

Middle East & Africa Leather for Railway Market Size and Forecast (2021 - 2031)

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Abstracts

The leather market for railway applications in the Middle East and Africa is projected to grow significantly, with an expected market size of approximately US\$ 93.1 million by 2031, up from US\$ 71.3 million in 2024. This growth represents a compound annual growth rate (CAGR) of 3.9% from 2025 to 2031, indicating a steady increase in demand for leather products in the railway sector.

Executive Summary and Market Analysis

The leather for railway market in the Middle East and Africa is shaped by various factors, including regional governance and ongoing infrastructural developments. Notably, countries like the UAE and Saudi Arabia are incorporating luxury elements into their rail systems. A prime example is the Dubai Metro, which features leather seating options, showcasing the region's preference for opulence and high-quality materials in railway interiors. This trend highlights the increasing demand for premium materials that cater to aesthetic preferences and the desire to project a lavish image to international tourists.

The market is also influenced by a blend of traditional craftsmanship and modernization efforts. Nations such as South Africa and Egypt boast a rich heritage of leather craftsmanship, which is reflected in their railway systems. However, as these countries modernize their rail networks, there is a noticeable shift towards the use of advanced materials, including synthetic alternatives, to meet contemporary standards and reduce costs. This dynamic creates a need to balance heritage with modernization, which is a defining characteristic of the leather market for railway applications in the region.

Strategic Insights

Market Segmentation Analysis

The Middle East and Africa Leather for Railway Market can be segmented by type, application, and train type:

By Type: The market is divided into Genuine Leather, Artificial Leather, Polyurethane, Polyvinyl Chloride, and Others. In 2024, the Artificial Leather segment emerged as the market leader.

By Application: The market is segmented into Train Seats, Traction Bellows, Handle and Grip Bars, Cushions and Pillows, and Others. The Train Seats segment was the dominant application in 2024.

By Train Type: The market is categorized into Passenger Trains, Freight Trains, Mining Trains, and Others, with Passenger Trains leading the market in 2024.

Market Outlook

A notable trend in the leather for railway market is the rising demand for bio-based leather. As industries and consumers increasingly seek sustainable and cruelty-free alternatives to traditional leather, bio-based leathers—also referred to as plant-based or alternative leathers—are gaining popularity. These materials, derived from plant fibers, fungi, or food industry byproducts, offer an environmentally friendly option for railway applications. In railway interiors, bio-based leather is utilized for seating, paneling, and decorative elements, where both aesthetics and performance are crucial.

Bio-based leathers are designed to comply with stringent fire, smoke, and toxicity (FST) standards, which are essential for public transport safety. For instance, in March 2024, Bridge of Weir Leather introduced innovative technologies such as BioTAN and FreeTAN, aimed at developing bio-based and biodegradable leather. BioTAN enhances the bio-based content in chrome-free leather tanning processes to over 50%, while FreeTAN replaces traditional tanning methods with compostable technology.

The adoption of bio-based leather contributes to reduced weight, which enhances overall energy efficiency in trains. This aligns with the circular economy goals of railway operators who are committed to greener mobility solutions. Manufacturers are focusing on optimizing these materials for durability, UV resistance, and ease of

maintenance—key requirements for high-traffic environments. The trend towards bio-based leather reflects a growing preference for sustainable and high-quality alternatives in modern rail systems.

Country Insights

The Middle East and Africa Leather for Railway Market is further segmented by country, including South Africa, Saudi Arabia, the United Arab Emirates, Qatar, Morocco, and the Rest of Middle East and Africa. In 2024, the Rest of Middle East and Africa held the largest market share.

This region, which includes countries like Egypt, Turkey, Iraq, Jordan, and Iran, presents a complex yet promising landscape for the leather for railway market. These nations are gradually modernizing their railway infrastructure, driven by government initiatives aimed at improving connectivity, urban mobility, and freight transport efficiency. Additionally, there is a growing emphasis on passenger comfort, safety measures, and sustainability, which encourages the use of specialized leather materials that combine durability with aesthetic appeal while balancing cost-effectiveness and quality.

Company Profiles

Key players in the Middle East and Africa Leather for Railway Market include BASF SE, BOXMARK Leather GmbH & Co KG, Teijin Ltd, Toray Industries Inc, Covestro AG, San Fang Chemical Industrial Co Ltd, FILWEL Co., Ltd., Kuraray Co Ltd, Wickett-Craig, Super Tannery Ltd., Wollsdorf Leder Schmidt & Co Ges.m.b.H., Elmo Sweden AB, ICAIPLAST Spa, Conceria Leonica S.p.A., and Giriraj Coated Fab PVT. LTD.

These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products to consumers.

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