

ANUARIO DE LA PIEL
LEATHER ANNUAL REPORT
2006

MANUFACTURAS DE LA PIEL / PELETERÍA
LEATHER PRODUCTS / THE FUR INDUSTRY

INTRODUCCIÓN

Respecto a la exportación, hay una ligera subida en la peletería confeccionada y prendas en piel que indican la tendencia iniciada de leve recuperación desde 2003. También destaca la subida en la exportación de peletería en bruto, sobre todo en China y Finlandia.

Hay una acentuada continuidad en la exportación de peletería curtida o adobada, siguiendo la tendencia que se inició en 2003, y ello se debe, a que los países emergentes nos compran la mercancía curtida para después confeccionarla, por su bajo coste de producción

También hay una leve disminución en la exportación de confección de ante, nappa y doble faz.

En cuanto a la importación, se produce un alza en la de peletería confeccionada y prendas de piel muy significativa, puesto que el primer país del que importamos prendas, es de China, que está a gran distancia del resto de países.

En la importación de peletería en bruto, se observa una tendencia ala alta, siendo muy significativa la subida de las provenientes de Francia y Finlandia.

En la Peletería curtida o adobada, volvemos a niveles como los del año 2004, destacando un ligero ascenso y se mantienen prácticamente las cantidades de importación en confección de ante, nappa, double face y otros artículos manteniéndose a la cabeza, países como India y China.

Finalmente, respecto a la balanza comercial, es significativo que se invierta el desequilibrio de los años 2004 y 2005, pasando este año a ser más importador que exportador.

INTRODUCTION

There was a slight increase in tailored fur and Leather garment exports, evidencing that the slight recovery that began in 2003 has continued. Likewise, we have to point out the recovery of raw fur exports, in China and Finland

There was continuity with regard to exports of tanned and dressed leather, following a trend that began in 2003. This is due to the fact that emerging countries buy tanned goods from us to then tailor them because of their low production costs.

There was also a slight reduction in suede and nappa garments.

Concerning imports, there was a significant increase in tailored fur and leather garment imports, as the most important country from which we import garments is China, which is considerably ahead of the other countries.

A trend towards an increase in raw fur imports can be observed. Imports from France and Finland fell significantly.

Levels reached those for 2004 concerning tanned and dressed leather, with a light increase standing out. The amounts of suede, nappa, double face and other garments imports remained practically the same with India and China remaining as the most important exporters.

Lastly, concerning the trade balance, it is significant that the imbalance generated in 2004 and 2005 has been inverted. This year Spain has imported more than it has exported.

ESTRUCTURA SECTOR PELETERIA

THE FUR INDUSTRY STRUCTURE

| | 2003 | 2004 | 2005 |
|------------------------------------|--------|--------|--------|
| EMPLEO DIRECTO / DIRECT EMPLOYMENT | 28.000 | 28.000 | 28.000 |
| Granjas / Farms | 84 | 84 | 84 |
| Confeccionistas / Tailors | 45 | 45 | 45 |

Fuente/Source: OEEP

| PUNTOS DE VENTA / SALES OUTLETS | 2003 | 2004 | 2005 |
|---------------------------------------|-------|-------|-------|
| Tiendas / Shops | 1.550 | 1.500 | 1.500 |
| Grandes almacenes / Department Stores | 78 | 130 | 130 |
| Otros / Others | 2.000 | 2.000 | 2.000 |
| TOTAL | 3.628 | 3.630 | 3.630 |

Fuente/Source: OEEP

FACTURACION PIELES AL POR MENOR (DISTRIBUCION POR TIPOS DE ESTABLECIMIENTO)

RETAIL FUR SALES / (DISTRIBUTION BY TYPE OF COMMERCIAL ESTABLISHMENT)

| | 2002 | 2003 | 2004 |
|---------------------------------------|------|------|------|
| Tiendas peletería / Fur outlets | 28% | 26% | 25% |
| Tiendas textiles / Textile outlets | 20% | 22% | 23% |
| Grandes almacenes / Department Stores | 50% | 50% | 50% |
| Otros / Others | 2% | 2% | 2% |

Fuente/Source: OEEP

| FACTURACION SECTOR PELETERIA MERCADO INTERIOR | |
|---|---------------------|
| CONSUMO ALTA PELETERÍA | |
| 1. VISÓN (Incluido prendas de retal de Visón)Consumo aproximado en España de Visón | 3.429.900unidades |
| Facturación | 64.890.000 € |
| Total Chales y Complementos | 92.700 unidades |
| Facturación | 2.317.500 € |
| 2. ZORROS (Se emplea casi todo en guarnición) | |
| Consumo aproximado en España de Zorro | 91.820 unidades |
| Facturación | 25.180.440 € |
| 3. OTRAS PIELES | |
| Leopardo, rat-mousquet, karakul... | 7.650 unidades |
| Facturación | 11.169.000 € |
| CONSUMO CORDERO ESPAÑOL | |
| 4. CORDERO ESPAÑOL | |
| Total Prendas Realizadas | 66.656 unidades |
| Facturación | 36.162.472 € |
| 5. ANTE, NAPA, NOBUCK, ETC. | |
| Total Prendas Realizadas | 892.500 unidades |
| Facturación | 187.425.000 € |
| CONSUMO CONEJO | |
| 6. CONEJO | |
| Producción conejos | 25.000.000 unidades |
| Facturación | 120.000.000 € |
| TOTAL FACTURACIÓN SECTOR PELETERÍA | |
| ALTA PELETERÍA | |
| Visón | 67.207.500 € |
| Zorros | 25.180.440 € |
| Otras pieles | 11.169.000 € |
| CORDERO | |
| Cordero | 36.162.472 € |
| Ante, napa, nobuck, etc. | 187.425.000 € |
| CONEJO | |
| Total: | 120.000.000 € |
| Total Facturación: | 456.135.872 € |

