

# Global Raw Hides and Skins Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

# Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

**ANDREY SHEVCHENKO,** Managing Partner

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# Market at a glance

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

| Indicator | Value |
|---|---|
| Market size (2025) | USD 8.7 bn |
| Forecast (2031) | USD 10.7 bn |
| CAGR (2021-2031) | 3.4% |
| Study period | 2021-2031 |
| Largest region | Asia-Pacific · 42.6% |
| Fastest-growing region | Asia-Pacific · 4.4% |
| Market concentration | Low |
| Licence | Individual / Company |

The global raw hides and skins market reached USD XXX billion in 2025 and is forecast to rise to USD XXX billion by 2031, advancing at a XX% CAGR. Bovine hides remain the commercial core of the market, while goat and exotic skins command higher unit values in luxury, footwear and specialty applications. Asia-Pacific accounts for XX% of market value and is also the fastest-growing region, supported by its concentration of tanning, footwear, automotive leather and leather-goods manufacturing. Supply remains structurally tied to livestock slaughter rather than leather demand, making utilization, grading, preservation and traceability decisive determinants of profitability.

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# Executive summary

The global raw hides and skins market reached USD XXX billion in 2025 and is forecast to rise to USD XXX billion by 2031, advancing at a XX% CAGR. Bovine hides remain the commercial core of the market, while goat and exotic skins command higher unit values in luxury, footwear and specialty applications. Asia-Pacific accounts for XX% of market value and is also the fastest-growing region, supported by its concentration of tanning, footwear, automotive leather and leather-goods manufacturing. Supply remains structurally tied to livestock slaughter rather than leather demand, making utilization, grading, preservation and traceability decisive determinants of profitability.

| Indicator | Value |
|---|---|
| Market size 2025 | XXX |
| Forecast 2031 | XXX |
| CAGR | XXX |
| Largest region | XXX |
| Fastest region | XXX |

## Key findings

- The market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Bovine and buffalo hides represented XX% of 2025 market value.
- Asia-Pacific accounted for XX% of global value in 2025 and will expand at a XX% CAGR through 2031.
- Wet-salted material held XX% of market value because it combines storage stability, established grading protocols and compatibility with long-distance trade.
- Footwear and leather goods absorbed XX% of raw-hide and skin value in 2025.
- FAOSTAT-linked industry data place 2024 global goat-hide production at approximately XXX tonnes, with China contributing XX%, India XX% and Pakistan XX%.
- USDA Foreign Agricultural Service recorded USD XXX million of US hides and skins exports in 2024, including USD XXX million shipped to China.
- UN Comtrade data show Italy exported USD XXX million of HS 410129 fresh or wet-salted bovine hides and skins in 2024.

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# Market size and forecast

### Market value by year, USD bn

| Indicator | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | CAGR |
|---|---|---|---|---|---|---|---|
| Market value, USD bn | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Market volume | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Production | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Imports | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Exports | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Apparent consumption | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

### Year-over-year value change

| Indicator | 2027 | 2028 | 2029 | 2030 | 2031 | CAGR |
|---|---|---|---|---|---|---|
| Market value | X% | X% | X% | X% | X% | X% |
| Production | X% | X% | X% | X% | X% | X% |
| Imports | X% | X% | X% | X% | X% | X% |
| Exports | X% | X% | X% | X% | X% | X% |

*Source: XXX*

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# Global Raw Hides and Skins Market Trends and Growth Drivers

Raw-hide economics begin in the livestock and meat chain rather than in the tannery. Slaughter volumes establish the available number of hides, but species, weight, husbandry, climate, parasites, branding and flaying practices determine how much saleable area reaches each grade. This disconnect between supply formation and leather demand creates recurring price volatility.

Preservation is the central operational bridge between slaughter and tanning. A hide cured quickly and consistently can travel across continents; a delay of several hours in warm conditions can produce irreversible bacterial damage. Cold-chain capacity, salt quality, trained labor and container availability therefore influence marketable value as directly as animal type.

Traceability is becoming a commercial specification alongside weight, area and defect count. Automotive, footwear and luxury buyers increasingly reward suppliers that connect lots to slaughterhouses, farms and environmental controls, shifting margin toward integrated processors and well-organized collection systems.

## Growth drivers

### Asian footwear and leather-goods capacity

China, Vietnam, India, Indonesia and Bangladesh anchor the world's largest concentration of tanning, footwear and leather-goods conversion capacity. Factory utilization and export orders in these countries translate quickly into purchases of bovine, goat and sheep raw material from domestic and overseas suppliers.

