



Sustainable Manufacturing and
Environmental Pollution

Gender Equality and Social Inclusion (GESI) Perception Survey in Pakistan's Leather Sector

Survey Report

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DISCLAIMER

This is a project output funded by the Sustainable Manufacturing and Environmental Pollution (SMEP) Programme.

Pakistan Leather Sector: Traceability, Cleaner Production and Circularity, implemented by WWF- Pakistan with partners including Punjab Agriculture & Meat Company (PAMCO), Pakistan Council of Scientific & Industrial Research (PCSIR), Information Technology University (ITU), and Leather Field Pvt Ltd., has been awarded a UK International Development grant in order to demonstrate a pioneering initiative in Pakistan that aims to identify the actors in the leather value chain with digital tool while simultaneously promoting cleaner production and circularity in the leather sector. The grant has been made via the SMEP Programme and has been awarded until June 2026.

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PURPOSE OF THIS REPORT

The overarching purpose of the survey report was to document and assess perceptions and experiences related to gender equality and social inclusion within leather sector of Pakistan.

1 Background

Pakistan's leather sector is one of the country's leading export-oriented industries, employing thousands of workers across tanning, manufacturing, and trading sub-sectors. Despite its significant economic contribution, the industry continues to face challenges related to gender imbalance, limited representation of marginalised groups, and lack of inclusive workplace practices.

Globally, sustainable development frameworks, such as the UN Sustainable Development Goals (SDGs), emphasise that economic growth must be inclusive, ensuring equal opportunities for women, youth, and persons with disabilities (PWDs). Within this context, WWF-Pakistan, as part of the project 'Pakistan Leather Sector: Traceability, Cleaner Production and Circularity' funded by UK International Development through SMEP Programme, is looking out for opportunities to integrate Gender Equality and Social Inclusion (GESI) principles across leather supply chain.

However, evidence on the current perceptions and practices of inclusion within Pakistan's leather sector has remained limited. While policies increasingly reference gender and social equity, little empirical data exists on how these values are understood, applied, or experienced by the sector's workforce.

The GESI perception survey was therefore designed as a pre-pilot assessment to capture baseline insights on inclusion awareness, existing barriers, and the willingness of sector actors to adopt inclusive practices. The findings are intended to inform program design, training priorities, and advocacy strategies for advancing equality and social justice within the leather value chain.

2 Purpose

The overarching purpose of the survey was to assess perceptions and experiences of gender equality and social inclusion within Pakistan's leather sector, focusing on the following objectives:

- To understand the level of awareness of inclusion concepts among sector stakeholders particularly involved in the project.
- To identify barriers faced by women, PWDs, and other marginalized groups in employment and leadership.
- To explore existing practices and attitudes related to inclusion in the workplace.
- To identify training and capacity-building needs to strengthen inclusive participation.
- To generate evidence to support policy advocacy and donor programming for a fairer and more equitable leather industry.

3 Methodology

The GESI perception survey was conducted using a structured questionnaire developed under the project.

3.1 Survey tool

The questionnaire covered seven thematic sections including demographics, awareness and perceptions of inclusion, barriers to participation, access to resources and opportunities, participation in decision-making, gender and disability inclusion, and training and capacity building needs. See Annexure I for questionnaire both in English and Urdu.

3.2 Sampling and participants

A total of 21 respondents participated in this survey. Participants represented a diverse range of stakeholders from the leather value chain, including:

- Tannery workers and supervisors
- Business owners and traders
- Technical/quality control staff
- Researchers and academia

The survey intentionally included both male and female participants to ensure diverse representation.

3.3 Data Collection and Analysis

Data was collected through self-administered questionnaires. Responses were anonymized and coded for analysis using descriptive statistics. Results were visualized through frequency charts and summary tables.

Qualitative interpretation was applied to identify underlying trends, challenges, and opportunities. The survey serves as an initial baseline to guide further detailed GESI studies under the SMEP project in Pakistan.

4 Results

4.1 Demographics

Most respondents were 25-44 years old, indicating a predominantly mid-career sample. The majority were male, highlighting the sector's gender imbalance. Most participants held college/university or vocational training qualifications and were employed full-time, typically earning between PKR 50,000 and 90,000 per month. Respondents represented various functions, primarily tanneries, technical staff, and business owners, reflecting the diversity of roles within the value chain.

