

Commodity Report: Leather (2026)

Leather and leather goods are reportedly produced with forced labor (FL) and/or child labor (CL) in the following countries:¹

Leather:

- Bangladesh (CL)
- Pakistan (CL)
- Vietnam (CL)

Leather Goods:

- India (CL)
- Mexico (CL)

Top ten countries that export leather and leather goods:²

Leather:

1. Italy
2. United States
3. China
4. Brazil
5. Spain
6. Germany
7. Thailand
8. France
9. Australia
10. Vietnam

Leather Goods:

1. China
2. France
3. Italy
4. Vietnam
5. Germany
6. India
7. Hong Kong
8. Netherlands
9. Spain
10. Cambodia

¹ This list is based solely on findings from the [U.S. Department of State's 2025 Trafficking in Persons Report](#) and the [U.S. Department of Labor's 2024 List of Goods Produced by Child Labor and Forced Labor](#).

² [International Trade Center. Trade Map](#). (ITC Calculations based on UNCOMTRADE Statistics). **Note:** The country list is ordered by value exported.

Top ten countries that produce raw hides of cattle worldwide:³

- | | |
|------------------|------------------|
| 1. China | 6. Mexico |
| 2. United States | 7. Russia |
| 3. Brazil | 8. Pakistan |
| 4. Argentina | 9. Turkey |
| 5. Australia | 10. South Africa |

Top ten countries that produce raw hides of sheep worldwide:⁴

- | | |
|----------------|-------------------|
| 1. China | 6. United Kingdom |
| 2. Australia | 7. Algeria |
| 3. India | 8. Pakistan |
| 4. Turkey | 9. Chad |
| 5. New Zealand | 10. Sudan |

Top ten countries that produce raw hides of goats worldwide:⁵

- | | |
|---------------|-------------|
| 1. China | 6. Ethiopia |
| 2. India | 7. Kenya |
| 3. Pakistan | 8. Chad |
| 4. Bangladesh | 9. Tanzania |
| 5. Nigeria | 10. Sudan |

³ FAOSTAT. [Crops and Livestock Products. Food and Agriculture Organization of the United Nations. 2024.](#) **Note:** This list includes only “raw hides and skins of cattle.” This list is sorted by greatest production value.

⁴ FAOSTAT. [Crops and Livestock Products. Food and Agriculture Organization of the United Nations. 2024.](#) **Note:** This list includes only “raw hides and skins of sheep or lambs.” This list is sorted by greatest production value.

⁵ FAOSTAT. [Crops and Livestock Products. Food and Agriculture Organization of the United Nations. 2024.](#) **Note:** This list includes only “raw hides and skins of goats or kids.” This list is sorted by greatest production value.

Where is leather reportedly produced with human trafficking, including forced labor, and/or child labor?

According to the U.S. Department of Labor's *2024 List of Goods Produced by Child Labor or Forced Labor*, child labor has been found in the production of leather in Bangladesh, Pakistan, and Vietnam. In India and Mexico, child labor is used in the creation of leather goods.⁶

Bangladesh, India, Mexico, Pakistan, and Vietnam are listed by the U.S. Department of State's *2025 Trafficking in Persons Report* as Tier 2 countries.⁷

What does human trafficking, including forced labor, and/or child labor in leather production look like?

This section includes countries with publicly available research and reporting on forced labor and child labor, in addition to the countries listed in the above-mentioned government reports.

The focus of this report is the production and processing of animal hides – most commonly cattle, sheep, and goats – into leather. For more information on cattle ranching and beef products, please see the [Cattle report](#).

In most reported cases, child labor in leather production occurs in the informal sector, where children work as assistants or apprentices, and where it is difficult for governments to enforce regulations. The work includes animal slaughtering and skinning, dyeing the hides, waste disposal, and the manufacturing of leather products and by-products, such as glue and leather scraps used for smaller accessories like key chains. In informal tanneries, children generally work in unsafe conditions, commonly without protective gear, and are known to suffer from respiratory diseases, chemical burns, permanent skin damage,⁸ and chronic fatigue.⁹

⁶ U.S. Department of Labor. [2024 List of Goods Produced by Child Labor or Forced Labor](#). 5 Sept 2024.

