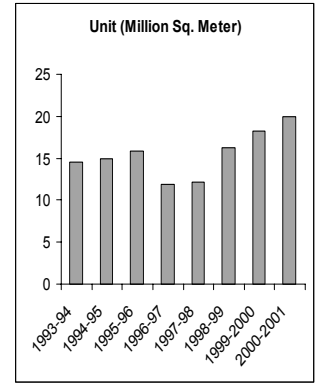


LEATHER SECTOR OF BANGLADESH AN OVERVIEW

Presented by
Khandaker Mainuddin
BCAS

Production of Leather and Leather Goods

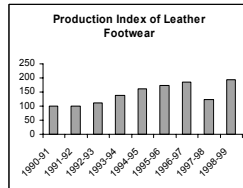
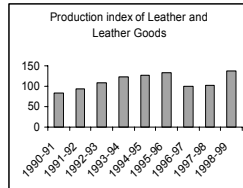
Year	Unit (Million Sq. Meter)
1993-94	14.60
1994-95	15.00
1995-96	15.90
1996-97	11.95
1997-98	12.12
1998-99	16.21
1999-2000	18.31
2000-2001	19.91



Source: Bangladesh Economic Survey, Ministry of Finance, 2002

Quantum Index of Leather and Leather Goods and Leather Footwear

Year	Production Index	
	Leather and Leather Goods	Leather Footwear
1990-91	84.34	100.03
1991-92	92.97	100.07
1992-93	108.72	110.93
1993-94	123.44	139.48
1994-95	126.77	161.76
1995-96	133.85	174.46
1996-97	100.84	185.95
1997-98	102.25	123.17
1998-99	136.72	192.84



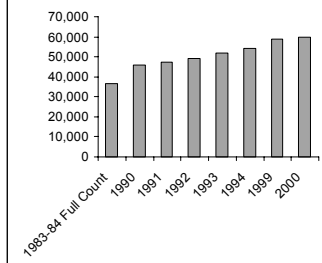
Source: Statistical Year Books of Bangladesh 1997, 1999, Bangladesh Bureau of Statistics

Livestock Population in Bangladesh

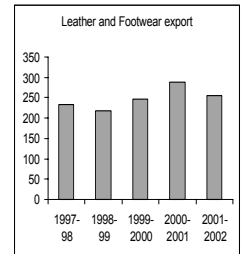
Species	('000 head)							
	1983-84 Full Count	1990	1991	1992	1993	1994	1999	2000
Cattle	21,495	23,244	23,500 (1.00)	23,480 (Nil)	23,923 (1.89)	24,130 (0.87)	23,400 (-0.60)	23,254 (-0.06)
Buffalo	567	758	810 (3.10)	832 (2.72)	866 (4.09)	874 (0.92)	820	850
Goat	13,658	21,031	22,000 (4.61)	23,979 (9.00)	25,967 (8.29)	28,050 (8.02)	33,500	34,590
Sheep	767	873	900 (3.09)	940 (4.44)	989 (5.21)	1,070 (8.19)	1,110	1,118
Total	36,487	45,906	47,210	49,231	51,745	54,124	58,830	59,812

Source: Estimates based on FAO and BBS reports, and EPB export statistics

Livestock Population in Bangladesh



Year	Total Export	Leather and Footwear export	Leather and Footwear as % of Total Export
1997-98	5161.20	232.89	4.51
1998-99	5312.86	218.89	4.12
1999-2000	5752.20	246.35	4.28
2000-2001	6467.30	287.56	4.45
2001-2002	5986.09	255.82	4.27

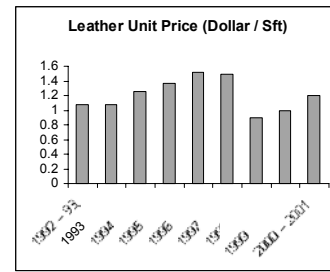


Source: Export Promotion Bureau of Bangladesh (EPB)

**Leather (Value, Volume, Unit Price)
(1992-93 to 2000-2001)**

Year	Value (Mn Dollar)	Volume (*000 Sft)	Unit Price (Dollar / Sft)
1992 - 93	147.91	138630	1.07
1993 - 94	168.17	157430	1.07
1994 - 95	202.08	161660	1.25
1995 - 96	211.70	155810	1.36
1996 - 97	195.48	128610	1.52
1997 - 98	190.26	127690	1.49
1998 - 99	168.24	186930	0.90
1999 - 2000	195.05	197020	0.99
2000 - 2001	253.93	211610	1.20
Total	1732.82	1465390	10.85

Source: EPB Export Statistic 1998-99, Page 20

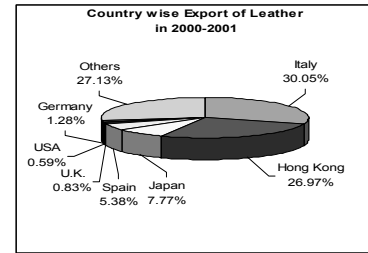


Country wise Export of Leather

(Value in 000 Dollar)

Countries	1997 - 1998		1998 - 1999		1999 - 2000		2000 - 2001	
	Value	% of Total	Value	% of Total	Value	% of Total	Value	% of Total
Italy	38176	20.07	38372	22.81	46820	24.00	76326	30.05
Hongkong	66939	35.18	54854	32.60	68179	34.96	68490	26.97
Japan	12690	6.67	12460	7.41	11989	6.15	19739	7.77
Spain	10420	5.48	10416	6.19	9584	4.91	13652	5.38
U.K.	370	1.99	4482	2.66	3470	1.78	2111	0.83
USA	1828	0.96	1642	0.98	1267	0.65	1497	0.59
Germany	3470	1.82	3977	2.36	3283	1.68	3246	1.28
Others	56367	27.83	42044	24.99	50484	25.87	68867	27.13
Total	190260	100.00	168247	100.00	195046	100.00	253928	100.00