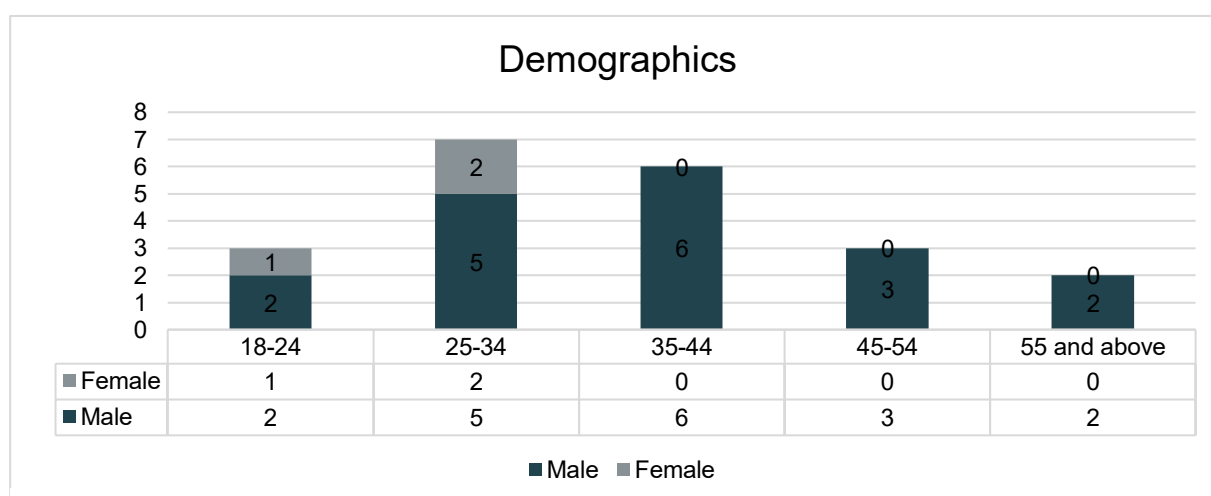


Figure 1 Demographic data of survey respondents

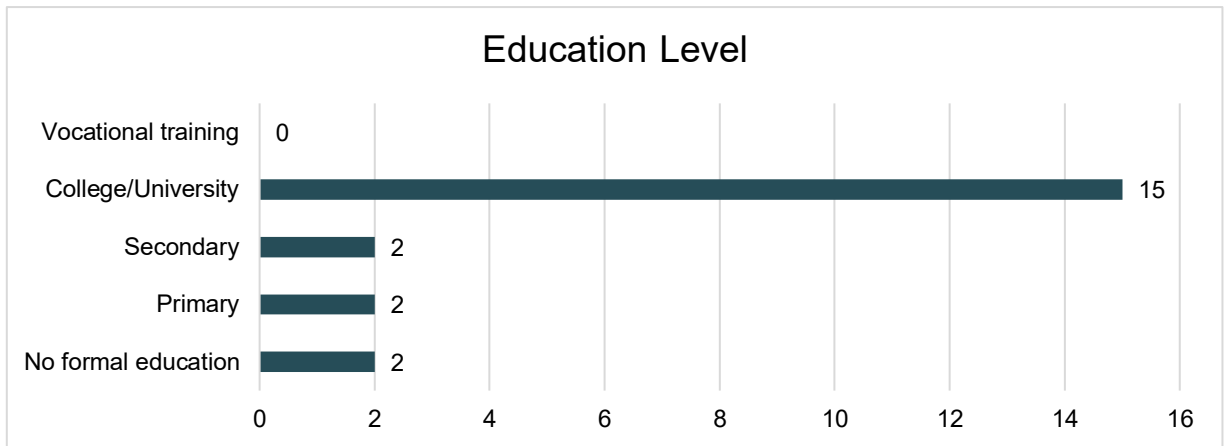


Figure 2 Education level of survey respondents

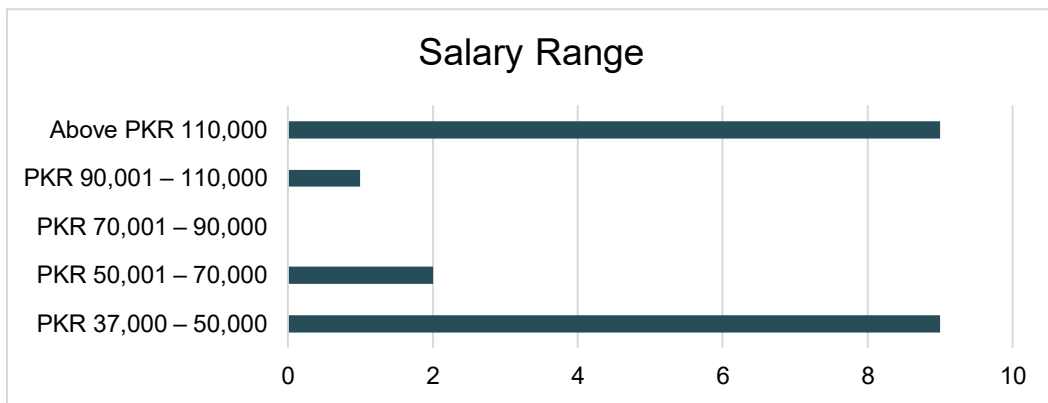


Figure 3 Salary range of survey respondents

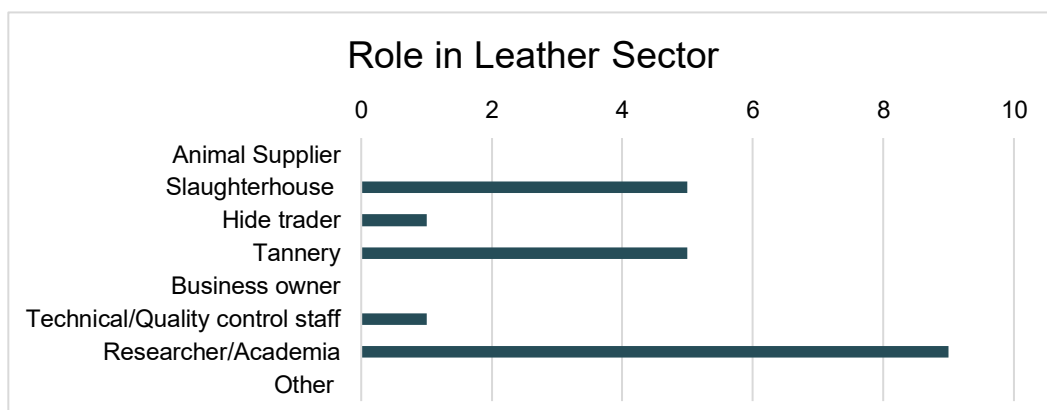


Figure 4 Role of survey respondents in leather sector

4.2 Awareness and Perceptions

Most respondents were somewhat to very familiar with the concept of social inclusion, showing growing awareness within the sector. However, perceptions of actual inclusivity were mixed: many respondents rated the sector as “neutral” or “somewhat inclusive”, with only a few describing it as “very inclusive.” Nearly half of respondents reported witnessing or experiencing discrimination, primarily during hiring, promotion, and leadership opportunities.

