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ETHIOPIAN LEATHER INDUSTRIES ASSOCIATION - ELIA



Ethiopia.

LAND OF ORIGIN.
THE FUTURE OF LEATHER.

2026


WELCOME TO
THE SOURCE



THE WORLD'S FINEST SHEEP LEATHER STARTS HERE.

Ethiopia is where humanity began and where some of the world's most remarkable leather begins, too.

High in the Ethiopian highlands, **above 3,000 meters,** a sheepskin grows unlike any other: thinner, lighter, softer yet remarkably strong. This is Ethiopian Highland Leather. It has been prized by the world's glove makers, garment houses, and luxury brands for generations.

And it comes from a nation with Africa's largest livestock population a raw material base few countries on earth can match.

ELIA is your gateway to all of it.

Whether you are a buyer seeking premium material, an investor looking for a proven opportunity, or a brand searching for a reliable sourcing partner Ethiopia is ready. And ELIA will take you there.



#1

Livestock population in Africa



165 M+

Cattle, sheep & goats



3000 M+

Highland altitude



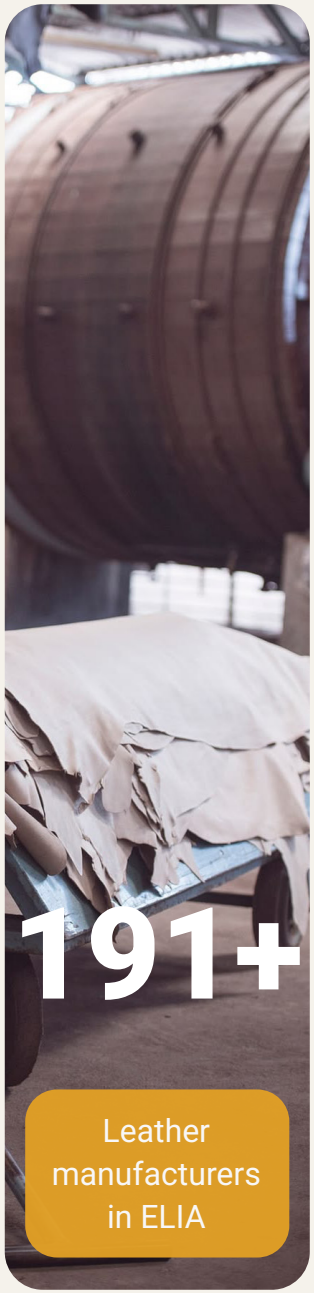
0.35 MM

Highland leather thinness



100+

Colors in production



191+

Leather manufacturers in ELIA



THE MATERIAL THE WORLD CAN'T REPLICATE

Born at 3,000 meters.

Ethiopia's highlands have bred something no tannery can copy.

A rare climate — low latitudes tempered by high elevation — lets sheep roam freely across vast highland pastures. Stress-free. Grass-fed. Never needing heavy wool against bitter cold.

The result: a special hair sheep whose skin is so fine it becomes leather unlike any other in the world.

WHAT MAKES HIGHLAND LEATHER DIFFERENT

Thin — crafted down to less than 0.35mm by skilled Ethiopian hands.

Light & soft — a hand-feel prized by the world's glove, garment, and luxury goods makers.

Strong & durable — a strength-to-weight ratio synthetic materials still chase.

Colorful — over 100 unique colors, dyed with generations of Ethiopian expertise.



ETHIOPIAN HIGHLAND LEATHER™

A NATIONAL BRAND, GLOBALLY PROTECTED

Ethiopian Highland Leather (EHL) is Ethiopia's national quality brand for premium sheep leather. It is trademarked in Ethiopia, Japan, and the EU with expansion underway to the US and beyond.

Only tanneries that pass rigorous on-site inspection and laboratory testing earn the right to carry the EHL mark. Every shipment is verified. Every promise is kept.

FROM RAW MATERIAL TO FINISHED FASHION

Ethiopia is no longer just a source of skins. Today, Ethiopian tanneries and manufacturers deliver value at every stage of the chain.



MATERIALS

- Finished sheep & goat leather
- Cow leather for footwear & upholstery
- Suede, nappa & specialty finishes
- Crust & wet blue Products



PRODUCTS

- Fashion & dress gloves
- Footwear — fashion, casual & safety
- Bags, belts & small leather goods
- Leather garments & accessories



SUSTAINABILITY BY NATURE

Ethiopian leather begins as a natural by-product of smallholder farming — free-range, grass-fed, and traceable to origin.

The sector is investing in cleaner production, modern effluent treatment, and international certification. Specialized industrial parks with zero-liquid-discharge facilities are already operational. Ethiopia is aligning with the due-diligence and sustainability standards global buyers now require.

GOOD FOR BUSINESS.
GOOD FOR THE PLANET.
GOOD FOR THE PEOPLE WHO MAKE IT.

