1	0.1	1.5
PROCESSED LEATHER	0.0	0.0	0.0	0.0	0.0	0.0	0.0
PATENT LEATHER	0.0	0.0	0.0	0.0	0.0	-	0.0

Source of Data: <https://data.gov.bh/>

*Till July 31, 2021

Of the aforementioned leather based product segments, the Footwear and Handbags market comprises of 70% of the total consumption of the leather and related products in the country. This is followed by the Pocket Items and other accessories, which includes products like card holder, belts, etc.

It can be noted that the leather demand in Bahrain is primarily concentrated in the fashion segments, while the market for other items such as saddlery and leather skins is relatively smaller.



LEATHER IMPORTS IN BAHRAIN

With Vietnam moving down the chart in leather exporters to Bahrain, the India is competing with Italy, China and France to appear on the leaderboard for leather imports in Bahrain. Below is a comparative analysis of the Indian exports with the imports from top 3 exporter countries, for leather and related products. List of import categories aggregated based on product segments is provided below, considering data from January 2016 to July 2021.

COMPARATIVE ANALYSIS – TOP 3 LEATHER EXPORTING COUNTRIES V/S INDIAN EXPORTS

USD IN MILLIONS*	ITALY	CHINA	FRANCE	INDIA
FOOTWEAR	42.5	22.9	0.9	4.1
HANDBAGS	41.2	16.6	16.6	0.5
POCKET ITEMS	10.8	4.3	3.1	1.6
ACCESSORIES	5.1	4.1	1.3	1.6
BRIEFCASES	1.3	4.1	0.6	0.5
GLOVES	0.1	3.3	0.0	1.1
OTHER LEATHER ARTICLES	1.0	1.0	0.5	0.2
SADDLERY	0.1	0.8	0.4	1.0
ANCILLARIES FOR LEATHER	0.0	0.3	0.0	0.2
CHAMOIS LEATHER	0.0	0.0	0.0	0.0
DRESSED LEATHER	0.6	0.0	0.0	0.0
PROCESSED LEATHER	0.0	0.0	-	0.0
PATENT LEATHER	0.0	0.0	-	-

Source of Data: <https://data.gov.bh/>

*Till July 31, 2021

- India maintains the overall position as fourth largest exporter of leather products to Bahrain in 2021.
- However, in terms of Saddlery exports, the value of Indian leather exceeds the value of exports by top 3 exporters, placing India at the top in saddlery exports to Bahrain.
- In terms of leather footwear, Indian exports amounts to \$ 4 million whereas the cumulative value of handbag exports is merely \$ 0.5 million. The handbag and footwear markets are denominated by Italy and China cumulatively, due to their advantages for quality and cost respectively.



LEATHER IMPORTS IN BAHRAIN

From India, the import of leather products in Bahrain, are primarily made under the below categories:

IMPORT CATEGORIES OF INDIAN LEATHER PRODUCTS

USD IN MILLIONS	2016	2017	2018	2019	2020	2021*	TOTAL
POCKET ITEMS	0.32	0.36	0.37	0.28	0.16	0.09	1.58
OTHER FOOTWEAR	0.12	0.26	0.18	0.31	0.30	0.24	1.41
MALE LEATHER FOOTWEAR NOT COVERING THE ANKLE	0.32	0.22	0.16	0.23	0.12	0.08	1.13
OTHER LEATHER GLOVES	0.36	0.14	0.22	0.11	0.11	0.11	1.06
SADDLERY AND HARNESS	0.06	0.21	0.20	0.18	0.22	0.13	1.00
BELTS AND BANDOLIERS OF LEATHER	0.19	0.15	0.19	0.12	0.10	0.05	0.80
MALE LEATHER FOOTWEAR COVERING THE ANKLE	0.16	0.27	0.07	0.06	0.05	0.03	0.65
ARTICLES OF APPAREL OF LEATHER	0.16	0.18	0.10	0.08	0.05	0.04	0.60
HANDBAGS WITH OUTER SURFACE OF LEATHER	0.12	0.15	0.06	0.06	0.06	0.04	0.48
OTHER LEATHER CASES AND TRUNKS	0.02	0.01	0.22	0.05	0.02	0.01	0.33
OTHER LEATHER ARTICLES	0.05	0.05	0.03	0.03	0.02	0.01	0.20
FEMALE LEATHER FOOTWEAR NOT COVERING THE ANKLE	0.11	0.03	0.02	0.02	0.01	0.00	0.19
OTHER SPORTSWEAR	0.03	0.02	0.03	0.02	0.06	0.03	0.19
LEATHER POLISHES AND CREAMS	0.04	0.00	0.03	0.06	0.04	0.00	0.17
TEXTILE-UPPER FOOTWEAR WITH OUTER SOLES OF LEATHER	0.02	0.03	0.01	0.06	0.01	0.01	0.13
OTHER CASES WITH OUTER SURFACE OF LEATHER	0.04	0.02	0.02	0.04	0.00	0.00	0.13
FOOTWEAR WITH OUTER SOLES OF LEATHER	0.02	0.09	0.01	0.00	0.00	0.00	0.12
LEATHER TRUNKS AND SUITCASES	0.01	0.05	0.01	0.03	0.00	0.00	0.10
BABY LEATHER FOOTWEAR NOT COVERING THE ANKLE	0.00	0.02	0.03	0.01	0.02	0.00	0.09
FEMALE LEATHER FOOTWEAR COVERING THE ANKLE	0.01	0.02	0.01	0.01	0.01	0.01	0.08
OTHER FOOTWEAR WITH UPPERS OF LEATHER	0.00	0.00	0.01	0.06	0.00	0.00	0.07
LEATHER SCHOOL SACHELS	0.01	-	0.00	0.01	0.00	-	0.02
DESK PADS OF LEATHER OR COVERED WITH LEATHER	0.00	0.00	0.00	0.01	0.00	0.01	0.02
OTHER CLOTHING ACCESSORIES OF LEATHER	0.00	0.00	0.00	0.00	0.00	0.00	0.02
BABY LEATHER FOOTWEAR COVERING THE ANKLE	0.00	0.01	0.01	0.00	0.00	0.00	0.02

Source of Data: <https://data.gov.bh/>

*Till July 31, 2021

The majority of leather imports from India belongs to categories pertaining to footwear, saddlery and men accessories, including footwear belts, pocket items and similar.