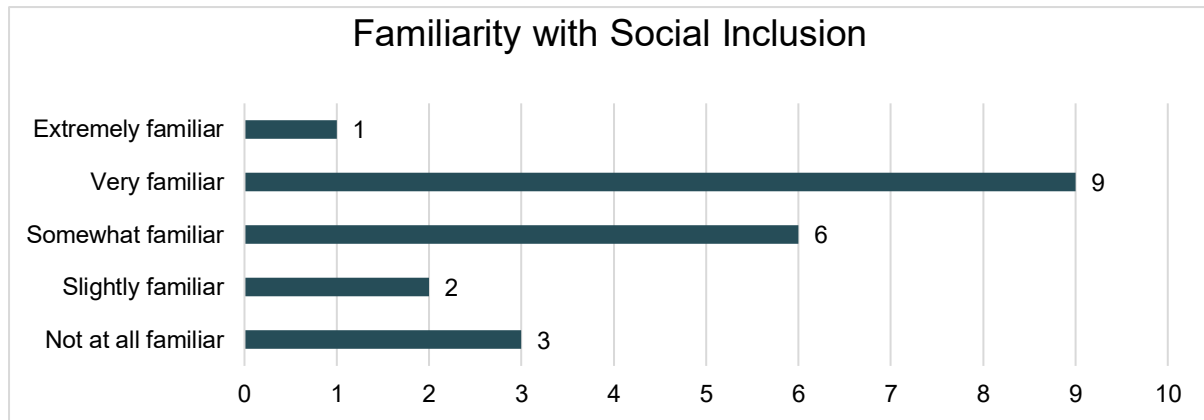


Figure 5 Familiarity of respondents with social inclusion

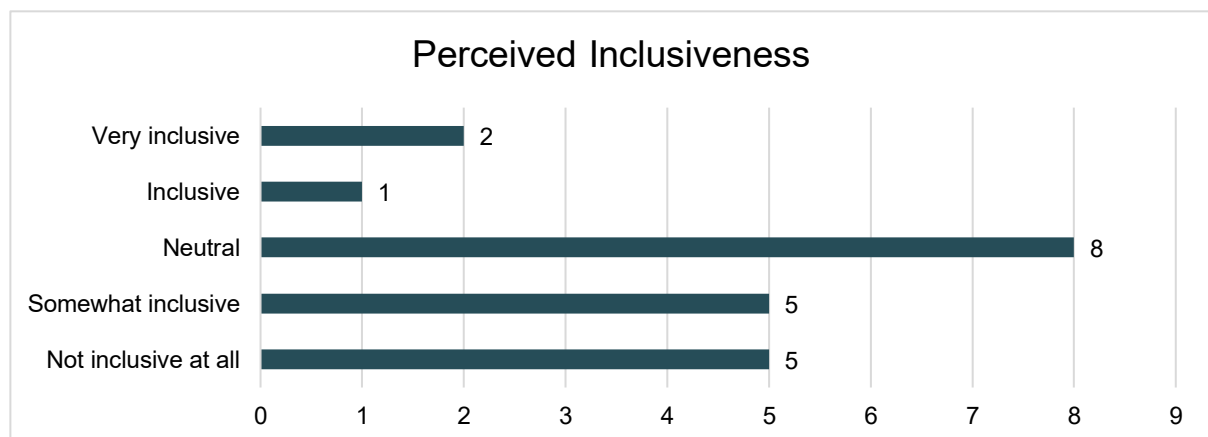


Figure 6 Perceived inclusiveness in the leather sector

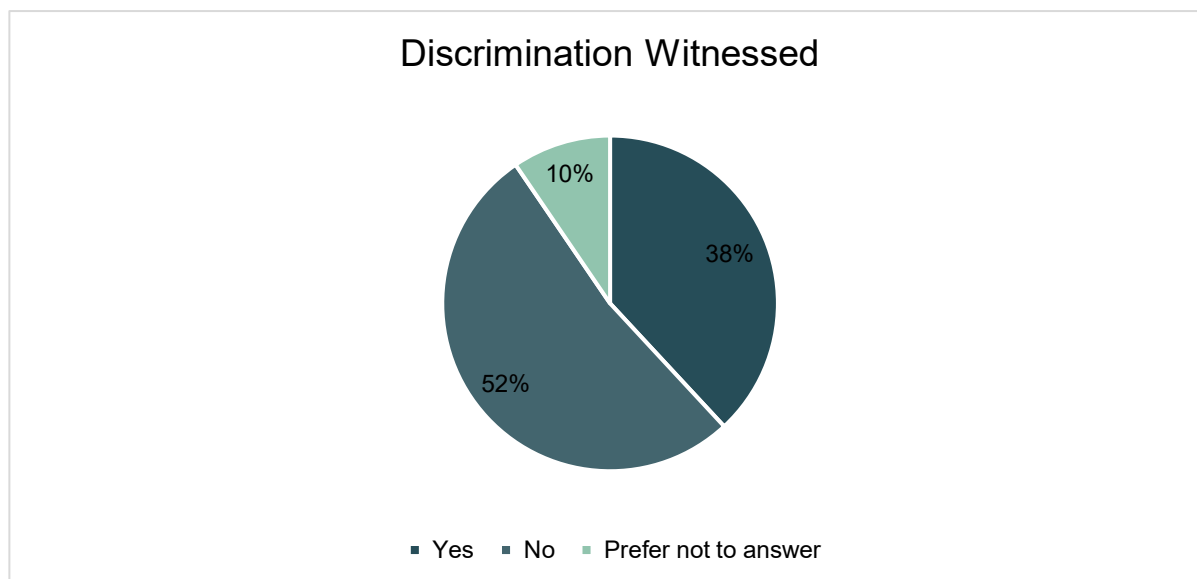


Figure 7 Discrimination witnessed by the respondents

4.3 Barriers to Inclusion

The respondents identified that inequality exists in multiple areas of the industry, from limited opportunities for women to hiring, recruitment and promotion processes.

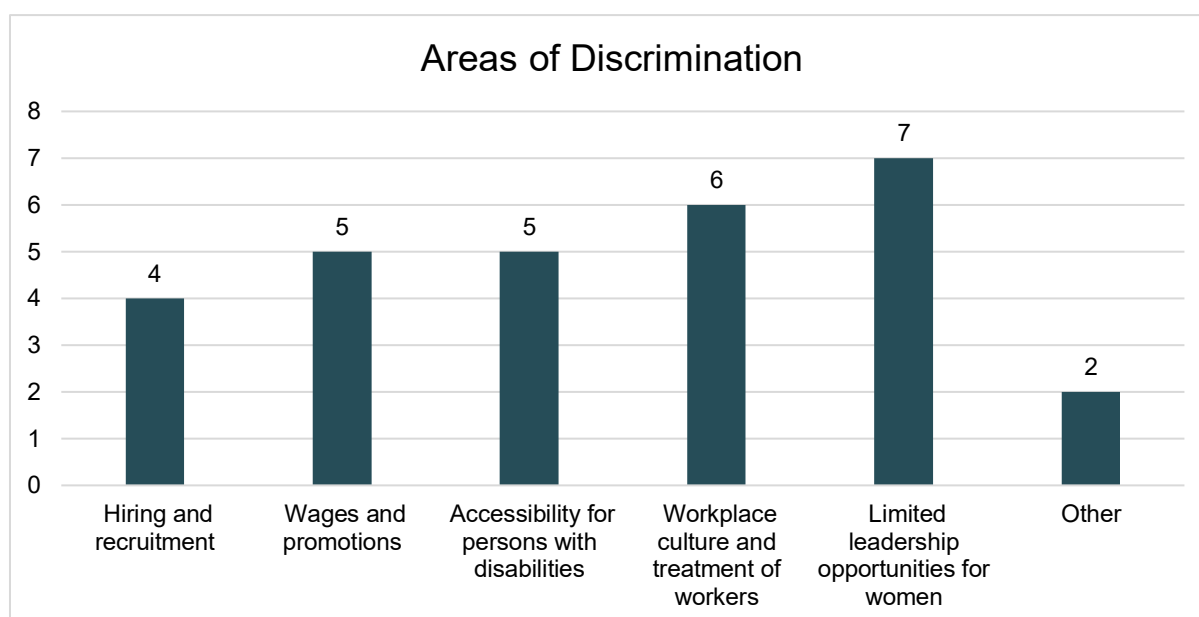


Figure 8 Areas of discrimination observed by the respondents

Respondents identified several barriers preventing women and marginalized groups from equal participation. The most frequently cited barriers were:

- Lack of access to education and technical training
- Gender bias and discriminatory hiring practices
- Unfair recruitment procedures
- Lack of leadership and career growth opportunities

These barriers reflect structural challenges rather than individual attitudes, emphasizing the need for institutional reform.