Fuente/Source: OEEP

| TURNOVER OF THE FUR SECTOR | |
|--|---------------------|
| CONSUMPTION BY HIGH CLASS FURRIERS | |
| 1. MINK (Including garments in mink cuttings) | 3.429.900 unidades |
| Turnover | 64.890.000 € |
| Total Shawls and Complements: | 92.700 unidades |
| Turnover | 2.317.500 € |
| 2. FOX FUR (Most is used in textile) | |
| Approximate consumption of Foxfur in Spain: | 91.820 unidades |
| Turnover | 25.180.440 € |
| 3. OTHER FURS: | |
| Leopard, rat-mousquet, karakul... | 7.650 unidades |
| Turnover | 11.169.000 € |
| CONSUMPTION SPANISH LAMB | |
| 4. SPANISH LAMB | |
| Total number of garments produced: | 66.656 unidades |
| Turnover | 36.162.472 € |
| 5. SUEDE, GLACE LACE, NOBUCK, ETC. | |
| Total number of garments produced: | 892.500 unidades |
| Turnover | 187.425.000 € |
| CONSUMPTION RABBIT | |
| 6. RABBIT | |
| Rabbits | 25.000.000 unidades |
| Turnover | 120.000.000 € |
| TOTAL TURNOVER OF THE FUR SECTOR | |
| HIGH CLASS FURRIERS | |
| Mink | 67.207.500 € |
| FoxFur | 25.180.440 € |
| Others Furs | 11.169.000 € |
| LAMB | |
| Lamb | 36.162.472 € |
| Suede, Glace Lamb, Nobuck, etc. | 187.425.000 € |
| RABBIT | |
| Total: | 120.000.000 € |
| Total Turnover: | 456.135.872 € |

Fuente/ Source: OEEP

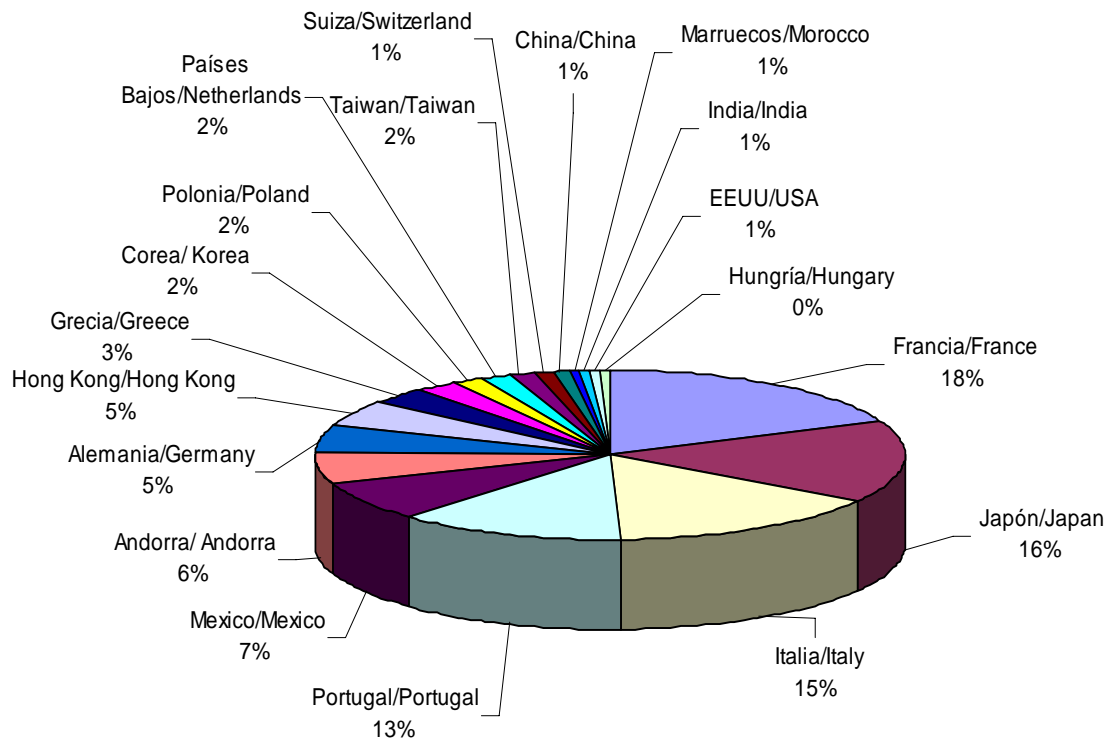
EXPORTACIONES PELETERÍA CONFECCIONADA Y PRENDAS CONFECCIONADAS EN PIEL.
PRINCIPALES COMPRADORES 2006. (Euros)