### Automotive leather specification demand

Automotive seating requires large, uniform hides with predictable thickness, low defect rates and dependable lot consistency. Rising vehicle output and premium interior content support procurement premiums for well-flayed, refrigerated and accurately graded bovine hides.

### Formalization of livestock slaughter

The migration of slaughter into inspected plants improves hide recovery, reduces cuts and putrefaction, and places more material into documented commercial channels. The effect is strongest in South Asia, Southeast Asia and parts of Africa, where collection losses remain materially above mature-market levels.

### Traceability and certified-origin premiums

Tanneries and consumer brands increasingly require animal-origin, slaughterhouse and environmental data alongside the physical hide. Suppliers able to preserve identity through aggregation secure preferred-buyer access and higher realization, encouraging investment in tagging, geolocation and digital lot records.

### Goat and sheep skin utilization

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Goat and sheep skins serve footwear lining, gloves, garments and premium small leather goods where softness, grain and low weight are valued. Expanding organized collection in China, India, Pakistan, Türkiye and Africa raises the proportion reaching export-quality grades.

### Circular by-product economics

Meat processors can convert hides from a disposal burden into a revenue-generating co-product while diverting organic material from landfill. Additional outlets in collagen, gelatin, rawhide chews and technical proteins establish a value floor for grades unsuitable for premium leather.

## Restraints

### Alternative-material substitution

Polyurethane-coated textiles, recycled synthetics and emerging bio-based materials compete directly with leather in footwear, upholstery and accessories. Substitution is most pronounced in price-sensitive mass-market products and compresses tannery demand for lower and middle raw-hide grades.

### Slaughter-cycle volatility

Raw material supply responds to beef, dairy and small-ruminant economics rather than to leather prices. Herd rebuilding can restrict hide availability, while liquidation cycles create oversupply and sharp price declines that weaken collector and processor margins.

### Preservation and defect losses

Branding, parasites, flay cuts, manure contamination and delayed curing reduce usable cutting area and downgrade otherwise marketable hides. Losses remain acute where slaughter is fragmented and salt, refrigeration, logistics or trained labor are insufficient.

### Sanitary and trade compliance

Veterinary certificates, disease controls, post-import testing, wildlife permits and shifting tariffs increase lead times and working-capital requirements. Smaller traders face the greatest burden because they lack dedicated compliance staff and diversified market access.

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# Raw Hides and Skins Market Driver and Restraint Impact

### Drivers — impact on forecast

| Driver | Impact on CAGR | Geography | Horizon |
|---|---|---|---|
| Asian footwear and leather-goods capacity | XXX | XXX | XXX |
| Automotive leather specification demand | XXX | XXX | XXX |
| Formalization of livestock slaughter | XXX | XXX | XXX |
| Traceability and certified-origin premiums | XXX | XXX | XXX |
| Goat and sheep skin utilization | XXX | XXX | XXX |
| Circular by-product economics | XXX | XXX | XXX |

*Source: XXX*

### Restraints — impact on forecast

| Restraint | Impact on CAGR | Geography | Horizon |
|---|---|---|---|
| Alternative-material substitution | XXX | XXX | XXX |
| Slaughter-cycle volatility | XXX | XXX | XXX |
| Preservation and defect losses | XXX | XXX | XXX |
| Sanitary and trade compliance | XXX | XXX | XXX |