GENDER BASED LEATHER IMPORTS



LEATHER IMPORTS INTO BAHRAIN GENDER WISE

USD IN MILLIONS	MALE	FEMALE	BABIES	GENERAL
FOOTWEAR	21.0	28.9	4.4	36.4
HANDBAGS	-	88.5	-	-
POCKET ITEMS	27.0	-	-	-
ACCESSORIES	-	-	-	22.4
BRIEFCASES	-	-	-	7.5
GLOVES	-	-	-	7.5
OTHER LEATHER ARTICLES	-	-	-	4.0
SADDLERY	-	-	-	4.0
ANCILARIES FOR LEATHER	-	-	-	2.1
CHAMOIS LEATHER	-	-	-	1.5
DRESSED LEATHER	-	-	-	1.5

Source of Data: <https://data.gov.bh/>

LEATHER EXPORTS INTO BAHRAIN FROM INDIA GENDER WISE

USD IN MILLIONS	MALE	FEMALE	BABIES	GENERAL
FOOTWEAR	1.8	0.3	0.1	1.9
HANDBAGS	-	0.5	-	-
POCKET ITEMS	1.6	-	-	-
ACCESSORIES	-	-	-	1.6
BRIEFCASES	-	-	-	0.5
GLOVES	-	-	-	1.1
OTHER LEATHER ARTICLES	-	-	-	0.2
SADDLERY	-	-	-	1.0
ANCILARIES FOR LEATHER	-	-	-	0.2

Source of Data: <https://data.gov.bh/>

SHARE OF INDIA IN TOTAL IMPORTS GENDER WISE

USD IN MILLIONS	MALE	FEMALE	BABIES	GENERAL
TOTAL	48.0	117.3	4.4	87.0
INDIA	3.4	0.8	0.1	6.4
% OF TOTAL LEATHER IMPORT	7.0%	0.6%	2.4%	7.4%

Source of Data: <https://data.gov.bh/>

- Based on demographics of the country, the majority of the leather and related products are consumed by the Female segment of the society in the form of Handbags.
- Where at one end, the global imports for the handbags stood at 88.5 million \$ since 2016, India contributed just about 0.5 million \$ to the same. Approximately around 0.6%.
- Similarly, for the products which can be related to men, babies and the population in general, India's contribution to such imports stand around 7.0%, 2.4% and 7.4% respectively.
- With coverage of male users relatively fine, India is contributing negligibly and very marginally, to the demand of handbags and babies products respectively, which can be explored further.

Note: The products are segregated among the different user segments, based on the general market trends and normal demand (For example, the handbags are assumed to be classified under the Female user categories as the demand for the same is concentrated primarily within the female buyers.)



FOOTWEAR IMPORTS IN BAHRAIN

Based on the earlier mentioned analysis, it can be noted that then largest component of the leather based products is Footwear.

The footwear and related products market in Bahrain, inclusive of both leather and non-leather based, amounts to total import of value US Dollar 423.42 million, since January 2016 till July 2021.

Where the leather based footwear imports amounts to \$ 91 million, non-leather based footwear imports amounts to \$ 321 million. In terms of non- leather based footwear products, China stands as the largest exporter to Bahrain while India stands at 5th position with non-leather based footwear exports of value \$ 15 million.

GCC represents one of the largest markets for footwear, primarily driven by the growing presence of a specialized leather processing hub that has resulted in the increased production and exports of leather-made footwear.

Besides this, due to their high purchasing power, consumers in the GCC countries are inclined toward premium footwear that reflects their social status. region, which is creating a positive outlook for the market.

Other factors, such as the increasing expatriate population leading to shifting aesthetic preferences among consumers and easy product accessibility through proliferating online retail channels, are driving the market further.

In the footwear industry, all types of market players exist, including but not limited to Nike, Adidas-Reebok, Puma, and Fila,.

It is to be noted that the footwear industry targets different age groups of the gender, creating separate target markets, for instance, male, female and babies.

A brief trend analysis of import of footwear products in Bahrain market is provided in following slides.



FOOTWEAR IMPORTS IN BAHRAIN

One of majority category of leather product which is imported into Bahrain is Footwear. Trend analysis for leather footwears is as follows:

LEATHER BASED FOOTWEAR IMPORTS

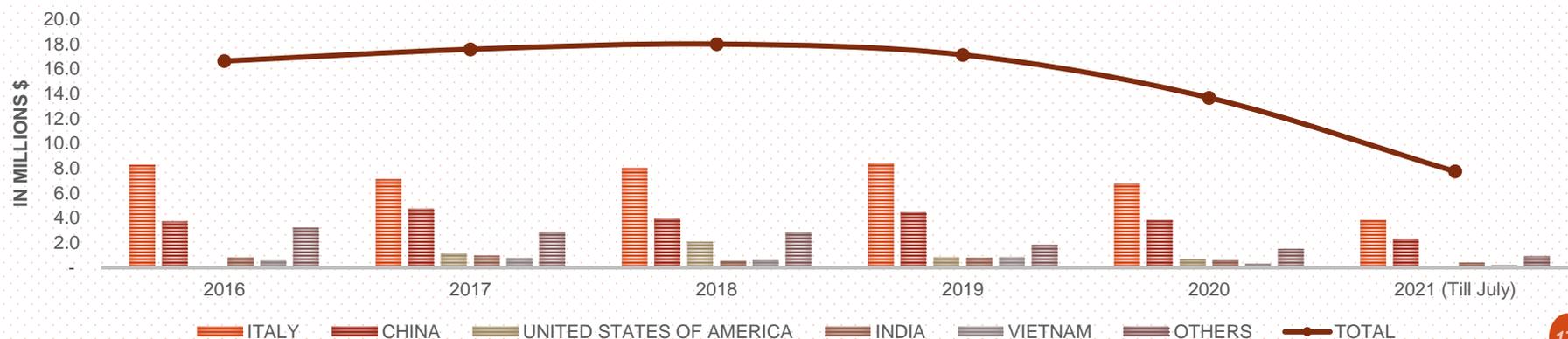
USD IN MILLIONS	2016	2017	2018	2019	2020	2021*	Total
ITALY	8.3	7.1	8.0	8.4	6.8	3.9	42.5
CHINA	3.7	4.7	3.9	4.4	3.8	2.3	22.9
UNITED STATES OF AMERICA	0.0	1.2	2.1	0.8	0.7	0.0	4.8
INDIA	0.8	1.0	0.5	0.8	0.6	0.4	4.1
VIETNAM	0.6	0.8	0.6	0.8	0.3	0.2	3.3
OTHERS	3.2	2.9	2.8	1.8	1.5	0.9	13.2
TOTAL	16.6	17.6	18.0	17.1	13.7	7.7	90.7

Source of Data: <https://data.gov.bh/>

*Till July 31, 2021

Other than Italy and China, USA is also on the leader board when it comes to footwear exports to Bahrain, with branded footwear and related products available in the market.