TAILORED FUR AND FUR GARMENTS EXPORTS. MAIN BUYERS 2006. (Euros)

| País/Country | 2005 | 2006 |
|--------------------------|-----------|-----------|
| Francia/France | 1.671.070 | 1.684.510 |
| Japón/Japan | 1.611.840 | 1.479.180 |
| Italia/Italy | 1.247.910 | 1.416.120 |
| Portugal/Portugal | 1.326.330 | 1.158.170 |
| México/Mexico | 287.937 | 675.212 |
| Andorra/ Andorra | 318.022 | 545.915 |
| Alemania/Germany | 384.996 | 486.758 |
| Hong Kong/Hong Kong | 642,63 | 459,585 |
| Grecia/Greece | 95.680 | 320.099 |
| Corea/ Korea | 17.520 | 200.089 |
| Polonia/Poland | 2.721 | 150.564 |
| Países Bajos/Netherlands | 163.422 | 149.572 |
| Taiwan/Taiwan | | 142.511 |
| Suiza/Switzerland | 43.949 | 103.661 |
| China/China | 2.172 | 78.42 |
| Marruecos/Morocco | 57.399 | 57.069 |
| India/India | 123.175 | 52.638 |
| EEUU/USA | 47,664 | 48,552 |
| Hungría/Hungary | 2.524 | 46.176 |
| Subtotal/Subtotal | 8.046.960 | 9.254.800 |
| TOTAL/TOTAL | 8.451,685 | 9.571,822 |

Fuente/Source: OEEP

EXPORTACIONES PELETERÍA CONFECCIONADAY PRENDAS CONFECCIONADAS EN PIEL.



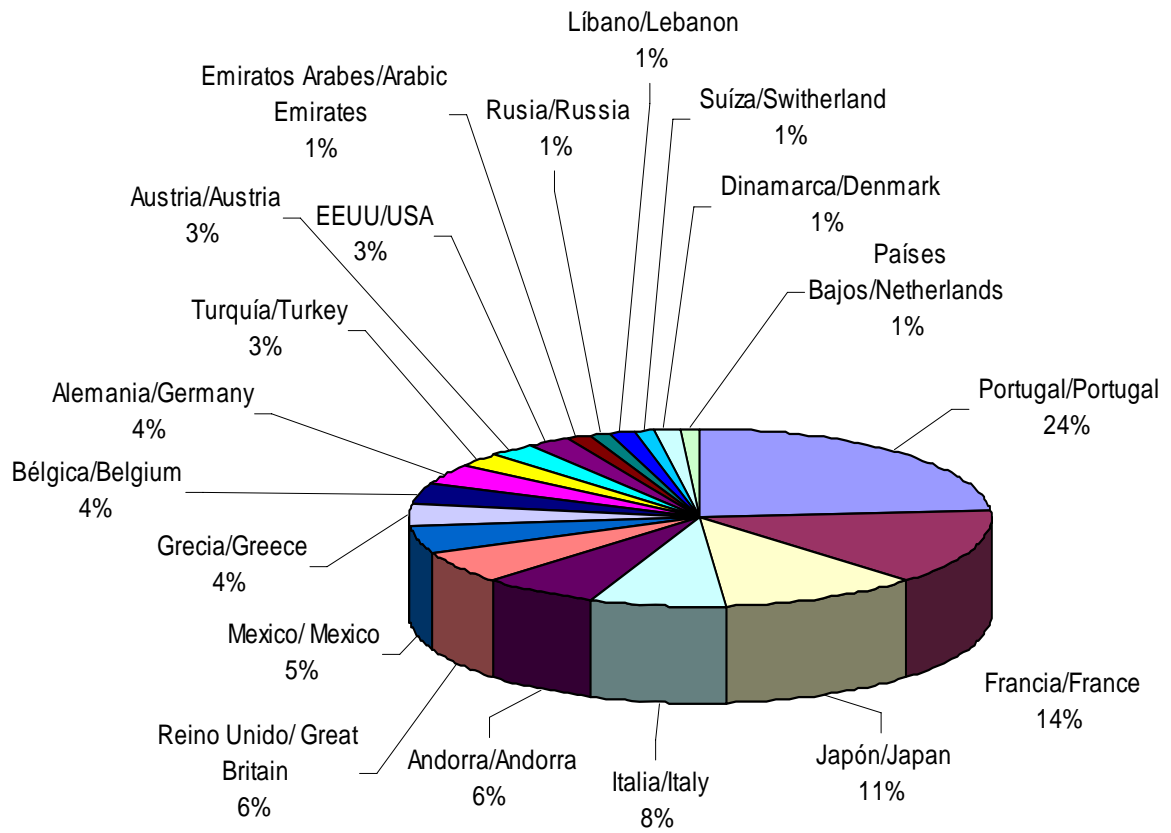
**EXPORTACIONES CONFECCIÓN ANTE, NAPA Y OTROS ACABADOS.
PRINCIPALES COMPRADORES 2006. (Euros)**