*Source: XXX*

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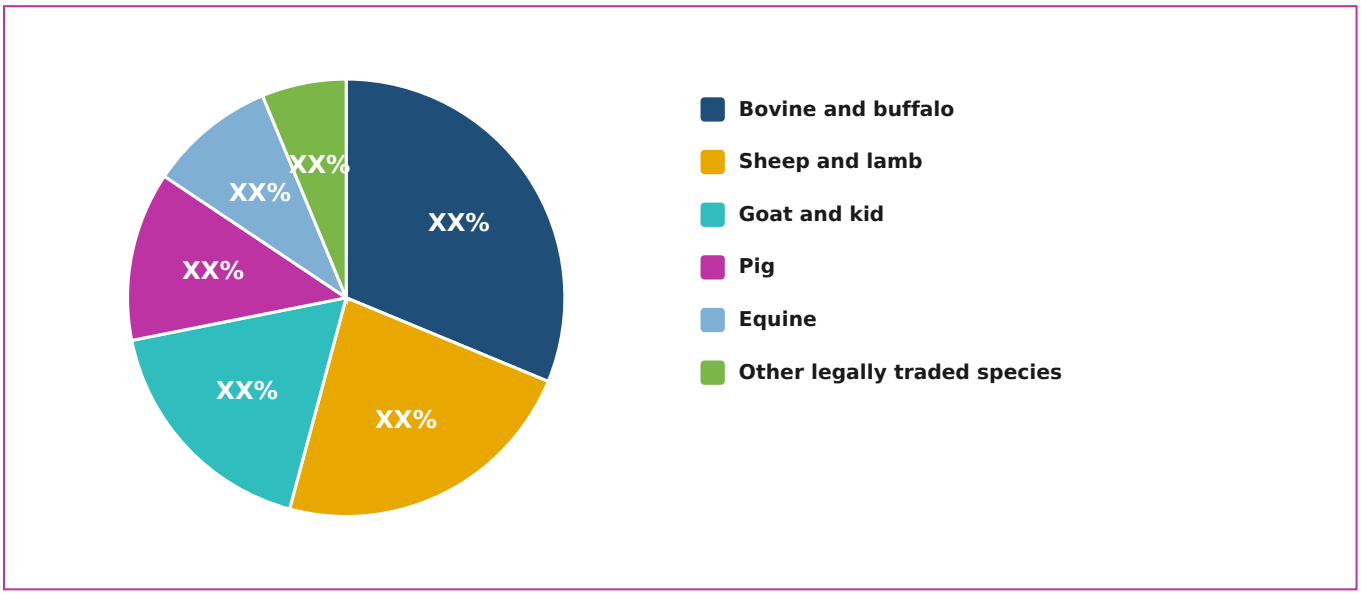
# Raw Hides and Skins Market Segmentation Analysis

## By Animal Type

Bovine hides dominate because cattle yield the large, durable surfaces required by footwear, automotive upholstery, furniture and heavy leather. Sheep and goat skins command attractive unit prices in garment, glove and luxury applications. Goat and kid skins will grow fastest as organized collection improves across Asia and Africa.

**Value share by animal Type, 2025**




*Source: XXX*

**Value by animal Type, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Bovine and buffalo | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Sheep and lamb | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Goat and kid | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Pig | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Equine | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Other legally traded species | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Preservation Method

Wet salting remains the standard for internationally traded bovine hides because it arrests bacterial degradation without requiring continuous refrigeration. Fresh and chilled material is gaining within

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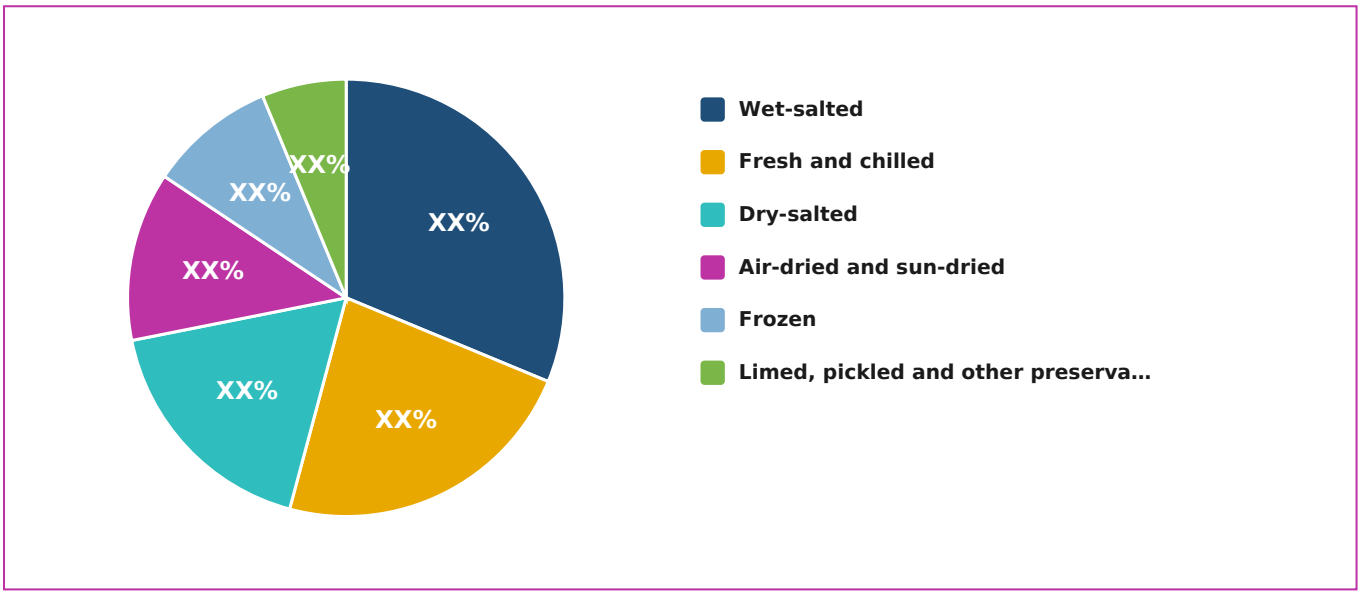
integrated, short-haul supply chains, where rapid delivery improves yield and reduces salt use. Dried material remains important in areas with fragmented collection and limited cold-chain access.