⁷ [For the 2025 Trafficking in Person Report's tier ranking methodology, see "A Guide to the Tiers."](#)

⁸ Green America. ["Hidden Hands."](#) 27 May 2026.

⁹ Ahmad, Syed, et al. ["Assessing the Impact of Current Working Conditions on the Health of Laborers in the Indian Leather Industry."](#) 6 Oct 2025.

Child labor is considered “endemic to the leather industry” in South Asia, and children are often employed in every stage of production, from drying animal hides to polishing finished leather.¹⁰

In **Bangladesh**, employees surveyed in leathermaking reported that it is a “young sector,” as older workers commonly suffer from ergonomic pain over time. Good eyesight, which worsens in older workers, is also needed to cut the leather into patterns.¹¹

Leather hubs in Bangladesh are found in Dhaka, where workers described feeling trapped without other means of survival.¹² According to a survey conducted in 2022, more than half of the Bangladeshi leather workers made less than the sectoral minimum wage of BDT 13,500 (USD 109) per month, while women made 30 percent less than men, on average.¹³ Ninety-five percent of tannery workers were hired without a signed contract, indicating widespread informality in the sector among workers of all ages.¹⁴ Sixty percent of the surveyed workers believed that their tannery work experience would not enable them to find a better job in another industry.¹⁵ Most workers are not unionized, with the primary reason being employer disapproval or prohibition against membership, followed by a general lack of knowledge of collective bargaining as a practice.¹⁶

Workers in the industry typically train their children to take over their job over time, or children will seek out tanneries to contribute to the household income.¹⁷ Additionally, vulnerable children from Bangladesh, including those who have been displaced due to natural disasters such as river erosion,

¹⁰ Green America. [“Hidden Hands.” 27 May 2026.](#)

¹¹ Aked, J, et al. [“Worst Forms of Child Labour in the Bangladesh Leather Industry: A Synthesis of Five Years of Research by Children, Small Business Owners, NGOs, and Academics” 19 Sept 2024.](#)

¹² Green America. [“Hidden Hands.” 27 May 2026.](#)

¹³ Schroder, Axel. [“Unsafe and Underpaid: Working Conditions in South Asia’s Leather, Leatherwear, and Footwear Factories.” December 2022.](#)

¹⁴ Eusuf, Abu, et al. [“Employment and working conditions in Bangladesh’s leather industry: Evidence from a survey of tannery workers.” September 2022.](#)

¹⁵ Eusuf, Abu, et al. [“Employment and working conditions in Bangladesh’s leather industry: Evidence from a survey of tannery workers.” September 2022.](#)

¹⁶ Eusuf, Abu, et al. [“Employment and working conditions in Bangladesh’s leather industry: Evidence from a survey of tannery workers.” September 2022..](#)

¹⁷ Aked, J, et al. [“Worst Forms of Child Labour in the Bangladesh Leather Industry: A Synthesis of Five Years of Research by Children, Small Business Owners, NGOs, and Academics” 19 Sept 2024.](#)

floods, or cyclones, are reportedly coerced into informal tanneries, where they are “paid pennies,” work under hazardous conditions, and face harassment and abuse.¹⁸

In Dhaka, children ages seven to 17 reportedly work at least 12 hours a day, six days per week across leather production processes.¹⁹ In one case, a 10-year-old worker working to support his family described his job mixing toxic chemicals to dye leather, working up to 16 hours a day with no rest days.²⁰ The work requires children to touch and inhale the fumes of glue and harmful chemicals, such as hexavalent chromium, formaldehyde, arsenic, sulfides, and banned azo dyes. Other hazardous work noted includes carrying heavy loads on stairs without guardrails and handling sharp objects such as knives and cutting machinery.²¹ Based on five years of reporting on the Bangladesh leather industry, workers were rarely provided with proper protective gear when handling dangerous equipment and materials. Some children were also refused water and toilet breaks during their shifts.²²