TAILORING IN SUEDE, NAPPA LEATHER, DOUBLE FACE AND OTHER PRODUCTS EXPORTS. MAIN BUYERS 2006. (Euros)

| País/Country | 2.005 | 2.006 |
|---------------------------------|---------------|---------------|
| Portugal/Portugal | 11.663.430,00 | 10.202.700,00 |
| Francia/France | 11.123.263,00 | 5.699.880,00 |
| Japón/Japan | 5.574.670,00 | 4.982.890,00 |
| Italia/Italy | 2.167.300,00 | 3.434.940,00 |
| Andorra/Andorra | 2.502.920,00 | 2.951.935,00 |
| Reino Unido/ Great Britain | 2.269.130,00 | 2.775.860,00 |
| Mexico/ Mexico | 2.521.890,00 | 2.527.250,00 |
| Grecia/Greece | 1.907.710,00 | 1.994.570,00 |
| Bélgica/Belgium | 3.292.910,00 | 1.856.470,00 |
| Alemania/Germany | 2.488.439,00 | 1.656.638,00 |
| Turquía/Turkey | 449.424 | 1.183.969,00 |
| Austria/Austria | 508.675 | 1.172.996,00 |
| EEUU/USA | 1.415.510,00 | 1.089.080,00 |
| Emiratos Arabes/Arabic Emirates | 906.964 | 974.269 |
| Rusia/Russia | 522.922 | 656.717 |
| Líbano/Lebanon | 504.611 | 576.440 |
| Suíza/Switzerland | 636.392 | 561.574 |
| Dinamarca/Denmark | 136.660 | 530.905 |
| Países Bajos/Netherlands | 477.786 | 530.758 |
| Subtotal/Subtotal | 51.070.606,14 | 45.359.841 |
| TOTAL/TOTAL | 57.499.410,00 | 51.583.600,00 |

Fuente/Source OEEP

EXPORTACIONES CONFECCIÓN ANTE, NAPA Y OTROS ACABADOS.

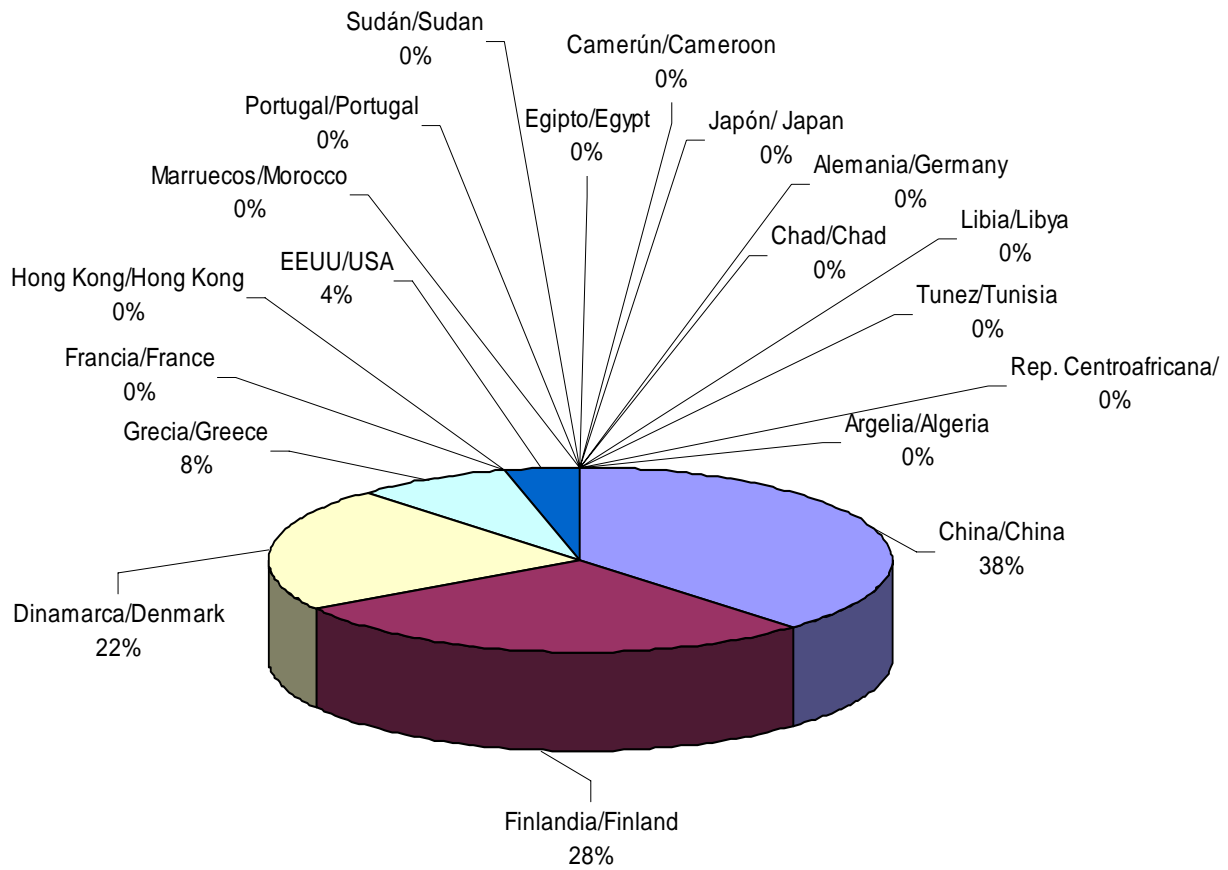


EXPORTACIONES DE PELETERÍA EN BRUTO. PRINCIPALES COMPRADORES 2006. (Euros)
 RAW FUR EXPORTS. MAIN BUYERS 2006. (Euros)

