

WORLD LEATHER

THE WORLD'S NO.1 MAGAZINE FOR THE LEATHER INDUSTRY

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Volume 34, Number 2



Antimicrobial leathers

Nothing To Hide: livestock for life

French resistance from Frank Boehly

Finnish start-up spins leather waste solution





Welcome – Great to have you with us and welcome to the TFL family



The TFL Group would like to express a warm welcome to all new colleagues joining from the Lanxess Organic Leather Chemicals business. We are really pleased to have you on board and to start our exciting journey together. The experience and know-how of our combined workforce will make us a leading player in the market. Great to have you with us!



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TFL – Great chemicals. Excellent advice.



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The World Leather team has been publishing a new series of original, dynamic podcasts since 2019. The whole series is available on Anchor, Spotify, Apple Podcasts, Google Podcasts, Pocket Casts, Overcast and other podcasting platforms. Just search for the World Leather Podcast on the platform you prefer.



Cover image: The interior of the latest version of the Mercedes-Benz CLS Coupé. Mercedes has used additional leather in this version as a means of upgrading the interior.
CREDIT: DAIMLER AG



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FRANCE French leather industry initiative Au-Delà du Cuir (ADC) has opened its 2022 programme. Each year, ADC chooses between five and ten emerging, French leathergoods brands to take part in its programmes. These companies receive personalised coaching to help them develop their businesses. Candidate companies for the new intake have until July 18 to apply. Criteria for inclusion are that the companies have to be recent start-ups, and to have turnover of more than €50,000 (to be part of the Emergence programme) or €250,000 (for the Growth programme).

UK Footwear brand Dr Martens sold 12.1 million pairs of shoes and boots in the 12 months ending March 21, 2021. This represented an increase in volume of 14.4% compared to the previous business year. It achieved revenues of £773 million, an increase of 15% year on year. Earnings before tax were £71 million, but it said that figure would have been more than £150 million but for expenses relating to Dr Martens going public at the start of 2021.

BELGIUM Belgian leather manufacturer Radermecker took advantage of the interruptions of 2020 to move to a new production site in Comines-Warneton. The company has said the new site is substantially smaller than the one the current management team, Nicolas Quintin and Loïc Honoré, acquired from the Radermecker family five years ago. According to Mr Quintin, the move provided the perfect opportunity to introduce efficiencies such as a new boiler system that will help it save energy and new finishing technology that will help it save on finishing chemicals.

NETHERLANDS The leather manufacturing division of footwear group Ecco has said its Hot-Shop design event will take place from August 31 to September 3 this year. This will be the fourteenth time Ecco Leather has run its Hot-Shop event, for which it invites designers from around the world to its headquarters in the Netherlands to learn about the basics of making leather and to work with leather. The objective is to inspire them to use leather extensively in their work when they return home.

TURKEY Following announcements earlier this year that Turkish tanners were investing in gelatine, Tuzla-based leather producer Uyguner Deri has announced that gelatine production has already begun at a factory it has set up. Extensive gelatine production from pig-skins is well established in Europe and North America, but demand for gelatine from bovine sources has increased from the food industry in Muslim countries.

KENYA A Kenyan politician and leather entrepreneur, Joseph Manje, has presented a formal petition in parliament asking for an overhaul of the Kenya Leather Development Council (KLDC). Mr Manje told Kenya's national assembly that the KLDC leadership team had focused more on improvement programmes for hides and skins than on promoting the country's leather and leather products. He said this had led to tannery closures and to a steep decline in export revenues.

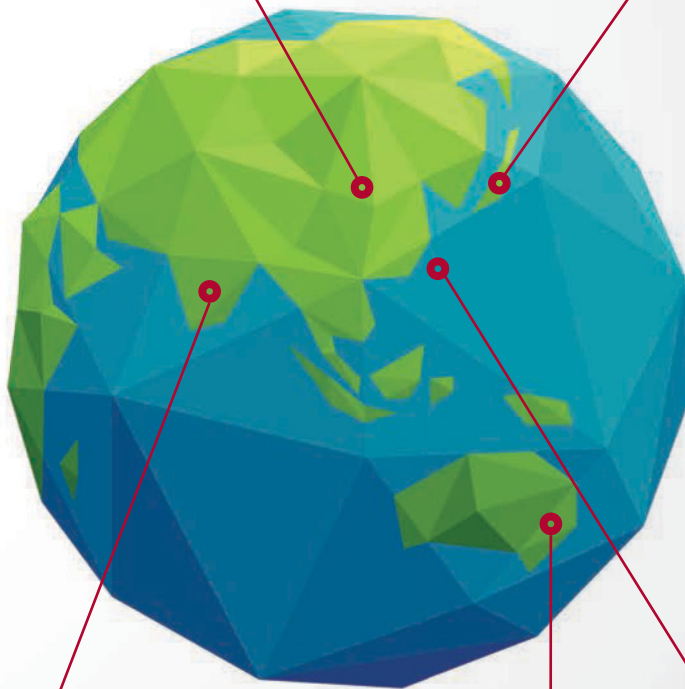
EGYPT A large state-of-the-art tannery is being planned in Egypt by leather group Piel Color using Italian machinery. The factory will convert leather waste into organic fertilisers and other by-products such as gelatine and biodiesel. Piel Color also plans to build shoe factories and a solar energy station. President Sisi has asked that locally manufactured leather products become available to citizens "at reasonable prices".

ZIMBABWE The CEO of Zimbabwe-based trade body ZimTrade has described the country's leather sector as "low-hanging fruit" in terms of potential, given its large livestock population and improved infrastructure. Allan Majuru said the Zimbabwe Leather Sector Strategy (2021-2030), launched in April, will boost production capacities and improve access to regional and international markets. He said the strategy could increase exports of leather products from 10% to 40% of production.

CHINA Shanghai-headquartered Fosun Fashion Group (FFG), owner of luxury brands including Lanvin and Wolford, recently signed an agreement to acquire 100% of Italian footwear company Sergio Rossi. The San Mauro Pascoli-based shoemaker is currently owned by Absolute Luxury Holding, an independently managed subsidiary of global investment group Investindustrial, which purchased the firm from luxury goods conglomerate Kering in 2015.

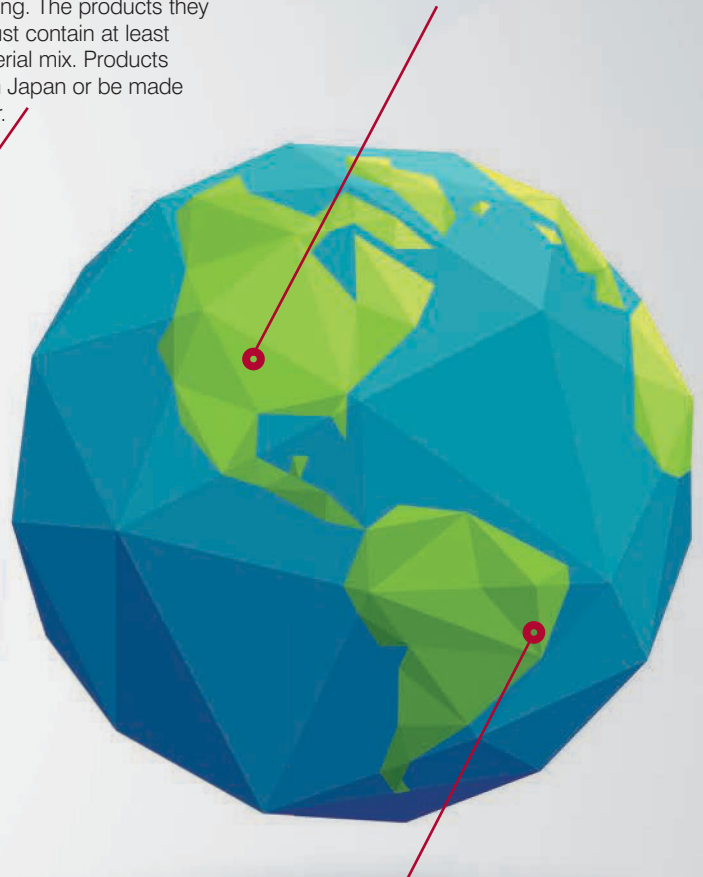
JAPAN The Japan Leather and Leathergoods Industry Association (JLIA) has announced that it will set up a Japanese pavilion at an event called In Style, which will take place in Taipei in October. It said it would select six companies to travel to Taipei to take part. Participants in the JLIA delegation can be producers of shoes, bags, belts, gloves and clothing. The products they display at the event must contain at least 60% leather in the material mix. Products must either be made in Japan or be made using Japanese leather.

US Meat and leather group JBS has confirmed that it had to pay a ransom of \$11 million to the group responsible for a cyberattack on its US division at the end of May. JBS USA said that the attack, which affected its IT systems and prevented its operations from functioning fully, was over and that it had lost less than one full day of production. It said it expected to recover the lost volume within a week.



INDIA The authorities in the Indian state of Uttar Pradesh have approved the construction of a new leather park near the village of Ramaipur. Local media reports suggest around 100 hectares of land have already been purchased for the construction of the new leather park and that the new set-up will be able to accommodate 150 newly built tanneries, creating as many as 50,000 jobs, including indirect employment. Most of Kanpur's tanneries are in the district of Jajmau, two kilometres or so from the River Ganges. Ramaipur is only 15 kilometres from Jajmau, but a move there would take the leather industry away from the river.

AUSTRALIA Red meat promotions body Meat and Livestock Australia (MLA) has said 47% of the cattle that went to slaughter in Australia in the first quarter of 2021 was grain-fed. MLA said this was the highest proportion in 20 years. It said a total of 1.4 million head of cattle had gone to slaughter in the first three months of this year. Of these, around 665,000 head had come from feedlots, giving grain-fed cattle a 47% share. MLA said there was "continued confidence of the lot feeding industry" in Australia.



BRAZIL Portão-based Courovale has been named as the first Brazilian tannery to achieve the Diamond seal by the Brazilian Leather Certification of Sustainability (CSCB), which the industry body describes as the highest level of certification for sustainable leather production in Brazil. Courovale's administrative manager, Solange Pauletti, said: "This achievement strengthens our credibility with the national and international markets."

TAIWAN Twenty candidates from different universities in Taiwan have been shortlisted for the 2021 Taiwanese Real Leather, Stay Different competition, jointly organised by the Leather and Hide Council of America (LHCA) and the Taiwan International Leather Association (TILA). In total, the Taiwanese competition attracted 540 entries from 34 different universities. They responded to a brief of creating "unique, compelling designs that promote the use of leather now and in the future". There are four categories: apparel, bags, footwear and accessories. All designs must feature US hide and leather as the principal material.



TFL completes acquisition of Lanxess leather business

Leather chemicals group TFL finalised its acquisition of Lanxess's organic leather chemicals business on June 1. Lanxess and TFL agreed the deal last August. Subject to regulatory approval, they said the purchase price would comprise a fixed component of €80 million and a performance-related component of up to €115 million. In addition, TFL will assume "certain liabilities" associated with the business.

In January, TFL announced it had received the necessary approval from the competition authorities. The combined TFL and Lanxess leather businesses will employ around 1,200 people worldwide and have an annual turnover of approximately €450 million.

Environmental cost of wasted hides

The Leather and Hide Council of America (LHCA) has produced an 'infographic' pdf that highlights the environmental problems caused by wasting 4.8 million US cattle hides per year. Those 4.8 million discarded or destroyed hides could have been used to produce leather for approximately 86.4 million pairs of shoes, 96 million footballs or 1.6 million sofas, according to LHCA.

LHCA president Stephen Sothmann said: "Converting hides from animals processed for food into real leather is not only the right thing to do for the environment, but it also yields some of the most creative, visually-stunning, stylish products that would cease to exist if they were simply thrown away."

Not only do products that use real leather last longer, thereby reducing consumer waste, but they are also naturally biodegradable, and may decompose in less than 50 years. Synthetics derived from petrochemicals, however, could take as many as 500 years to break down.

Mr Sothmann added: "The fast versus slow fashion debate has reached a critical inflection point, as consumers, brands and retailers increasingly take stock of their purchasing decisions, and the broader societal impact of those choices. "In the race to develop a greener supply chain and reduce waste, the fastest way to ensure defeat is to doubt leather's durability and sustainability, which have been proven over millennia."

New leather workshop

Luxury goods house Hermès recently opened its eighteenth leather workshop, neighbouring the company-owned Tannerie de Montereau in the Montereau commune of France's Seine-et-Marne department,



Change of owners for Pasubio

Specialist automotive leather manufacturer Pasubio had one of the most tumultuous periods in its 60-year history in mid-June. The Arzignano-based group confirmed the acquisition of Hewa Leder, a Bavaria-based producer of leather for the interiors of high-end cars and yachts, on June 15.

Just as the industry was digesting this news, a new announcement came that Pasubio itself is to be acquired by PAI Partners, an independent private equity firm. PAI confirmed on June 23 that it had agreed to acquire Pasubio from investment group CVC Capital Partners. It did not disclose the financial details of the transaction.

PAI partner and head of its business in Italy, Simone Cavalieri, said on confirming the deal: "We are delighted to invest in Pasubio. The company has a fantastic reputation in its field and is a key European player with significant global potential. We look forward to partnering with [founders] the Pretto family to support their exciting growth plans."

For his part, Pasubio chief executive, Luca Pretto, added: "We have very much enjoyed our journey with CVC, and we would like to thank them for all their support in helping us transform under their ownership. Over the last few years, we have further professionalised our operations and processes, through a combination of new skills and automation, as well as building up an unrivalled track record of quality and service for our clients around the world. We are very excited to be partnering with PAI and to benefit from their strong experience going forward, as we look to further grow our position as a global and diversified market leader, both organically and through acquisitions."

The transaction, which is subject to customary closing conditions, is expected to close in October 2021.

Pasubio employs approximately 1,000 people and operates six facilities in Europe and North America, where it performs tanning, post-tanning and cutting activities. The company also has a dedicated research and development centre in Arzignano. Its list of key clients includes BMW Group, Porsche, Bentley, JLR, VW, Lamborghini and Maserati.

Future Pasubio growth will include "other materials"

PAI Partners, the independent private equity firm that has agreed to acquire automotive leather manufacturer Pasubio, has made it clear it intends to support the management team's growth strategy.

Pasubio chief executive, Luca Pretto, said on confirming the deal that the tanning group wants to grow "both organically and through acquisitions".

At the time of the announcement, PAI echoed this ambition. It said it was committed to supporting the efforts of Pasubio's management team in "further consolidating the fragmented global automotive leather market". It also said it would support the diversification of the company's offering into "other premium automotive interior materials".

around 50 kilometres from central Paris.

The brand described the new site as fostering a strong artisan and human culture, particularly on account of its long-term links with local recruitment and training partners on the ground in Montereau.

Built on former brownfield land, over 200 trees and “thousands” of shrubs have been planted at the site, contributing to a re-greening strategy that is consistent with the company’s sustainability ambitions.

Demetra won’t replace leather

Luxury brand Gucci has introduced a new material called Demetra, which is produced in tanneries, but not from hides or skins. It is 77% veg-based, using cellulosic fibres from sustainably managed forests and bio-based polyurethane from renewable sources. The remainder of the ingredients comes from non-renewable chemical compounds, which Gucci says it hopes to replace in future.

Italian leather industry news resource *La Conceria* has identified Gruppo Colonna, which is 51% owned by Gucci, as the leather manufacturing group that is making Demetra. It said Gucci had assured it that it did not view Demetra as a replacement for leather.

Lectra completes acquisition of Gerber

Leather cutting technology provider Lectra has finalised the acquisition of US-based rival Gerber Technology. It completed the acquisition of all outstanding Gerber shares on June 1. The deal cost Lectra €175 million. The company said the combination of the two companies would result in the creation of a leading player in bringing Industry 4.0 to the global automotive, furniture and fashion markets.

Automotive leather maker ‘reinvents’ itself

Leather manufacturer GST Seton AutoLeather has changed its company name to Pangea and established a new brand identity. Chief executive, Randy Johnson, described this move as a “reinvention of our company”. GST AutoLeather filed for Chapter 11 bankruptcy protection in October 2017. In April 2018, it secured a payment deal for its main creditors and, one month later, it formally exited Chapter 11 and Mr Johnson, formerly a senior figure at rival automotive leather provider Eagle Ottawa, joined as chief executive.

Pangea is the name geologists gave to a “supercontinent” that most of the earth’s land-mass combined to form around 300 million years ago.

New funding for Qualus

Irish Investments, a syndicate of angel investors based in Ireland, has led a new funding round of £1 million for leather-sector technology provider Qualus. Its technology is based on using polymer beads inside drums during the tanning process, which, it claims, can reduce water consumption by up to 40% and the use of chemicals by up to 15%.

The technology emerged in 2014, after a company called Xeros had achieved some success in the laundry sector. It renamed its tannery-focused division Qualus in 2018 and completed the spin-off of Qualus in 2019. After years of in-field trials at tanneries, the company says it now has “multiple customers transitioning all production to its system” and a strong pipeline of potential customers in Asia, Europe, and Latin America that have applied its technology at a pilot scale.

Qualus said it would use the new funding to establish reference customers in Asia, Brazil, and Europe, to build an engineering centre in England to accelerate the development of its product portfolio and to raise awareness of its technology with automotive, footwear and luxury brands.

Vicenza congress will spark Renaissance

The organisers of the third IULTCS Congress, Unione Nazionale Industria Conciaria (UNIC or the Italian tanners’ association), the national association of Italian leather chemicals manufacturers (UNPAC) and the Italian leather chemists’ association (AICC), have announced the theme for the event.

Vicenza, the provincial capital of the part of Italy that is home to the Arzignano-Chiampo leather cluster, will host the congress from September 18-20, 2022. The organisers have announced that the theme will be ‘Rinascimento’, or Renaissance.

On making the announcement, they said the event can mark a rebirth for leather. They said autumn 2022 would be “the perfect time to explore the future of leather technologies” and that Vicenza would be “the right place to learn about up-to-date technical and scientific developments” and that the event would represent an opportunity to appreciate “the unique values of natural leather”.

Mercedes adds more leather

Automotive group Mercedes has chosen to increase the amount of leather it uses in the latest version of its CLS coupé. It introduced the CLS at the

Frankfurt Motor Show in 2003 and has launched regular updates, with the most recent iteration reaching customers in August 2021.

Design updates for the interior include new types of wood, including open-pore brown walnut. “At the same time, the interior has been upgraded with additional leather,” the company said. This includes nappa leather in colour combinations of red-black, saddle brown-black, truffle brown-black, deep white-black and yacht blue-black.

There is also a newly designed steering wheel in nappa leather.

Effective against the coronavirus

Researchers at De Montfort University in Leicester have worked with the British Footwear Association (BFA) to help the shoe industry understand how the coronavirus behaves on leather.

The team, led by microbiologist Dr Katie Laird and virologist Dr Maitreyi Shivkumar, looked at how the virus survived on different types of shoe leather and cross-contamination on surfaces such as stainless steel (used in sewing machines) and cardboard to assess transfer.

This study used a human coronavirus OC43, which has a similar survival pattern to that of SARS-CoV-2, the virus that causes covid-19.

They found OC43 was able to survive on some leathers for up to 48 hours and could be transmitted to shoe boxes and stainless steel surfaces during the manufacturing process. But they also found that, when leather was treated with Micro-Fresh antiviral coating, it took the survival time of coronavirus down to just two hours.

Chief executive of the BFA, Lucy Reece Raybould, said: “I am pleased that this study has found some concrete information for the footwear industry that can now be transformed into actionable guidance to boost consumer confidence and give customers greater peace of mind, whether they are browsing, trying on or taking their goods home.”

On land and sea

A Bentley owner was so impressed with the leather and finishes of his luxury car that he designed his custom yacht to match.

Bentley Motors collaborated with Dutch yacht builder Contest Yachts to replicate the look and feel, with emphasis on red and beige leathers.

The interior panelling in the yacht also showcased Bentley’s signature diamond-in-diamond stitching. Outside, the deep blue hull complemented the finish of the owner’s Continental GT V8 Coupé. 🌐



ICHSLTA names new president

At its 92nd annual general meeting, the International Council of Hides, Skins, and Leather Traders Association (ICHSLTA) elected **Toni Baltes** as its new president.

Mr Baltes is the managing director of A+B Hides and president of the German hides association, Wirtschaftsverband Häute Leder (WHL). Based in Geldern, close to the border with the Netherlands, A+B Hides formed in 2006, when Franz Aengenheyster EK and Häutehandelsgesellschaft Toni Baltes merged.