Physical and mental abuse is prevalent in tanneries in Bangladesh. One report cited approximately 40 instances of beating, scolding, and name-calling by employers and adult colleagues.²³ Girls between the ages of 10 and 14 were also found to experience sexual harassment in the workplace.²⁴

In **India**, leather processing is historically tied to caste identity. Traditionally, leather processing and production were assigned to Dalit people from “the lowest rank of Indian society,” because the work was considered debasing.²⁵ As parts of India outlaw the slaughter of cows, believed to be a sacred animal, leather work carries a particular stigma. Lower caste groups and Muslims continue to make up a large proportion of the leather workforce, while management positions are taken by higher-caste groups. These undesirable jobs are often the only livelihood option for people from the Dalit caste,

¹⁸ Green America. [“Hidden Hands.” 27 May 2026.](#)

¹⁹ Aked, J, et al. [“Worst Forms of Child Labour in the Bangladesh Leather Industry: A Synthesis of Five Years of Research by Children, Small Business Owners, NGOs, and Academics” 19 Sept 2024.](#)

²⁰ Green America. [“Hidden Hands.” 27 May 2026.](#)

²¹ Green America. [“Hidden Hands.” 27 May 2026.](#)

²² Aked, J, et al. [“Worst Forms of Child Labour in the Bangladesh Leather Industry: A Synthesis of Five Years of Research by Children, Small Business Owners, NGOs, and Academics” 19 Sept 2024.](#)

²³ Aked, J, et al. [“Worst Forms of Child Labour in the Bangladesh Leather Industry: A Synthesis of Five Years of Research by Children, Small Business Owners, NGOs, and Academics” 19 Sept 2024.](#)

²⁴ Aked, J, et al. [“Worst Forms of Child Labour in the Bangladesh Leather Industry: A Synthesis of Five Years of Research by Children, Small Business Owners, NGOs, and Academics” 19 Sept 2024.](#)

²⁵ Advocating Rights in South Asia (ARISA). [“Hides & Hardship: Caste-based discrimination in the leather industry in India, Bangladesh, and Pakistan.” March 2023.](#)

which makes these workers more vulnerable to exploitation. Noted practices include low wages, harassment by employers, denied access to clean drinking water, exposure to hazardous dyeing chemicals without protective equipment, and temporary or non-existent contracts.²⁶

There are multiple major leather-producing states in India, including Tamil Nadu, West Bengal, and Uttar Pradesh.²⁷ A 2023 report on both export-oriented and informal tanneries and shoe factories in Tamil Nadu, considered the largest leather-producing region, found that workers faced work-related health issues due to a lack of protective equipment, wages below local legal minimum wage, wage disparities based on sex, a lack of grievance procedures, and insufficient formalization of work contracts.²⁸ Workers in tanneries are often subjected to long hours and a seven-day workweek, while employees in shoe factories were found to frequently face verbal harassment and physical threats from supervisors seeking to meet high production targets. Workers in these environments were also reported to have very limited awareness of their labor rights.²⁹

In **Pakistan**, over one million people are employed in the leather sector, earning an average of USD 79 per month, despite the statutory minimum wage being USD 90 to 95 per month.³⁰ Over 90 percent of tanneries in Pakistan are small or medium-sized enterprises, many not officially registered.³¹ Reporting has described a pattern of informality in which employers refuse workers access to social security or social insurance schemes, compounded by weak enforcement of labor laws stemming from under-resourced inspectors who lack proper training.³²

²⁶ Advocating Rights in South Asia (ARISA). [“Hides & Hardship: Caste-based discrimination in the leather industry in India, Bangladesh, and Pakistan.” March 2023.](#)

²⁷ India Brand Equity Foundation. [Leather Industry and Exports. June 2026.](#)