LEATHER FOOTWEAR



Note: The table and charts shows cumulative imports for the period from January 2016 to July 2021.

FOOTWEAR IMPORTS IN BAHRAIN



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In addition to imports of leather-based footwear, the non-leather based footwear imports of Bahrain also makes a significant contribution to the total imports in the country. Trend analysis for the same since 2016 is as below:

NON-LEATHER BASED FOOTWEAR IMPORTS

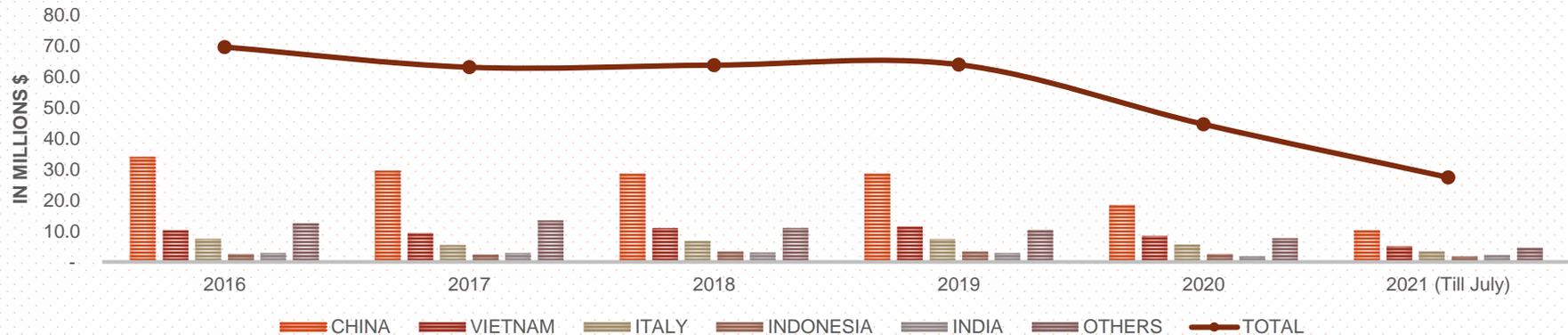
USD IN MILLIONS	2016	2017	2018	2019	2020	2021*	Total
CHINA	34.1	29.6	28.7	28.7	18.5	10.3	149.8
VIETNAM	10.4	9.4	11.0	11.5	8.5	5.1	55.9
ITALY	7.5	5.5	6.9	7.4	5.7	3.5	36.5
INDONESIA	2.5	2.4	3.3	3.3	2.4	1.7	15.5
INDIA	2.8	2.9	3.0	2.8	1.9	2.2	15.4
OTHERS	12.5	13.5	11.0	10.3	7.7	4.7	59.6
TOTAL	69.7	63.1	63.8	64.0	44.7	27.4	332.7

Source of Data: <https://data.gov.bh/>

*Till July 31, 2021

With its cost efficiency, the China leaves all other countries way behind in terms of non-leather based footwear industry in Bahrain. It can be noted that China alone contributes 45% to total imports of non leather footwear in Bahrain, where as contribution by India to the same, stands at 5%.

NON LEATHER FOOTWEAR



Note: The table and charts shows cumulative imports for the period from January 2016 to July 2021.

RE-EXPORT FROM BAHRAIN

RE-EXPORT

It is to be noted that Bahrain also serves as a platform to further export, as it also exports to other countries.

The exports from Bahrain are done primarily under these categories:

1. National Origin, and
2. Re-Export.

Since 2016 to July 2021, Bahrain has exported \$ 39.6 Million leather & leather related products, out of which **\$ 36.9 million belongs to re-export** and remaining \$ 2.7 Million from National Origin. Trend analysis of re-exports from Bahrain, with import categories aggregated based on product segments, is provided below is as follows:

TREND OF RE-EXPORTS FROM BAHRAIN

USD IN MILLIONS	2016	2017	2018	2019	2020	2021*	Total
ACCESSORIES	0.4	1.3	1.6	0.2	0.1	0.1	3.5
ANCILARIES FOR LEATHER	0.2	0.1	0.1	0.1	0.0	0.0	0.6
BRIEFCASES	0.3	0.2	0.1	0.1	0.1	0.1	0.7
CHAMOIS LEATHER	0.00	0.0	0.0	0.0	0.0	0.0	0.0
DRESSED LEATHER	0.0	0.0	0.0	0.0	0.0	0.0	0.1
FOOTWEAR	5.9	3.4	3.8	1.7	1.3	0.8	17.0
GLOVES	0.3	0.0	0.2	0.1	0.0	0.0	0.6
HANDBAGS	2.3	3.2	2.8	1.1	1.7	0.5	11.6
OTHER LEATHER ARTICLES	0.0	0.1	0.1	0.0	0.0	0.0	0.1
POCKET ITEMS	0.7	0.4	0.4	0.4	0.3	0.0	2.1
PROCESSED LEATHER	0.0	0.0	0.0	0.0	0.0	0.0	0.0
SADDLERY	0.1	0.0	0.0	0.2	0.2	0.1	0.6
	10.0	8.7	9.0	3.8	3.7	1.6	36.9

Source of Data: <https://data.gov.bh/>

*Till July 31, 2021

RE-EXPORT FROM BAHRAIN

Bahrain share of national origin export in total export is around 6.8% which clearly shows the fact that 93.2% exported from Bahrain is re-export.