The new ICHSLTA president is Toni Baltes junior; his father, also Toni, was a master butcher, who set up in the hides business in 1952. In 2018, A+B Hides became part of the OSI food group.

Lisa Howlett retires

Tanning group ISA TanTec has announced the retirement of **Lisa Howlett** from her role as a brand ambassador for the company. Ms Howlett joined ISA TanTec when the group integrated her family company, Auburn, into the business in 2018.

Auburn Leather was established in Kentucky in 1863, specialising in leathergoods for the horse and buggy market before evolving into a producer of leather laces for footwear and sporting goods. With Lisa Howlett's help, ISA TanTec has continued to offer these products to its customers.

In 2013, coinciding with Auburn's 150th anniversary, the Export-Import Bank of the US named the company as Small Business Exporter of the Year. This coincided with Ms Howlett being elected chair of Leather Industries of America, one of the component bodies that merged in 2019 to form the Leather and Hide Council of America. The International Council of Tanners appointed Lisa Howlett as its president in 2018, a role she carried out until 2020.

Another new CEO for Tyson

With immediate effect, **Donnie King** is assuming the role of chief executive and company president at packer and tanning group Tyson. He replaces **Dean Banks**, who is leaving the company for personal reasons.

Mr Banks became chief executive of Tyson in December 2019, succeeding **Noel White**, who only took up the role in September 2018 when predecessor, **Tom Hayes**, left, also for personal reasons. Tom Hayes had become president of Tyson in June 2016 and took over as chief executive at the end of that year, replacing **Donnie Smith**, who had led the company since 2009.



CREDIT: CHRIST CRUISEN

Royal visit for Smit & Zoon

Leather chemicals group Smit & Zoon has said an official visit to its headquarters in Weesp by **Queen Máxima of the Netherlands** on May 26 was a success and certain to be a highlight of its 200th anniversary celebrations this year.

Queen Máxima received a guided tour of the site and listened to detailed presentations about circularity in the leather value chain, the importance of education and knowledge-sharing, the group's Zeology tanning concept (which it has described as a sustainable, chrome-free alternative to existing tanning systems), and its 200 years of family tradition and entrepreneurship.

Smit & Zoon chief executive, **Hans van Haarst**, said that the visit had provided "a great opportunity for dialogue" with Queen Máxima on creating circularity in the leather industry in particular, and in the fashion sector more widely. He said it had been an honour to host the royal visitor.

New chief executive, Donnie King, joined Tyson in 1982 and has held a number of senior roles, including head of poultry and prepared foods and president of North American operations.

New sustainability role at ISA TanTec

Tanning group ISA TanTec has announced that **Keith Hill** will take up a new role as vice-president for sustainable

business development. Originally from the US, Mr Hill moved back there in 2019 to become ISA TanTec's vice-president for business development, based at the group's showroom in Portland, Oregon.

He was previously the group's vice-president for sales, based at corporate headquarters in Macau, and had, before that, worked for Simona Tanning in Huizhou, China. At the time of his relocation to the US, he had worked in Asia for 21 years.

In his new role Keith Hill will remain in the US, working to help ISA TanTec develop an understanding of the sustainability strategies and objectives of its customers. He will also raise awareness of ISA TanTec's own sustainability initiatives among customers and at wider industry events.

Ronda de Bie has now taken up the role of vice-president for sales.

Appointments at Leather Naturally

Dietrich Tegtmeier, head of business development and industry relations at chemicals group TFL, has highlighted Leather Naturally's potential as he joins the campaign group's supervisory council.

He said: "Leather Naturally can be proud of its achievements over the past 10 years. I strongly believe there is still a lot potential for growth."

Carl Flach, senior director of strategy for tannery group ISA TanTec, has also become a member of the council. He said: "Leather Naturally is getting stronger within the leather industry and its stakeholders. We now need to bring out the message to the designers and the customers in the street that leather is a durable, sustainable and beautiful material."

JBS sustainability manager, **Kim Sena**, has also joined the board of Leather Naturally following the departure of Lanxess marketing director **Rodrigo Henriquez**. Mr Sena will lead the promotions team. He will be the point of contact at shows, organise talks and promote the scheme to brands, designers, consumers and influencers.

Material origins

The director of industry body Leather UK, **Dr Kerry Senior**, has told fashion education platform the Sustainable Fashion Collective that the biggest misunderstanding surrounding leather is where the material comes from.

In a recent question-and-answer session with the Sustainable Fashion Collective, Dr Senior said the origin of leather was probably the most important point to put across to people who are unfamiliar with the industry and may have picked up negative messages about it.

He said: "It's really important that people understand that leather is made from hides

and skins that are a by-product of the meat and dairy industries. The animals they come from are reared for meat, milk and wool, and the hides and skins are produced, inevitably, when you slaughter the animals."

Anti-leather entrepreneur 'crosses red line'

Leather industry representative body **COTANCE** wrote to the European Patent Office (EPO) in May to complain about one of the finalists in a competition called the European Inventor Award.

One of 15 inventions that has a chance of winning the people's vote in the 2021 European Inventor Award was Piñatex, a material that is made, in part, from waste from pineapple crops and which its inventor, **Dr Carmen Hijosa**, has long presented as an alternative to leather.

Dr Hijosa previously worked as a consultant in the leathergoods sector but began to consider fibres from pineapple leaves as an alternative material after visiting the Philippines in the 1990s and seeing poor practice in local tanneries, as well as some use of the fibres from pineapple leaves in textiles.

In the formal presentation of Piñatex as a finalist in the 2021 European Inventor Award, Dr Hijosa took a different tone. Reflecting on what she had seen when visiting Asia more than 30 years earlier, she said in the official EPO video: "I realised that leather is unsustainable. It's toxic for people and the environment. I saw it so clearly there at that time. I decided there and then that I didn't want to work with leather any more."

COTANCE has reacted furiously to this, saying in its letter to the EPO: "In claiming that leather is toxic, Dr Hijosa has crossed a red line. The European leather industry cannot tolerate such shameless public vilification."

LA designer wins Zeology competition

Los Angeles-based designer **Hommy Diaz** has emerged as the winner of a competition that leather chemicals group Smit & Zoon's organised as part of the celebration of its 200th anniversary this year.

It invited five shortlisted designers around the world to create shoes with the emphasis on longevity, using chrome-free, heavy metal-free and aldehyde-free Zeology-tanned leather from tanners working with Nera, the company Smit & Zoon set up in October last year to bring new tanning solutions to market.

Hommy Diaz's winning entry was a pair of functional and fashionable slip-on sneakers that he called Home Base. He will have the

opportunity to showcase the design at WHITE Milano, during the Milan Fashion Week in September.

Blockchain body appoints general secretary

Aura Blockchain has appointed former Balenciaga and Gucci executive **Dr Daniela Ott** as its first general secretary. Aura Blockchain is a new non-profit organisation launched in April by luxury companies LVMH, Prada and Cartier.

Its aim is to promote the use of blockchain technology to make sure consumers have the information they need on transparency, traceability and product authenticity. Aura will push for the use of a single global blockchain solution platform, which it says will be open to all luxury brands across the world.

On taking up the post, Dr Ott described Aura as "a visionary collaboration" that will address "shared challenges" and drive change in the luxury industry. She said blockchain technology, which works by matching information about a product to information about a client through a chain of secure, non-reproducible, digital blocks, will help luxury brands communicate with consumers about authenticity, responsible sourcing and sustainability.

Milwaukee tannery welcomes new technical director

Law Tanning has appointed **David Bowmaster** as its new technical director. He will move to the Milwaukee-based leather manufacturer from ISA TanTec, where he has worked as technical manager of the Mississippi TanTec facility in Vicksburg.

Mr Bowmaster began his career in 1990 at Seton Leather in Saxton, Pennsylvania and continued working in the automotive leather sector with Eagle Ottawa (later, Lear Corporation) for nine years.

His work at Law Tanning will be more varied as the company claims to be the most diverse leather producer in North America. It tans cowhide (grain and splits), American bison, pigskin, deer, elk and kangaroo.

Company president, **Ryan Law**, said David Bowmaster would bring a wealth of knowledge and experience to the business, in finishing, wet end and leather chemistry.

Portobello bag reimaged

Leathergoods brand Mulberry is continuing with a series of special capsule collections to celebrate its fiftieth anniversary this year. The latest in the series is a collection created by London-based designer **Priya Ahluwalia**.

Ms Ahluwalia used the silhouette of the

brand's Portobello bag to create the capsule collection. Craftspeople at the Mulberry factory in Somerset put the products together using surplus leather and fabrics. Mulberry described the result as "a beautiful reimagining of the Portobello".

Shoe design award winner announced

A footwear design student at De Montfort University in Leicester, **Jihee Ahn**, is the winner of the 2021 Cordwainers Footwear Awards. Students from De Montfort, the University of Northampton and London College of Fashion took part in the competition, submitting their portfolios digitally owing to covid-19.

Second prize went to **Kamile Peleckyte** from London College of Fashion, with **Reuben Crabbe**, also from the London College of Fashion picking up the third prize. A special sustainability award went to **Louise Pietrzyk**, another London College of Fashion student, while there was a commendation for **Maartje den Boer** from De Montfort University.

Prominent industry figure dies

Industry body Leather UK has reported that **Roy Thomson**, former CEO of the Leather Conservation Centre and past president of the Society of Leather Technologists and Chemists, passed away on June 14. Mr Thomson worked in research and technical services associated with the leather trades until 1968 when he was appointed works director at the largest lambskin clothing leather tannery in the UK.

In 1994 he was appointed chief executive at the Leather Conservation Centre. He retired in 2004. He was an accredited conservator, fellow of the Royal Society of Chemistry, and fellow of the International Institute for Conservation. He is past chairman of the Council of the Museum of Leathercraft and treasurer of the Archaeological Leather Group.

Art space

Founder and honorary chairman of luxury group Kering, **François-Henri Pinault**, fulfilled his dream of opening a private Paris art museum, dedicated to his personal collection of post-1960s art, when the doors to the Bourse de Commerce - Pinault Collection opened in May.

Situated within a former eighteenth-century, heritage-listed grain exchange near Les Halles in the centre of the French capital, the Tadao Ando-designed space – which reportedly cost Mr Pinault €160 million to transform – has been leased from Paris City Hall on a 50-year rental basis. 🌐



World Leather's publishing cycle and limitations on space make it impossible for us to run more than a carefully selected sample of news from across the industry. However, we publish hundreds more stories on *leatherbiz.com*. The site is updated every day with news from every continent and every part of the industry, making *leatherbiz.com* one of the most comprehensive archives of news anywhere on the web for the global leather industry.

We list below just a few of the headlines that have appeared on the site in recent weeks and can still be accessed.

24/06/2021

UK lockdown provides boost for handmade leathergoods company

23/06/2021

70,000 authentic luxury items, worth \$15.5 million, seized in Hong Kong raid

22/06/2021

Loewe homes in on craft with Weaves collection

21/06/2021

Hebei Leather Industry Association to host local fashion week

18/06/2021

Hermès opens first-ever Michigan store

17/06/2021

Exor partnership to drive high-end growth in Italy

16/06/2021

Covid interrupts success of Viard collections at Chanel
Sacai and Dior partner in first collaboration
Tyson aims for net-zero greenhouse gas emissions

15/06/2021

RCEP brings China's leather industry 'major' opportunities

14/06/2021

Tapestry increases its use of leather from LWG silver and gold tanneries
Brush-off leather revival predicted in new TFL trends catalogue

11/06/2021

Montblanc becomes first to choose Dani's emission offsetting scheme

10/06/2021

Digital Freiberg Leather Days concludes successfully
\$3.6 million online handbag auction sees Christie's set new record

09/06/2021

JBS Couros launches antiviral leather
Ssense valued at \$4.1 billion in first funding round
UK buyers find appetite for MG cars

08/06/2021

New Louboutin designs combat racial injustice

07/06/2021

500-plus Galliano-era Dior articles auctioned
Cyberattack costs JBS USA less than a day's production
Search for new apprentices under way at Dr Martens
'Unsustainable strain' of input costs forces Buckman price hike

04/06/2021

Luxury houses, Vogue Arabia to mentor Saudi designers
Blockchain breakthrough for Stahl

03/06/2021

Social media push proves successful for *World Leather*
Aston Martin x Girard-Perregaux timepiece yours for \$146,000

02/06/2021

Deal completion brings 420 Lanxess employees to TFL
LHCA supports call for improvement in China-US trade relationship
MCM receives ESG prize at Korean awards ceremony

01/06/2021

Saint Laurent, Gucci lead Kering's circular leather goals
Physical Tanning Tech holds promise of revival, Assomac says
Renewable feedstock at the heart of new Stahl portfolio

28/05/2021

TCLF appeals to European Commission
Industry first for Gruppo Dani

27/05/2021

Camera della Moda welcomes signs of recovery
LHCA study shows leather has no direct effect on cattle numbers
Hermès builds pop-up gym in Chengdu
Ugg demand drives record quarter at Deckers

26/05/2021

Zschimmer & Schwarz joins UN Global Compact
Korean bag brands pivot in face of foreign luxury

25/05/2021

Wasted hides still equal wasted opportunities
Gucci Gaok to open in Seoul's Itaewon

24/05/2021

Tuscan complex includes academy for new-generation Furla artisans
Milestone for Bentley Motors factory
Kering-Richemont merger pitched 'more than a year ago'

21/05/2021

CNC president says leather is a model for the circular economy
Public vote opens for Smit & Zoon shoe challenge

20/05/2021

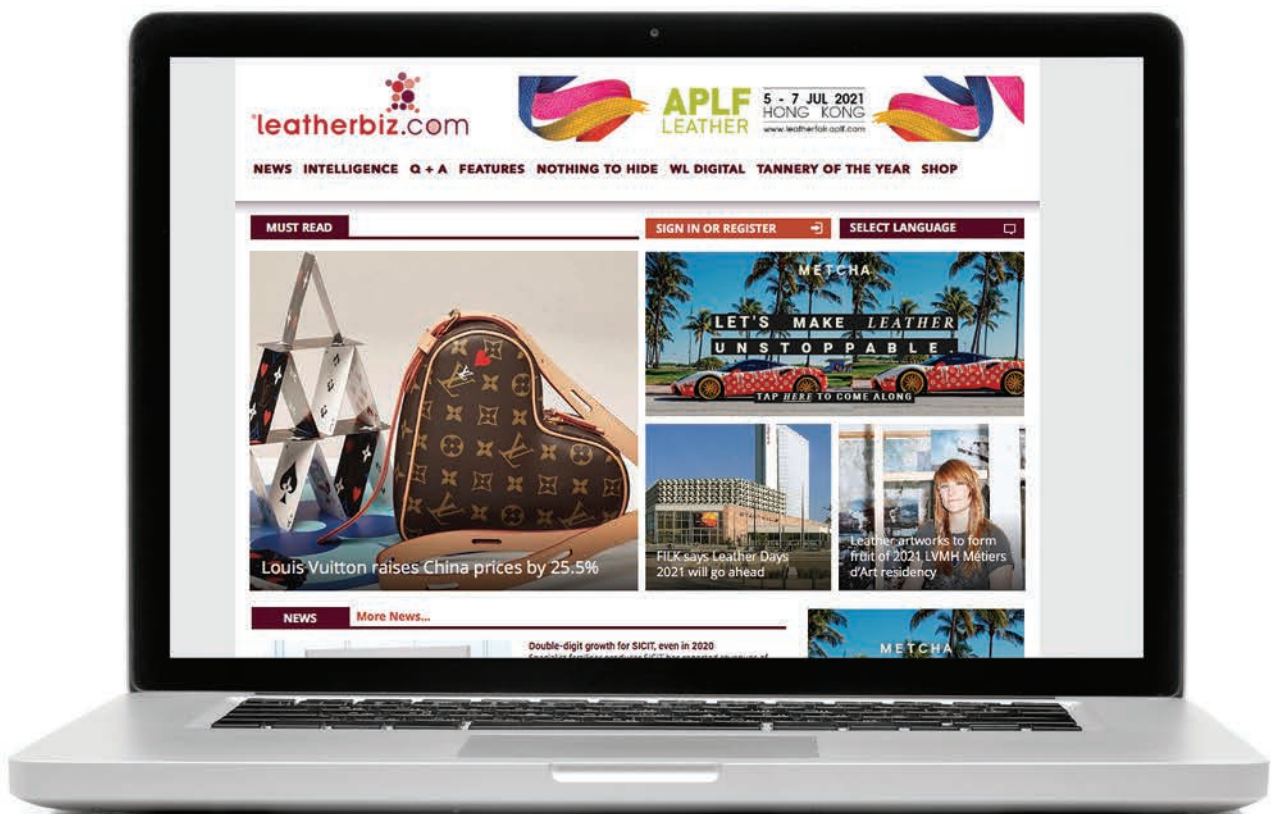
Joint venture will justify Ecco's interest in leather waste
Partners join forces to make circular material from leather waste
Hawaiian leathergoods brand supports homeless children

19/05/2021

Burberry takes its Olympia on world tour
Electric vehicle milestone for Lexus
Bain sees two possible scenarios for luxury in 2021
Ugg sets disability inclusion targets

18/05/2021

Furious COTANCE response as anti-leather entrepreneur 'crosses red line'
Hospitality sector favours Billy Tannery's leather



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Production at the Fuga Couros tannery in Marau, Rio Grande do Sul.

Fuga Couros was founded in Marau in Rio Grande do Sul in southern Brazil in 1947 by José Fuga. The company has grown; it now runs tanneries in other parts of Brazil too and has interests in livestock farming, meat production, pet food production and biodiesel. In 2018, it became the first tannery to achieve certification under the Brazilian Leather Certification of Sustainability (CSCB). Eduardo Fuga is part of the second generation of the family to run the company. He is currently its commercial director.

Keep old friends, win new ones

What is the situation of the Brazilian leather industry at the moment?

The parts of the Brazilian industry that work exclusively for the domestic market are suffering. We have had a number of consecutive increases in raw material prices, high export demand for that raw material, and low slaughter. All of this is pushing the price of Brazilian raw material to levels that the domestic leather industry is unable to absorb and unable to pass on to our domestic customers. It would also be difficult for any overseas customer to pay the necessary price and still to leave some margin for our companies. In essence, the situation is really difficult for Brazilian tanneries.

What are your expectations for the rest of 2021 and for 2022, for the global industry, the industry in Brazil and for Fuga Couros specifically?

The expectations for 2021 are that the virus situation will stabilise, commerce will reopen and life will start to return to normal. Then the consumption that has been suppressed may increase, enabling the industry to

produce more. In the same way, the raw material situation that has been affected by the reduced cattle slaughter numbers, can normalise. We hope to enter 2022, optimistically speaking, in a better position.

What was the significance for Fuga Couros of being the first leather manufacturer to achieve the Brazilian Leather Certification of Sustainability (CSCB) accreditation from national leather industry association, CICB, in 2018?

It was very gratifying to be the first Brazilian tannery to be certified with the sustainability accreditation. Being a family business and being part of the second generation to run the business, this was very important. We have leather and tanning in our DNA. It was good to be able to show to Brazil and to the world that leather is a sustainable product and that our company meets the required environmental and social responsibility standards. Being the first to get the certification was something priceless for Fuga Couros, so much more than a prize. It showed how far we have come in evolving our ideas.



What are the advantages and disadvantages of being first?

We can only see advantages. This accreditation confirmed that we are achieving what the world is looking for, sustainability.

What difference do you think CSCB certification has made in the opinion that furniture, accessory or footwear companies have of leather? Has CSCB helped leather win new friends or at least keep its old friends?

In our opinion actions like the CSCB programme can make a big difference. The programme is extremely important for tanneries and for communities because it promotes environmental, economic and social care, which is becoming more and more necessary all the time. CSCB has definitely helped us to keep our old friends and win new ones.

Please explain what the José Fuga Foundation is and how it works?

The José Fuga Foundation is a non-profit organisation that aims to promote the ideals of solidarity and community action within the neighbourhood in which the tannery is situated. The facilities available include an open library, a choir, and classes in home economics and the basics of business. There are also English lessons and digital inclusion courses for children and adults. The foundation was run by Lidia Fuga, my mother, in memory

“Being the first to get CSCB certification was something priceless for Fuga Couros, so much more than a prize. It showed how far we have come in evolving our ideas.”

of José Fuga, my father and the founder of Fuga Couros. My mother passed away in October 2020 and since then the Fuga Couros company has assumed the running of the foundation.

Of all the ways in which the José Fuga Foundation has helped people, which are the examples that have given you the greatest satisfaction?