²⁸ Advocating Rights in South Asia (ARISA). [“Leather and leather shoes from India: Labour abuses in supply chains uncovered.” March 2023.](#)

²⁹ Advocating Rights in South Asia (ARISA). [“Leather and leather shoes from India: Labour abuses in supply chains uncovered.” March 2023.](#)

³⁰ Green America. [“Hidden Hands.” 27 May 2026.](#)

³¹ Schroder, Axel. [“Unsafe and Underpaid: Working Conditions in South Asia’s Leather, Leatherwear, and Footwear Factories.” December 2022.](#)

³² International Labor Organization [“Pakistan’s tanning and leather industries: An overview of trends and labour and environmental conditions.” 2023.](#)

Parveen, Farhat. [“Employment and working conditions in the leather industry in Pakistan.” National Organization for Working Communities, December 2022.](#)

Research conducted in Karachi, Pakistan, in 2022 found indirect evidence, through mentions in interviews, of workers under the age of 14 working as helpers or operators of dangerous machinery, who sometimes worked night shifts.³³ According to workers interviewed, protective equipment and clothing were not provided for operating dangerous machinery, nor was training to use the machinery or perform dangerous tasks. Workers also described unsanitary and dimly lit workstations, lack of washrooms and clean drinking water, and often being denied sick leave when they needed it.³⁴

Brazil is a key contributor to the global leather supply chain as a major producer of cattle. According to a 2025 report by the Fair Labor Association, 46 percent of forced labor in Brazil occurs in the cattle industry. Due to uneven monitoring by Brazilian enforcement agencies, forced labor and unfair working conditions are more likely to occur in parts of the leather supply chain that overlap with the meat industry (cattle ranching and slaughterhouses) as opposed to tanneries.³⁵ For more information, please see the [Cattle report](#).

Leather Production and Supply Chain:

Sixty-five percent of global leather production is sourced from bovines (cattle), followed by 15 percent sheep, 11 percent pigs, and 9 percent goats.³⁶ Leather manufacturing consists of converting raw animal skin into leather through the three sub-processes of prepping, tanning, and crusting.³⁷ Most hides used in leather come from livestock, including cows, goats, sheep, and buffalo. After animals are slaughtered for meat in slaughterhouses, the hides are sold to middlemen, who then sell them to warehouses. At the warehouse level, hides are cleaned and trimmed. Tanners then buy hides from warehouses. Depending on the geographic context and size of the supply chain, the hides may sometimes move directly from slaughter to tanning.³⁸ In some countries, the multi-staged process of leather production results in a

³³ Parveen, Farhat. [“Employment and working conditions in the leather industry in Pakistan.” *National Organization for Working Communities*, December 2022.](#)

³⁴ Parveen, Farhat. [“Employment and working conditions in the leather industry in Pakistan.” *National Organization for Working Communities*, December 2022.](#)

³⁵ Fair Labor Association (FLA). [“Toward promoting human rights and decent working conditions in the leather supply chain: An overview of the leather industry in Brazil.” May 2025.](#)

³⁶ Bonney, Sanjida, et al. [“Who Leads the Global Leather Industry? An In-depth Analysis of the Export Competitiveness of Top Leather-Exporting Nations.” January 2025.](#)

³⁷ SGT Group. [“How Sustainable Is Your Leather Material Supply Chain?” 22 May 2022.](#)

³⁸ Overeem, Pauline, et al. [“Shine a light on leather. Analysis: supply chain disclosure practices of 100 companies in the leatherware industry.” November 2022.](#)

fragmented industry with both large factories that conduct each step of leather processing, as well as enterprises of all sizes dedicated solely to one element of processing.³⁹

