

# **Bonded Leather Market Forecasts to 2030 – Global Analysis By Product (Bonded Leather Rolls, Bonded Leather Sheets, Bonded Leather Scraps and Other Products), Material Composition, Processing Method, Grade, Application, End User and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Bonded Leather Market is growing at a CAGR of 6.8% during the forecast period. Bonded leather is a synthetic material made by combining leftover scraps of real leather with a bonding agent, usually polyurethane or latex. These leather fibers are processed into sheets, which are then coated with a layer of polyurethane or similar materials to give them a smooth, uniform appearance. Bonded leather typically contains a significant percentage of recycled leather but is more affordable and durable than genuine leather.

According to a report published by a Portugal-based provider of statistics on the footwear sector worldwide, in August 2022, sales of the leather products and saddler business increased by 16% in the first quarter of 2022.

Market Dynamics:

Driver:

Growing demand in upholstery and furniture

As consumers seek stylish and durable options at lower prices, bonded leather offers an attractive alternative to genuine leather. It is increasingly used in sofas, chairs, and other upholstered furniture due to its cost-effectiveness, durability, and aesthetic appeal. Manufacturers also benefit from bonded leather's versatility, which allows for a wide

range of textures, colors, and designs. This trend boosts market growth by making bonded leather a preferred choice in both residential and commercial furniture.

#### Restraint:

##### Lower perceived quality

Bonded leather is often perceived as lower quality due to its composition of recycled leather fibers mixed with adhesives, which can make it less durable and prone to wear over time. This perception of inferior quality compared to genuine leather hampers its market growth, especially in premium segments where consumers prioritize longevity and authenticity. As a result, some buyers may opt for higher-end materials, limiting the adoption of bonded leather in luxury or high-performance products.

#### Opportunity:

##### Expansion in automotive industry

Bonded leather is widely used for seating, trim, dashboards, and other interior features due to its durability, aesthetic appeal, and affordability compared to genuine leather. As automakers focus on providing luxurious yet affordable interiors, bonded leather offers a viable alternative to traditional leather. Furthermore, the growing trend of electric and eco-friendly vehicles, which prioritize sustainable materials, boosts the adoption of bonded leather in vehicle production, further propelling market growth.

#### Threat:

##### Environmental concerns with chemicals

Environmental concerns with bonded leather stem from the chemicals used in its manufacturing process, such as adhesives and coatings, which may contain harmful substances like volatile organic compounds (VOCs) and plastics. These chemicals can have negative environmental impacts during production, disposal, or recycling. . Companies are pressured to develop greener alternatives, but the transition can be costly and challenging, slowing market expansion.

##### Covid-19 Impact

The covid-19 pandemic negatively impacted the bonded leather market by disrupting

manufacturing processes, supply chains, and raw material availability. Consumer spending declined during the economic downturn, leading to reduced demand for non-essential goods like furniture and fashion accessories made from bonded leather. However, as the economy gradually recovered and the demand for eco-friendly, affordable materials increased, the market showed signs of rebound. The rise in home-based activities and e-commerce also contributed to modest growth in certain segments.

The bonded leather rolls segment is expected to be the largest during the forecast period

The bonded leather rolls segment is predicted to secure the largest market share throughout the forecast period. Bonded leather rolls are large, flexible sheets made from recycled leather fibers combined with bonding agents. They offer an affordable, eco-friendly alternative to genuine leather, providing similar texture and appearance at a lower cost. Bonded leather rolls are versatile, durable, and can be easily cut, sewn, or molded, making them ideal for both mass production and customized applications.

The footwear segment is expected to have the highest CAGR during the forecast period

The footwear segment is anticipated to witness the highest CAGR during the forecast period due to its affordability, durability, and eco-friendly properties. It is commonly used for making insoles, linings, and uppers in shoes, offering a leather-like appearance and texture at a lower cost than genuine leather. Its versatility allows manufacturers to create fashionable, lightweight, and sustainable footwear options. The growing consumer demand for eco-conscious and budget-friendly products has contributed to the rising use of bonded leather in footwear applications.

Region with largest share:

Asia Pacific is expected to register the largest market share during the forecast period driven by increasing consumer demand for affordable, eco-friendly products. Countries like China, India, and Japan are key markets, with rising urbanization and middle-class populations fueling demand for bonded leather in furniture, automotive interiors, fashion, and accessories. Additionally, the availability of cost-effective manufacturing and a large workforce further strengthens the region's position as a key player in the global bonded leather industry.

Region with highest CAGR:

North America is expected to witness the highest CAGR over the forecast period fuelled by growing consumer interest in sustainable and cost-effective alternatives to genuine leather. The United States and Canada are key markets, where bonded leather is widely used in furniture, fashion, and automotive industries. Additionally, rising consumer awareness about environmental issues and the availability of bonded leather at competitive prices are driving the adoption of this material in various sectors across North America.

### Key players in the market

Some of the key players profiled in the Bonded Leather Market include Toray Industries, Inc., Sappi Limited, BASF SE, Veika UAB, Kuraray Corporation, Topsun Interlining Corporation, Fibermark Inc., E-Leather Ltd., Ultrafabrics Inc., H.R. Polycoats Pvt. Limited, Mayur Uniquoters Limited, Gruppo Mastrotto S.p.A., Decotex USA, Benecke-Kaliko AG, Bolton Group, Dr. Martens and ECO Leather.

### Key Developments:

In July 2024, BASF launched Haptex® 4.0, an innovative polyurethane solution for the production of synthetic leather that is 100% recyclable. Synthetic leather made with Haptex 4.0 and polyethylene terephthalate (PET) fabric can be recycled together using an innovative formulation and recycling technical pathway without the need of layer peel-off process.

In March 2024, Dr. Martens introduced the Genix Nappa collection, featuring footwear crafted from reclaimed leather in collaboration with Gen Phoenix, a leader in sustainable recycled leather. This collection includes the 1460 Lace-Up Boot, 1461 3-Eye Shoe, and 2976 Chelsea Boot, all designed to offer durability and comfort while reducing leather waste.

### Products Covered:

Bonded Leather Rolls

Bonded Leather Sheets

Bonded Leather Scraps

## Other Products

### Material Compositions Covered:

Leather Fiber

Polyurethane (PU) Binder

Latex Binder

Other Material Compositions

### Processing Methods Covered:

Coated Bonded Leather

Uncoated Bonded Leather

### Grades Covered:

Low-Grade

High-Grade

### Applications Covered:

Upholstery

Bookbinding

Fashion Accessories

Footwear

Automotive Interiors

Packaging

Other Applications

End Users Covered:

Residential

Commercial

Retail

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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