Footwear are the leather products which are majorly re-exported from Bahrain to other countries. Since Jan 2016 to July 2021 \$ 2.5 Million footwears are out total re-export of \$ 2.7 Million. Trend analysis of exports of national origin from Bahrain, with import categories aggregated based on product segments, is as follows:

TREND OF NATIONAL ORIGIN EXPORTS FROM BAHRAIN

USD IN MILLIONS	2016	2017	2018	2019	2020	2021*	Total
ACCESSORIES	0.0	0.0	0.0	0.0	0.0	0.0	0.0
ANCILARIES FOR LEATHER	0.0	0.0	0.0	0.0	0.0	0.0	0.0
BRIEFCASES	0.0	0.0	0.0	0.0	0.0	0.0	0.0
CHAMOIS LEATHER	0.0	0.0	0.0	0.0	0.0	0.0	0.0
DRESSED LEATHER	0.0	0.0	0.0	0.0	0.0	0.0	0.0
FOOTWEAR	0.7	0.6	0.3	0.4	0.4	0.0	2.5
GLOVES	0.0	0.0	0.0	0.0	0.0	0.0	0.0
HANDBAGS	0.0	0.0	0.0	0.0	0.0	0.0	0.1
OTHER LEATHER ARTICLES	0.0	0.0	0.0	0.0	0.0	0.0	0.0
POCKET ITEMS	0.0	0.0	0.0	0.0	0.0	0.0	0.0
PROCESSED LEATHER	0.0	0.0	0.0	0.0	0.0	0.0	0.0
SADDLERY	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	0.8	0.7	0.3	0.5	0.4	0.0	2.7

Source of Data: <https://data.gov.bh/>

*Till July 31, 2021



▪ **DUTIES AND TAXES IN BAHRAIN**

VAT on Import as an Import Duty is applicable at the rate of **5 percent** on leather & leather products

▪ **BAHRAIN VAT LAW**

For Bahrain VAT Law to apply, an import of goods must take place into the territory of the Kingdom of Bahrain.

▪ **ELIGIBLE IMPORT OF GOODS**

The fact that goods enter Bahrain and are customs cleared is enough for an import of goods to have taken place for VAT purposes.

▪ **SUPPORTING DOCUMENTS**

Bahrain requires several supporting documents to the Customs declaration for imports – including invoices, delivery orders, certificates of origin, copies of the insurance policy, bills of lading, import permits, and bank guarantees.

▪ **COMPANY REGISTRATION**

Companies will need to obtain official Commercial Registration from Bahrain before importing into the country. This registration is renewed every year.

▪ **100% FOREIGN OWNED**

Unlike many other Middle Eastern countries, importing businesses in Bahrain may be 100% foreign-owned.

▪ **LESS COSTLY, TIME CONSUMING**

Time required to receive and process documents in Bahrain is slightly higher than that of the U.A.E., the process does generally cost less to complete. In addition, Bahrain has been making reforms that streamline these procedures and increase the ease of trading across borders.



REPUBLIC OF INDIA

- + MARKET OVERVIEW
- + COUNCIL FOR LEATHER EXPORTS
- + LEATHER PRODUCTS IN INDIA
- + LEATHER EXPORTS FROM INDIA





MARKET OVERVIEW

- The Leather Industry holds a prominent place in the Indian economy. This sector is known for its **consistency in high export earnings**, and it is among the top ten foreign exchange earners for the Country.
- The export of footwear, leather and leather products from India reached a value of **US\$ 3.68 billion** during 2020-21.
- The leather industry is bestowed with an affluence of raw materials as India is endowed **with 20% of world cattle & buffalo and 11% of world goat & sheep population**. Added to this are the strengths of skilled manpower, innovative technology, increasing industry compliance to international environmental standards, and the dedicated support of the allied industries.
- India is the **second largest exporter of leather garments and third largest exporter of Saddlery & Harness** in the world.
- The major production centers for footwear, leather and leather products in India are located in the States of **Tamil Nadu, West Bengal, Uttar Pradesh, Maharashtra, Punjab, Karnataka, Telangana, Haryana, Delhi, Madhya Pradesh, Kerala, Rajasthan, Jammu & Kashmir**.

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The Indian leather industry accounts for around 12.93% of the world's leather production of hides/skins. India's leather industry has grown drastically, transforming from a mere raw material supplier to a value-added product exporter.

The total leather and leather products export during April 2000 to March 2021 was US\$ 3.30 billion and for the month of March 2021 it was US\$ 317.77 million.

During April 2020 to March 2021, products exported include leather footwear component (US\$ 197.59 million), leather garments (US\$ 295.56 million), and leather goods (US\$ 944.31 million)

Source: <https://www.ibef.org/exports/leather-industry-india.aspx>

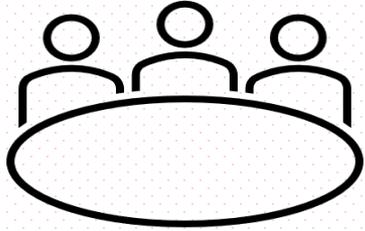
MARKET OVERVIEW

STRENGTHS OF INDIAN LEATHER SECTOR

- Own raw material source About 3 billion sq ft of leather produced annually
- Some varieties of goat / calf / sheep skins command premium position
- Strong and eco-sustainable tanning base
- Modernized manufacturing units
- Trained / skilled manpower at competitive wage levels
- World class institutional support for Design & Product Development, HRD and R & D.
- Presence of support industries like leather chemicals and finishing auxiliaries
- Presence in major markets Long Europe experience
- Strategic location in the Asian landmass

EMERGING STRATEGIES

- Design development initiatives by institutions and individuals
- Continuous modernization and technology up-gradation
- Economic size of manufacturing units
- Constant human resource development programme to enhance productivity
- Increasing use of quality components
- Shorter prototype development time
- Delivery compliance
- Growing domestic market for footwear and leather articles



The **Council for Leather Exports (popularly known as CLE)** set up in July 1984, is an autonomous non-profit company registered under the Indian Companies Act, 1956 entrusted with **export promotion activities and development of the Indian leather industry.**

- CLE function under the aegis of the **Ministry of Commerce and Industry, Government of India.**
- CLE caters to the needs of the leather exporters and serves as a **connecting bridge** between Indian leather exporters and buyers all over the world.
- CLE's status as the apex Leather Export Promotion Organization in India also calls for its active involvement with the Central and State Governments in the evolution of suitable action plans and formulation and dissemination of proactive Government policies to promote Indian leather exports as well as the infrastructure and fiscal support available to exporters.
- In this whole exercise of **promoting exports**, CLE works closely with its members and Government departments in having their **individual and collective problems and difficulties resolved.**
- CLE serves as a vital link between the government and the industry members, while focusing on the overall health and growth of the Indian leather industry

CLE acts as a **facilitator for building relationships between overseas buyers/investors and their Indian counterparts to promote exports** from the Indian leather industry.