| País/Country | 2005 | 2006 |
|----------------------|------------|------------|
| China/China | 2203554,67 | 2876296,23 |
| Finlandia/Finland | 2126012,72 | 2151309,32 |
| Dinamarca/Denmark | 1639203,03 | 1691742,31 |
| Grecia/Greece | 348106,75 | 663248,96 |
| Hong Kong/Hong Kong | 223421,69 | 19799,7 |
| Francia/France | 143099,5 | 275 |
| EEUU/USA | 66351,23 | 300,989,65 |
| Japón/ Japan | 14850 | 0 |
| Alemania/Germany | 5074 | 0 |
| Portugal/Portugal | 2309,54 | 20738,24 |
| Marruecos/Morocco | 0 | 0 |
| Argelia/Algeria | 0 | 0 |
| Tunez/Tunisia | 0 | 0 |
| Libia/Libya | 0 | 0 |
| Egipto/Egypt | 0 | 0 |
| Sudán/Sudan | 0 | 0 |
| Chad/Chad | 0 | 0 |
| Camerún/Cameroon | 0 | 0 |
| Rep. Centroafricana/ | 0 | 0 |
| Subtotal/Subtotal | 6771983,13 | 7423409,76 |
| TOTAL/TOTAL | 6771983,13 | 7423409,76 |

Fuente/Source: OEEP

EXPORTACIONES DE PELETERÍA EN BRUTO



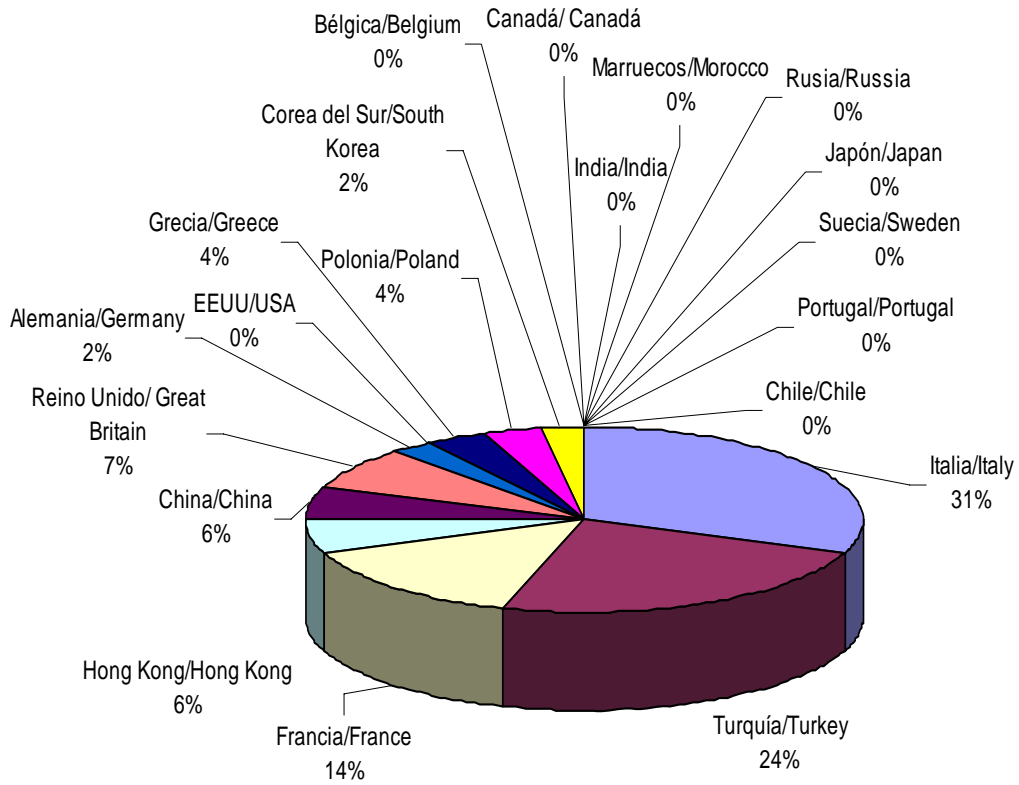
EXPORTACIONES PELETERÍA CURTIDA O ADOBADA.
PRINCIPALES COMPRADORES 2006. (Euros)

TANNED OR DRESSED FUR EXPORTS. MAIN BUYERS 2006. (Euros)

| País/Country | 2005 | 2006 |
|----------------------------|---------------|----------------|
| Italia/Italy | 25.673.605,47 | 30.790.930,14 |
| Turquía/Turkey | 20.369.451,56 | 23.676.408,85 |
| Francia/France | 11.671.718,83 | 14.313.513,94 |
| Hong Kong/Hong Kong | 7.749.560,30 | 6.371.283,42 |
| China/China | 7.721.846,65 | 6.649.397,92 |
| Reino Unido/ Great Britain | 3.768.760,10 | 7.425.756,20 |
| Alemania/Germany | 3.531.793,42 | 300,989,65 |
| EEUU/USA | 3.293.454,22 | 0 |
| Grecia/Greece | 2.485.527,54 | 4.407.703,03 |
| Polonia/Poland | 1.849.567,16 | 3.565.053,64 |
| Corea del Sur/South Korea | 1.658.152,25 | 2.573.552,41 |
| Canadá/ Canadá | 1.240.318,84 | 659.595,74 |
| Rusia/Russia | 1.151.109,80 | 792.579,29 |
| Portugal/Portugal | 973.114,28 | 1.155.470,67 |
| Chile/Chile | 763.946,36 | 0 |
| Japón/Japan | 728.110,88 | 694.284,77 |
| Bélgica/Belgium | 593.842,08 | 1.005.598,69 |
| India/India | 562.810,78 | 0 |
| Marruecos/Morocco | 515.283,61 | 870.551,29 |
| Suecia/Sweden | 448451,01 | 641354,31 |
| Subtotal/Subtotal | 96.750.425,14 | 105.593.034,30 |
| TOTAL/TOTAL | 100627895,3 | 106686603,7 |