Figure 9 Barriers to inclusion of women and marginalized groups in the leather sector

4.4 Access to Resources and Opportunities

Respondents expressed concern over insufficient training and career development programs for women and PWDs. Most workplaces were described as only partially accessible, with limited physical infrastructure for PWDs. Respondents identified the following key enablers for inclusion:

- Better workplace accessibility
- Anti-discrimination policies
- Vocational training and financial support programs

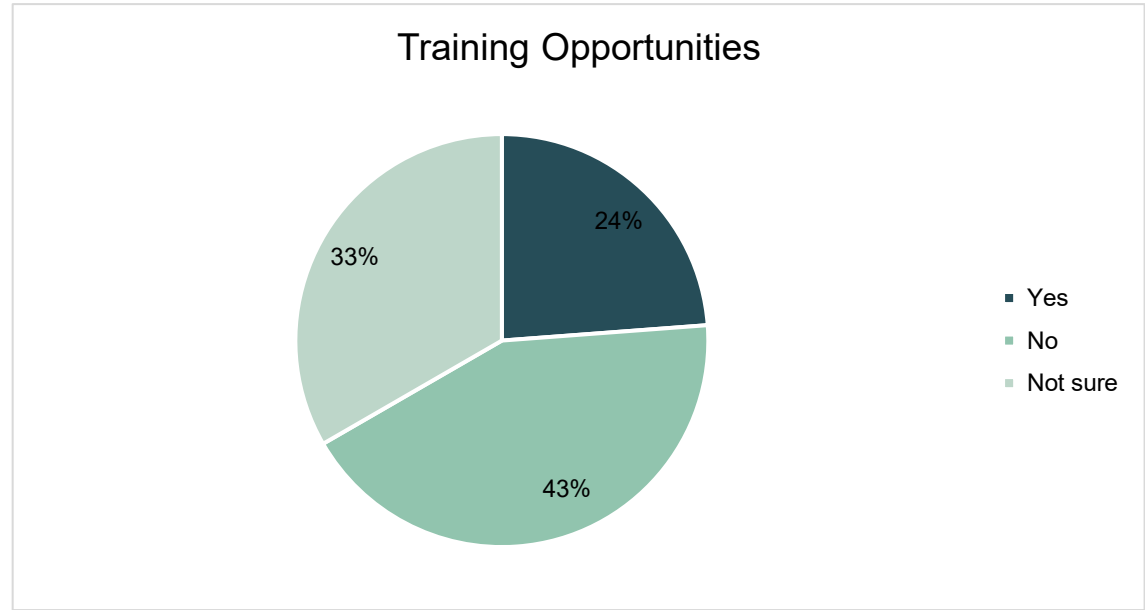


Figure 10 Training opportunities for women and marginalized groups in leather sector

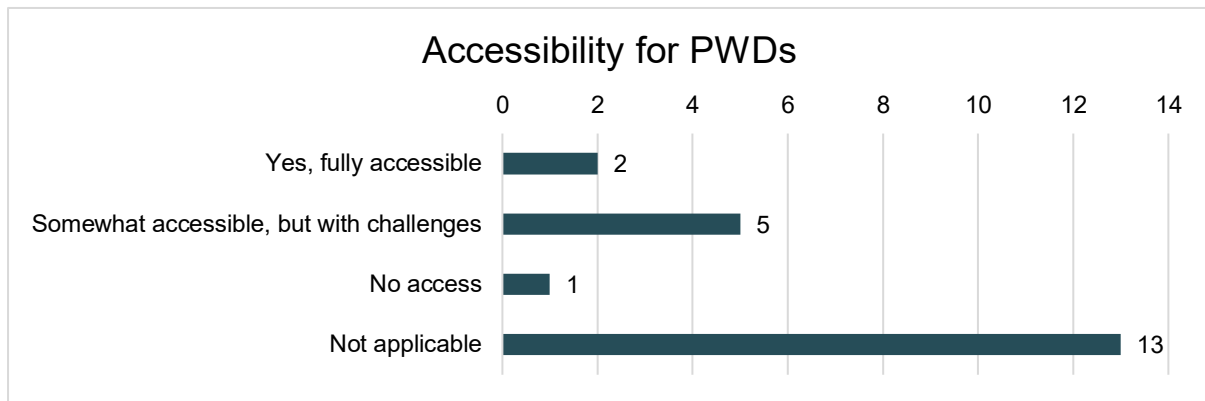


Figure 11 Workplace accessibility by persons with disabilities

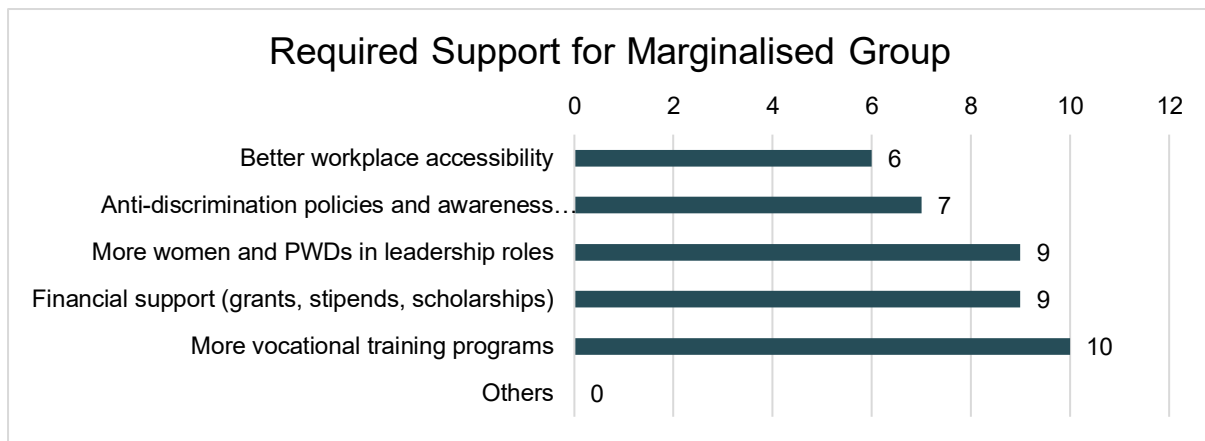


Figure 12 Required support for improved participation of marginalized groups

4.5 Participation in Decision-Making

Most respondents felt that women and PWDs are rarely or only sometimes included in organizational decision-making. This points to persistent exclusion from management and leadership roles where policies and strategies are shaped.