As a government **sponsored** nodal agency, CLE is a one-stop source for international investors to not only access all the information, but also avail the guidance they need, to set up a successful venture in the Indian marketplace.

CONTACT DETAILS

Council for Leather Exports,
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Tel: 044 48684380-84 (5 lines) | Fax: 044 48684386 | E-Mail: cle@cleindia.com
<https://leatherindia.org/contact-us/>

LEATHER PRODUCTS IN INDIA

Tanning Sector

Annual production about 3 billion sq. ft. Accounts for 10% of world leather requirement. Indian colors continuously being selected at the MODEUROPE Congress



Footwear Sector

- Second largest footwear producer after China.
- Annual Production 2257 million pairs. Footwear (leather and non-leather) export accounts for about 43.5% share in India's total leather & leather products export.
- Footwear products mix; Gents 58%, Ladies 30% ,Children 9% and others 3%

Leather Garments Sector

Second largest producer and second largest global exporter. Accounts for 9% share of India's total export from leather sector.



Leather Goods & Accessories Sector including Saddlery & Harness

Fifth largest global exporter. Accounts for about 24% share of India's total export.



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LEATHER EXPORTS FROM INDIA

INDIA'S EXPORT OF LEATHER & LEATHER PRODUCTS TO VARIOUS COUNTRIES FOR LAST 5 YEARS

Value in Million USD

Countries	2016-17	2017-18	2018-19	2019-20	2020-21	%Share of 2020-21
USA	867.2	847.3	893.7	873.3	645.0	17.5%
Germany	657.4	684.4	659.2	607.4	481.4	13.1%
UK	606.2	616.4	597.3	528.8	327.0	8.9%
Italy	374.1	389.1	368.7	320.8	248.6	6.8%
France	287.7	326.4	323.0	301.1	245.4	6.7%
Netherlands	169.0	197.0	194.4	178.7	155.4	4.2%
Spain	293.4	281.3	258.3	254.1	154.1	4.2%
China	173.7	170.3	148.2	132.1	95.2	2.6%
Poland	101.1	144.5	115.0	106.8	86.3	2.3%
U.A.E.	226.7	161.3	226.2	169.9	80.1	2.2%
Others	1,890.3	1,923.1	1,907.0	1,597.6	1,163.2	31.6%
Total	5,646.8	5,741.0	5,691.0	5,070.6	3,681.6	100.0%

Source: <https://leatherindia.org/indian-leather-industry/> | DGCI & S

As per Indian Financial Year April to March

Note: Data taken from Council For Leather Export website (<http://leatherindia.org/>). Extract dated 22.08.2021

In terms of leather and leather products exports from India, the main target market is USA with share of 18%, as per the latest data available for the period 2020-21

The leather exports to UAE accounts for 2% of the total leather exports from India to other countries globally.

While the overall demand for Indian leather remained constant from the period 2016-17 till 2019-20, the reduction has been noted during the pandemic hit year 2020-21.



LEATHER EXPORTS FROM INDIA

INDIA'S EXPORT OF LEATHER & LEATHER PRODUCTS 2019-20 vis-a-vis 2020-21

Value in Million USD

Category	2019-20*	2020-21**	% Variation	% Share 2021
Finished Leather	524.2	378.2	-27.8%	10.3%
Leather Footwear	2,081.6	1,485.6	-28.6%	40.4%
Footwear Components	261.7	197.6	-24.5%	5.4%
Leather Garments	429.1	295.6	-31.1%	8.0%
Leather Goods	1,340.6	944.3	-29.6%	25.7%
Saddlery And Harness	151.4	186.2	23.0%	5.1%
Non-Leather Footwear	282.0	194.2	-31.1%	5.3%
Total	5,070.6	3,681.6	-27.4%	100.0%

Source: <https://leatherindia.org/indian-leather-industry/> | DGCI & S

As per Indian Financial Year April to March

*Data taken from 'Export Analysis April-March 2019-20' available on Council For Leather Export website (<http://leatherindia.org/>). Extract dated 16.09.2021**Data taken from 'Export Analysis April-March 2020-21' available on Council For Leather Export website (<http://leatherindia.org/>). Extract dated 16.09.2021

Remission of Duties and Taxes on Exported Products (RoDTEP) Scheme

- Also effective from 1st January 2021, the RoDTEP scheme of Government of India, is giving **boost to Indian exports** by providing a level playing field to domestic industry abroad.
- This scheme provides for **rebate of Central, State and Local duties/taxes/levies on exported goods** which have not been refunded under any other duty remission schemes. This does not only include the direct cost incurred by the exporter but also the prior stage cumulative indirect taxes on goods.



LEATHER EXPORTS FROM INDIA

- India is the second largest producer of footwear and leather garment in the world, third largest exporter of Saddlery & Harness and 4th largest exporter of Leather Goods in the world.
- The Indian leather industry alone accounts for around 13% of the world's leather production of hides/skins. The country accounts for 9% of the world's footwear production. Furthermore, the Indian industry is known for its consistency in high export earnings and it is among the top ten foreign exchange earners for the country.
- The industry experienced a positive metamorphosis from being a mere transporter of raw materials to an established exporter of value added and finished leather products.
- As per the Department for Promotion of Industry and Internal Trade (DPIIT), the leather, leather goods and pickers sector in India has attracted FDI equity inflows equivalent to \$ 215.2 million for the period Apr 2000 to Mar 2021.
- India has an abundance of raw materials with access to 20% of world's cattle and buffalo and 11% of the world's goat and sheep population.
- Main leather exports from India comprise of products belonging to the segments like skins and hides of animals such as cow, sheep nappa, goat skin and wet blue. Footwear, leather gloves, garments, handbags, purses, wallets, and briefcases are some of the products exported by the Indian industry.
- The prominent brands in leather and footwear related segment, sourced from India, are Acme, Clarks, ColeHann, Deichmann, Ecco, Elefanten, Florsheim, Gabor, Hasley, Hush Puppies, Double H, Justin, Marks & Spencer, Nautica, Nike, Nunn Bush, Reebok, Salamander, Stacy Adams, Tony, Lama, Next, Bally.
- Among others, Aldo, Bally, Clarks, Ecco, Florshiem, Ferragammo, Hush Puppies, Lee cooper, Lloyd, Marks & Spencer, Nike, Nine West, New Balance, Reebok, Rockport, Stacy Adams are a few notable leather product brands sold in India.