Fuente/Source: OEEP

EXPORTACIONES PELETERÍA CURTIDA O ADOBADA



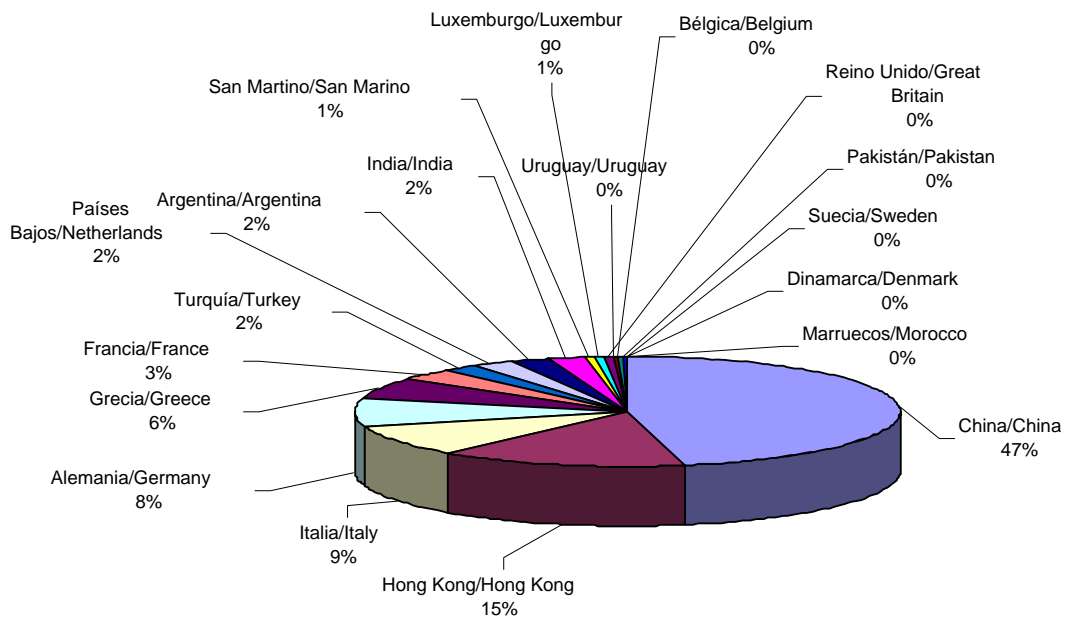
IMPORTACIONES PELETERÍA CONFECCIONADA Y PRENDAS CONFECCIONADAS EN PIEL.
PRINCIPALES PROVEEDORES.2006. (Euros)

TAILORED FUR GARMENTS IMPORTS.MAIN SUPPLIERS 2006. (Euros)

| País/Country | 2005 | 2006 |
|---------------------------|---------------|---------------|
| China/China | 20.965.570,00 | 22.807.294,93 |
| Hong Kong/Hong Kong | 5.459,56 | 7.206.200,00 |
| Italia/Italy | 4.746.520,00 | 4.565.330,00 |
| Alemania/Germany | 4.436.620,00 | 4.091.470,00 |
| Grecia/Greece | 2.677.210,00 | 2.964.140,00 |
| Francia/France | 1.663.460,00 | 1.689.400,00 |
| Turquía/Turkey | 886.017 | 1.177.060,00 |
| Países Bajos/Netherlands | 1.577.590,00 | 1.128.210,00 |
| Argentina/Argentina | 716.642 | 1.120.700,00 |
| India/India | 1.325.416,00 | 1.045.093,00 |
| San Martino/San Marino | 619.341 | 381.592 |
| Luxemburgo/Luxemburgo | 319.782 | 289.879 |
| Reino Unido/Great Britain | 527.524 | 240.492 |
| Uruguay/Uruguay | 270.167 | 205.021 |
| Bélgica/Belgium | 702.531 | 117.097 |
| Pakistán/Pakistan | 32.264 | 93.112 |
| Suecia/Sweden | 4.996 | 83,953 |
| Dinamarca/Denmark | 161,289 | 73.390 |
| Marruecos/Morocco | 0 | 65.239 |
| Subtotal/Subtotal | 41.477.270,85 | 49.260.803,88 |
| TOTAL/TOTAL | 47.514.765,00 | 49.714.109,00 |