We believe that the greatest satisfaction is to know that the foundation is in a position to help teenagers and younger children from the families of the workers at our tannery in Marau, and that this help is also available to other young people with a connection to the community. 🌐

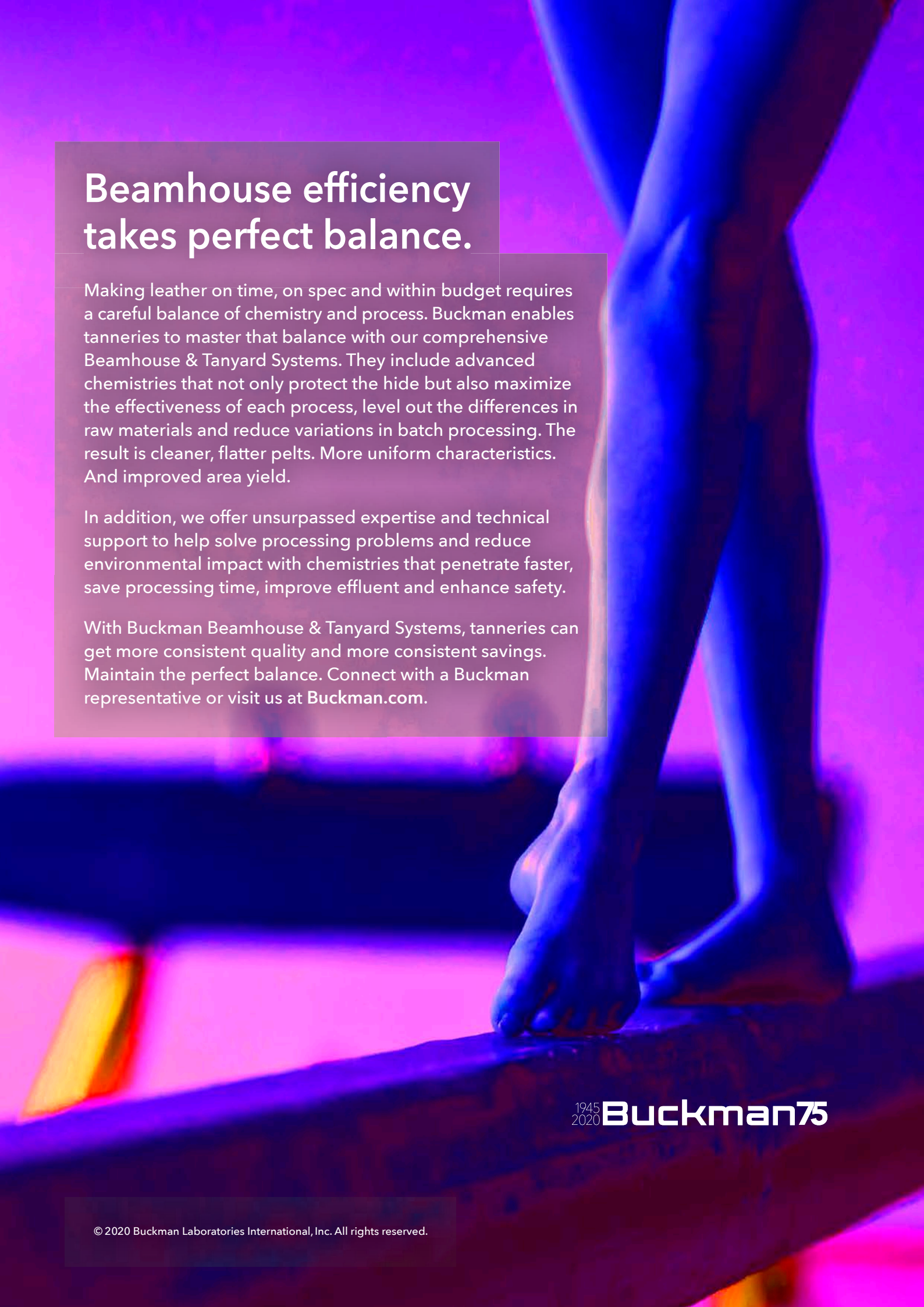


Eduardo Fuga, commercial director and representative of the second generation of the Fuga family to run the company.



Fuga Couros founder, the late José Fuga. The company now runs a successful non-profit organisation in his memory.

ALL CREDITS: FUGA COUROS



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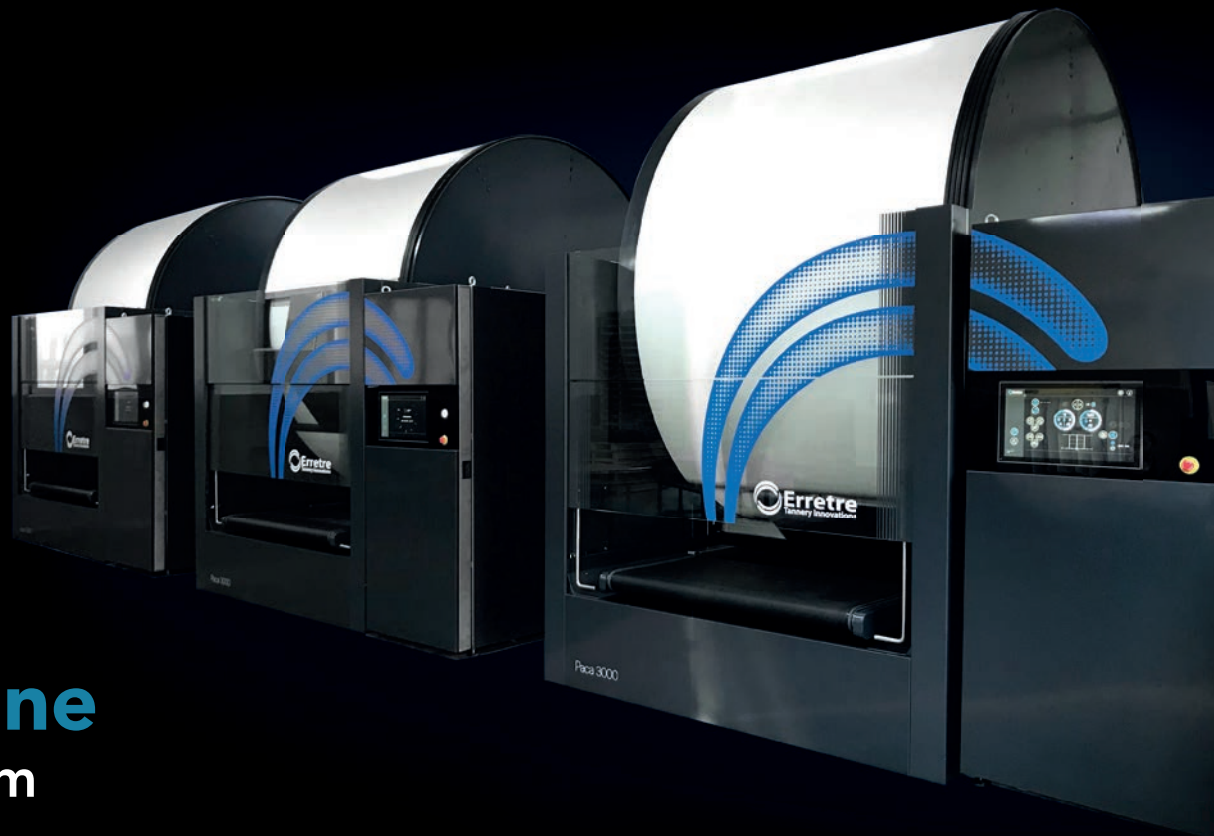
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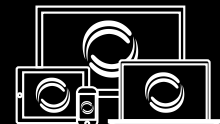
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Nothing to Hide: Animals and the fight against poverty

Children in Benin.

CREDIT: EUROPEAN COMMISSION

Executive summary

According to The World Bank, there are almost 700 million people living on less than \$1.90 a day in 2021, which it defines as living in extreme poverty. Its data shows that four out of five of these people live in rural communities. Specialist UN agency the International Fund for Agricultural Development (IFAD) has calculated that 800 million smallholder farmers in these communities combine to look after a billion head of livestock.

Research from academics and aid agencies shows that owning and looking after animals is of incalculable value to people in poverty. The animals are a source of food that, even if in limited supply, is of high nutritional value. In these communities, this nutrition is of particular importance to children, for mental and for physical growth, and to pregnant women. Animals also provide a means of transport, of bearing loads and of working the land. Their manure is a source of fuel and of fertiliser. All of these are potential sources of income, during the animal's life. And after slaughter, the hide and other by-products can supplement the value of the meat.

Looking after livestock also helps women in developing countries to achieve greater equality and economic independence.

In recent years, more and more farmers in all parts of the world have become convinced that planned grazing of livestock, in which the animals move from field to field, is of crucial importance to regenerative agriculture and could be our best hope of reversing climate change. 🌱

About this essay

The main sources of the information in this essay are The World Bank, the International Fund for Agricultural Development (IFAD), the International Livestock Research Institute (ILRI), the International Institute for Sustainable Development, the International Food Policy Research Institute (IFPRI), Allan Savory's 2013 TED Talk and the 2020 film *Kiss The Ground*.

Around 800 million smallholders in the developing world look after at least 1 billion head of livestock. CREDIT: EUROPEAN COMMISSION



Nothing to Hide: Animals for life and livelihoods

The value of livestock in the fight against poverty and malnutrition is impossible to exaggerate. The nutritional, social and economic importance of animals to people in the developing world is clear. In many parts of the world, evidence is growing of livestock's contribution to keeping the soil productive and effective in the fight against climate change.

Livestock farming has become relatively industrialised in developed economies. Farmers raise cattle, build up their herds and, when the time seems right, sell some of the calves, cows, heifers and bulls to feedlots or to packer companies for fattening up and slaughter. Grain farmers devote much of their land, labour and time to producing crops to supply feed for these animals, causing harm in many regions to the soil through over-production, which is often subsidised, and the use of synthetic chemicals. This often seems like the way of the world. But not the whole world: many farmers do not have the option of being part of these large-scale operations, and for some, whom this system is an option prefer to have nothing to do with it.

Numbers of people living in extreme poverty had been in decline for 20 years, The World Bank said in 2020, until the covid-19 pandemic¹, which it said was likely to push the total to almost 700 million people

in 2021. The World Bank defines people who live on less than \$1.90 per day as living in extreme poverty. This amount of money constitutes what it calls the international poverty line. It warns that close to a quarter of the world's population lives on less than \$3.20 per day and that more than 40%, a total of more than 3.25 billion people, live on less than \$5.50 per day. In 2018, four out of every five people below the international poverty line lived in rural areas. This, too, is The World Bank's data².

Specialist UN agency the International Fund for Agricultural Development (IFAD) has said that, as their communities have done for generations, millions of these people rely on livestock to help feed themselves and their families. Furthermore, the IFAD calculates that 800 million smallholder farmers in these communities combine to look after a billion head of livestock.

Safety net

Ceres2030, a joint programme run and funded by Cornell University, the International Institute for Sustainable Development, and the International Food Policy Research Institute (IFPRI), refers to livestock as a safety net for the rural poor. Ceres2030's work involves evaluating academic literature to draw out from published papers what the most effective interventions might be to help smallholder farmers and end hunger. Funding from the programme is from the German government and the Bill & Melinda Gates Foundation.

Principal scientist and programme leader at the International Livestock Research Institute (ILRI) in Nairobi, Dr Isabelle Baltenweck, leads the livestock feed solutions research team for Ceres2030. In 2020 she said: "Livestock are crucial for people's livelihoods, especially in developing countries. In these areas where we see significant hunger, livestock are integrated into farm production: the cow creates manure, which fertilises the maize, which both the humans and the livestock eat. Livestock is a key piece of maintaining this system." She pointed out that, in the event of drought or civil unrest, people are able to move their livestock with them when they move and still have an income and a food source.

Food for thought

And not just any food source. These animals are a source of sustenance that, even if in limited supply, is of high nutritional value. In these communities, this nutrition is of particular importance to children, for mental and for physical growth, and to pregnant women. In a 2018 paper written by researchers from the University of London's School of Oriental and African Studies and the IFPRI, data showed that the problem of faltering growth among children often begins between the ages of six months and two years³. The authors said that many families in the developing world are only able to give these small children complementary foods that are low in high-quality protein and micronutrients. These foods frequently include rice, wheat, maize or starchy roots and tubers. They agree with earlier research that draws a clear connection between low consumption of animal-sourced foods (ASFs) and faltering growth among these small children during this critical phase of development.



The involvement of women in the care of livestock in the developing world is an important factor in progress towards meeting the UN's Sustainable Development Goal number five, which focuses on gender equality. CREDIT: EUROPEAN COMMISSION

A specific study the authors carried out in Bangladesh found that almost half of the children living in rural communities in the Asian country suffer from stunted growth. They reach a similar conclusion to those that earlier studies focusing on East Africa have drawn: "Increasing dairy consumption among children and women of childbearing age should be a central priority for nutritional strategies in Bangladesh."

Meat matters

As far as meat is concerned, IFPRI has said that over the next several decades, a large proportion of the growth in demand for meat will come from the developing world. By 2050, according to IFPRI modelling, annual per capita meat consumption will reach 77 kilos in Latin America, 52 kilos in Asia-Pacific, and 24 kilos in regions of Africa that are south of the Sahara. These figures compare to amounts for the year 2000 of 58, 28 and 11 kilos respectively.

This shift could improve nutrition in developing countries, the organisation has said. The issue is clear for Dr Marie Ruel, director of IFPRI's Poverty, Health, and

Nutrition division. She says: "Meat is especially important for young children, who go through a critical phase of accelerated physical growth and brain development in the first two years of life, and for women, who have high iron requirements during their reproductive years. Meat and dairy products contain micronutrients, including iron, zinc, calcium, and vitamins A and B12, in forms that are readily available and taken up by the body more easily than when they are obtained from plant sources."⁴

The institute has no concerns about people in the most developed economies decreasing their meat consumption if they want to, mainly because it believes this will lower prices and make meat more affordable for people in developing countries. Dr Ruel points out that many vegetarians are unable to meet their nutritional needs without taking vitamin and mineral supplements or consuming fortified foods, most of which are in shorter supply in developing economies. "In populations that don't have access to specially formulated fortified foods or products, infants and young children should be consuming ASFs daily," she insists.



Before and after. The same piece of land in Zimbabwe pictured (left) in 2004 before planned grazing had taken place on it and (right) in 2007 after Allan Savory's team had included it in its programme.

CREDIT: SAVORY GLOBAL NETWORK

Equality for women

Raising animals in much of the developing world drives greater equality for women. ILRI's Dr Isabelle Baltenweck has made the point that livestock are important in helping women become economically empowered. "If a woman can access a few chickens, she can earn some income and improve her family's nutrition. Then maybe she can save up and invest in a few goats, then a few cows."

Women are key to the health and productivity of livestock as it is they, in many communities, who feed the animals and attend to the births of new-born calves, kids and lambs. IFAD has said that when women have access to the right resources and training, animals tend to be better fed, healthier and more reproductive; it has called on international bodies to help train women to carry out these roles better.

Care of livestock, therefore, is an important driver in meeting the fifth of the United Nations' 17 Sustainable Development Goals (SDGs). Number five focuses on gender equality, even though improving women's access to non-agricultural paid work is also an important priority. Owning livestock increases a woman's decision-making and economic power within her household and in the community.

Livestock is also a source of money and can open up access to credit. The sale of sheep or goats is a useful way of raising money quickly for medical treatment or school fees, while selling milk provides a regular flow of money for everyday items, including food. By-products from these animals represent another important source of employment and empowerment for women. Hides, skins, wool, bone and manure are among the by-products that bring economic benefits to animal owners; in many communities it is women who use these materials to make and sell products such as clothes, household goods or fuel.

Climate action

To return briefly to the SDGs, the goals that livestock ownership can help individuals and communities achieve are, at least numbers: one, two, three, five, eight, ten, twelve, fifteen and sixteen⁵.

SDG 13, which focuses on climate action, deserves a separate mention in this Nothing To Hide essay. There is 'received wisdom' that livestock cause desertification through over-grazing. In a now famous TED Talk in 2013, Allan Savory, a Zimbabwean ecologist, biologist and livestock farmer, compared this to the 'received wisdom' in earlier centuries that the earth was flat⁶. "Desertification only happens when we create too much bare ground," he said in the talk. "There is no other cause. We were taught that this is caused by livestock and I loved wildlife so I hated livestock. Well, I have news for you. We were wrong then [about the earth being flat] and we are wrong about livestock now."

He observed, in the US as well as in Africa, that in National Parks in which livestock had been removed in an attempt to halt desertification, the opposite had happened: there was more bare land over time rather than less. In some parts of the world, there is so much rainfall that desertification will never be a problem, "no matter what we do", Mr Savory said. But a scarcity of water affects around 40% of the earth's land-mass and there are areas, a large swathe of northern Africa, for example, in which 95% of the millions of people who live there can grow practically nothing and are dependent on animals for food. There are wet months and dry months. Poor soil makes it likely that moisture during the wet months will go to waste through run-off or evaporation.

Herd mentality

Soil and vegetation developed and remained in place across large areas of the world not in spite of the presence of livestock, but

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because the animals were there. The reason over-grazing did not happen, originally, was that the animals made their stay in any given area relatively short before moving on. Allan Savory's realisation was that these grazing animals developed with the threat of ferocious, pack-hunting predators hanging over them all the time. Bigger herds meant individual animals had a better chance of survival. This meant the areas where they were grazing soon became covered with the animals' own dung and urine, trampled into the earth by their hooves. And after the grazing animals had moved on, healthy grasslands grew in their wake, equipping the land with a much greater ability to retain moisture during the wet months. Without the concentration of animals in a given area and without the animals soon moving on, there is a danger over-grazing.

He studied other professions and found planning techniques that he could take and adapt. From this he developed a holistic management approach centred on planned grazing. He concluded that "the only option left" is to use livestock, bunched and moving, as a proxy for the large herds of former times, to mimic nature. "After they move on, the soil is ready to absorb and hold rain, to store carbon and to break down methane," he said, adding that the more industrialised agricultural systems we have in place at the moment are causing as much climate change as fossil fuels, and possibly more.

"This is causing hunger, poverty, social breakdown, violence and war," he said. "Millions of men, women and children are suffering and dying. And if this continues, we are unlikely to be able to stop the climate from changing, even after we have eliminated fossil fuels. We can work with nature, at very low cost, to reverse all of this, taking carbon out of the atmosphere and safely storing it in grassland soils. If we do this on half of the world's grasslands, it would take us back to pre-industrial levels of carbon while feeding people."

Sealed with a kiss

By the middle of 2021, there had been more than 7.5 million views of Allan Savory's TED Talk. It featured, and he featured, in a 2020 documentary called *Kiss The Ground*⁷, which extols the benefits of his holistic management and planned livestock grazing ideas as part of a wider philosophy of regenerative farming. In less than a year, *Kiss The Ground* won more than 40 film awards and its message spread across the world in schools and cinemas and on Netflix and Vimeo.

This is important because campaigners who want to end livestock farming and meat consumption often have a high profile. There are others who confess themselves willing to tolerate livestock and meat because of the difficulty in replacing them in economies and diets, especially in the developing world. This attitude seems present even in important reports on climate change from bodies such as the Intergovernmental Panel on Climate Change (IPCC). It said in the build-up to the important 2015 United Nations Climate Change Conference (COP21) in Paris that methane emissions from livestock "are difficult to mitigate"⁸. The implication is that raising cattle, sheep and goats is a lesser evil than exacerbating global poverty, but that it would be good if we could find other ways to achieve the same outcome.



Ecologist and biologist Allan Savory, whose seminal TED Talk in 2013 reversed many people's thinking on the importance of livestock.

CREDIT: SAVORY GLOBAL NETWORK

Allan Savory has shown, however, that this is wrong. Raising livestock as part of a regenerative agriculture programme is not an evil of any kind; it is an important weapon in the fight against poverty and against climate change. It is crucial to healing the soil in areas where dry seasons are long and few things grow and healing the soil is critical if we are to heal the climate crisis. "Much-vilified livestock," as Mr Savory has called them, could be the key in helping the earth to remain habitable. ☺

1. <https://www.worldbank.org/en/news/press-release/2020/10/07/covid-19-to-add-as-many-as-150-million-extreme-poor-by-2021>
2. <https://www.worldbank.org/en/topic/poverty/overview>
3. <https://www.sciencedirect.com/science/article/pii/S1570677X1830011X?via%3Dihub>
4. <https://www.corecommunique.com/the-meat-of-the-issue/>
5. <https://sdgs.un.org/goals>
6. https://www.ted.com/talks/allan_savory_how_to_fight_desertification_and_reverse_climate_change?language=en
7. <https://kissthegroundmovie.com/about/>
8. <https://www.ipcc.ch/report/ar5/syr/>

Antimicrobial leathers – a silver lining

Matthew Abbott, Technical Editor

The coronavirus pandemic has brought about a change in consumer awareness regarding cleanliness and the spread of viruses. Aftermarket products and advertisements for them are now commonplace and, for the most part, are targeted towards antibacterial activity. The leather industry has long known about the use of biocides in the form of fungicides and bactericides for early and full-term preservation. In recent months, antimicrobial leathers have been “on-trend” with many manufacturers bringing out their own versions. Here we look at how silver is behind many of these antiviral offerings.