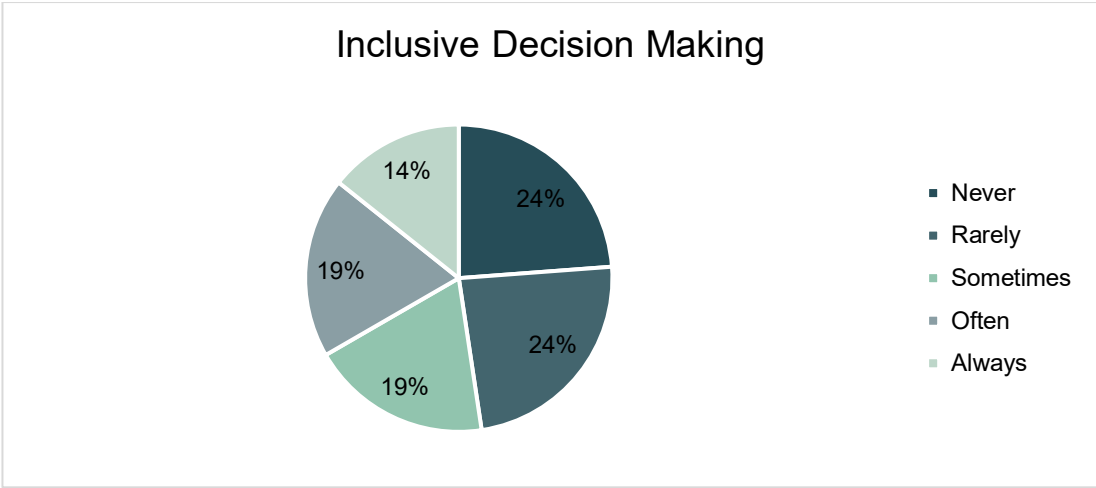


Figure 13 Inclusive decision making

4.6 Gender and Disability Inclusion

While some progress is evident, most respondents stated that women in the sector still face barriers to equal employment and promotion. Workplace accommodation for PWDs was reported as rare or inconsistent, confirming that disability inclusion remains underdeveloped.

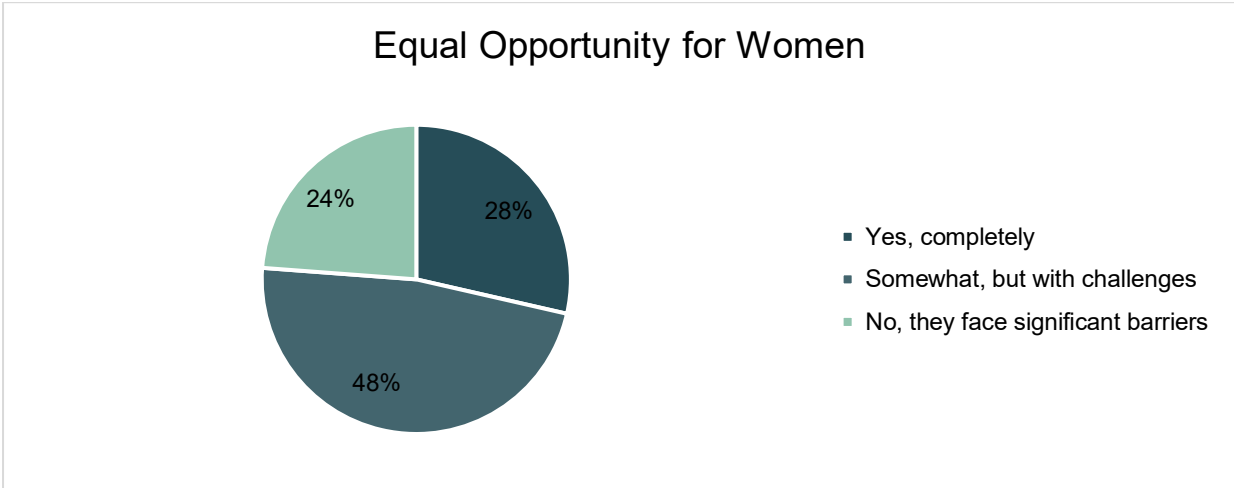


Figure 14 Equal opportunities for women in leather sector



Figure 15 Frequency of workplace accommodation for persons with disabilities

4.7 Training and Capacity Building

Respondents demonstrated high interest in receiving training on gender equality and inclusion, leadership and decision-making, and cleaner production and sustainability. However, most participants reported never attending any such training before, revealing a major opportunity for intervention.