Fuente/Source: OEEP

IMPORTACIONES PELETERÍA CONFECCIONADA Y PRENDAS CONFECCIONADAS EN PIEL



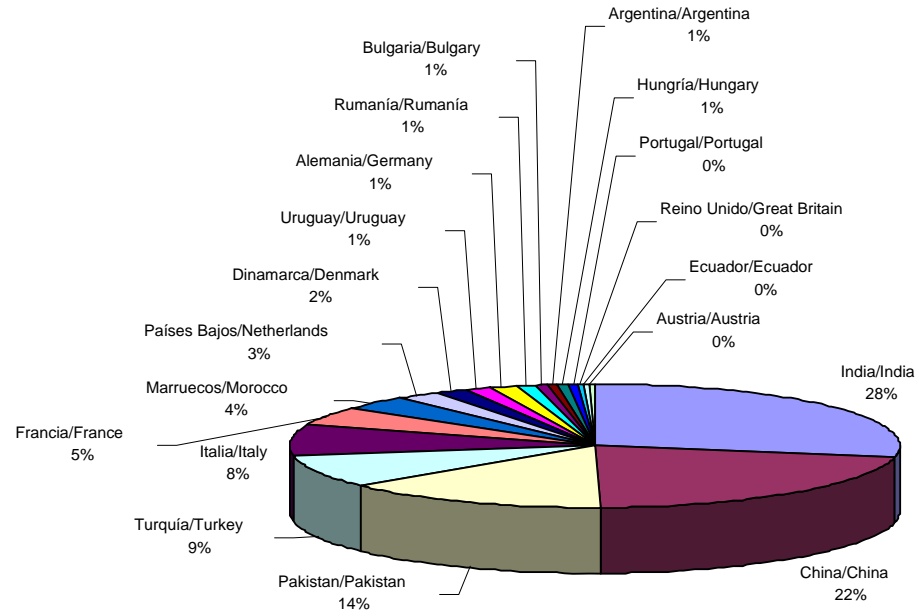
IMPORTACIONES CONFECCIÓN ANTE, NAPA, Y OTROS ACABADOS, PRINCIPALES
PROVEEDORES 2006. (Euros)

TAILORING IN SUEDE, NAPPA LEATHE, DOUBLE FACE AND OTHER PRODUCTS.
MAIN SUPPLIERS 2006. (Euros)

| País/Country | 2005 | 2006 |
|---------------------------|----------------|----------------|
| India/India | 55.000.866,00 | 42.633.385,00 |
| China/China | 33.620.310,00 | 33.101.760,00 |
| Pakistan/Pakistan | 21.054.991,00 | 21.446.410,00 |
| Turquía/Turkey | 13.863.557,00 | 13.588.617,00 |
| Italia/Italy | 9.902.551,00 | 12.083.033,00 |
| Francia/France | 7.447.172,00 | 7.229.787,00 |
| Marruecos/Morocco | 10.025.911,00 | 5.795.405,00 |
| Países Bajos/Netherlands | 2.251.215,00 | 3.836.125,00 |
| Dinamarca/Denmark | 2.873.754,00 | 2.387.296,00 |
| Uruguay/Uruguay | 1.437.801,00 | 2.198.431,00 |
| Alemania/Germany | 1.573.919 | 1.799.318,00 |
| Rumanía/Rumanía | 1.591.470,00 | 1.727.474,00 |
| Bulgaria/Bulgary | 942.701 | 1.120.961,00 |
| Argentina/Argentina | 1.077.972,00 | 783.755 |
| Hungría/Hungary | 706.907 | 774.842 |
| Portugal/Portugal | 1.526.092,00 | 741.318 |
| Reino Unido/Great Britain | 635.347 | 712.323 |
| Ecuador/Ecuador | 981.329 | 400.255 |
| Austria/Austria | 533.153 | 318.154 |
| Subtotal/Subtotal | 165.473.099 | 152.048.356,41 |
| TOTAL/TOTAL | 170.666.014,00 | 154.622.411,00 |

Fuente/Source: OEEP

IMPORTACIONES CONFECCIÓN ANTE, NAPA, Y OTROS ACABADOS



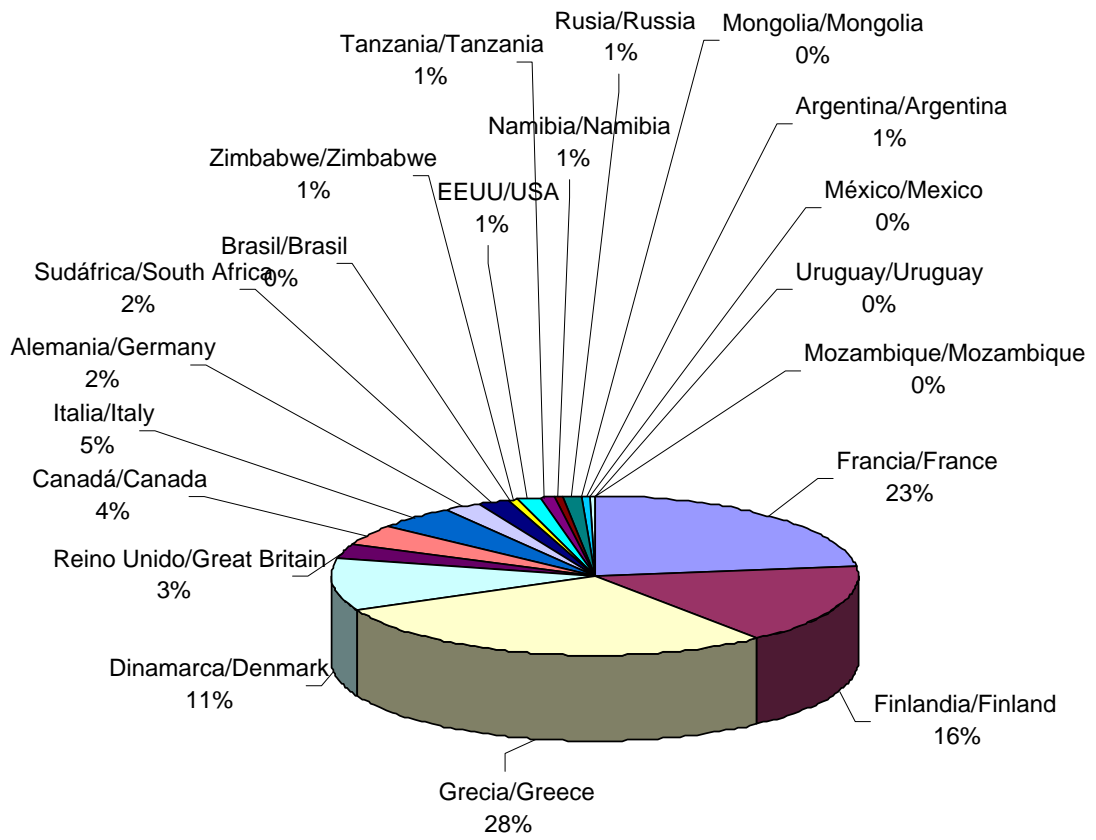
**IMPORTACIONES PELETERIA EN BRUTO. PRINCIPALES
PROVEEDORES 2006. (Euros)**