At the outset, we need to distinguish between viruses and bacteria, possibly including fungi, too, as these are all possible issues that tanners have to contend with.

Viruses

Described as the simplest form of germ – consisting of genetic material (DNA/RNA) within a protein shell. Viruses need a host in order to replicate. They have no other function but to replicate and by doing so – once within a suitable host, including bacteria and fungi – they have the ability to replicate at such a rate as to overcome the host’s immune system and start to destroy its own cells. Viruses are the cause of mild illnesses such as the common cold but also extremely dangerous illness such as covid-19 and ebola.

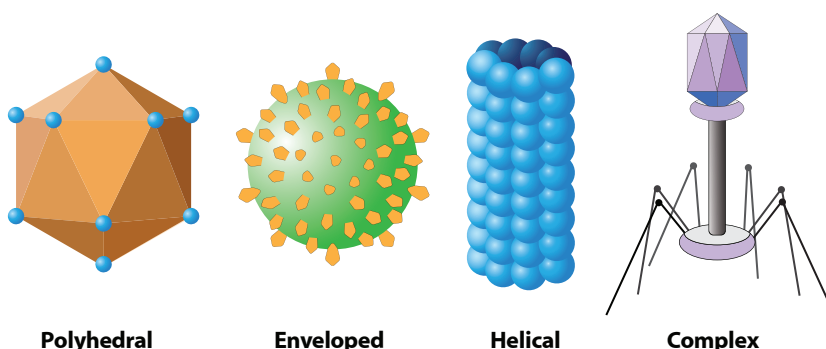
Being so small, viruses can be carried on the air and in bodily fluids. They are usually classified into one of four different groups, based on shape: head and tail (complex), helical, polyhedral or enveloped. Until recently, virus contamination for leather was seldom a concern for the tanner.

Bacteria

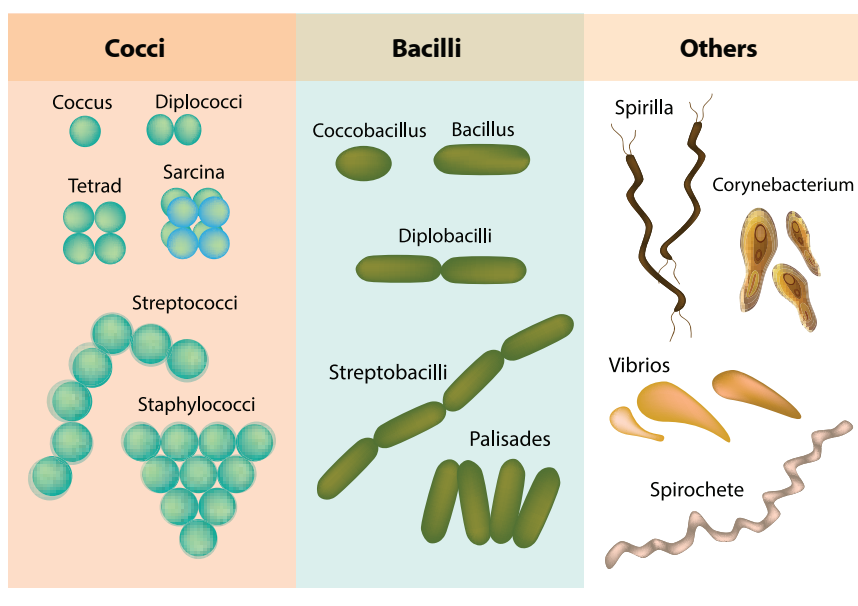
More complex than viruses, being single cell organisms, bacteria can grow without a host and are found in water and soil, as well as the human body. Still small enough to be transmitted through the air, bacteria cause infections such as tuberculosis and strep throat but also food poisoning, tuberculosis, and cholera.

Bacteria come in various forms, again grouped by their shape: spherical (cocci), rod (bacilli), spiral (spirilla),

Types of viruses



Types of bacteria



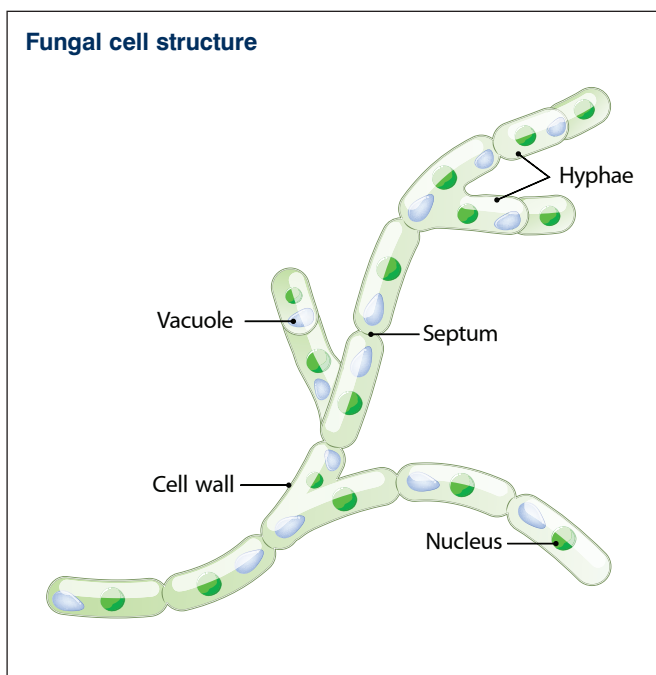


comma (vibrios) or corkscrew (spirochaetes).

One of the most common bacterial attacks that tanners face is hair slip, where early preservation has been improperly carried out or delayed after flaying. Bacterial attack at the basal cell layer of the epidermis causes putrefaction and the hair is easily pulled out or removed in early soaking. If mild, the grain will be unaffected but, in serious cases, the bacterial damage will penetrate the full thickness of the hides leading to looseness at best or in a worst case scenario, holes and possibly complete dissolving of the hide or skin in the liming process. Another common bacterial issue is Red Heat, whereby halophilic bacteria – those that can survive in salt – give the salted flesh side of the hide a red appearance. Not an immediate indicator of substantial damage but nevertheless a very good indicator that stock should be moved on, and a possible discussion with your supplier to use clean salt in their curing operation.

Fungi

More complex again, fungi (mould) are multi-celled organisms. Like both bacteria and viruses, fungi are quite commonplace in nature and are divided into five classes. For the tanner, the ascomycetes class, also known as sac fungus, and containing strains such as aspergillus, yeast and penicillium, is the most likely and commonly encountered fungi, in most cases causing no issue with infections. Of concern to human infection are the fungi that can give rise to spores that can then enter the lungs where weakened immune systems can quickly become compromised. In contrast to the damage that bacteria cause in leather manufacture, moulds do not cause a reduction in hide substance. In most cases, fungal attacks cause and create staining, either with the tanning agent itself or in combination with the fats used. This latter point also brings to the fore the issue of fatty spews caused by moulds. Not only can moulds cause fatty spew due to the breakdown of the fats to free fatty acids but the appearance can be visually similar. A simple test would be the application of heat from a lighter or match. Fatty spew should melt and disappear – mould will not.



Inherent properties

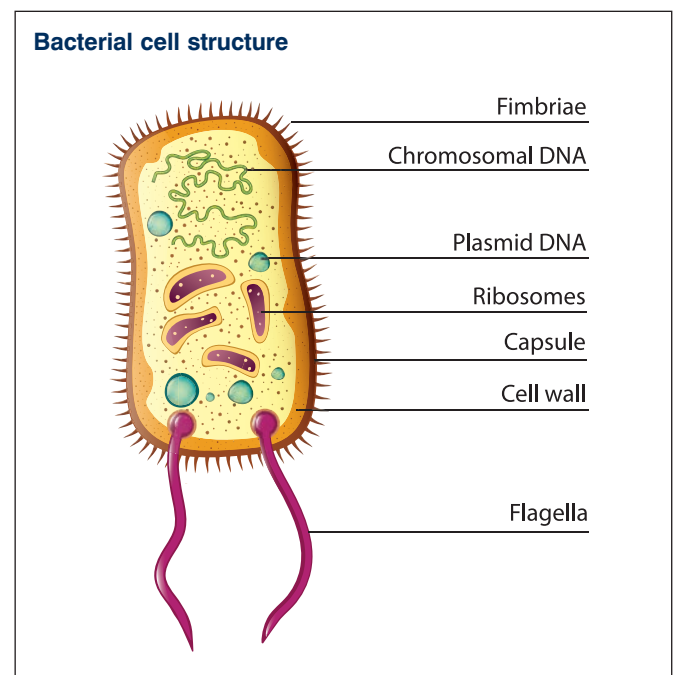
Leather and its inherent properties are well documented. World Leather published an in-depth article in its June/July 2020 edition regarding the antibacterial properties of leather. The process of tanning is itself a preservative method that renders the hide imputrescible – in other words, no longer subject to decay. Unlike fresh hides that, should they not be sufficiently preserved or processed quickly enough after slaughter, are prone to attack by bacteria and autolysis, tanning greatly reduces the enzymatic activity on the substrate. In most cases this is probably due in part to the acidic nature of tanned leather, being within the pH 3-4 range for an aqueous extraction.

Inbuilt protection

What may not be so well documented is the inherent antiviral properties of leather. As a base line, one leading tannery found that finished leather will naturally inhibit approximately 80% of viruses with which they come into contact. Whilst this sounds impressive, antimicrobial products will commonly claim 99.9% eradication – again another bold statement, partly for marketing reasons and partly that to kill 100% would be to act as a sterilisation process, which is something totally different. Claims should be read in conjunction with caveats as to which test, or strains have been assessed.

The spread of disease from surfaces was recently emphasised by a study published by Imperial College London, showing that a virus applied on a hospital bed rail had, within a few hours, spread to over a dozen other surfaces. With information like this, it is clear that in the consumer world, where cleaning and sanitising are not up to general hospital standards, the contamination of surfaces, such as leather bags, handles and even seats and headrests could pose an even bigger problem.

Over recent months, there have been many different producers offering their antimicrobial and sometimes specifically antiviral leathers. Whilst some tanneries have





used inhouse expertise and claimed innovation and design from within, such as Gruppo Mastrotto, others have opted to partner with well-respected companies already in the business of producing antimicrobial products. Examples include JBS with their V-block in conjunction with Nanox, Muirhead's Active hygiene leather with Polygiene and Pittards' Tri-protex with Microfresh. The move away from aftermarket treatment does to a certain extent offer the tanneries a USP but it also takes away the issue of a somewhat uneducated consumer using unsuitable products. The use of alcohol gels has been instrumental in the fight against the spread of covid-19 but extreme and prolonged use of these gels on leather would be inadvisable, if not reckless.

Common thread

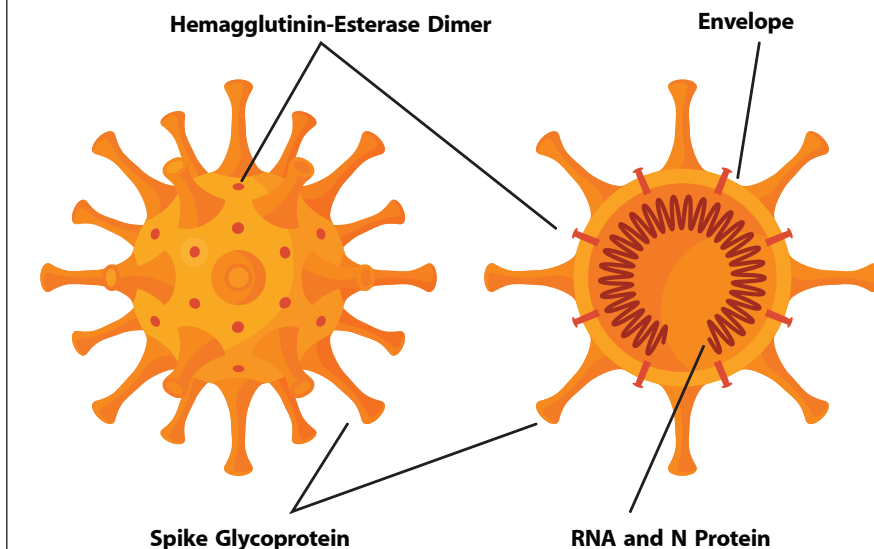
The uniqueness of all the leathers being offered cannot be doubted, some are exclusively for mass transit while others are offered for hospitality and bespoke work. What brings most of these antimicrobial leathers together is in their employed method of protection.

The antimicrobial properties of silver have been known and used for thousands of years, with early mention by the father of history, Herodotus, that Persian kings should not drink water from anything other than silver containers as it kept the water fresh.

Antimicrobial activity of silver, more specifically the positive silver ion Ag^+ , is the reason behind its ability to kill bacteria, fungi and some viruses. In attacking bacteria, the silver ion has several ways of rendering them inactive. They are able to bind to the cell wall and inhibit the transport of substances in and out of the cell. By breaking through the cell wall, the silver ions not only rupture the cell but also bind to negatively charged groups within it and begin to destroy energy production. Furthermore, the genetic material within the cell (DNA) combines with the silver, and cell division is prevented and replication stopped.

Being of a simpler structure, viruses are inactivated in a similar manner in that the silver ions break open the protein shell holding the genetic material. Once this has happened, replication is no longer possible, and the genetic material held within oxidises.

Coronavirus



Practical applications

The likelihood of a leather handbag having multiple owners throughout its life is in fact a selling point further up the supply chain. In a press release announcing that its new antiviral treatment would be applied to bags manufactured by a company that manufactures for Marc Jacobs, Giorgio Armani, Coach and Gucci, chemicals manufacturer Polygiene explained: "An

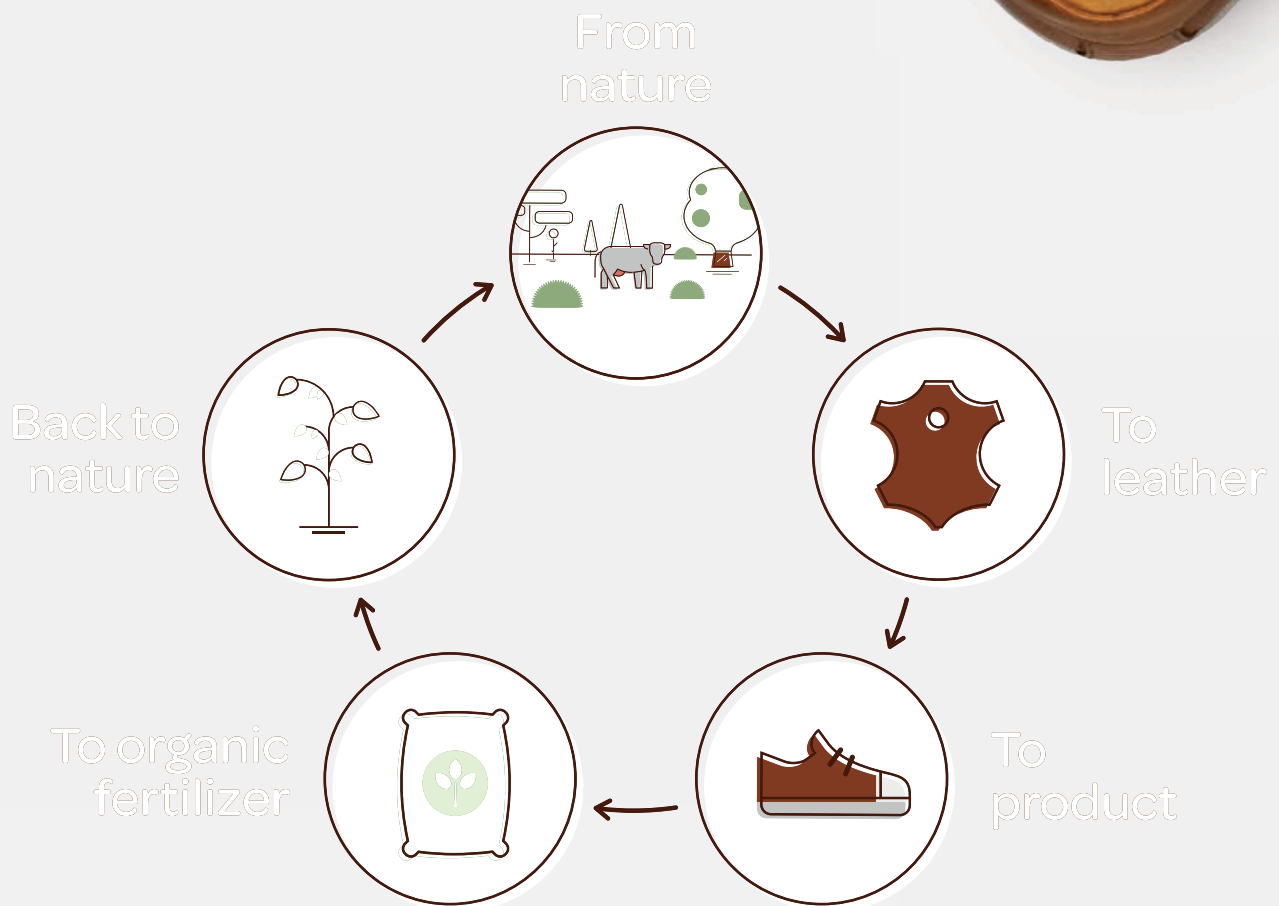
expensive branded handbag could change hands in the vintage market many times before being discarded". By providing antiviral properties, largely engineered into the tanning and finishing of the leather, gives the consumer another level of confidence in the products they are using and buying. Whilst many on trend fads come and go, the microbial protection of leathers looks to be here to stay. 🌐



Incorporating antimicrobial performance to leather ensures permanent protection and consumer confidence. CREDIT: SCOTTISH LEATHER GROUP

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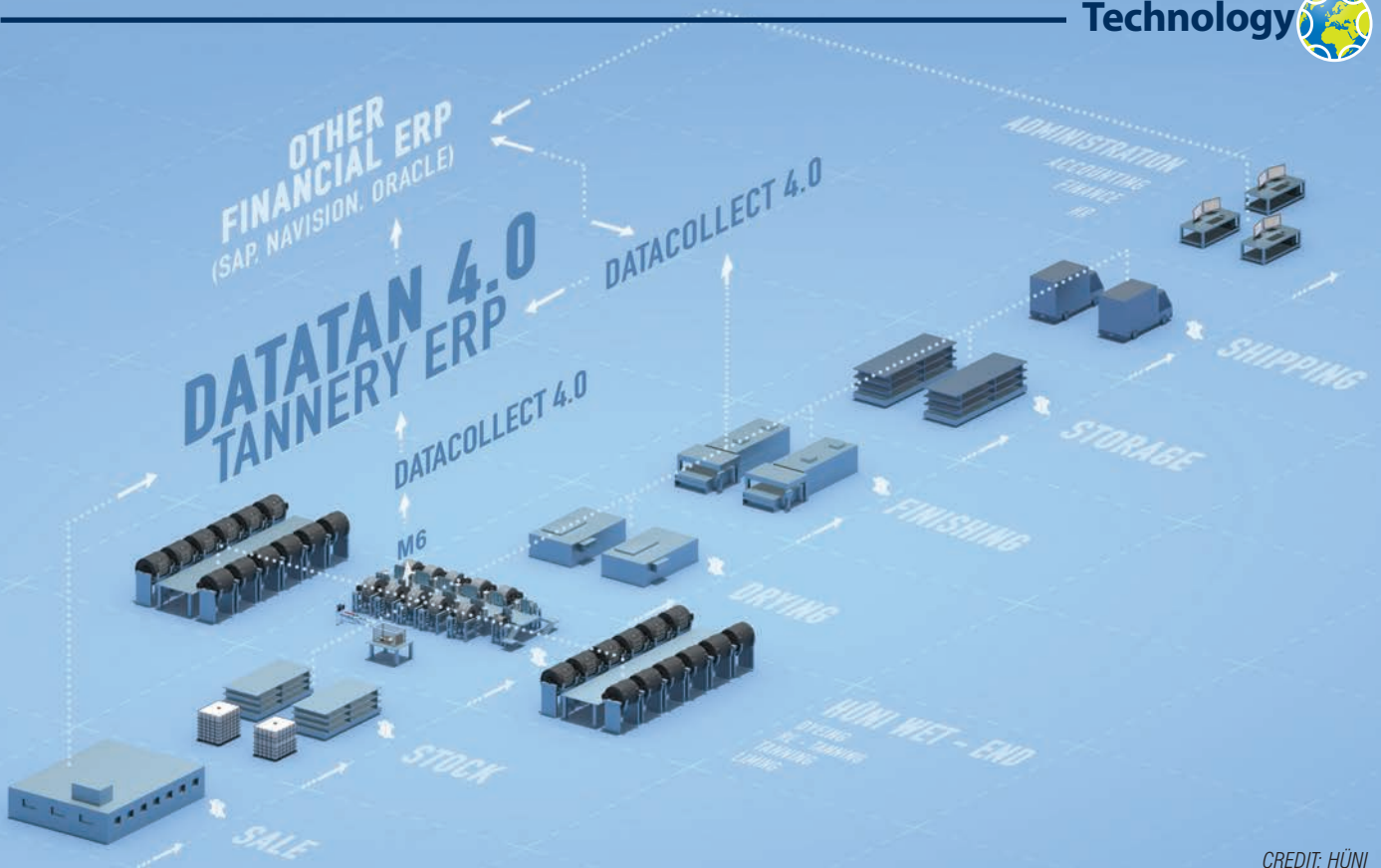
This tanning technology uses patent pending tannin based products and has been developed thanks to a partnership between Silvateam, Biofin, Fertilizzanti Certaldo and some of the world's best tanneries.