YOUR GATEWAY:

ELIA & THE ALL AFRICAN LEATHER FAIR

ONE ASSOCIATION. ONE CONTINENT'S OPPORTUNITY.

The Ethiopian Leather Industries Association (ELIA) is the national voice of Ethiopia's leather industry — and your single point of access to it.

ELIA represents 191+ leather manufacturers: tanneries, footwear and leather-goods producers, input suppliers, and designers. We are the bridge between industry and government, and between Ethiopia and the world.

We work hand-in-hand with the Ministry of Industry, the Leather Industry Development Institute (LIDI), and the Ethiopian Investment Commission.



WHAT ELIA DELIVERS FOR INTERNATIONAL PARTNERS

Sourcing Support

Curated introductions to vetted tanneries and manufacturers. Sampling and quality facilitation. Order follow-up — so nothing gets lost in translation.

Investment Facilitation

Factory and site visits. Joint-venture matchmaking. Clear guidance on incentives and licensing, in partnership with the Ethiopian Investment Commission.

Market Intelligence

Sector data, export procedures, regulatory guidance, and buyer requirements — everything you need to make confident decisions.

Trade Platforms

The All African Leather Fair in Addis Ababa. Ethiopian pavilions at the world's leading leather fairs. Inbound and outbound trade missions.

Standards & Skills

Training partnerships, design development, and cleaner-production support through national and regional institutes.


ONE FAIR
ONE CONTINENT.
ONE INDUSTRY.
ASFW
Zhongshi Shoe & Outsole & Access.Manufacturing
G33
ASFW
Tongxiang Zhongxin Chemical Fiber Co Ltd
E26
ASFW
Shaoxing Jinsheng Intl Trading Co Ltd
D27



THE ALL AFRICAN LEATHER FAIR (AALF).

Africa's dedicated leather marketplace — and your fastest route into the continent. Organized by ELIA in Addis Ababa, AALF unites tanners, manufacturers, buyers, machinery and chemical suppliers, and investors from across Africa and beyond.

Now in its 15th edition, AALF is held at Convention center, Addis Ababa in November, 2026, ELIA entered a five-year strategic partnership with Germany's Trade and Fairs Consulting GmbH to take the fair global.

At AALF you will find

- ※ Leather, leather products, inputs & accessories on display
- ※ B2B matchmaking & meetings
- ※ Leather fashion zone & runway show
- ※ Innovation zone
- ※ African Leather Journal
- ※ Expert panel discussions

All African Leather Fair

The All African Leather Fair brings together tanners, manufacturers, designers, buyers, investors, technologists, researchers and policymakers from across Africa and around the world, turning the continent's raw potential into real trade, partnership and growth. AALF's purpose is simple: to unlock Africa's leather potential and connect it to global markets.

OUR GOALS

Drive Value Addition

Move Africa from exporting raw hides and skins to producing finished leather, footwear and goods at home.

Grow Exports

Open export opportunities and connect African producers directly with qualified international buyers.

Attract Investment

Draw investors and joint-venture partners into a high growth leather value chain with room to scale.

Advance Technology & Innovation

Facilitate technology transfer, cleaner production and new materials across the value chain.

Strengthen Intra-African Trade

Build lasting business ties between African countries and every link of the leather value chain.

Position Africa Globally

Showcase African leather quality, craftsmanship and sustainability to the world stage.



AFRICA LEATHER AND LEATHER PRODUCTS INSTITUTE

Sustainable leather for health, wealth, and luxury!

ADDIS ABABA: AFRICA'S LEATHER CAPITAL

Addis Ababa is home to the Africa Leather and Leather Products Institute (ALLPI) the continental hub of leather expertise serving 21 African nations.

It is also Africa's diplomatic capital, host to the African Union and UNECA and the hub of Ethiopian Airlines, connecting to 130+ destinations worldwide.

When you come to Addis, you come to the center of it all.

THE OPPORTUNITY

INVEST. SOURCE. PARTNER.

WHY ETHIOPIA. WHY NOW.

Unmatched raw material.

Africa's largest livestock population. 165M+ cattle, sheep & goats. 41 million hides and skins produced annually — yet only 22 million reach tanneries. The value-addition opportunity is enormous.

Competitive production.

A young, trainable workforce. Some of the region's most competitive operating costs. Room to scale.

Preferential market access.

Duty-free entry to the EU under Everything But Arms (EBA). COMESA's 560 - million - consumer free trade area. The African Continental Free Trade Area (AfCFTA) — 1.4 billion people. AGOA access to the US. And proximity to the Middle East and Europe.

World-class connectivity.

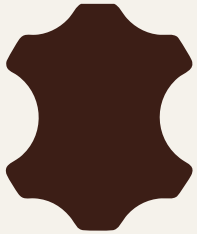
Ethiopian Airlines cargo links Addis Ababa to 130+ destinations. Addis is Africa's diplomatic capital — and home to ALLPI, serving 21 nations.