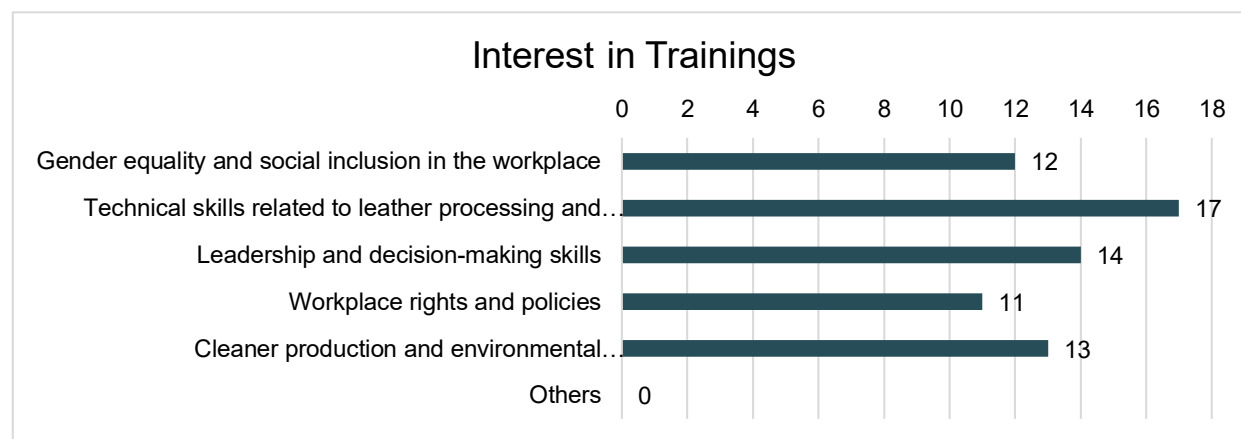


Figure 16 Interest of respondents in the relevant trainings

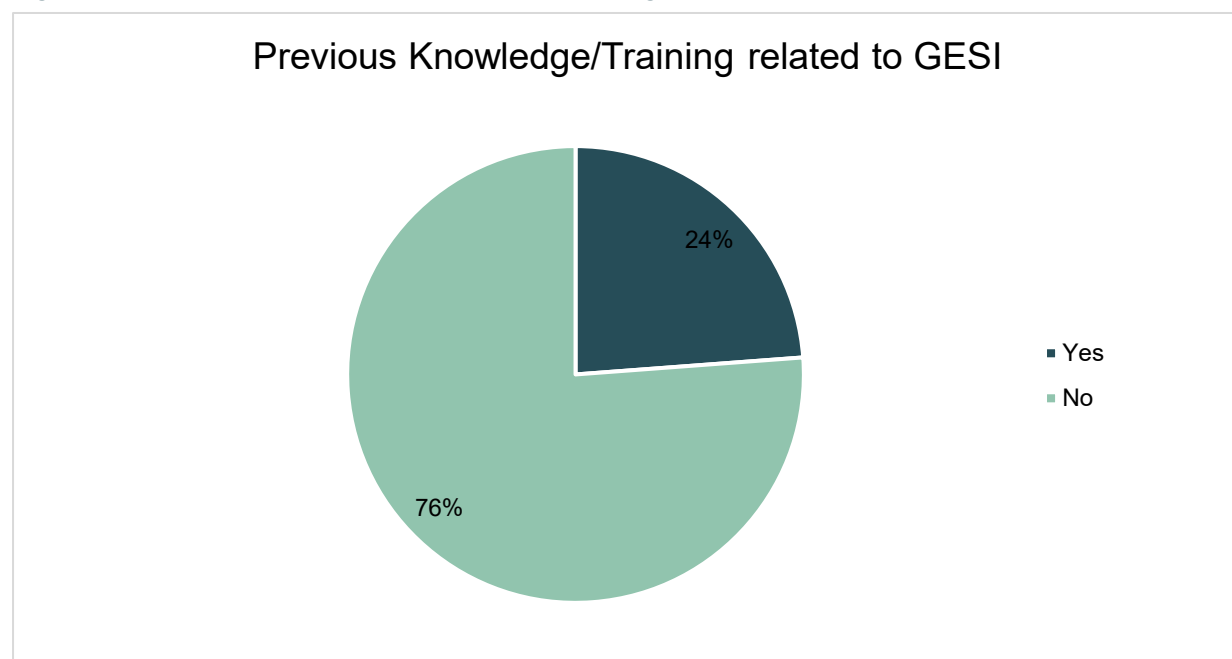


Figure 17 Previous trainings attended by respondents related to GESI

5 Discussion and Inference

The pre-pilot findings reveal that the leather sector has begun acknowledging inclusion, yet meaningful integration into workplace systems and policies is still limited.

Awareness exists, but implementation lags. While many workers understand the importance of gender and social inclusion, practices such as equitable hiring, leadership participation, and accessibility for PWDs remain underdeveloped.

Women remain significantly underrepresented, both numerically and hierarchically. Their progression is constrained by gender norms, lack of targeted training, and male-dominated management structures. Persons with disabilities face even greater exclusion due to physical, attitudinal, and systemic barriers.

Despite these challenges, the survey also reveals optimism: respondents expressed strong interest in learning and change, particularly through inclusive training programs. This suggests a readiness for transformation if guided by policy support and institutional leadership.

For donors and implementing partners, these findings highlight the importance of shifting from awareness raising to action-oriented capacity building and accountability. Embedding GESI into the broader sustainability and circularity agenda of the leather sector can ensure that economic and environmental progress goes hand in hand with social equity.

6 Conclusion

The GESI perception survey provides indicative baseline insights into the current state of gender equality and social inclusion within Pakistan's leather sector. While there is growing awareness of inclusion principles among stakeholders, practical implementation remains limited and uneven across institutions. Persistent barriers, such as gender bias, lack of training opportunities, inadequate workplace accessibility, and exclusion from decision-making, continue to restrict the participation of women and persons with disabilities.

At the same time, the strong willingness expressed by respondents to engage in training and inclusive initiatives signals a positive shift in attitudes and readiness for change. This momentum offers a strategic entry point for embedding GESI principles into ongoing interventions under the Pakistan Leather Sector: Traceability, Cleaner Production and Circularity project.

Moving forward, integrating gender and social inclusion into the sector's sustainability and circularity agenda will be crucial. By ensuring equitable access to opportunities, leadership, and capacity development, the leather industry can not only advance environmental goals but also achieve a fairer, more inclusive, and socially responsible value chain, one that leaves no one behind.

Annex

Annexure I: Questionnaire (English and Urdu)