MARKET BARRIERS

- + BAHRAIN IMPORT CHALLENGES
- + GENERAL EXPORT CHALLENGES



Bahrain being a market with consumers who are quality conscious, primarily faces the challenges from two perspectives when it comes to imports from India. These are:

✓ QUALITY CONSTRAINTS

- + Major segment of the Bahraini consumer market is quality conscious and have the loyalty towards Italian leather.
- + From Jan 2016 to July 2021 Bahraini buyers have imported around \$103 Million leather and leather products from Italy.
- + In terms of quality, Indian products fall slightly on the lower end when compared with Italian leather.
- + Primary reason for such lacking is unavailability of resources like hide and skins of animals at reasonable price in Indian market.

✓ PRICE CONSTRAINTS

- + While Bahrain's majority market is quality conscious, certain buyers in the market share the concern for price restraints as well, when it comes to standard quality products.
- + In terms of price advantage, China has a low man-power cost.
- + Accordingly, as China provides relative price advantage to India, being a tough competitor, the demand of leather products in Bahrain is satisfied by the Chinese goods at cheaper rather.

Resultantly, the first three positions in leather has been occupied by Italy, China and France being the top exporters to Bahrain for leather and related products, while India stood at fourth.

✓ DEMAND OF ANIMAL HIDES & SKIN LEATHER PRODUCTS

- + While considering Indian Leather imports, Bahraini importers take into account the other aspects as well.
- + Owing to unavailability of high quality animal based leather in India, manufacturers in India have no option but to import bovine leather from countries like Pakistan, Bangladesh and others, which makes it a costly process.
- + And this becomes one of the reasons for Bahraini Importers to avoid Indian leathers.
- + Additionally, on price aspect of the same concern, with recent amendments* in the Duty-Free Import Scheme by India in Union Budget 2021-22 for specific products, imports of such goods have become costlier.
- + **With aforementioned dynamics related to leather market and products, Bahraini buyers are forced to incline towards the purchases from competitor countries that provide the same quality products, at a relatively lesser price.**

**Note: Effective April 1, 2021, Basic Customs duty exemption is provided only for import of lining and interlining materials by Leather Garments exporters, up to 2% of FOB value of exports. Exemption shall not be available to leather garment exporters, manufacturer exporters of footwear and other leather products.*



GENERAL EXPORT CHALLENGES

✓ INADEQUACY OF TRADE INFORMATION SYSTEM

- + Efficient and time bound trade information system is a basic need for success in today's dynamic export business. Electronic commerce including Electronic Data Interchanges (EDI) and Internet play a very crucial role in the world trade at present. In India, there are still no proper facilities of communication and therefore it is not possible to rely on Internet for getting up to date global trade information.

✓ FACELESS PRESENCE

- + Most leather products exported have a faceless presence in world markets.
- + The exports from India undergo further processing or repacking in many cases. However, in such instances Indian goods are sold in the foreign markets with little or no change, BUT under the umbrella of foreign brand names, and ends up losing the exposure for being promoted as Indian product.
- + The possible reason for the same is that when a product carries a foreign brand name it gets a relatively higher price than if it is sold with an Indian brand name. Specifically in the Bahrain and other GCC countries where the consumers are brand conscious.



WAY FORWARD

- + MARKET PENETRATION STRATEGIES
 - LOW COST
 - DIFFERENT PRODUCTS
 - BLUE OCEAN STRATEGY
- + LUXURY FURNITURE MARKET
- + VALUE FOR MONEY SEGMENT
- + STRENGTHENING CURRENT POSITION

WAY FORWARD

A) LOW-COST PRODUCTION STRATEGIES

For Leather and leather products low-cost relative to competitors may become the theme running through the entire strategy, through quality, service and other areas cannot be ignored. Achieving an overall low-cost position will require a high relative market share or other advantageous, such as favorable access to raw material.

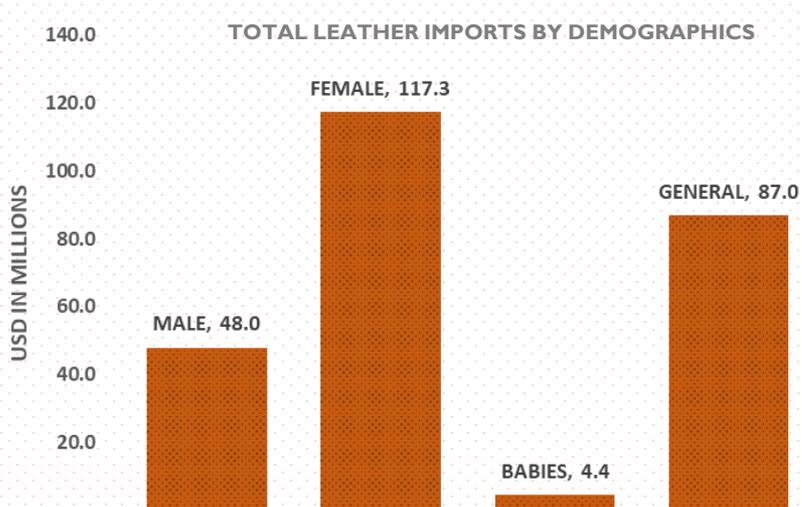
B) DIFFERENTIATING THE PRODUCTS

For Leather and leather products approaches can be taken in form of brand image, design, customer service orientation, establishing good dealer network, or other dimensions. In ideal scenario, it should be a method to differentiate on more than one basis. Differentiation provides insulation against competitive rivalry because of brand and country loyalty by customers (like Italian Leather) and resulting lower sensitivity to price.