Serious incentives.

Income-tax holidays. Duty-free import of capital goods and inputs. Serviced industrial parks. One-stop-shop investor services. 100% foreign ownership. Leather park developers can enjoy up to 15 years of income-tax exemption.

A national priority.

Leather is a flagship sector of Ethiopia's industrial development agenda — with a government target of 300,000 jobs in the value chain by 2030



Ethiopia's leather & tannery market

$1,001.68

MILLION BY 2034 (CAGR 6.07%)



Fashion & garment leather segment growing at

9.62%

CAGR (2025–2031)



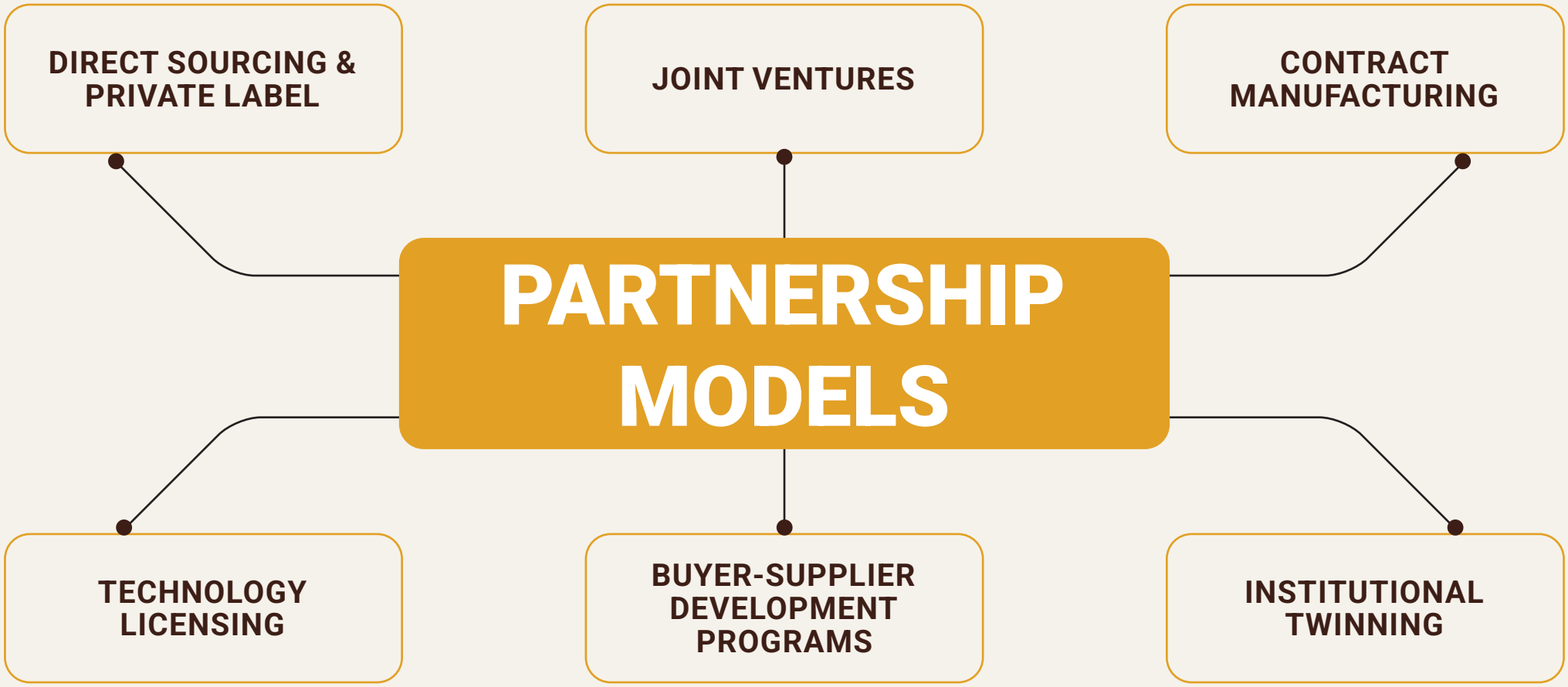
Government vision

300,000

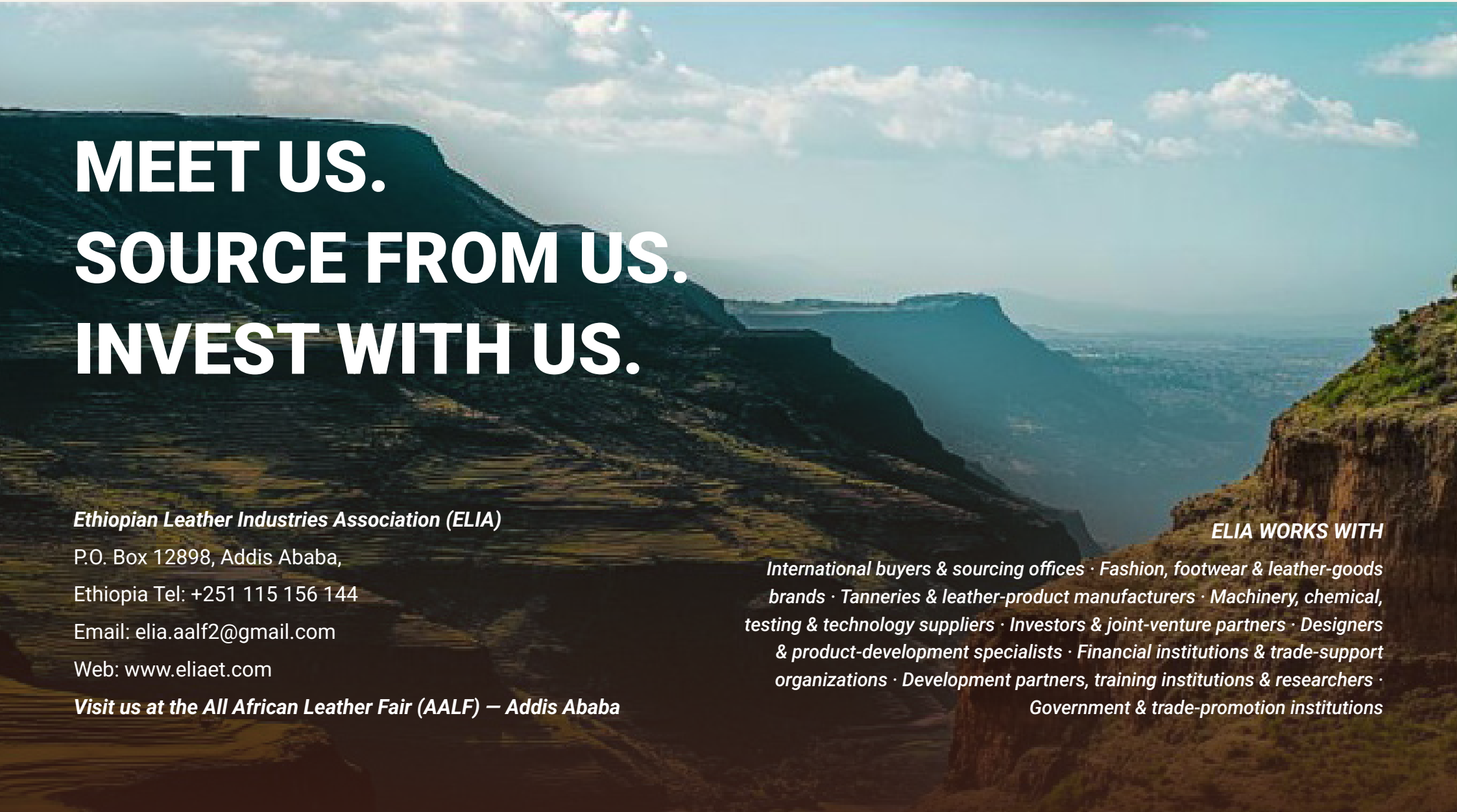
JOBS IN THE LEATHER VALUE CHAIN BY 2030

OPPORTUNITIES ACROSS THE VALUE CHAIN

- ※ Tanning & finishing modernization — technology, chemicals, effluent treatment
- ※ Footwear manufacturing — athletic, fashion, and safety footwear at scale
- ※ Gloves & fine leather goods — built on Highland Leather's global reputation
- ※ Leather garments & accessories
- ※ Machinery, equipment & chemical supply
- ※ Training, design & R&D partnerships
- ※ Traceability & sustainability programs for global compliance markets


DIRECT SOURCING & PRIVATE LABEL
JOINT VENTURES
CONTRACT MANUFACTURING
PARTNERSHIP MODELS
TECHNOLOGY LICENSING
BUYER-SUPPLIER DEVELOPMENT PROGRAMS
INSTITUTIONAL TWINNING

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ETHIOPIAN LEATHER INDUSTRIES ASSOCIATION - ELIA



MEET US.
SOURCE FROM US.
INVEST WITH US.

Ethiopian Leather Industries Association (ELIA)

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Visit us at the All African Leather Fair (AALF) — Addis Ababa

ELIA WORKS WITH

International buyers & sourcing offices · Fashion, footwear & leather-goods brands · Tanneries & leather-product manufacturers · Machinery, chemical, testing & technology suppliers · Investors & joint-venture partners · Designers & product-development specialists · Financial institutions & trade-support organizations · Development partners, training institutions & researchers · Government & trade-promotion institutions