**Value share by preservation Method, 2025**




*Source: XXX*

**Value by preservation Method, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Wet-salted | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Fresh and chilled | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Dry-salted | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Air-dried and sun-dried | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Frozen | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Limed, pickled and other preservation | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Quality Grade

Standard grades supply the broad footwear, upholstery and general leather markets. Premium grades earn higher prices through superior usable area, lower parasite and flay damage, consistent thickness and documented origin. Lower grades face pressure from synthetic substitution but retain outlets in splits, technical products, collagen and pet applications.

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**Value by quality Grade, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Premium and traceable | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Standard commercial | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Utility and lower grade | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Specialty and exotic | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Sales Channel

Direct contracting provides the strongest control over grade, preservation timing, volume planning and origin documentation. Traders and exporters remain essential for consolidating fragmented sheep, goat and regional bovine supply. Digital marketplaces are expanding from a small base as standardized photography, grading and logistics data improve remote purchasing.

**Value by sales Channel, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Direct slaughterhouse-to-tannery contracts | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Hide traders and exporters | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Collectors and auction markets | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Digital and brokered platforms | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By End Use

Footwear remains the largest outlet because uppers, linings, soles and components use several hide and skin grades. Leather goods produce strong demand for premium calf, goat and exotic skins, while automotive buyers emphasize large clean bovine hides and traceable lots. Industrial conversion provides an increasingly important outlet for downgraded material.

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**Value by end Use, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Footwear | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Leather goods and accessories | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Automotive upholstery | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Furniture and interiors | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Garments and gloves | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Industrial, collagen and other uses | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

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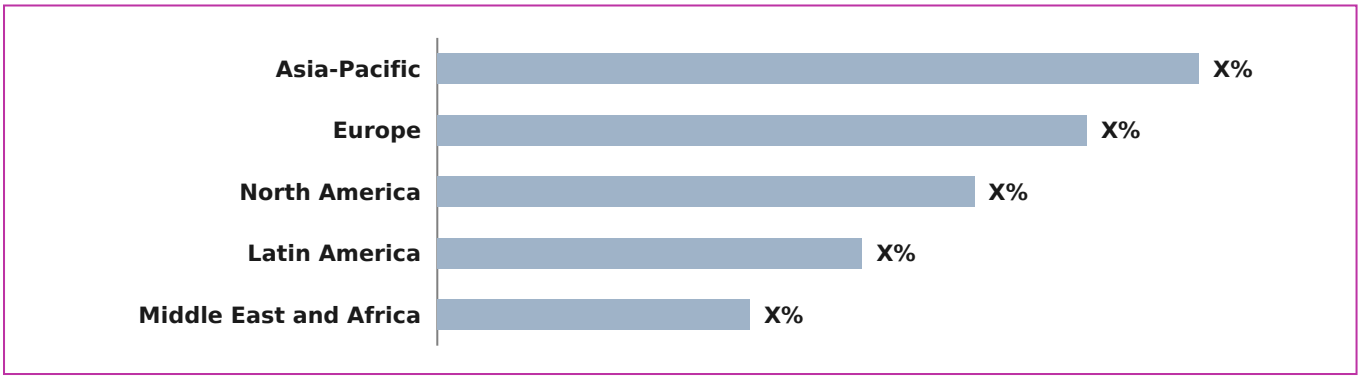
# Raw Hides and Skins Market Regional Analysis and Country Outlook

Asia-Pacific led the market with a XX% share in 2025 and will record the fastest regional CAGR of XX% through 2031. China remains the largest tanning and leather-conversion hub, while India combines a large bovine and small-ruminant resource base with extensive footwear production. Vietnam and Indonesia are increasing their dependence on imported, consistently graded hides as export-oriented footwear and upholstery capacity expands.

Europe accounted for XX% of market value, supported by Italy's premium tanning clusters, Germany's automotive supply chain, Spain's footwear industry and substantial slaughter-based supply across France, Ireland and Central Europe. Environmental controls, labor costs and downstream demand favor high-specification raw material and short, documented supply chains rather than commodity volume growth.