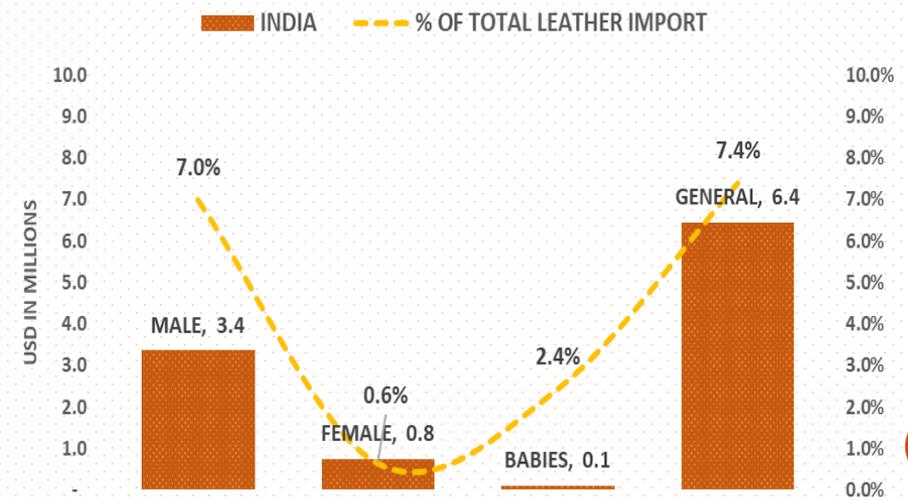
C) BLUE OCEAN STRATEGY (LOW COST AND DIFFERENT PRODUCTS)

Adoption of business strategies like Blue Ocean in order to simultaneously pursuing differentiation and low cost to open up a new market space and create new demand, and capturing uncontested market space, thereby making the competition irrelevant.

For example, if one looks at the chart below, it shows the allocation of leather and related products based on demographics of the Kingdom of Bahrain since 2016. It can visually be noted that focus has been on primarily of tapping the female segment of the society, with increase sales & promotions of handbags. The Indian exporters may consider attempting to explore the relatively untapped market for Males and marginally tapped market for the Babies/Kids, with adoption of strategies to target these markets specifically.



Source of Data: <https://data.gov.bh/>



Source of Data: <https://data.gov.bh/>

WAY FORWARD

D) LUXURY FURNITURE MARKET

The luxury furniture market in the Middle East is poised to grow in next five years. The market is driven by the increase in the number of office spaces and growing residential construction.

The increase in strategic partnerships by MNCs acts as one of the prime reasons driving the luxury furniture market in Middle East growth during the next few years. Wood and Metal luxury furniture are also gaining popularity due to the properties it offers, such as durability and high aesthetics value.

With increase demand in such segments, Indian exporters may consider attempting to tap the market for the luxury leather based furniture (bonded and genuine).

E) VALUE FOR MONEY SEGMENT

In a webinar organised by the Confederation of Indian Footwear Industries in May, it was pointed out that China's share in the global footwear production dropped from 58 per cent in 2017 to 56 per cent in 2018. However, countries such as Vietnam and Indonesia benefited most from this decline. Indian exports are skewed towards leather footwear or handcrafted footwear, the manufacturer may increase focus on machine-made non-leather footwear to boost exports in this segment.

In a country like Bahrain, where the buyers are brand sensitive, the Indian footwear manufacturers may consider doing their brand promotion as 'Value for Money' segment in order to capture the untapped share of the Bahraini market. In terms of quality in leather and non-leather products, it may appear as a challenge for Indian exporters to compete products imported in Bahrain from Italy, Spain, France, etc.

However, by targeting a different set of audience who are quality sensitive but as well as price sensitive, products by Indian manufacturers like Bata, Liberty, Paragon, Lancer, Mochi, Relaxo, Red Tape, Hitz, Tirubala, Lakhani, VKC may create a place of their own in the Bahrain leather and non-leather footwear market. For instance, these can be promoted under the slogan of 'Budget to Brand'.

F) STRENGTHENING CURRENT POSITION

As pointed in the point (c) earlier, the market for Male user is marginally captured. However, in comparison to female, babies and general use related segments, India has relatively stronger presence in Male user segments with 7.0% share as shown earlier.

Accordingly, the Indian exporters may first consider strengthening their position among Male user segments and increasing the market share under the same, against competing in Female segments, where the market is primarily captured by Italian exporters.



MARKET PLAYERS

- + BAHRAINI LEATHER IMPORTERS
- + BAHRAINI FOOTWEAR IMPORTERS
- + INDIAN EXPORTERS



BAHRAIN LEATHER IMPORTERS

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3	EMPIRE FASHIONS	+973 17215403	-	P.O Box.No: 2706 , Manama , Bahrain
4	HUNDLUR TRADING CO WLL	+973 16666611	info@hundlur.com	Moda Mall, Shop 138 , Bahrain World Trade Centre, Office 182 , Building 20, Road 365, Block 316 , Manama , Bahrain
5	M M SHARIF HATAM & SONS	+973 17228258	mmshatam@batelco.com.bh	P.O Box.No: 469 , Manama , Bahrain
6	VALENCIA	+973 17179397	valenciabcc@arg.com.bh	P.O Box.No: 1088 , Seef , Bahrain
7	KING VIPER & COMPANY	+973 38871808	Kingviper132@gmail.com	Building 27, Road 26 , Block 926, West Riffa , Bahrain
8	SUPER LEATHER UPHOLSTERY	+973 17784403	-	PO Box 39344, Riffa , Building 61G, Road 10, Block 704 , Salmabad , Bahrain
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10	AL ASAYEL EQUESTRIAN SUPPLIES	+973 17611861	alabayel@batelco.com.bh	P.O Box.No: 38003 , Riffa , Bahrain
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12	ANF APPAREL	+973 77060288	info@anfholding.com	PO Box 489, Manama , Dar AlEzz Building, Office 126 , Building 322, Road 1910, Block 319 , Hooraa , Bahrain
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BAHRAIN FOOTWEAR IMPORTERS