RAW FUR AND IMPORTS. MAIN SUPLIERS 2006. (Euros)

| País/Country | 2005 | 2006 |
|---------------------------|--------------|--------------|
| Francia/France | 1.528.265,83 | 2.055.146,93 |
| Finlandia/Finland | 908.171,76 | 1.457.105,36 |
| Grecia/Greece | 835.342,45 | 2.517.932,56 |
| Dinamarca/Denmark | 619.004,09 | 937.120,92 |
| Reino Unido/Great Britain | 552.394,50 | 293.638,68 |
| Canadá/Canada | 368.661,53 | 374.473,20 |
| Italia/Italy | 177.105,26 | 458.592,87 |
| Alemania/Germany | 132.928,80 | 147.369,85 |
| Sudáfrica/South Africa | 104.318,94 | 188.053,99 |
| Brasil/Brasil | 82.986,92 | 45.441,69 |
| Zimbabwe/Zimbabwe | 46.968,69 | 47.868,27 |
| EEUU/USA | 35.549,23 | 133.742,13 |
| Tanzania/Tanzania | 30.886,56 | 67.551,98 |
| Namibia/Namibia | 23.156,15 | 52.503,93 |
| Rusia/Russia | 21.133,73 | 105.751,17 |
| Mongolia/Mongolia | 11.355,43 | 0 |
| Argentina/Argentina | 10.952,29 | 45.008,91 |
| México/Mexico | 10.423,92 | 24.794,12 |
| Mozambique/Mozambique | 5.983,73 | 0 |
| Uruguay/Uruguay | 5.819,75 | 0 |
| Subtotal/Subtotal | 5.511.409,56 | 8.952.096,56 |
| TOTAL/TOTAL | 5.536.522,14 | 9.102.232,50 |

Fuente/Source: OEEP

IMPORTACIONES PELETERIA EN BRUTO



IMPORTACIONES DE PELETERÍA CURTIDA O ADOBADA.
PRINCIPALES PROVEEDORES 2006. (Euros)

TANNED OR DRESSED FUR EXPORTS. MAIN SUPPLIERS 2006 (Euros)

| País/Country | 2005 | 2006 |
|---------------------------|---------------|---------------|
| Italia/Italy | 4.396.716,31 | 4.205.466,06 |
| Grecia/Greece | 1.947.130,26 | 2.721.784,29 |
| Francia/France | 1.352.144,06 | 1.292.937,69 |
| Finlandia/Finland | 1.344.966 | 1.047.792,39 |
| Dinamarca/Denmark | 1.340.328,88 | 670.458,99 |
| Turquía/Turkey | 1.148.276,44 | 1.919.085,07 |
| Reino Unido/Great Britain | 940.068,36 | 1.404.608,11 |
| Marruecos/Morocco | 910.563,20 | 1.208.089,31 |
| China/China | 600.238,78 | 1.486.888,22 |
| Alemania/Germany | 532.814,45 | 533.307,92 |
| Argentina/Argentina | 494.316,88 | 901.931,42 |
| Hong Kong/Hong Kong | 241.695,56 | 155.835,89 |
| Portugal/Portugal | 223.005,22 | 642.550,76 |
| EEUU/USA | 129.059,90 | 47.327,95 |
| Rusia/Russia | 78.621 | 93.641,03 |
| Polonia/Poland | 69.555,46 | 59.752,76 |
| India/India | 67.945,81 | 0 |
| Canadá/Canada | 60.831,54 | 0 |
| Brasil/Brasil | 47.614,14 | 472.111,23 |
| Suecia/Sweden | 37.934,69 | 0 |
| Subtotal/Subtotal | 15.963.826,94 | 18.863.569,09 |
| TOTAL/TOTAL | 16.217.088,52 | 18.863.854,96 |

Fuente/Source: OEEP

IMPORTACIONES DE PELETERÍA CURTIDA O ADOBADA