Tanning is a complex process which requires toxic chemicals. First, the hide is prepared, which includes removing all remaining hair or other material from the hide and pickling the hide with salts. In chrome tanning, the hide is then tanned through what is commonly called the “wet-blue process,” which turns animal hides into leather. In this process, hides are placed in large drums in a mixture of water and chemical chromium. The leather is wet and blue when removed from the chemical bath.⁴⁰ Exposure to chromium and other chemicals during this process makes workers in tanneries more susceptible to cancer and puts them at greater risk for respiratory and skin disease. The tanned leather is then piled down, wrung, and graded for thickness and quality, split into flesh and grain layers, and shaved to the desired thickness. The grain leathers from the shaving machine are then separated for re-tanning, dyeing, and fatliquoring (using oils and fats to soften leather).⁴¹ Some tanners lack their own tannery or the capacity to carry out all the production phases, so they pay to use the facilities of another tannery or subcontract the work to informal tanneries. This contributes to the murkiness of the supply chain, in which the final product may be made in different locations.⁴²

After the tanning process, leather may be exported or made into consumer goods, or parts of consumer goods, locally. In the footwear industry, it is common for the leather parts of shoes to be produced by hand in the homes of subcontracted workers. These parts are then exported for manufacture by companies into complete shoes for the retail market.⁴³

³⁹ Benayoun, Stephane, et al. [“Leather sustainability, an industrial ecology in process.” December 2024.](#)

⁴⁰ Beamhouse Tannery Services. [“The Leather Tanning Process.” 17 Jan 2023.](#)

⁴¹ Benayoun, Stephane, et al. [“Leather sustainability, an industrial ecology in process.” December 2024.](#)

⁴² Overeem, Pauline, et al. [“Shine a light on leather. Analysis: supply chain disclosure practices of 100 companies in the leatherware industry.” November 2022.](#)

⁴³ Advocating Rights in South Asia (ARISA). [“Leather and leather shoes from India: Labour abuses in supply chains uncovered.” March 2023.](#)

How consumers are linked to human trafficking, including forced labor, and/or child labor in leather production:

Top ten countries that import leather and leather goods:⁴⁴

Leather:

- | | |
|--------------|--------------|
| 1. China | 6. Mexico |
| 2. Italy | 7. Cambodia |
| 3. Vietnam | 8. Spain |
| 4. France | 9. Germany |
| 5. Indonesia | 10. Thailand |

Leather Goods:

- | | |
|------------------|-------------------|
| 1. United States | 6. Italy |
| 2. Japan | 7. Korea |
| 3. China | 8. Hong Kong |
| 4. France | 9. United Kingdom |
| 5. Germany | 10. Spain |

Leather goods are popular among consumers for their durability.⁴⁵ Leather has been used throughout the history of transportation and furniture for seating, harnesses and saddles, as well as for footwear and luxury goods like bags and other accessories.⁴⁶

A 2026 report on the leather goods market found that 37 percent of leather produced globally is used for footwear. Both athletic and casual leather footwear styles are growing in popularity, in part due to

⁴⁴ [International Trade Center. Trade Map.](#) (ITC Calculations based on UNCOMTRADE Statistics). **Note:** The country list is ordered by value imported.

⁴⁵ Rolford Leather. ["What is Leather and How Is It Produced - A Comprehensive Guide." 2025.](#)

⁴⁶ Mordor Intelligence. ["Leather Goods Market - Growth, Trends, COVID-19 Impact, and Forecasts \(2022-2027\)."](#)

the blending of fashion with functionality, as leather is a durable and long-lasting material.⁴⁷ Furniture is the second most popular use of leather, followed by handbags, belts, wallets, and small accessories.⁴⁸ Major companies operating in the leather goods market include Hermes International and Louis Vuitton (luxury apparel and handbags), and Samsonite (luggage). Europe is the largest leather market globally, but Asia is projected to be the fastest growing due to growing demand for luxury goods.⁴⁹

In automobiles, leather accessories are projected to have a compounded annual growth rate of 9.1 percent between 2026 and 2033;⁵⁰ as of 2024, more than 40 percent of luxury vehicle models include leather interiors in the U.S.⁵¹

Though leather is strongly criticized for both its manufacturing conditions and environmental impact, its durability makes it a consistently utilized material across multiple industries.⁵² In 2023, there was a 15 percent increase in demand for eco-friendly leather materials, such as vegetable-tanned leather, in light of growing awareness of leather's environmental and animal welfare impacts.⁵³ This may signal some shift in consumer attitudes towards the leather industry.