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CREDIT: HÜNI

Traceability – a practical application for the tannery

Ralph Arbeid

International leather value chain consultant

Traceability is rapidly becoming one of the major issues that the leather industry has to deal with but creating credible traceability is easier said than done. Hüni AG, a global provider of drum technology, process control and process automation, has partnered with the Italian company TeamDuemila which produces of specialised tannery ERP (Enterprise Resource Planning) software marketed under the name Datatan 4.0.

Climate change, deforestation, and environmental impact are practical but crucial elements the sector must deal with. Additionally, sections of the general public may have a negative image of the meat and leather industries, due to being subjected to seriously biased propaganda by various interest groups. In general, the leather value chain goes out of its way to be as sustainable as possible but suffers from bad actors. It is not just the bad actors, but also in some cases the impossibility to obtain or provide information. It is either unavailable or, where the composition of

chemicals is concerned, is within the sphere of confidentiality.

When a luxury brand demands a full account of the origin of its raw materials and the use of chemicals from the leather supplier, they should realise that it is humanly impossible for a tannery to stop deforestation in Brazil or Colombia. How can you reasonably trace a goatskin that is tanned in India and sold to a leather goods manufacturer in China, bought in the raw from a trader in Cameroon, who received the skin from Nigeria where the skin crossed the border by a collector of home-slaughtered animals in Chad, where the

animal arrived after being traded from its birthplace in Libya? Animals' cross borders without being registered all over Africa and the Indian subcontinent, depending on the market price of the meat. That is the reality in certain parts of the world.

We cannot stop malpractices such as deforestation or the lack of animal welfare upstream in the value chain, but we can try to influence the operators, by engaging the local authorities, and push them towards sustainable practices by assisting rather than by refusing.

So, what do we need to do to gain positive reviews from the brands and



consumers? Apart from properly documented animal welfare through accessible webcams in slaughterhouses, we need animals to be registered at birth with either ear tags or implanted RFID (Radio Frequency Identification) tags stating, among other data, that they were born in a regularly licensed farm. Each movement from the birth farm to the slaughter facility can then be recorded through the ear tag or RFID chip. This is possible, and already happening in many countries where the farming and meat industries are regulated. In countries like the Indian continent or any of the African countries where most families have an animal, the animal is in effect their savings account, their family capital. When it is slaughtered at home or on some slaughter slab out in the fields, how can you regulate this in a credible way? You cannot unless the authorities step in and oblige all livestock holders to register their animals and give these small-scale farmers some form of incentive. Money talks, people listen.

Let us assume that the animal reaches the slaughterhouse with an ear tag. Once the animal is processed, you generally have two carcass sides and one hide or skin. The ear tag number must be transferred to the carcass sides in most western countries by law and ideally should also be transferred to the hide. Credible identification of the single hide is possible through application of several technologies, ranging from number punching to laser marking, DNA tagging or particle application. However, for traceability to be credible, seamless transfer of identification is required. If an ear tag of an animal is not in some way directly transferred to the hide in the abattoir, and subsequently, if the hides are sold to a merchant by the hundreds, who then builds up or mixes lots, solid traceability back to the farm is lost and all that is left is purely an indication of traceability.

When the hides reach the tannery for processing, the situation becomes more complicated and volatile, due to the sheer volume of hides being processed through various production stages. With a variety of chemical and mechanical operations, traceability becomes an unreachable dream unless the tannery uses ERP software that can collect and process data for each operation and movement of the leathers throughout the production process.

Two possible scenarios

There are two possible scenarios: traceability of single leathers, the perfect example being for precious CITES (Convention on International Trade in Endangered Species) tagged skins, or batch traceability. For single leather traceability, the leathers must be identified piece by piece with a unique code, whether physically (number), electronically (RFID), DNA or by chemical particles. These codes should remain identifiable throughout the production process and resistant to the chemical and mechanical operations to which the leathers are submitted. Batches can be anything from a full container load to parts thereof. Batches can be split over and again throughout the production from station to station. Piece by piece identification makes for a solid traceability from start to finish, whereas batch traceability offers no guarantee.

Without inputs, there are no outputs, hence unregulated countries need to adapt and adjust to traceability requirements and provide for the inputs into traceability systems. To achieve this, the downstream part of the supply line, in places such as Africa and India, must incentivise its suppliers to introduce step-by-step identification systems, either directly or via Government, UN or NGO channels. It needs to be done in a focused manner with an eye on results in the field and backed by incentives. This can be plotted with a timeline, which should start at the exporter level and then track back to the supplier's supplier, the markets, and the animals.

This is not utopia, or wishful thinking. Over ten years ago, Botswana introduced a traceability system for its livestock through implanting microchips in the necks of calves on which the ownership and medical history of the animal was wirelessly recorded. At slaughter, the microchip was extracted, cleaned, reset and ready to be implanted in another calf. Linking the microchip data to a downstream system such as Datatan 4.0 is easy.

Datatan 4.0 is an independent software program especially developed to manage tannery activities from purchase to sales, as well as plan and manage the whole production process and elaborate the data connected to these activities offering the tannery management live insight into warehouse and production situations at all levels. The program expounds statistics, calculates profit and loss for each

separate article and processing station, allowing management to understand if and where there are any bottlenecks in the production flow, whether there are inefficient machines requiring too many repairs or excessive maintenance. Datatan 4.0 collects and exchanges data from and with equipment and production. Data inputs can be made manually, by barcode, RFID or QR codes from multiple workstations and where possible directly by the production equipment itself, for which the most recent can be connected directly with the ERP, whereas others may need an interface. In principle, all machines, irrespective of brand can be connected to Datatan. All safeguards against inputs of erroneous or inconsequent data are obviously in place, and are flagged when errors occur.

Installing an ERP system is not like installing a drum or a vacuum dryer. There is a process in place, from creating a blueprint of the software adapting it to the buyer's requirement, after which the program is created and put at the disposal of the customer, who then has to feed the database for the system. Following appropriate training, the system can go live. This process usually takes between 3-5 months depending on the size of the tannery and the complexity of the buyer's requirements. Therefore, the present situation of reduced orders is the ideal moment to introduce Datatan into a tannery, when staff have time and are not stressed by hectic delivery programs.

Datatan 4.0 is capable of tracing, live, both single leathers and batches from the so-called cradle to the tannery gate within the limits of the available data prior to the arrival of the raw materials in the tannery. Tracing the physical position of the leather or its timeline is only part of the traceability process. Tracking the costs involved in the production, the consumption of natural resources such as water and electricity and the quantity and nature of the chemicals used in the process are just as important. Traceability is becoming more and more a requirement demanded by brands and distribution chains. Auditing authorities such as LWG and the recently launched SLF are giving traceability more and more importance and tanneries need to consider that if they wish to remain on the shopping list of the buyers. Traceability will become a must within a very short period of time. 🌐

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SLF aims to provide a 'transparent umbrella' for the leather industry

Formed as recently as July last year, and officially launched this April/May, SLF, the Sustainable Leather Foundation, has already gathered an impressive list of partners, including fashion brands, test houses and tanneries, to its programme. With environmental, social, and economic responsibility essential in today's leather industry, its aim is to support the stakeholders and provide transparency for consumers. World Leather's technical editor, Mat Abbott, discussed its plans with the foundation's managing director Deborah Taylor.

Question. What gap do you see SLF fulfilling in the current landscape

Answer. There are a number of areas where SLF plugs gaps in the current landscape – the first being that, before SLF, no single organisation had looked at the whole environment, social and governance, or ESG, remit within one offering that is consistent in its application. The second area lies in our transparent approach, which is both fully inclusive and accessible. Our SLF Transparency Dashboard – it is our trademark – not only gives visibility to a facility's actual credentials, but it also clearly identifies and recognises the certifying organisation that has awarded the criteria.

This is absolutely the first of its kind. There are several different organisations that all provide similar types of certifications for specialist areas, but our dashboard gives comprehensive visibility for all in the value chain, including end consumers. This removes the confusion that sometimes exists around what all these certification standards actually mean. It also avoids the need for duplication of effort and resource when dealing with requests from brands and customers around sustainability risks.

Having a single reference point where all of a facility's information can be displayed is valuable, not just for the facility but also for the value chain customer and end consumer. It can also include added value details – such as renewable energy purchase, community social schemes, etc., that may not be an auditable element but nonetheless gives additional indicators of a company's values and good practice.

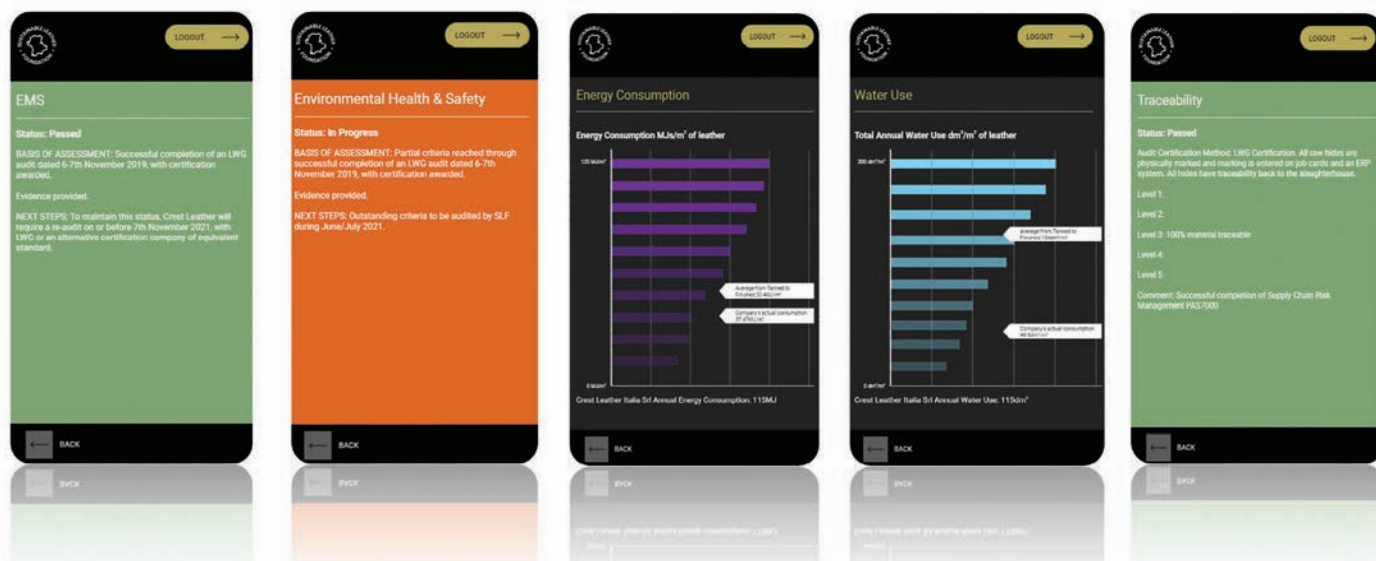
SLF is focused on ensuring that the end consumer is brought into the sustainability conversation within the industry – this is another area that has been missing until now. Our industry does quite well at talking to each other

but has been reticent to openly communicate with the external community. SLF is committed to creating consumer-focused information – in clear concise language that everyone can understand and relate to. It also resonates with their key concerns about raw materials and responsible, ethical production of the articles they purchase.



Deborah Taylor previously managed the Leather Working Group, is a Practitioner of the Chartered Quality Institute and is also an accredited SA8000 Social Systems Lead Auditor.

ALL CREDITS: SUSTAINABLE LEATHER FOUNDATION



You have emphasised SLF's not-for-profit organisation status – how important is this to achieving your goals?

It is very important, especially in the current climate. To build strong relationships with organisations across the industry spectrum, we have to be trusted as impartial, independent and not seeking to make a profit from the industry. Nevertheless, it is necessary to have a solid revenue stream to enable us to do the work we do – our ambitious vision can only be realised with the financial support of the industry, but the industry can trust that the funds will only be used for the work of the Foundation and the ultimate benefit of the leather industry. It is worth mentioning that to be legally registered as a Foundation, we have legal obligations around financial management to protect the organisation from profiteering; for example, we can't "sell" the Foundation for commercial gain. We are also legally registered as a Community Interest Company and to do that we have to specify the community we serve – and of course that community is the global leather industry.

You have a wide range of founding partners – how do they benefit from being founders?

Our founding partners represent the group of organisations that have understood the vision of SLF right from the start and have been willing to support us in this pivotal development year. It represents huge trust on their part as they had no results to gauge success on, but they did ultimately believe in the vision and the passion of our aims and objectives. The wide range of partners is also a testament to the value of SLF across the whole industry.

Among them are brands, tanners from different product sectors, chemical companies, machinery companies, innovation solution providers, testing houses and consultants. The difference in their size is also an indicator of relevance and value – we have small start-ups right through to long established multi-national companies. In terms of benefits, these organisations are able to constructively support our development process and act as a barometer for us in terms of progress. It really gives them credit as forward-thinking organisations that understand the need for transformative change and collective action to achieve a sustainable future for the leather industry.

The Dashboard is open source for the basic view and partners of SLF can click on each section to see the basis of assessment and metrics related to the result.

Similarly, with the SLF collaboration hubs – how do you ensure an unbiased approach from members?

The collaboration hubs are completely open and accessible to any interested party – you don't have to be a paying partner of SLF to participate. During our first round of meetings in April and May, clear terms of reference and a code of conduct were presented. These hubs represent an opportunity to bring collective experience, expertise and knowledge together in a pre-competitive space, in order to consider key challenges, risks and opportunities for our industry. There is no cost or barrier to access and all participants can either contribute to the discussions or just observe and learn from others. There is no vested interest for any party, other than creating positive actions for the industry.

Do you differentiate between legal and legislative requirements, and self-imposed procedures – as some countries will differ on this?

This is an interesting question. To have a basis upon which to create a standard, there must be an application of at least a minimum required expectation. Within that premise, it is accepted that not all legislative requirements or accepted norms will be consistent in all areas around the world. In order to combat this, we have a couple of solutions: the first is that wherever possible our starting point is to use already existing normative standards – these could be ILO Conventions or OECD Due Diligence when we are considering social aspects, or it could be ISO standards when we consider environmental management or health & safety. The second way we approach this challenge is to make it clear that a facility does not have to complete every section of the three ESG modules in order to be registered and listed on the SLF Transparency Dashboard. If an organisation doesn't have a legal requirement for a certain element and they don't wish to voluntarily comply with something that isn't required, then that part of their dashboard will remain "unassessed". The ability we have to apply notes to the dashboard that will explain situations like that make it unique in its ability to accurately and transparently show the full picture to value



chain customers. SLF doesn't discriminate, nor exclude, on the basis of ability – but shows the context of each individual facility's performance.

Audit modules are colour coded : Grey signifies not yet started that assessment; Orange signifies it is in progress, Green signifies that the section has been successfully assessed and Red signifies a failing section.

Can you explain or expand on the inclusion of third party audits and schemes?

Recognition of existing certification, irrespective of the issuer, is part of the inclusive vision of SLF. If a tannery has already undergone audits with LWG, ICEC, BSI, Intertek, Oeko-Tex, SGS, CSCB or any other credible organisation, then we do not require them to have yet another audit through SLF for the same criteria. A facility can provide us with evidence of their audit report and certification, which allows us to map that onto our dashboard and avoids duplication of effort and resource. This puts the freedom of choice into the hands of the facility about which certification organisation they would like to work with. For the brands and value chain customers, they will be able to see at a glance that if they require ISO14001, for example, then it has been achieved (irrespective of who certified it, as long as it is a credible party).

As an extension to this, we have already begun equivalency discussions with some certification companies to better align part of the SLF audit standard with their own offerings, to further streamline the equivalency approach in the future, which will provide even greater clarity for the end customers over what different certification programmes really mean.

Sustainability is clearly a buzz word at the moment, overused some might say. Do you worry that companies might sign up and see that as "doing their bit"?

This is a great question and I would even go so far as to say that some people use the word "sustainability" without really understanding what it means. It has to be recognised that truly "walking the walk" and not just "talking the talk" is a

huge undertaking for many companies – and will require a lot of energy, commitment and resource. The primary factor in SLF's deliberate use of the term "partner" in referring to organisations that join SLF, is to reinforce the concept of working in partnership – partnership between SLF and the companies that join, partnership between brands and their value chains and partnership between industry associations. It is important that brands and retailers feel secure enough to really work actively with their suppliers even if they are not yet where they need them to be. They shouldn't be afraid to continue working with a supply chain that isn't perfect – sustainability isn't a static destination but a journey of continued improvement that takes into account the principles of people – planet – profit.

What does the next 18 months hold in store?

Someone said to me recently "in the midst of striving to get where we need to be, don't forget to reflect on how far you have come already". Our first nine months have been exciting, challenging and rewarding in equal measure, with the recent launch of our trademarked transparency dashboard allowing us to visually demonstrate the value and effectiveness of SLF. Over the next 18 months, we will build on our achievements so far with the publication of the SLF Audit Standard this July, accreditation of the standard will follow, and we have a scheduled plan for workshops once travel allows. Further IT development is already in discussion. Remaining at the forefront of thought leadership for the leather industry, I don't want to give too much away right now — but watch this space over the next few months for more innovative solutions that are planned. 🌍

STARSPLIT



Photo: G. Maitan

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Face masks and social distancing were not a problem for the organisers of Leatherdays who had to run the programme online to its worldwide virtual audience.

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Leatherdays – online in Freiberg

Planning for the 9th Freiberg Leatherdays event demanded flexible thinking due to covid-19 pandemic restrictions. In the end, the planned hybrid two-day seminar took place online, being transmitted from a conference hall in Chemnitz, 40 kilometres from Freiberg. Leatherdays attracted over 130 attendees from 19 countries but it was clear that the organisers, FILK and VGCT, were aware of the problems with online presenting. They had thoughtfully included short “activity” sessions in the programme, with a fitness instructor providing exercise techniques to help stretch and loosen up attendees being seated in front of their screens for the presentations. Digital meeting rooms were also created for networking and informal chat sessions. *World Leather's* technical editor reviews the extensive programme without revealing what exercise he took in the virtual breaks.

Bio-based content has added importance

Commercial automotive leathers have a much higher bio-based carbon content, as much as 86%, significantly less when compared to synthetic alternatives that have almost 100%

fossil-based carbon. Extensive experimental studies centred on the bio-based content of leather are being done and Dr Autenrieth from Trumpler explained how examining the bio-based, renewable, content in leather can be mapped using Carbon 14; it is also possible to design and calculate other parameters such as COD, total dissolved solids, and many other technical parameters. Knowing this, the impact of a selection of chemical products on the bio-based content of leather can be quantified and finally linked with its biodegradability.

The second part of the Trumpler presentation was entitled ‘Closing the cycle’. Although tanners are primarily working to create a long lasting and durable material, Dr Jordi Escabros explained how the focus must also be put on what happens to a leather article at the end of its lifecycle. Absolute care needs to be taken not to create a permanent, possibly toxic, waste material out of a natural, readily biodegradable by-product by converting raw hide into leather. The design of suitable processing chemicals that are sustainable, low carbon footprint but with high renewable bio-based carbon content were considered; Trumpler's

findings, comparing industrial composting versus laboratory biodegradability testing of a range of tanning methodologies, showed that the theory does not always follow the physical facts.