North America contributed XX% of value and remains a major export-surplus region for heavy bovine hides. Latin America holds XX%, led by Brazil and Argentina, where large cattle slaughter systems support integrated hide processing. The Middle East and Africa represent XX% and offer the widest long-term recovery upside as formal collection, grading, veterinary control and preservation infrastructure improve.

**Growth rate by region, 2025-2031**




*Source: XXX*

**Market value by region, USD bn**

| Region | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Asia-Pacific | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Europe | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| North America | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Latin America | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Middle East and Africa | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

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**Market value by leading country, USD bn**

| Country | 2025 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|
| United States | XXX | XXX | XXX | XXX |
| Germany | XXX | XXX | XXX | XXX |
| United Kingdom | XXX | XXX | XXX | XXX |
| Belgium | XXX | XXX | XXX | XXX |
| Netherlands | XXX | XXX | XXX | XXX |
| Japan | XXX | XXX | XXX | XXX |
| China | XXX | XXX | XXX | XXX |
| Mexico | XXX | XXX | XXX | XXX |

*Source: XXX*

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# Raw Hides and Skins Market Competitive Landscape and Company Share

The global market is fragmented at the collection and trading levels but substantially more concentrated at large-scale bovine slaughter and primary processing. JBS, Tyson Foods, Cargill, National Beef, Minerva Foods and Marfrig benefit from direct access to slaughter volumes, standardized flaying and rapid preservation. Thousands of regional abattoirs, collectors and brokers continue to determine supply in sheep, goat and lower-volume specialty categories.

JBS has the broadest disclosed integrated hide-processing footprint among profiled suppliers, including 15 Brazilian plants with aggregate daily capacity of XXX hides at year-end 2025. Tyson Foods combines US beef-processing scale with four Leather Working Group Gold-rated tannery facilities, while South American processors use cattle availability and export logistics to compete in Asian and European markets.

Competition is moving beyond spot price toward usable area, defect control, origin documentation and assured delivery. The December 2025 agreement combining JBS Couros and Viva illustrates consolidation across the leather chain, while Prada's 2025 investment in Rino Mastrotto demonstrates downstream buyers' growing interest in securing specialized processing capability and supply-chain visibility.

**Leading companies**

| Company | HQ | Est. revenue 2025 | Market share 2025 | YoY |
|---|---|---|---|---|
| JBS S.A. | XXX | XXX | XXX | XXX |
| Tyson Foods, Inc. | XXX | XXX | XXX | XXX |
| Cargill, Incorporated | XXX | XXX | XXX | XXX |
| National Beef Packing Company, LLC | XXX | XXX | XXX | XXX |
| Minerva S.A. | XXX | XXX | XXX | XXX |
| Marfrig Global Foods S.A. | XXX | XXX | XXX | XXX |
| Danish Crown A/S | XXX | XXX | XXX | XXX |
| Vion Food Group | XXX | XXX | XXX | XXX |
| NH Foods Ltd. | XXX | XXX | XXX | XXX |
| Teys Australia | XXX | XXX | XXX | XXX |
| Sanimax Industries Inc. | XXX | XXX | XXX | XXX |
| Rino Mastrotto Group | XXX | XXX | XXX | XXX |

*Source: XXX*

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# Raw Hides and Skins Market Forecast and Commercial Opportunities

The market will add USD XXX billion between 2025 and 2031. Physical supply will grow more slowly than value as improved recovery, grade differentiation, preservation and traceability lift average realization. Asia-Pacific will remain the principal demand center and absorb close to half of incremental global revenue.

The base-case forecast assumes normalized cattle slaughter, continued footwear export growth in Asia and measured automotive leather demand. A stronger global consumer cycle and faster formalization of African and South Asian collections would push value growth above XX%, while prolonged substitution and weak discretionary spending would hold growth near XX%.

Winning suppliers will control quality at the point of slaughter, cure material within narrow time windows and connect each lot to reliable origin and animal-health documentation. Integrated processors will lead high-volume bovine trade, while specialist collectors and processors will retain attractive positions in calf, goat, lamb and legally certified exotic skins.

## Opportunities

- Digital chain-of-custody systems linking farms, slaughterhouses and tanneries
- Cold-chain and modern salting infrastructure in emerging supply countries
- Premium defect-controlled calf, goat and lamb skins
- Recovery of collagen, gelatin, pet-chew and industrial-protein feedstocks
- Automated optical grading and yield prediction
- Direct procurement partnerships between brands, tanneries and meat processors

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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