 Pre-Pilot Social Inclusion Survey Project: Pakistan Leather Sector: Traceability, Cleaner Production, and Circularity Objective: This survey aims to assess the current state of social inclusion in the leather sector, including participation and challenges faced by women, persons with disabilities (PWDs), and other marginalized groups. The data will help to understand gender equality and social inclusion aspects within the industry. Section 1: Demographics 1. What is your age group? ☐ 18–24 ☐ 25–34 ☐ 35–44 ☐ 45–54 ☐ 55 and above 2. What is your gender? ☐ Male ☐ Female ☐ Non-binary/Other ☐ Prefer not to say 3. Do you identify as a person with a disability? ☐ Yes ☐ No 4. What is your highest level of education? ☐ No formal education ☐ Primary ☐ Secondary ☐ College/University ☐ Vocational training 5. What is your employment status in the leather sector? ☐ Employed (Full-time/Part-time) ☐ Self-employed ☐ Unemployed ☐ Student	☐ Other (please specify) _____ 6. What is your salary range (per month)? ☐ PKR 37,000 – 50,000 ☐ PKR 50,001 – 70,000 ☐ PKR 70,001 – 90,000 ☐ PKR 90,001 – 110,000 ☐ Above PKR 110,000 7. What is your role in the leather sector? ☐ Animal Supplier ☐ Slaughterhouse ☐ Hide trader ☐ Tannery ☐ Business owner ☐ Technical/Quality control staff ☐ Researcher/Academia ☐ Other (please specify) _____ Section 2: Awareness & Perceptions of Social Inclusion 8. How familiar are you with the concept of social inclusion in the workplace? ☐ Not at all familiar ☐ Slightly familiar ☐ Somewhat familiar ☐ Very familiar ☐ Extremely familiar 9. How inclusive do you think the leather sector is in terms of gender, disability, and marginalized communities? ☐ Not inclusive at all ☐ Somewhat inclusive ☐ Neutral ☐ Inclusive ☐ Very inclusive 10. Have you or someone you know faced discrimination or exclusion in the leather sector due to gender, disability, or socio-economic status? ☐ Yes ☐ No ☐ Prefer not to answer 11. In what areas do you think discrimination occurs most often in the leather industry? (Select all that apply) ☐ Hiring and recruitment
☐ Wages and promotions ☐ Accessibility for persons with disabilities ☐ Workplace culture and treatment of workers ☐ Limited leadership opportunities for women ☐ Other (please specify) _____ Section 3: Barriers to Inclusion in the Leather Sector 12. What are the biggest challenges preventing women and marginalized groups from fully participating in the leather industry? (Select all that apply) ☐ Lack of access to education and technical training ☐ Gender bias and discrimination ☐ Work environment unsuitable for persons with disabilities ☐ Unfair recruitment and hiring practices ☐ Lack of career growth and leadership opportunities ☐ Other (please specify) _____ 13. Do you feel comfortable raising concerns about discrimination or exclusion in your workplace? ☐ Yes ☐ No ☐ Sometimes Section 4: Access to Resources and Opportunities 14. Do you think there are enough training and career growth opportunities for women and marginalized groups in the leather sector? ☐ Yes ☐ No ☐ Not sure 15. If you are a person with a disability, do you have access to workplace accommodations (e.g., ramps, assistive technology, adapted workstations)? ☐ Yes, fully accessible ☐ Somewhat accessible, but with challenges ☐ No access ☐ Not applicable 16. What type of support would help marginalized groups participate more fully in the leather sector? (Select all that apply) ☐ Better workplace accessibility ☐ Anti-discrimination policies and awareness programs ☐ More women and PWDs in leadership roles ☐ Financial support (grants, stipends, scholarships)	☐ More vocational training programs ☐ Other (please specify) _____ Section 5: Participation in Decision-Making 17. Do you feel that women, persons with disabilities, and other marginalized groups are included in decision-making processes in the leather industry? ☐ Never ☐ Rarely ☐ Sometimes ☐ Often ☐ Always Section 6: Gender and Disability Inclusion in the Leather Sector 18. Do you think women in the leather sector have equal opportunities for employment and career growth? ☐ Yes, completely ☐ Somewhat, but with challenges ☐ No, they face significant barriers 19. How often do workplaces in the leather sector provide accommodations for persons with disabilities? ☐ Never ☐ Rarely ☐ Sometimes ☐ Often ☐ Always Section 7: Training and Capacity Building Needs 20. Would you be interested in receiving training on: (Select all that apply) ☐ Gender equality and social inclusion in the workplace ☐ Technical skills related to leather processing and traceability ☐ Leadership and decision-making skills ☐ Workplace rights and policies ☐ Cleaner production and environmental sustainability in leather processing ☐ Other (please specify) _____ 21. Have you previously attended any training programs related to gender inclusion, disability rights, or workplace diversity in the leather sector? ☐ Yes ☐ No

پری پائلٹ سماجی شمولیت کا سروے

پروجیکٹ: پاکستان لیدر سیکٹر، ٹریڈ اینڈ انویشن، اور سرگرمی

مقصد: یہ سروے پتھرے کے شعبے میں سماجی شمولیت کی موجودہ صورتحال کا جائزہ لینے کے لیے کیا جا رہا ہے، جس میں خواتین، معذور افراد (PWDs)، اور دیگر محروم طبقات کی شرکت اور ان کو درپیش چیلنجز شامل ہیں۔ حاصل شدہ ڈیٹا سے اس صنعت میں صحتی مبادعات اور سماجی شمولیت کے پہلوؤں کو بہتر طور پر سمجھنے میں مدد ملے گی۔

حصہ 1: آپ کی معلومات

1. آپ کس عمر کے گروپ میں آتے ہیں؟

☐ 18-24

☐ 25-34

☐ 35-44

☐ 45-54

☐ 55 یا اس سے زیادہ

2. آپ کی جنس کیا ہے؟

☐ مرد

☐ عورت

☐ تین یا زائد دیگر

☐ چنانچہ بتائیں کہ آپ کی

3. کیا آپ خود کو کسی معذوری کے حامل فرد کے طور پر شناخت کرتے ہیں؟

☐ ہاں

☐ نہیں

4. آپ کی سب سے زیادہ تعلیمی قابلیت کیا ہے؟

☐ کوئی رسمی تعلیم نہیں

☐ پرائمری

☐ میٹریکولی

☐ کالج/یونیورسٹی

☐ تکنیکی/پیشہ ورانہ تربیت

5. پتھرے کے شعبے میں آپ کا روزگار کا درجہ کیا ہے؟

☐ کارمات (کامل وقت/جزوقتی)

☐ خود روزگار

☐ بے روزگار

☐ طالب علم

☐ دیگر (براہ کرم وضاحت کریں) _____

6. آپ کی ماہانہ آمدنی کیا ہے؟

☐ 37,000 سے 50,000 روپے

☐ 50,001 سے 70,000 روپے

☐ 70,001 سے 90,000 روپے

☐ 90,001 سے 110,000 روپے

☐ 110,000 سے زیادہ

7. پتھرے کے شعبے میں آپ کا کردار کیا ہے؟

☐ جانور فراہم کرنے والا

☐ منسج خانہ

☐ کھال کا پھر

☐ پتھر اچھا کرنے والا/کارخانہ (تقریبی)

☐ کاروباری مالک

☐ تکنیکی/مہیا، لکڑی، لٹائف

☐ معیشتی/تعلیمی شعبہ

☐ دیگر (براہ کرم وضاحت کریں) _____

حصہ 2: سماجی شمولیت کے بارے میں آگاہی اور نظریات

حصہ 3: پتھرے کے شعبے میں شمولیت کی راہ میں حائل رکاوٹیں

12. خواتین اور محروم طبقات کے پتھرے کی صنعت میں مکمل شرکت کی راہ میں سب سے بڑی رکاوٹیں کیا ہیں؟ (تمام منتخب کریں جو لاگو ہوتے ہیں)