Degradation

The development of more sustainable leather tannages has also required the development of methods to test and quantify the claims. Dr Marcelo Bertazzo, from the Spanish footwear technology centre INESCOP, presented their recently developed technology for the quantification and assessment of leather biodegradation processes in a fast and efficient way. The technology, based on ISO 20136, Leather - Determination of degradability by micro-organisms, whereby the test material is exposed to activated sludge from tannery wastewater, allows the accelerated assessment of such processes in a relatively short period of time – as little as 30 days, where understanding the biodegradation profile of materials would take years to degrade in nature. Based on comparative tests between field trials and laboratory work, it can be determined which leathers have the greater degradation capacity.



Profitable leather processing

Roman Faatz, from Lectra, explained that in any business, maximising return on investment and minimising the total cost of ownership are key. New technologies can assist in this by achieving efficiency gains to increase profitability and create sustainable value while lowering costs. In his overview of their digital solutions, he showed how their three steps to 'transform to zero' works, where its virtual prototyping solution DesignConcept helps optimise material usage and costs. Lectra's digital leather cutting solution Versalis can provide even more flexibility and keep waste to a minimum.

Traceability of chemicals

Dr Julian Schenten, from the Darmstadt University of applied sciences, covered a multi stakeholder project SNE. The System Innovation for Sustainable Development started in 2018 and will run until 2022. Part of the project targets more sustainable chemistry in the leather supply chain, dedicated to the challenges along the value chains of leather products. One of the main focus points of the project is traceability, where, in this context, traceability means the capacities of supply chain actors, facilitated by IT tools, to trace back chemical substances present in the materials provided by their respective suppliers.

A definition of sustainable chemistry

Rather than an in-depth look at products, Dr Peter Thoma from Zschimmer and Schwarz proposed a discussion on the topic of a definition for sustainable chemistry. This could add to the established sustainability that leather already has. The act of making leather, an upcycling process, reduces or limits the use of fossil-based alternatives. It also reduces the waste of a natural raw material and even when processed with synthetic tanning materials it has a high bio-based carbon content. Dr Thoma explained that more concentrated products, those with a lower water content, should be prioritised as these are more sustainable with regards resource utilisation, transport costs and ultimately a smaller CO₂ footprint. In terms of biodegradability, chemicals used need to have fewer residues after wastewater treatment, and have a lower impact on the environment without wastewater treatment. Care needs to be taken, however, as there is also conflict

Chemnitz city congress hall had been chosen as the venue for Leatherdays, had the physical event taken place in order to accommodate more people than the facilities at FILK would have allowed.

CREDIT: INSPI_ML / SHUTTERSTOCK.COM



here, especially where materials such as vegetable tannins are concerned. These, whilst being natural and biobased, can have poor biodegradability values. Any definition of sustainable chemistry therefore must include a high percentage of active matter, high value of biodegradability and be manufactured with a high percentage of bio-based raw materials.

Formaldehyde free

Melamine formaldehyde condensates or resin re-tanning agents are still used as common products in the leather industry. They give rise to homogeneous filling but generally contribute to free formaldehyde. Many projects to resolve this issue have been carried out. Covering this topic, Stahl's Dr Jochen Ammenn introduced a new and innovative chemistry of melamine ethoxylates as a potential substitute. The resulting polymers are stable and well applicable on leather. An insight into the synthesis of these products and their scope of application was presented for the first time, introducing formaldehyde free replacement for resin re-tanning agents. Aside from the benefit of being formaldehyde free, the melamine ethoxylates can be manufactured from partly renewable raw materials. They have a similar cost basis to the established resins, give similar softness and grain tightness properties but do lack a little in their filling power.

Natural materials

In a joint presentation, Dr Dietrich Tegtmeier and Dr Jens Fennen from TFL discussed the fundamentally true concept that leather is a natural and

sustainable material. This statement, however, must be used in the context that it is limited to the credentials of the auxiliaries used in the processing. Preferably, auxiliaries for leather making should be of natural origin, too, and there is often an expectation that bio-based materials are also intrinsically readily biodegradable.

Another potential dilemma of the industrial applications of many natural materials is competition with the food chain. With an ever-growing population, it would be much better to use raw materials that are not suitable for consumption. From this perspective, lignocellulose is an ideal base material for sustainable products for industrial use, because of its abundant availability, low toxicity, and relatively low cost. It is therefore not surprising that polysaccharides, such as cellulose and lignin are widely investigated as sources for bio-based polymers. Having recently purchased the Lanxess leather business, TFL presented both their cellulose/lignin based Puretec biopolymer and the newly acquired animal-based (shavings) X-Biomer. It was shown how each biopolymer undergoes functionalisation and hydrolysis in slightly different mechanisms, but that leather produced using the two can result in the bio-based content of the chemistry being as high as 62.9% in a fashion leather (from 16.7% for conventional chemistry) and 55% in an automotive leather (from 12% for conventional chemistry).

Softening polymers

Olga Ballus from Cromogenia Units discussed the advantages of using



fatliquoring polymers over traditional oils. Increasingly, stringent requirements make it difficult to select the appropriate fatliquoring agents. Fatliquoring polymers are an alternative to traditional oils, in that they confer very good properties without affecting the degree of softness. In this study, eight different products were examined, based on vegetable and animal oils, lecithins, sulphochlorinated paraffins, phosphoric esters, and fatliquoring polymers. The degree of softness, dye intensity and penetration, weight, tightness, and ageing were all assessed. The fat attached to the skin was assessed by extractable fatty matter, and product distribution in the skin cross-section was determined by means of two staining tests, Sudan IV and methylene blue. These tests allow detection of the neutral part (Sudan IV) and the hydrophilic part (methylene blue) of the fat in the cross-section. The results allowed relating the degree of softness to the penetration of the neutral part and to the HLB (hydrophile/lipophile balance) of the products. Sudan IV staining showed the distribution of the neutral part of the fats and the migration of these products at drying. Fatliquoring polymers improved the properties of conventional oils in terms of tightness, lightness, low extractability, and ageing.

Digital Hide Auctions

Digital online auctions are the sourcing and selling tools for the 21st century. In this presentation, Jo Gilet explained how Hidexe, a 2020 start-up based in Luxembourg, had developed tailor-made transaction software for the hide and leather industry, providing users a transparent and digital audit trail that is capable of handling all the administrative, legal, procurement and logistics in a highly automated manner.

Animal meets laser

For seamless tracing of hides and skins through the process chain, Erik Heller, Project Engineer for German based SLCR Lasertechnik, highlighted its latest technology that proposes to close the information gap between slaughterhouse and tannery. Utilising inline laser marking, hides can be made identifiable with the originating ear tag number in only a few seconds; the permanent mark withstands all tannery processing and can be a powerful tool in ensuring the purchase of sustainable raw material.

Chrome VI review

The recent consultation period for the proposed lowering of Chrome VI limits has been a focal point for the Institute for Creative Leather Technologies. Dr Stefan Davis gave a review of the ICLT research into the two main methods of detection to identify possible sources of interference leading to false results, and the limit of quantification with respect to the proposed new compliance limit. Dr Davis demonstrated areas for improvement and the consideration of alternative methods. There is evidence to suggest that the proposed detection limit of 1 ppm is unachievable with the current standards.

Flame retardants

Dr Ali Serdar Gultek, Istanbul University, spoke about their study on pyrolysis characterisation of resinous-flame retardant as applied to leather. Flame retardancy is important for upholstery leathers that are used in mass transport and furniture industries to achieve acceptable conditions during a fire. CFD, computational fluid dynamics, based fire models are currently used to design and assess fire safety designs. It is frequently mentioned in literature that resinous chemicals create flame retardant effects in textile materials due to their nitrogen content. Urea, melamine and dicyandiamide resins are regularly used in the retanning process, and the study found that certain resins could contribute to flame retardancy.

Lime splitting re-invented

The physical action of lime splitting has remained almost unchanged since the 1950s. Marc Oomens, from IM Innovating, gave an update on the Alpepak Predator lime splitter, revisiting a topic that was discussed at the 7th Freiberg Leatherdays in 2018, when the splitter was originally launched. With feed in conveyors improving operator safety, and a throughput rate of up to 400 hides per hour, almost double the standard rate, the newest addition to the splitter is the upper introduction conveyor. This technology removes the contact between the grooved top roller and the delicate grain of the hide and eliminates the subtle but very serious grain damage that can occur.

Temperature build-up

Dr Anke Mondschein, from FILK, presented a collaboration project

between Heusch GmbH, FILK Freiberg and TU Dresden, with a study on the temperature development during leather shaving, with the emphasis on studying the blade temperature using both infrared monitoring and the placement of thermistors on the blades themselves. Work on the temperature development was shown for both wet blue and chrome-free leathers when parameters such as feed rate and cut depth were altered. Water loss from the leather at different feed rates was also illustrated.

Engraving

Lutz Engisch of SWG Frankenberg discussed high-resolution laser engraving of embossing rollers for functional 3d structures. The laser technology can be used to create intricate 3-dimensional effects on engraving rollers for use in leather manufacture as well as other materials.

Perfect seams

In a very practical presentation, Margarita Schafer from industrial sewing machine manufacturer Durkopp Adler explained the importance, function, and method of different sewing seams. Besides the comfort and quality of leather products, decorative seams play an important role. High-quality decorative seams enhance the leather products and give it exclusivity. They also underline the high-quality design of the leather products and give them a personal touch.

Retanning substitutions

Dr Ezgi Ismar Sir, Kazlicesme Research and Development Centre, Istanbul, presented the results of a study on the use of waste proteins, in the form of leather shavings, to create biopolymers for use as retanning agents. Using different synthesis methods, for low molecular weight and high molecular weight proteins, the results indicated that a protein/acrylamide polymer had superior mechanical properties over a protein/acrylic acid polymer, as a filling material. Leather tear strength was substantially enhanced with the application of the obtained natural protein-based filler.

Mass customised manufacturing

Thomas Rodighiero, from Zund, outlined how personalisation needs to be understood, modelled and controlled. Not to be confused with personal branding or aesthetic gimmicks, personalisation at this level is



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giving the consumer full customisation at the point of sale to offer fashion on demand, local supply, or transparent supply chains without imposing total standardisation.

Zunds' modular approach utilises product data management (PDM) bundling that provide flexible options. The interaction features needed at point of sale in order to select variations has to be done in an acceptable form for an end user. Production organisation will need to cope with almost one-to-one production and material planning and assignment needs to be reconsidered. Printing individual materials, assigning stock and delivering information to suppliers on demand trends is also a necessary connection. Highly intelligent nesting algorithms assure that the consumption of material is kept to a minimum and therefore contribute to sustainability.

Chemometrics

The Leatherdays programme was completed by Dr Luca Iannarelli from the Spanish leather chemicals company ICAI. Chemometrics is the use of mathematical and statistical models for the extraction of relevant information on chemical systems, largely used in different industrial fields, as well as the leather industry.

It is already known that quality control operators must deal rapidly and efficiently with complex issues. Infrared spectroscopy is a fingerprint type technique frequently used in quality control laboratories because of its flexibility, speed and relative low cost. The mathematical interpretation of the spectral data using chemometric models allows for the analysis of simultaneous multivariate data sets, such as infrared spectra. Although chromatographic methods are much more sensitive, the application of chemometrics to vibrational spectroscopy ensures fast and cheap analyses with no sample treatment, and no specialist interpretation.

At the start of this review, we used the words flexible thinking — there were two more illustrations of this on the part of the organisers. An interactive quiz with answers hidden in some of the presentations ran through the two days and taking the place of the usual first night dinner was a task-based tour where participants had to solve puzzles from around the world!

The 10th Freiberg Leatherdays are scheduled for the 11th and 12th of May 2022. 🌐



Dr Benjamin Autenrieth is honoured by Martin Heise with the 2021 VGCT Recognition Award for the development of the C14 method.

THE VGCT 2020-2021 AWARDS

Dr Dietrich Tegtmeier, on behalf of the German Leather Technicians and Chemists Association, VGCT, and Dr Michael Meyer, from FILK, the Freiberg research institute, went online to welcome the audience. The Leatherdays agenda also included an awards ceremony.

Andreas Meyer of VDL, the German Leather Federation, announced the retrospective 2020 VGCT Silver medal to the late Jens Schwekendiek for his many years of voluntary service at the Kerschenstein leather school in Reutlingen.

The 2021 awards were presented by VGCT chairman Martin Heise of Smit & Zoon, to Dr Beate Haaser, who for many years worked for Südleider but is now Consultant for Waste and Wastewater Treatment, Environment and Energy (Rehau). The Recognition Award was presented to Dr Benjamin Autenrieth of Trumpler, for the development of the C14 method for determining the bio-based content in leather and other materials. This will allow comparative investigations between materials with regard to their composition.



Dr Beate Haaser received a 2021 award to recognise her tireless efforts on behalf of the leather industry and the VGCT, on whose board she has served for many years.

CREDITS: FILK FREIBERG INSTITUTE



Leather and the circular economy



Leather uses renewable raw materials



Waste from other sectors (meat and dairy) is the input for making leather



The material is long-lasting



Leather products are eminently repairable



Leather is in keeping with sustainable consumption and sustainable production and, thus, supports the UN's Sustainable Development Goals (SDGs)



Use of leather aids the battle against marine pollution, also part of the SDGs



The leather industry opens up pathways into the circular economy for companies of all sizes, including many thousands of small and medium enterprises



Leather content fulfils finished product manufacturers' desire to use recycled material



Finished products made from leather will meet criteria for green tax relief and for green procurement exercises



Leather manufacturing supports green employment commitments

Credit: WTP/Flaticon

Flaws in Farm to Fork

Farm To Fork, a strategy launched by the European Commission to make food systems fair, healthy and environmentally-friendly, celebrated its first birthday in May. COTANCE, the tanning industry's representative body in the European Union (EU) chose not to celebrate the anniversary. It was one of nearly 30 organisations with connections to the food industry to sign a joint statement to say they would not be baking any birthday cakes for the Farm To Fork idea. "We cannot celebrate this anniversary," the statement read, "as the strategy still raises too many questions in the European farming and agri-food community."

In December 2019, the European Commission published a document to explain a set of policy initiatives it calls The European Green Deal, which has the aim of "resetting" the organisation's commitment to tackling climate and environment-related challenges. The document describes such an undertaking as "this generation's defining task". Six months later, it launched Farm To Fork, saying this strategy was "at the heart of the Green Deal". It said: "The Farm to Fork Strategy is a new comprehensive approach to how Europeans value food sustainability. It is an opportunity to improve lifestyles, health, and the environment."

What's not to like? The problem for COTANCE and the other signatories of the joint statement, which include representatives of livestock farming, meat production, dairy

Multistakeholder group European Livestock Voice has flagged up nine contradictions in the Farm To Fork strategy. Leather industry body COTANCE is one of the signatories of a joint statement highlighting these nine "paradoxes".

and the promotion of rural economies is not that the strategy calls for the food system to integrate further measures to improve sustainability. It is not that it wants these measures to come in as fast as possible and without any compromise on food standards or food affordability. It's not that Farm To Fork says reversing obesity rates across the EU by 2030 is critical.

Synthetic solutions

Statements in the Farm To Fork strategy document that draw links between meat and the environmental and health problems the food industry needs to confront have gone



Executive Commission vice-president for the European Green Deal, Frans Timmermans, at the launch of Farm To Fork in May last year. Credit: European Commission

down less well. It says, for example: "Moving to a more plant-based diet with less red and processed meat and with more fruits and vegetables will reduce not only risks of life-threatening diseases, but also the environmental impact of the food system." It goes on to call for increased research into synthetic meat substitute products and the use of insects as a replacement source of protein, almost as though the strategy ought to be called Laboratory To Fork.

And this apparent snub of farms is the point. COTANCE and its fellow signatories complain that a comprehensive impact assessment would have been the appropriate way to engage in a concrete discussion on all these subjects. Their joint statement insists that individual studies on the different objectives of the strategy would not be sufficient. Instead, they want there to be an assessment of the whole plan, with cross-checking across the Farm To Fork proposals to determine what impact each will have, collectively, across farming and food production. "Such a study was promised by European Commission vice-president Frans Timmermans," the joint statement reads. "We now know that such an assessment will not be carried out."

Common sense

COTANCE and its fellow signatories continue: "We are asking for the application of three common sense principles." The first of these is to have a policy based on concrete data and scientific evidence, "not on ideology and political stances". Number two is to start talking about concrete tools and technologies, capable of creating a bit of enthusiasm in the farming community for the project. Principle number three is to make sure the requirements EU farmers and food companies have to meet apply equally to trade partners

outside the 27 European states that make up the bloc.

The signatories insist there are nine areas of the Farm To Fork strategy in particular that need clarifying. It calls these "the nine paradoxes". They stem from "the preconception that meat is not sustainable for the environment or our health". They point out that livestock farms have made great advances in recent years and now use fewer resources, but say many consumers remain unaware of these improvements because they live in cities and may never have seen a farm at close quarters. It is this disconnect that has given rise to the nine "paradoxes". They have produced a short video animation to make clear what the nine errors are.

Paradox upon paradox

The first of these is the doubt that seems to exist in the minds of the authors of the Farm To Fork strategy about the benefits of animal protein as part of people's diets. Eating meat is an efficient way for us to consume in a few calories all nine essential amino acids, along with 16 vitamins and minerals and 10 bioactive compounds. Easy access to these nutrients through eating meat is what has helped human beings become the intelligent species we are today, the groups behind the joint statement say.

Next, they take issue with the suggestion in the EU's Farm To Fork strategy document that livestock farming takes up too much land, 68% of the EU's total agricultural land. "It's not true that livestock farming takes valuable land away from crops for human consumption," they insist. "In Europe, the land used for farming and grazing has remained almost constant for the last 60 years, while the [human] population has grown by 125 million and the average life-span has lengthened by about ten years to reach almost 80 years of age." They argue that raising animals is complementary to human life because the animals have a diet based on plants that people cannot eat, including crop residues, grass and hay, and convert the cellulose in these foodstuffs into proteins of high biological value that we can eat.

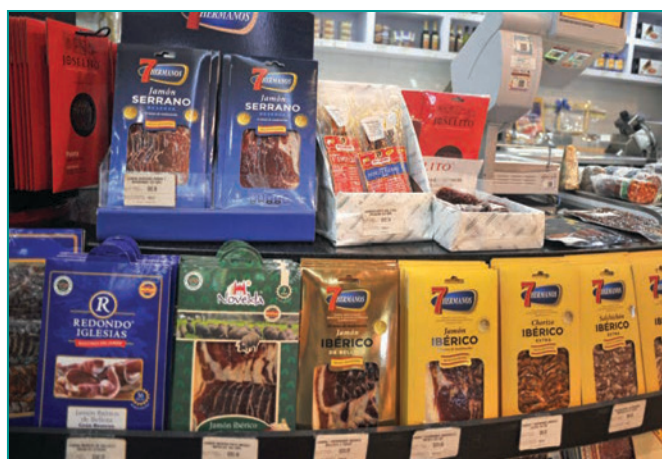
Protect the land

Paradox number three for the authors of the joint statement is the suggestion in Farm To Fork that moving away from red meat in our diets will be good for the environmental



A child watches a herd of cattle in Sweden. Livestock farming is about employment and support for rural communities as well as about food.

Credit: European Commission



The Farm To Fork strategy calls for additional measures to make it clear to consumers where food products come from. Critics wonder how ultra-processed and synthetic food, made with no territorial identity or cultural heritage, can be part of this.

Credit: European Commission

impact of food systems. “Where there is livestock production, there are people who are invested in protecting the land,” the video animation says. Their work prevents the land from being abandoned and prevents “hydrogeological instability” and the loss of biodiversity. The organisations behind the joint statement go on to say: “Meat is, increasingly, the scapegoat when it comes to CO₂ emissions, but, in Europe, livestock are responsible for 7.2% of greenhouse gas emissions.” Paradoxically, the elephant in the room here is not animals. It is the consumption of fossil fuels that are responsible for between 85% and 90% of greenhouse gas emissions in Europe, including energy consumption for industry, the residential sector and transport. The video points out that a return flight from Brussels to Rome would equate to greenhouse gas emissions of 500 kilos of CO₂-equivalent for each person on board. If each of these people consumed meat moderately for one year, the carbon emissions relating to the meat they eat would be 400 kilos of CO₂-equivalent.