⁴⁷ Grand View Research. ["Leather Goods Market \(2026 - 2033\)." 15 June 2026.](#)

⁴⁸ Mahi Leather. ["The Global Leather Industry." 2024.](#)

⁴⁹ Grand View Research. ["Leather Goods Market \(2026 - 2033\)." 15 June 2026.](#)

⁵⁰ Grand View Research. ["Leather Goods Market \(2026 - 2033\)." 15 June 2026.](#)

⁵¹ APLF. ["APLF Report - Vehicle Sales and Automotive Leather Interior Trends by Region in 2024." 13 Jan 2025.](#)

⁵² Sheppard, Richard. ["The Global Leather Industry." 2026.](#)

⁵³ Market Growth Reports. ["Leather and Allied Products." 16 March 2026.](#)

Examples of what governments, corporations, and others are doing:

Fair Labor Association & Impactt

In 2025, the Fair Labor Association and Impactt laid out a strategy for brands to combat unethical labor, including forced labor, practices in their leather supply chains by increasing traceability.⁵⁴ The suggested strategy called for companies to adopt an exit strategy in high-risk countries where they may be unable to influence the sector, and invest in human rights due diligence and traceability systems. It also encourages companies to collaborate with sector coalitions that are focused on supply chain mapping and advocacy. It specifically recommends that companies visit slaughterhouses and tanneries in person to learn more about the production process and the risks workers face.

The Leather Working Group

The Leather Working Group (LWG), a global nonprofit membership organization for leather supply chain stakeholders, has developed audit protocols to certify leather manufacturers based on environmental compliance and performance.⁵⁵ While the LWG audit primarily concentrates on environmental and safety considerations, the P7 audit protocol introduced a new section on social responsibility. Though the LWG does not audit for social responsibility, they require audit reports or certifications from LWG-recognized third parties using social criteria from the Consumer Goods Forum's Sustainable Supply Chain Initiative (SSCI) benchmarks for processing and manufacturing facilities.⁵⁶ The SSCI criteria are informed by international frameworks, including relevant ILO conventions, and include elements against forced, bonded, prison, or child labor. Brands can become board members of LWG when they have been a member or have held a valid certification for at least three consecutive years, and have actively participated in LWG stakeholder meetings. Retailers that currently occupy the board, 100 in total, include Adidas, Hermes, and Dr. Martens.⁵⁷

⁵⁴ Fair Labor Association (FLA). ["Toward promoting human rights and decent working conditions in the leather supply chain: An overview of the leather industry in Brazil." May 2025.](#)

⁵⁵ Leather Working Group. ["Responsible Leather."](#)

⁵⁶ Leather Working Group. ["Standards and Certification." 2026.](#)

⁵⁷ Leather Working Group. ["Adidas, represented by Catherine Lee, joins the Leather Working Group Board." 27 March 2026.](#)

LWG has announced plans to replace the P7 audit protocol for the 'LWG Sustainability System' by 2027, as greater regulation and accountability are expected out of traceability mechanisms.⁵⁸ Pilot visits, in which LWG representatives visit tanneries to inform their revised standards, have been conducted as of March 2026, with the publication of standards expected in early 2027.⁵⁹

How can I learn more?

- [Read an in-depth report on child labor in Bangladeshi leather tanneries.](#)
- [Read an investigation on the leather supply chain across India, Bangladesh, and Pakistan.](#)
- [See inside and read about leather processing factories in Pakistan.](#)

⁵⁸ Leather Working Group. ["Everything you need to know about the new LWG Leather Production Standard" 27 June 2025.](#)

⁵⁹ Leather Working Group. ["Leather Working Group reveals how updated audit standards will benefit large and small tanneries." 16 Feb 2026.](#)