Source: EPB Export Statistics, 2000 - 2001, 1998 - 99, Page: 78,70

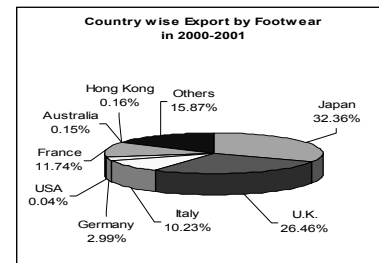


Country wise Export of Footwear

(Value in 000 Dollar)

Countries	1997 - 1998		1998 - 1999		1999 - 2000		2000 - 2001	
	Value	% of Total	Value	% of Total	Value	% of Total	Value	% of Total
Japan	9800	25.78	10713	23.01	9913	20.54	10881	32.36
U.K.	2812	7.40	8618	18.51	7285	15.10	8897	26.46
Italy	8400	22.10	8114	17.43	11809	24.47	3440	10.23
Germany	3562	9.37	6744	14.49	1145	2.37	1004	2.99
U.S.A.	453	1.19	271	0.58	714	1.48	15	0.04
France	4541	11.94	3879	8.33	5779	11.98	3948	11.74
Australia	24	0.06	24	0.05	327	0.68	49	0.15
HongKong	7	0.02	-	-	498	1.03	54	0.16
Others	8418	22.14	7989	17.6	10788	22.35	5341	15.87
Total	38017	100.00	46552	100.00	48258	100.00	33629	100.00

Source: EPB Export Statistics, 2000 - 2001, 1998 - 99, Page: 110, 102



Livestock population of the world (in million)

	1995-97 Average	1998	1999	2000 pre lest
BOVINE World Total	1486.9	1495.4 (0.57%)	1500.7 (0.35%)	1509.6 (0.59%)
Developing Countries	1126.5	1156.0 (2.62%)	1169.0 (1.12%)	1182.4 (1.15%)
Developed Countries	360.4	339.4 (-5.83%)	331.7 (-2.21%)	327.2 (-1.36%)
SHEEP World total	1073.6	1056.1		
Developing countries	652.4	661.8 (1.44%)	671.2 (1.42%)	674.9 (0.55%)
Developed Countries	421.2	394.3 (-6.39%)	389.2 (-1.29%)	389.5 (0.08%)
GOATS World Total	676.7	696.0 (2.85%)	708.8 (1.84%)	715.3 (0.98%)
Developing Countries	645.2	665.5 (3.15%)	679.3 (2.07%)	686.2 (1.02%)
Developed Countries	31.5	30.5 (-3.1%)	29.5 (-3.28%)	29.1 (-1.36%)
World Grand Total	3237.2	3247.5	3269.9	3259.3

Source: Leather International, July 2001

*Figures in parenthesis are the rates of increase/decrease of growth

Population of Hides and skins (000 tones)

	1995/97	1998	1999	2000 pre lest	Bangladesh Share (2000)
BOVINE HIDES AND SKINS World Total	5594.2	5664.4 (1.25%)	5698.7 (0.61%)	5806.0 (188%)	45.68 (0.78%)
Developing Countries	271.9	2910.2 (7.08%)	2962.8 (1.81%)	3048.7 (2.90%)	1050%
Developed Countries	2876.4	2754.2 (-4.25%)	2735.9 (-0.25%)	2757.4 (0.79%)	
SHEEPSKINS World total	396.9	390.9 (-1.51%)	394.7 (0.90%)	393.9 (-0.90%)	0.55 (0.14%)
Developing Countries	202.7	192.3 (-5.13%)	190.5 (-0.94%)	186.9 (-1.89%)	
Developed Countries	194.2	198.6 (2.27%)	204.2 (2.82%)	207.0 (1.37%)	0.27%
GOATSKINS World Total	219.7	235.2 (7.06%)	239.6 (1.87%)	242.7 (1.29%)	16.36 (6.74%)
Developing Countries	207.1	222.9 (7.63%)	227.5 (2.06%)	230.6 (1.36%)	7.09%
Developed Countries	12.6	12.3 (-2.38%)	12.1 (-1.63%)	12.0 (-0.83%)	

Source: Leather International, UK, July 2001

*Figure in parenthesis are the rates of increase/decrease

Global production, trade and consumption of footwear

(Million of Pairs)

Country	Production	Exports	Imports	Consumption
European Community	749.00	459.90	412.80	701.90
Non-EC West Europe	29.50	18.60	75.90	86.80
Eastern Europe	728.30	126.00	82.60	648.90
North America	178.50	14.90	1,305.26	668.90
South America	286.20	141.80	2.90	147.40
Australia	21.50	5.20	9.80	26.10
Asia and Middle East	1113.70	410.20	55.90	759.40
Africa	122.20	25.70	12.00	108.50
Total Global	3228.90	1202.20	1157.20	3183.90

Source: Compiled by TSG from World Footwear Markets 1990, SATRA

Consumption of leather goods in developed countries

	1995		1996		1997	
	Volume	Value	Volume	Value	Volume	Value
Total	34,068	268,272	38,301	321,907	38,350	329,944
Intra-EU	5,016	59,256	4,945	65,163	5,245	59,570
Extra-EU	29,052	209,016	33,356	256,744	33,105	270,374
Dev. Countries	11,451	80,508	15,940	102,368	16,331	113,982

Source : Center for the promotion of import from developing countries, a survey of the Netherlands and other selected markets in the European Union, compiled by Source, 1999.

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Top 5 Suppliers of Leather Goods

- China
- Italy
- India
- Belgium
- France