☐ تعلیم اور تکنیکی تربیت تک رسائی کی کمی

☐ صحتی اختیار اور منصوب

☐ معذور افراد کے لیے نامناسب کام کا ماحول

☐ غیر منصفانہ بھرتی اور تقرری کے طریقے

☐ کم پیر کی ترقی اور قیادت کے مواقع کی کمی

☐ دیگر (براہ کرم وضاحت کریں) _____

13. کیا آپ اپنے کام کی جگہ پر امتیازی سلوک یا اخراج کے بارے میں خدشات ظاہر کرتے ہیں خود کو آرام دہ محسوس کرتے ہیں؟

☐ بالکل متفق نہیں

☐ متفق نہیں

☐ غیر جانبدار

☐ متفق

☐ مکمل طور پر متفق

حصہ 4: وسائل اور مواقع تک رسائی

14. کیا آپ کے خیال میں پتھرے کے شعبے میں خواتین اور محروم گروہوں کے لیے کافی ترقی اور گریڈ کے ترقی کے مواقع موجود ہیں؟

☐ ہاں

☐ نہیں

☐ معلوم نہیں

15. اگر آپ معذور فرد ہیں، تو کیا آپ کو کام کی جگہ پر سہولیات تک رسائی حاصل ہے؟

☐ مکمل طور پر قابل رسائی

8. کیا آپ کو کام کی جگہ پر سماجی شمولیت کے تصور سے واقف ہیں؟

☐ بالکل واقف نہیں

☐ کچھ حد تک واقف

☐ کچھ حد تک واقف

☐ بہت زیادہ واقف

☐ مکمل طور پر واقف

9. کیا آپ کے خیال میں پتھرے کا شعبہ صنف، معذوری، اور محروم برادریوں کے لحاظ سے شامل کرنے والا ہے؟

☐ بالکل بھی شامل کرنے والا نہیں

☐ کسی حد تک شامل کرنے والا

☐ غیر جانبدار

☐ شامل کرنے والا

☐ بہت زیادہ شامل کرنے والا

10. کیا آپ یا آپ کے جاننے والے کو پتھرے کے شعبے میں صنف، معذوری، یا سماجی و اقتصادی حیثیت کی بنیاد پر امتیازی سلوک یا اخراج کا سامنا کرنا پڑا ہے؟

☐ ہاں

☐ نہیں

☐ اب دنيا پسند نہیں کریں گے

11. پتھرے کی صنعت میں آپ کے خیال میں کن شعبوں میں سب سے زیادہ امتیازی سلوک پایا جاتا ہے؟ (تمام منتخب کریں جو لاگو ہوتے ہیں)

☐ بھرتی اور تقرری

☐ اجرت اور ترقی کے مواقع

☐ معذور افراد کے لیے رسائی

☐ کام کی جگہ کا ماحول اور ملازمین سے رونا

☐ خواتین کے لیے قیادت کے محدود مواقع

☐ دیگر (براہ کرم وضاحت کریں) _____

19. چترسے کے شیعے میں کام کی جگہ معذور افراد کے لیے سہولیات کتنی بار فراہم کی جاتی ہیں؟

- ☐ کبھی نہیں
☐ شاید و بار
☐ کبھی کبھار
☐ اکثر
☐ ہمیشہ

حصہ 7: تربیت اور صلاحیت سازی کی ضروریات

20. کیا آپ تربیت میں دلچسپی رکھتے ہیں؟ (تمام منتخب کریں جو لگے ہوتے ہیں)

- ☐ کام کی جگہ پر صنعتی مساوات اور سماجی شمولیت
☐ چترسے کی یہ صلاحیت اور سراج رسائی سے متعلق تکنیکی مہارتیں
☐ قیادت اور فیصلہ سازی کی مہارتیں
☐ کام کی جگہ کے حقوق اور پالیسیاں
☐ چترسے کی یہ صلاحیت میں مداخلتہ اور اور ماحولیاتی پائیداری
☐ دیگر (لوگوں کو وضاحت کریں) _____

21. کیا آپ نے پہلے کسی ایسے تربیتی پروگرام میں شرکت کی ہے جو صنعتی شمولیت، معذوری کے حقوق، یا کام کی جگہ کی تنوع سے متعلق ہو؟

- ☐ ہاں
☐ نہیں

یہ سروے چترسے کی صنعت میں سماجی شمولیت کو بہتر بنانے میں مدد کرے گا۔ آپ کی رائے ہمارے لیے اہم ہے!

☐ کچھ حد تک قطعی رسائی، لیکن مشکلات کے ساتھ

- ☐ بالکل قطعی رسائی نہیں
☐ لاکھ نہیں ہوتا

16. کون سی مساوات محروم گروہوں کو چترسے کے شیعے میں مکمل شرکت میں مدد سے سکتی ہے؟ (تمام منتخب کریں جو لگے ہوتے ہیں)

- ☐ بہتر کام کی جگہ کی رسائی
☐ امتیازی سلوک کے خلاف پالیسیاں اور آگاہی پروگرام
☐ قوانین اور معذور افراد کی قیادت میں شمولیت
☐ مالی معاونت (گرانٹ، وقفہ، اسٹار شپ)
☐ تربیت و دان تربیتی پروگرام
☐ دیگر (لوگوں کو وضاحت کریں) _____

حصہ 9: فیصلہ سازی میں شرکت

17. کیا آپ محسوس کرتے ہیں کہ قوانین، معذور افراد، اور دیگر محروم گروہوں کو چترسے کی صنعت میں فیصلہ سازی کے عمل میں شامل کیا جاتا ہے؟

- ☐ کبھی نہیں
☐ شاید و بار
☐ کبھی کبھار
☐ اکثر
☐ ہمیشہ

حصہ 6: صنعتی اور معذوری کی شمولیت

18. کیا آپ کے خیال میں چترسے کے شیعے میں خواتین کو مساوی روزگار اور ترقی کے مواقع حاصل ہیں؟

- ☐ مکمل طور پر
☐ کچھ حد تک، لیکن پیچھے ہٹنے کے ساتھ
☐ نہیں، انہیں ذہنی نگاہوں کا سامنا ہے

Annexure II: Pictorial evidence



Figure A1. Survey conducted at PCSIR



Figure A2. Survey conducted at Leatherfield Pvt. Ltd.