Number four in the list of paradoxes is the economy. COTANCE and its partners see in the Farm To Fork strategy hints that the European Commission wants to downsize the European livestock sector. They point out that this could lead to importing meat from other parts of the world, in which meat production has a greater impact on the climate. “The economic impact of imports also needs to be accounted for,” they say. “The livestock is inter-connected with dozens of other sectors [including leather and leather products]. Reducing this sector [livestock] means putting other sectors in crisis.”

Keep livestock, lose chemicals

Next, the groups behind the joint statement address the paradoxes of animal welfare and fertilisers. They make the point that standards for animal welfare in Europe are among the highest in the world and, because this is something European consumers care about deeply, maintaining livestock production in Europe is a way of offering them reassurance. Farm To Fork lays out clearly the ambition to cut fertiliser use in Europe by at least 20% by 2030 and to have at least 25% of the EU’s agricultural land under organic farming within the same timeframe. The paradox here is that manure from

livestock should be an important part of any strategy to keep soil fertile without the use of chemicals. “Less livestock means less natural fertiliser, more chemicals and more desertification,” the video animation says.

The focus of paradox number seven is employment. “On average, each livestock farm guarantees seven jobs in rural areas,” the video says. Decreasing the number of livestock farms would make the challenge of addressing unemployment and depopulation in rural areas even more difficult. But Farm To Fork says that, even as societies become more urbanised, people want to feel closer to their food. “They want food that is fresh, less processed and sustainably sourced. And the calls for shorter supply chains have intensified during the current [covid-19] outbreak,” the strategy document says. It talks about enhancing the resilience of local and regional food systems and strengthening the position of farmers, for example through increased insistence on geographical indications to make it clear to consumers where food products come from. “This objective clashes with the globalisation of ultra-processed and synthetic food, made with no territorial identity or cultural heritage,” say the authors of the joint statement in presenting paradox number eight.

Feed the world

Bringing the list of paradoxes to a close is the subject of food security. Between now and 2050, the global population will increase by more than 2 billion, according to the United Nations Food and Agriculture Organisation. There will be many more mouths to feed and, on top of that, 70% of people in the world will live in cities. A much smaller section of the population will have to manage agricultural production to feed the world. “Based on this, it is more reasonable to support and appreciate livestock farms rather than denigrate them,” the signatories say. They add that, in the context of The European Green Deal, European Commission leaders would do well to acknowledge the advantage their part of the world has built up in livestock production and in agriculture more generally. “It would be unforgivable to waste this advantage,” they say. “There is a need to produce more with fewer resources and the livestock system is ready to play its role.”

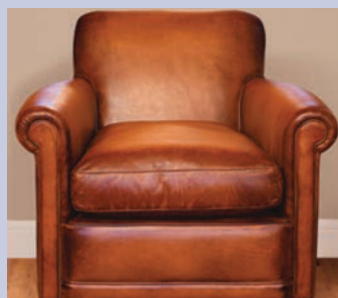


Reducing the livestock sector in Europe would affect the supply chains of other important industries, including leather.

Credit: JM Weston



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Leather's circular-economy credentials seem clear to the president of France's Conseil National du Cuir, Frank Boehly.

Credit: CNC

French resistance



Following claims that the French leather industry prevents 175,000 tonnes of waste per year from being destroyed and, instead, transforms it into a material and finished products that increase its value by more than 2,000%, an industry leader there has now explained in greater depth why he believes leather is an excellent example of the circular economy in action. Frank Boehly, president of France's Conseil National du Cuir, the country's main leather industry body, made his thoughts on the subject clear during a lengthy interview on the On(Ward) Fashion podcast at the end of May.

Points that Mr Boehly raises include the contention that it is "absolutely inappropriate" to attribute to the leather industry any of the environmental impact of livestock farming. He argues that, regardless of how many campaign groups claim repeatedly that animals are raised for leather, the message is "on the one hand completely false and on the other hand economically impossible". He points out that even a premium-quality French calfskin without any defects would account for no more than 10% of the value of the animal it came from and that the average price would be between 3% and 5% of the value. Mr Boehly then says that at least half of French hides

The president of France's Conseil National du Cuir (CNC), Frank Boehly, has continued his campaign to confirm leather's circular-economy credentials in recent weeks, not least in a stout defence of leather in a podcast called On(Ward) Fashion, dedicated to sustainability in the fashion sector.

and skins are of insufficient quality for tanners there to use at all. This raw material, he says, is sold "at very low prices" into markets in which manufacturers make "entry-level products".

He tells the presenter, Victoire Satto: "In the face of this, I ask you and I ask your listeners, who could be motivated to

raise an animal for the sake of 5% of its value? It just would not make any sense and it does not happen anywhere in the world. No cattle are raised for their hides. No sheep are raised for their skins. These animals are raised for one purpose only: to feed the human population."

Two options

The CNC president then says that, following animal slaughter, there are only two options regarding hides and skins: we can transform them or we can destroy them. "I have no hesitation in saying that the leather industry is a model for the circular economy," he continues. "What we do is take a waste product and transform it into raw material for other products. This is the very definition of the circular economy. We make this new raw material out of a by-product that is, in itself, useless." He repeats that efforts to place any of the weight of the upstream environmental impact of livestock farming on tanners is "completely inappropriate".

Mr Boehly concludes that, even if the leather industry across the world stopped using this raw material and not a single hide or skin anywhere were made into leather, the impact that livestock farming has on the environment would be unchanged; it would remain exactly the same. This, of course, is a separate question from the environmental impact that the leather industry, especially the tanning sector, has itself in its own production phase, but to ask the leather industry to include upstream carbon footprint of livestock farming is unfair, he insists. Companies that sell synthetic materials as alternatives to leather never seem to be asked to include a share of the upstream carbon footprint of the petrochemical industry in their environmental calculations, Mr Boehly points out.

The CNC president says that there are no French bovine hides going to waste at the moment, but that this is not the case with sheepskins. Small skins tanning has a strong tradition in France, but with skins having recently fallen in value to levels of €1 or €1.50 per piece, some of the material is now going to waste. A lack of local desire to collect and use wool these days has not helped.

Butterfly effect

Next in the podcast discussion, Frank Boehly addresses the question of the traceability of hides and he says it is something on which he expects France to lead the way. At the end of 2019, Lyon-based testing and research centre CTC released details of a system it has developed to use a high-power CO₂ laser-marking system to transfer a 14-character code to any hide. Marking only takes a few seconds per hide and can be automated. "Ear-tags are like an identity card for cattle," Mr Boehly says. Since the bovine spongiform encephalopathy crisis of the 1990s, there has been what he calls "perfect traceability of meat" and there continues to be surprise in many quarters that it has not been possible to trace hides in the same way. "It's all because we've been losing access to the animal's identity card as soon as we take the hide off," he says.

He likes the CTC solution, which involves capturing the information from the ear-tag at the slaughterhouse and printing a label with the same data and sticking that label to the flank of the hide. Obviously, a label of this kind cannot withstand the tanning process, which is where CTC's laser-marking system comes into play, marking the hide permanently with the same data. The system includes technology for reading the laser-marking. "Lots of finished-



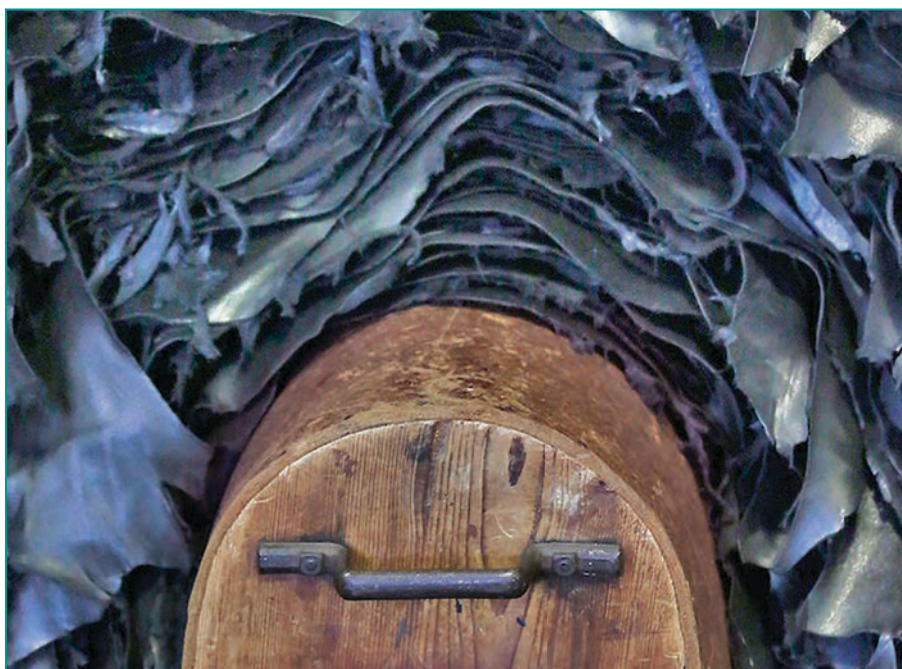
Frank Boehly continues to present a stout defence of the leather industry. Credit: Sustainable Leather Forum/CNC

product manufacturers would love to be able to tell a complete story, which would mean more or less tracing back to the animal and the farm it grew up on," he says. "And I have no hesitation in saying that France can lead the way in this."

In support of this contention, and in light of projects taking place elsewhere in the industry, he insists that almost the entirety of cattle hides that French abattoirs are able to supply to the leather industry could be marked using this system and maintain their traceability throughout the tanning process and into finished products. He thinks this could have a butterfly-effect influence and have the rest of the industry imitate what CTC has done in France.

Forum for progress

He believes an event such as the Sustainable Leather Forum, which the French leather industry is preparing to host for the third time in Paris on September 13, can help spread the word. It is international and it has speakers from across the whole of the supply chain, from hide supply to finished luxury leathers goods brands. Frank Boehly says previous editions have provided a platform for these companies to tell in detail the story of the success so far of their environmental and social responsibility programmes. "The forum has been able to instil in our collective consciousness the idea that environmental and social responsibility is not some



Sheepskin leather from French small skins tanner Bodin-Joyeux.

Credit: La Maison Bodin- Joyeux

unconquerable mountain-peak,” the CNC president says, “but is instead something that requires a strategy that consists of small steps and is accessible to everyone. There’s always more to do, but it’s a road we have to walk, a path along which we have to keep making progress.” He describes the information companies have shared and will continue to share at the Sustainable Leather Forum as an attempt to encourage companies of all sizes to begin, or continue, their march along the road.

In favour of innovation

Mr Boehly says he finds it “absolutely understandable” that consumers should express keen interest in innovative materials. “New materials can make people dream,” he says, “and helping people dream is marvellous. But reality is often different from dreams; that’s the flip-side of the coin. I don’t regard these new materials as alternatives to leather.” He points out that companies in the leather sector, too, are always searching for ways to improve their manufacturing processes and their products. The industry is in favour of progress and development, he insists.

His view is that, in its defensiveness in the face of unfounded criticism of leather on the part of some producers of synthetics, the leather industry is not seeking to defend itself, but rather to defend consumers. Consumers deserve

transparency and truth, he argues, and the leather industry complies readily with that demand. Finished leather undergoes so many tests before it goes into luxury leathergoods, furniture and automotive interiors that it is only fair to regard the industry as an open book, he insists.

Plastic is public enemy number one

“That’s not the case for some of the materials that have come onto the market recently,” he continues. “So many of them contain plastic and plastic is deadly for the planet. It breaks down into micro-particles. Those micro-particles are now showing up everywhere, even at the poles; they are in our water, in the air, in the flesh of the animals and fish we eat and are now in our own bodies too. This is a situation that is only going to become worse and we absolutely have to fight against it. Plastic is the number-one enemy of the planet and of everything living on it, including human beings.”

Earlier this year, Freiberg-based leather research institute FILK published a paper giving the results of tests it had carried out on a series of materials that are frequently presented these days as alternatives to leather. None of the substitute materials exhibited all of the performance characteristics of leather; some of them fell considerably short of leather’s levels on water vapour

absorption, water vapour permeability, flex- and tear-resistance. And some of the so-called alternatives contained chemicals of concern.

Frank Boehly welcomes the findings of the FILK report warmly. He points to the non-leather materials often mixing plastics with whatever natural material the manufacturers parade before the market. “There’s a simple reason for that,” the CNC president says. “The natural materials they are using do not have enough resistance to withstand the manufacturing process for finished products. That’s why their producers have incorporated synthetic materials into the mix. These materials are not what they seem and are not what the companies behind them claim them to be. This is why someone needs to stand up for consumers in all of this; they are entitled to know what they are buying. So-called ‘apple leather’, for example, has nothing to do with leather. I’m not even sure it has very much to do with apples.”

Resistance movement

He argues that the misuse by some of these companies of the term ‘leather’ in their product names is proof that they believe the mere idea of leather can add cachet to their ranges. For them to do this in parallel with denigrating leather in their marketing output strikes him as being redolent of cognitive dissonance, or in his phrase, “just a little bit schizophrenic”. In any case, his advice is that the suppliers of alternative materials should stop this practice because the term ‘leather’ is protected by law in France and many other countries and the law, he says, could hardly be clearer. Leather means the material comes from an animal. “Companies cannot use the term in conjunction with any old vegetable material,” he continues, “and if they do, consumers will know right away that the material in question is not leather. And they should also know that the synthetic materials they are being offered are likely to fall far short of the properties consumers expect from leather in terms of tear-resistance, flex-resistance, breathability, water-resistance and so on; the FILK report makes that clear.”

In spite of all the competition, fair or unfair, Frank Boehly is left believing that people in the industry he represents can continue to hold their heads high, proud of the work they do and of the product they make. “Leather,” he concludes, “is truly an amazing material; its qualities are absolutely extraordinary.” 🌱

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Meat companies in Italy supply 35% of all the hides Gruppo Dani sources. Some are so close to the leather manufacturer's operations that the hides arrive on the day of slaughter without the need for salting before going into the tanning drums.

Credits: Gruppo Dani

Milestones for Gruppo Dani



Arzignano-based leather manufacturer Gruppo Dani is claiming a world first. It has achieved certification under the ISO/IEC 17033:2019 standard, which covers companies' ethical claims and the supporting information with which businesses have to back up these claims. Gruppo Dani says it is the first leather manufacturer in the world to achieve this milestone but that it is also an accolade for its supply chain partners.

The group says ISO 17033 certification will provide its customers with reassurance that all the hides it processes come from farms that raise livestock for food purposes only. It says this has confirmed Gruppo Dani's commitment to the circular economy because it confirms that its work is based on "ennobling a by-product from the food industry that would otherwise go to waste".

Chief executive, Giancarlo Dani, says he has modelled the company's commitment to sustainability on making sure every phase and every supplier in the value chain are part of the overall effort. He speaks highly of joint projects in which Gruppo Dani has worked with other companies in the Veneto leather cluster to help operators learn and improve together, helping the wider Italian leather industry to stand

One of Italy's most prominent leather manufacturing groups is celebrating a series of recent achievements on its path towards embracing circular-economy principles.

out. "It's satisfying to see that we are making a concrete contribution to a better world," he points out.

How it started, how it's going

He often talks about the importance of the leather cluster that has Arzignano and Chiampo, in the province of Vicenza, at its core. Mr Dani explains that leather production took off there soon after World War II. The local leather industry now has 875 production sites in the area and employs a combined total of 11,500 people, making up more than 20% of all of the manufacturing jobs in this part of Italy.

Gruppo Dani is one of the fruits of that boom. The chief executive explains: "The business started in 1950, through the efforts of my father. He worked in agriculture, but he acquired a house in the centre of Arzignano with a courtyard at the back and he began making things with his hands while he was sitting out in the courtyard." As the family grew to number nine children, becoming what Giancarlo Dani describes as "a typically large Veneto family", turning his ability to make things into a business became an economic necessity for his father. And now that business has grown to be one of the most important in the global leather industry.

Raw material origins

Other recent milestones include ICEC TS SC 410 certification, which is awarded by Italy's quality certification institute for the leather sector, ICEC, for good practice in raw material traceability. Gruppo Dani has received a rating of 'excellent' from ICEC for this aspect of its supply chain. As part of its submission for certification under ICEC TS SC 410, the group presented "precise and complete mapping" of the origin of the hides it sources, identifying the slaughterhouses and farms where the material originates.

This analysis shows that 35% of the hides the group uses are from Italy, with 21% coming from Spain. Germany is the next biggest source with 9.5% of the total, followed by France with 7%, Poland with 6.5%, Denmark and Norway with 4.5% each, Ireland with 3.5% and the UK with 1.5%. This makes Europe's contribution 93% of all the hides the group uses. The remaining 7% comes from North America, 4.5% from Canada and 2.5% from the US.

Sourcing from these origins is one of the elements of the group's strategy that makes it possible for Gruppo Dani to produce high-quality leather for a wide variety of applications. The chief executive says it is obvious to him that farmers and the people who work in abattoirs in Italy and throughout Europe, in particular, are committed to high standards because this shows in the quality of the hides that his company buys. "We are practically on the doorstep of many of our suppliers," he says, "and this is helping us make this a circular-economy activity." By-product from the local food industry is upcycled locally by skilled people, creating jobs and wealth.



Giancarlo Dani, Gruppo Dani chief executive.

High demand

Giancarlo Dani can recall working in the past with poor-quality, dried-out, salted hides that had travelled thousands of kilometres before reaching Veneto. Now, in contrast, he says: "We now receive many of our hides the same day as the animal goes to slaughter. We receive them from abattoirs that are, perhaps, 100 kilometres away at most. These hides go straight into the drums and that means we don't even need to salt them."

After his teams of leather technicians and their colleagues across the Veneto cluster carry out their work, the resulting finished leather is what he calls "a product of great excellence". And it is a product that is in huge demand among high-profile brands for use in their bags, shoes, cars, furniture or belts.

Downstream partnerships

Gruppo Dani's sustainability efforts also include downstream supply chain partnerships with some of these brands. One success it celebrated recently was an agreement under which accessories brand Montblanc became the first company to sign up for a carbon emissions offsetting

programme that the leather manufacturing group has established.

The two partners have calculated that Montblanc should offset 200 tonnes of CO₂-equivalent to compensate for the environmental impact of leather it sourced from Gruppo Dani in 2020. They have not shared the full details of this calculation, but Montblanc chief executive, Nicolas Baretzki, says he likes the idea of compensating for emissions now and using the figures as a further driver for "progressively reducing emissions". They will aim to do this through, for example, research and development and process innovation.

Offsetting is based on the Clean Development Mechanism, a mechanism provided by the Kyoto Protocol that allows companies to offset the emissions they create by purchasing credits to finance sustainable projects in developing countries, with one credit compensating for one tonne of CO₂-equivalent. The money from the purchase of credits is invested in projects approved by the United Nations. In Montblanc's case, the credits it buys will help fund a renewable energy project in Guatemala. 

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Mulberry Exchange brings pre-owned bags to new owners. The brand has a team of artisans in Somerset who are restoring thousands of bags each year.

Credit: Mulberry

A new approach to sourcing leather



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SMEs



RECYCLED



GREEN JOBS

Leathergoods brand Mulberry is celebrating its fiftieth anniversary in 2021. One of a whole series of initiatives that it has launched so far to mark this special year promises to be long-lasting. Perhaps it will remain in place for the next 50 years.

It chose Earth Day at the end of the April to launch a whole new manifesto called 'Made To Last', saying that its aim is to be a pioneer of "a hyper-local, hyper-transparent" supply chain, through which it will establish transparency from farm to finished product.

Lowest-carbon

Part of the manifesto is the promise of a "transformative approach to leather sourcing". To put this into practice, Mulberry says it will "work in partnership with industry-

Mulberry wants its customers to think of buying its bags as a way to contribute towards saving the world.

leading tanneries to develop the world's lowest-carbon leather", made using hides sourced from environmentally conscious farms.

Mulberry still makes more than half of its products at its own factories in Somerset in the south-west of England. It says those factories are now carbon-neutral and that everyone who works there receives a salary that complies with a fairer work campaign called Living Wage. The



leathergoods brand says it wants all of its suppliers to follow this example with their own employees.

It is already working on a first range of bags born of the 'Made To Last' manifesto and will launch it later this year. It says this collection will reflect the future of the business, establishing a model that it will replicate with a network of trusted partners, "laying the foundations for our next 50 years".

School shoes

Long-lasting Mulberry bags are far from new. The company knows of bags it made soon after starting up that are still in use today and it wants to make sure the bags it produces in the years to come will also have the qualities required to endure half a century of use. Sustainability manager, Rosie Wollacott, says she thinks the idea at the heart of this, that long-lasting products are good, resonates with people of all ages. This is an interesting comment at a time when the entire industry is working hard to reach and appeal to millennials and Generation Z consumers.