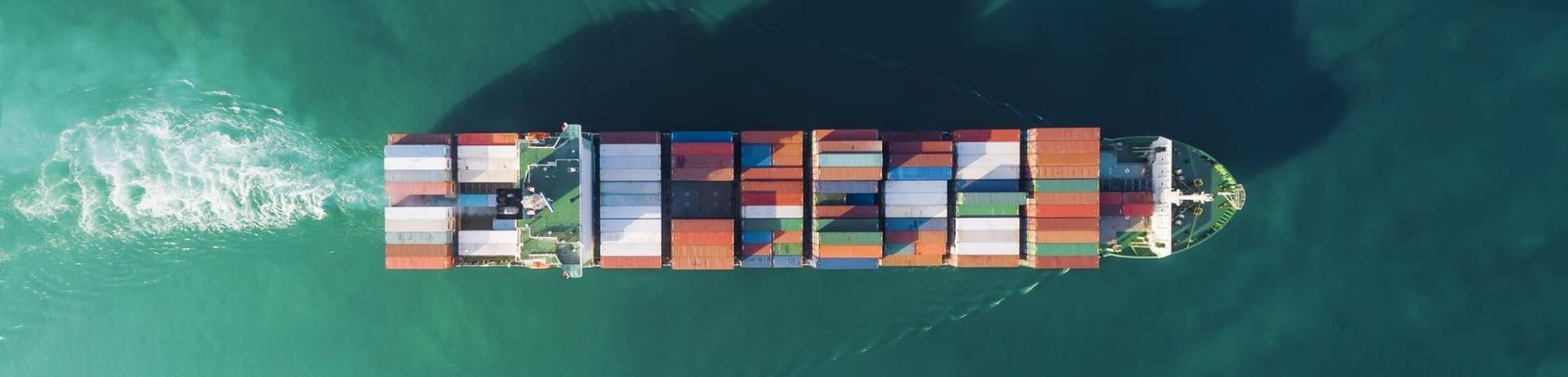
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12	EQUINOX FOR TRADING	+973 17293066	trading@equinox-bh.com	Shop 891 , Road 1812 , Hooraa , Bahrain
13	CEE KEY KEY TRADING CO.WLL	+973 1717 9760	-	Rd No 204, Isa Town, Bahrain
14	JASHANMAL & SONS PSC	+973 17582424	info@jashanmals.com	P.O Box. No: 16 , Manama , Bahrain
15	MR PRICE BAHRAIN WLL	+973 17686275	mr.pricebahrain@gmail.com	P.O Box. No: 11597 , Manama , Bahrain



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INDIAN EXPORTERS

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3	CSH90420	GLOBAL EXPORT	SHITEJ DHAWAN	dhawan@globalexport.net.in
4	NLF48209	KAMSON SHOE CO	NARENDRA KUMAR PURSNANI	tokyokamson@yahoo.co.in
5	CSH90191	HAMRAZ TRADERS	KHURSHEED ANWAR	hamraztraders1970@gmail.com
6	SNF03200	VEEKESY ELASTOMERS PVT. LTD.	V.ABDUL RASHEED	vkcnoushad@walkarogroup.com
7	CFL90201	SUPERHOUSE LTD.	A.K. AGARWAL	mamin@superhousegroup.com safetyshoe@superhousegroup.com akagarwal@superhousegroup.com
8	CLC90745	JAMIQ INTERNATIONAL	JAVED IQBAL	jamiqint@gmail.com info@naazexports.com 555javediqbal@gmail.com
9	NLF41366	RELAXO FOOTWEARS LIMITED	SANDEEP SINGH	export@relaxofootwear.com
10	NLF42442	M.B.S EXPORTS PVT. LTD.	DINESH SHARMA	nadiashoe@gmail.com
11	NLF48287	HARRADS INDIA FOOTWEAR	SYED MUAZZAM ALI	syedmuzzam@ymail.com
12	NNF42935	BALAJI INDUSTRIES	RAJ KUMAR	slajpr@gmail.com
13	NLF48275	JONES TRADERS	NADIM AHMAD	jonestraders@yahoo.co.in
14	ELP61693	JAN OVERSEAS	MOHAMMED JAHANGIR	janoverseas1@gmail.com
15	EGL60650	INDUSTRIAL SAFETY PRODUCTS PVT. LTD.	GOPAL KUMAR NAREDI	exim@ispgloves.com
16	NLF40198	LIBERTY SHOES LTD	ADESH GUPTA	dgft@libertyshoes.com
17	NLF41678	S.G.EXPORTS	KUNAL KUMAR	sgexports@yahoo.com
18	CFC91421	THREADS (INDIA) LIMITED	MANISH BALANI	manish.balani@threadsindia.com vikram.tripathi@threadsindia.com accounts3@threadsindia.com
19	NSH42959	MUSHKIN INTERNATIONAL	ABHINAV MITTAL	mushkinintl@gmail.com
20	NLP40122	GRANDWAY INTERNATIONAL PVT. LTD.	VIVEK GUPTA	grandway2014@gmail.com
21	SNF03441	SMARTAK FOOTCARE PVT. LTD.,	M. UMMER KOYA	smartak@vkcggroup.com
22	NLP41926	GRANDWAY ADVERTISERS	ARVIND GUPTA	grandwaygifts@gmail.com
23	CSH90018	S.K. INTERNATIONAL	SIDHARTH KAPOOR	sid@skinternationalmail.com
24	NLF48229	ARYAN OVERSEAS	MR.NEERAJ VERMA	aryanoverseasagra@gmail.com
25	SNF02470	PARAGON POLYMER PRODUCTS PVT. LTD.	REJI ABRAHAM,	paragon@paragonfootwear.com
26	ELP61846	TORERO CORPORATION PVT. LTD.	O. P. GUPTA	accounts@torerocorp.com
27	NNF43076	LEHAR FOOTWEARS LTD	NARESH KUMAR AGARWAL	info@leharfootwear.com
28	SLF02105	DYNAMIC TECHNO MEDICALS PVT.LTD.	P. VASUDEVAN	info@dynamictechnomedicals.com
29	NLP40870	SIBRAMA NEWAGE	RAJIV MARWAH	sibrama@sibrama.com



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