Ms Wollacott asks: "What was the first experience of shoes for those people? It was probably school shoes and they were probably in Clarks to buy them, not in a supermarket. And what they probably learned was that these were shoes that would last, even when they were running around the playground kicking a football. They learned that these shoes were better, worth queueing up for, worth paying more for."

Used but useful

Mulberry has a restoration team in Somerset that repairs and reconditions around 10,000 bags per year. It has also established Mulberry Exchange to bring restored, pre-owned bags to new owners. "A humble bag can have many lives," it says. And when its bags reach "the end of the line" and can no longer be repaired and reused, a new strand of the manifesto will come to the fore. Mulberry will still buy those bags back and what it will do with them is pass them on to one of its strategic leather manufacturing partners, Scottish Leather Group (SLG).

Used bags will go into the waste-to-energy programme that SLG runs at its tannery in Bridge of Weir and the products will, therefore, help power the production of new leather to make new bags, emphasising the circularity of leather, the leathergoods brand says. "We want to take responsibility for our whole supply chain, from farm to end of life," says Mulberry supply chain director, Rob Billington. "And for the first time, we're talking to abattoirs too, to engage them in the same message. It's not good enough for us just to look after our own little bit." He says the in-house team liked the campaign for 'Made To Last', but did not feel that it was saying anything revolutionary. "We didn't think we were doing anything untoward," Mr Billington continues, "but the reaction was brilliant, with people telling us we were pioneers. It seems that, all of a sudden, we are ahead of the pack. We don't know all the answers, but we are committed to finding solutions because we know we are part of the problem."

Energy drive

SLG director James Lang, the current chairman of industry body Leather UK, says he finds the 'Made To Last' manifesto fascinating. He would like more brands to take a leaf out of Mulberry's book. "Leather is good," he says. "As Mulberry has done, more companies need to say this, and have the data to back it up." SLG's own claim has, for some time, been that it



SLG innovation and sustainability director, Dr Warren Bowden, at the group's waste-to-energy plant in Bridge of Weir. Credit: SLG

already makes "the lowest carbon-intensity leather in the world".

Recovering energy from its own waste materials is an important part of this. It has had an on-site thermal energy plant at its Bridge of Weir tannery since 2010, taking what was previously waste that went straight to landfill and converting it into energy for heating recycled water for use in the manufacturing process. SLG's innovation and sustainability director, Dr Warren Bowden, was the driving force behind the waste-to-energy plant and sees the tie-up with Mulberry as a good use of the technology platform he and his colleagues have put in place at Bridge of Weir.

"The whole 'Made To Last' campaign is incredibly refreshing," Dr Bowden says. "There is a need for us to be more positive, a need for us to talk up leather. Mulberry may not be the only example of a company doing that, but the idea it's putting forward, that a bag can help save the world, is a good hook to hang the message on. It's good to present positive examples and it's important for us to make the case for the circular economy to become central to how the leather industry presents itself."

Court of public opinion

Back at Mulberry, Rob Billington says the company is aware that it can and must continue to become better at what it does. "We can get better; we can be a bit radical," he says, "but we can't say that and then do nothing about it." Little gets past the scrutiny of the court of public opinion these days, which is fine if you have nothing to hide. To this end, he would like to challenge the whole of the leather industry to do more on traceability; he laments the lack of a standard for this and hopes there will be one in the near future.

Such a standard would be a welcome additional tool as brands place themselves more and more in the public eye. "It's changed," he says. "We used to talk to the press. We used to concentrate on catwalk presentations, on making sure we had David Beckham sitting in the front row. But that's gone; now you have to talk directly to the consumer."

This change is affecting leather manufacturers, too, Dr Warren Bowden says. He explains: "We wouldn't normally speak to consumers, but our customers are now presenting our story to the consumer. We have automotive customers who present our leather in their cars with a quick-response code that will take the consumer straight to our website. We have to be part of that tapestry, making it clear to consumers that leather is all about upcycling, all about low carbon." 🌱

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Factoring product disassembly and the reuse of component materials into the design process is a crucial step towards circularity.

Credit: Kering

Links for luxury's loops



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RECYCLED

International fashion and leathergoods houses Gucci, Balenciaga, Saint Laurent, Bottega Veneta, Alexander McQueen and Brioni all call luxury conglomerate Kering home. Literally derived from the Breton word *ker*, which means home or a place to live, Paris-based Kering is supposed to be pronounced like the English word “caring” (according to its website). Particularly harmonious with this self-portrayal is the group’s determination to assert its duty of care for our common home, the Earth, a line of thinking it plainly, yet boldly, weaves throughout its Circularity ambition: coming full circle.

The foundational threads to the concept of a closed loop, with which Kering intends to encircle its stable of luxury brands, at least, are inevitably linked to regenerative agriculture and, at its very root, healthy soil, the group tells readers of the report. It describes this as the feeder-like starting point for the natural and renewable materials it uses, including leather, wool, cashmere and cotton. According to the document, the François-Henri Pinault-controlled company’s environmental profit and loss tool has marked tier four of its supply chain – “that is, with the goat herders, in the

While the classic luxury experience was crafted to surprise and delight, a new narrative is gaining ground, with deep roots in preserving the beauty of the natural world and its resources through well-publicised circular initiatives.

cotton fields and the cattle pastures” – as the cradle for its “biggest” environmental impacts, amounting to around 32%.

How the group plots the “coming full circle” aspect of its ongoing ambitions, with regard to handling leather and finished leathergoods according to circular economy principles, is arguably of greatest interest to the wider leather industry. Here, *World Leather* unpicks the most salient parts

of the report with regard to Kering's circular leather efforts across three of its luxury houses, in particular: Gucci, Saint Laurent and Balenciaga.

Natural cycles

In direct homage to the role of nature in the leathergoods ecosystem, the year 2020 alone saw Florence-headquartered Gucci collect 25 tonnes of leather offcuts and make them available for reuse as fertiliser, the group says. Further, the brand recovered and was able to reclaim or recycle 27 tonnes of leather scraps as part of its in-house Gucci-Up ("Gucci upcycling") scheme between 2018 and 2020. This was achieved via close collaboration with Italian non-governmental organisations and social cooperatives, although the report does not go into detail. Also in 2020, the house moved to reuse all its discontinued non-branded leathers (and fabrics) either internally or via "external channels", including donating these materials to non-profits.

Similarly, Paris-based Saint Laurent has begun to incorporate surplus leather from its handbag creations into the design of matching small leathergoods. Kering states that the majority of leather cutting now takes place within Saint Laurent's own ateliers, so as to enhance efficiency and ensure access to the "most advanced" technology. Interestingly, the brand reports that over the past few years an unspecified "exclusive partnership" has allowed it to make "new" leather materials in place of virgin ones through upcycling its own leather cuttings. According to Kering, the latest example of this is due to be launched for autumn-winter 2021, as part of the house's Sunset line of leathergoods.

Meanwhile, Saint Laurent says that most of the new stores it is opening throughout Europe, the Middle East and Africa have been decorated (back of house) with the leather offcuts from previous collections, which have been assembled into flooring. Reusing existing leather in this way has "significantly" reduced the brand's overall environmental impact, Kering suggests. Not only does the conglomerate recognise that leather is long-lasting (able to be used and later reused), but it further acknowledges that recycling leather plays a sizeable part in its brands' sustainable production of luxury leathergoods and interiors.

With Balenciaga the group points to the brand's spring-summer and



Kering considers the full lifecycle of leathergoods in its report.

Credit: Kering

autumn-winter 2021 collections, which it describes as featuring "sustainable" materials and the upcycling of second-hand clothing and accessories, including purchased deadstock or surplus military boots, motorbike trousers and women's leather shoes. 93.5% of all virgin materials used in the collection have met Kering's own, open-sourced, standards for sustainability in terms of raw materials and manufacturing processes, the group states in Circularity ambition.

Reconnecting materials

Finding a way to link all its houses under what it describes as a centralised dashboard is central to Kering's broader circularity goals. Monitoring stock levels, with the intention of keeping goods in circulation across the group, is key. Using a data analysis method developed over the past two years, the group tracks the levels and location of each brand's unsold or obsolete stock and subsequently incorporates employee friends and family sales, own-brand outlet organs and "pilot schemes" to extend the life of products.

Sharing surplus fabrics among ateliers is another crucial thread to the wider Kering circularity tapestry, with upcycling and recycling considered the best option for logo-branded materials that cannot otherwise be sold or reused. The group is currently working with engineers CETI (Centre Européen des Textiles Innovants) and the ESTIA institute of technology in south-west France to develop ways to robotically

disassemble shoes, handbags and complex clothing, which it hopes will allow for the recycling or reintroduction of finished articles' component parts as raw materials. Learning how a product is taken apart will in turn feed back into the design process, the report says, enabling group fashion and leathergoods designers to rethink their creative efforts in a style that makes eventual disassembly and recycling easier, building in circularity. 



Kering's chief sustainability officer, Marie-Claire Daveu.

Credit: Sustainable Leather Forum, Paris.



Made from leather waste Respin fibres by Spinnova can be woven or knitted to make material for shoe uppers and other applications.

Credit: Spinnova

Circular material from leather waste



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SMEs



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GREEN JOBS

Wet blue, crust and split supplier KT Trading has joined forces with Finnish bio-materials manufacturer Spinnova to produce what the two companies are calling “a new category of sustainable and circular textiles”. Their intention is to use waste from the tanning process as a raw material for a Spinnova yarn that can then be woven or knitted into material for shoe uppers and other applications. They intend to begin pilot-scale production of the new yarn, which they have called Respin, before the end of 2021.

Spinnova saw the light of day in 2014 as a spin-off from the VTT Technical Research Centre of Finland and has worked since then to produce versatile, recyclable yarns from, mainly, paper-grade wood pulp. Its technique is based on fibre-suspension flows, mechanically pulping the fibres and controlling the flow in such a way as to form a yarn.

After going through a drying process, the yarn is ready for spinning and textile producers have already begun using the spun yarn to produce woven and knitted fabrics. Early adopters of these materials include fashion brands H&M and Bestseller and outdoor clothing brand Bergans. Some early fabrics have involved blends of Spinnova’s wood-based yarns with more familiar fibres, including cotton.

Innovative yarn producer Spinnova is adding leather to the list of natural raw materials it can work with. KT Trading is lending its weight and its waste to the idea. Two major footwear brands, adidas and Ecco, are waiting in the wings.

Step forward for circularity

The chief executive of KT Trading, Kristian Geert Jensen, says he views setting up the Respin joint venture with Spinnova as a step forward in making the leather industry more circular. Based in Switzerland, KT Trading has close ties to Ecco Leather and other tanning companies. KT itself works more as a wholesaler of semi-finished leather, sourcing pre-selected material from leather manufacturers, storing it in its own distribution facilities and supplying it when required for tanners



to turn into finished leather. The company is, therefore, in the slightly unusual position of having tanners as its suppliers and as its customers. Ecco Leather, for example, is both.

It describes its mission in these terms: "Supplying high-quality calf and veal hides as wet blue, crust and splits to customers." It claims its years of experience, its high-quality distribution and storage facilities and its attention to detail in selecting hides are the key qualities that allow it to fulfil this mission.

Closed-loop shavings

Ecco's in-house research department began paying attention to Spinnova three years ago. Now, wet blue shavings from the Ecco Leather tannery in Dongen in the Netherlands will provide, via KT Trading, some of the initial raw material that will be shipped north for conversion into Spinnova's Respin yarn. The partners expect a pilot phase of production to begin before the end of this year. A pilot plant for Respin will be part of a new manufacturing set-up that is already under construction at the yarn manufacturer's headquarters in Jyväskylä, a university city in central Finland. Spinnova chief executive and co-founder, Janne Poranen, says his company is delighted "to close the leather loop" with Ecco and KT Trading as partners.

Kristian Geert Jensen confirms that the woven and knitted fabrics resulting from Respin yarns will be suitable for use in footwear uppers, which goes some way towards explaining Ecco's interest. In fact, it is a compliment to Ecco's vision that it saw this as a possibility three years ago because Spinnova's work with Bergans only became public knowledge in 2019, followed by announcements about its work with Bestseller in 2020 and with H&M this year. All of these big-name partnerships are, however, the fruit of years of proof-of-concept work.

Mr Jensen says that the Respin materials deriving from leather waste will provide a good alternative, not to leather, but to the synthetic substitutes that some brands use instead of leather. "Leather is an amazing high-quality material with unique properties," he insists, but he points out that, in spite of extensive effort, tanners have so far been unable to find any "real sustainable solution" for the type of waste that will now go into Respin. "With this new textile, we have taken another step towards completing the circular economy for leather," the KT Trading chief executive adds. "We have made a truly unique breakthrough."

Breakthrough technology

Respin can be a breakthrough for companies that want to move away from petrochemical-derived synthetics, and processing leather waste will not require new development of Spinnova's technology. The system it has put in place for transforming waste from the wood industry into yarn, which it has referred to as being "disruptively sustainable", will work with waste from tanners, too.

"It's very simple," says chief technology officer and co-founder, Juha Salmela. "It's the combination of two factors, the raw material sourcing and the technology we use, that makes this work." It is clearly more difficult to achieve than he makes it sound; otherwise, all fibre producers would quickly become "disruptively sustainable". Spinnova produces its yarns "without complex chemical processes" and without dissolving anything. Lifecycle assessment results show figures for carbon footprint and water consumption that are "minimal compared to anything else", Mr Salmela says. Naturally, the process generates no microplastics and is, in fact, zero-waste.



Spinnova yarns spun from wood waste have already led to partnerships with prominent brands. The Finnish company will use exactly the same method and the same technology to produce its Respin. Credit: Spinnova

Cornerstone investor

In May, the yarn manufacturer announced its intention to go public by listing on the Nasdaq Helsinki First North Growth Market. Furthermore, it has been able to announce this important step with the backing of another major partner, adidas. The global sports group has committed to being one of Spinnova's cornerstone investors. As part of the agreement, adidas has "committed irrevocably" to invest €3 million in Spinnova when the company's initial public offering launches.

Adidas has said little so far about what it hopes to gain from this commitment, but it seems safe to assume that, like Ecco, it sees potential for using Spinnova yarns in its products, including woven or knitted Respin in some of its shoes.

"We feel we are an ideal match with the adidas sustainability strategy," Janne Poranen says. "Our scalable technology platform can make fibre out of renewable materials that are abundantly available, provide full recyclability and quick biodegradability." These abundantly available, renewable raw materials now include waste from the leather-making process. 🌱



Close shave. KT Trading chief executive, Kristian Geert Jensen, insists that the tanning industry has been unable to find any "real sustainable solution" for managing wet blue shavings. Until now. Credit: KT Trading



As Diego Della Valle, the CEO of leathergoods group Tod's, mulls stepping back from the day-to-day running of the company, he considers how the market has matured – and says he has changed his mind about what luxury entails.

Late lessons in luxury

When Italian leathergoods and footwear company Tod's announced in April that LVMH Group had bought a 6.8% stake for €75 million, taking its share from around 3% to 10%, observers speculated this would be another example of a brand being swallowed into a large group as the market consolidates. But Tod's CEO Diego Della Valle has insisted he has no plans to sell the company – yet – and if “something happened” in the future, it would only be with LVMH under long-time friend Bernard Arnault. Mr Arnault agreed: “The friendship with Diego Della Valle and his family goes back over 20 years, a relationship cemented by common human and professional values. We are very happy to further reinforce this partnership.”

Mr Della Valle owns 63.64% of shares in Tod's, a company launched by his grandfather in 1920 and which now includes the Roger Vivier, Hogan and Fay brands. Speaking as part of the *Financial Times* Luxury Summit, he explains that as the luxury market has changed markedly over the past three to four years, his thinking has had to do the same. “Companies are bigger, growth is now in the double digits. Before, successful luxury companies grew less quickly, in the single digits, and the product was super exclusive. Now, that's changed.”

MameKurogouchi x Tod's is a new capsule collection created with Japanese rising star MameKurogouchi.

CREDIT: TOD'S





While the company's results for the first quarter 2021 showed 19% growth, with strides in ecommerce as well as in China – where it was also up 28% over the pre-pandemic Q1 2019 – it has been struggling with declining sales over the past few years. Mr Della Valle admits it was time for a rethink on strategy and on where growth will come from in the future. He steadfastly believed in the power of its classic shoe design, which changed very little from year to year, and which had been sought after through the generations. But now, he admits that change is necessary. "I now think that 50% of designs need to stay close to our story – super quality, Italian lifestyle," he says. "The other 50% is still high quality but has more creativity, a cool product that speaks to the younger generation. This formula will guarantee longevity of the company but will still reach new customers."

He says the company misjudged some factors in recent years: the expectations of the 20 to 30-year old consumers, the power of the Chinese buyer, and the dominance of shopping through a smart phone. One other change he resisted but has since revised: his view on sneakers. He believed they had no place in a luxury footwear brand – but the market told a different story. "When I was at university in Bologna, I was one of the few who wore blue jeans with white sneakers. I didn't believe sneakers were luxury," he says. "Now, we make 100,000 pairs of sneakers per month!"

Digital dominance

Younger customers have an evolving view of luxury, and to capture that audience means the company has had to embrace ecommerce. "Four years ago, I told my managers that the web will be dangerous for luxury companies, in terms of timeframes; we work slowly while that works quickly. This was the wrong decision, but now we are working in the right way, we work quickly to arrive at our goals." Does this mean he is risk averse? asks *Financial Times* editor Roula Khalaf. "I need to guide with a prudent touch as I have 10,000 employees," he replies. "But at the same time, I have a lot of curiosity."

The company has now invested in digital strategy and marketing, as well as changing the frequency of collections. Rather than launching two per year, products are unveiled every two months or so, backed by heavy marketing and social media campaigns.

Fresh view

In April, Tod's appointed Italian style influencer and digital entrepreneur Chiara Ferragni, who has 24 million followers on Instagram alone, to its board. She represents the voice of youth, says Mr Della Valle: "The appointment was an easy decision. We want the young people to understand what we do; so we ran through ideas about solidarity, welfare and younger people."

A youthful input has also been injected through a partnership with London-based arts school Central Saint Martins, where students have been given free rein to design small collections, tested in Tod's T Factory, its ideas lab. The designs can be created quickly, with a number reaching the shelves in limited editions.



A miniature version of the Timeless T bag.

CREDIT: TOD'S

"I try to test what I like. It is about new ideas, new communication. Everyone is free to do what they want," says Della Valle.

Post pandemic, the retail strategy will also have a shake-up. It is thought traditional stores won't provide the level of experience that customers expect – stores in the future will not be 'an experience', with a focus on pop-ups, showcasing young designers and limited editions, alongside the traditional stores and digital sales.

Changing of the guard

Tod's has had a particularly tough 12 months due to the pandemic, like most in the sector, but it can now "see the light" and expects 2022 to be an important year in terms of a sales turnaround. Despite the challenging global economic scenario, it is confident in its product and strategies.

As Mr Della Valle approaches 70, will he be willing to retire from the family company he has steered for so many years? The answer is yes, he says, putting full confidence in his brother Andrea, the vice-chairman. He needs some time to prepare a succession team, but he is hoping to relinquish 70% of the role in the near future – although letting go completely will be difficult. "I love to have some control over what people are doing, thinking of new ideas, marketing – it stops you getting old," he confesses. "Nobody believes that I will step back! But I am ready." 🌐

MAGAZINES



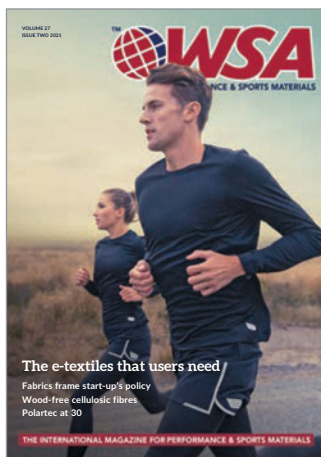
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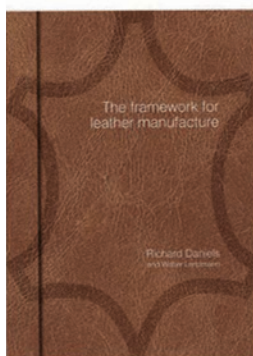
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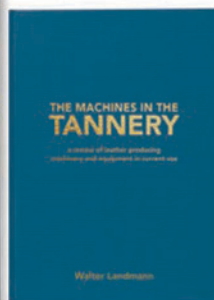
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