

WORLD LEATHER

ESTABLISHED 1987

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

April / May 2023 | [Published 28th April 2023]

Volume 36, Number 2

All roads lead to automation
Italy celebrates sustainability
Decision time on deforestation
Nothing To Hide: series finale

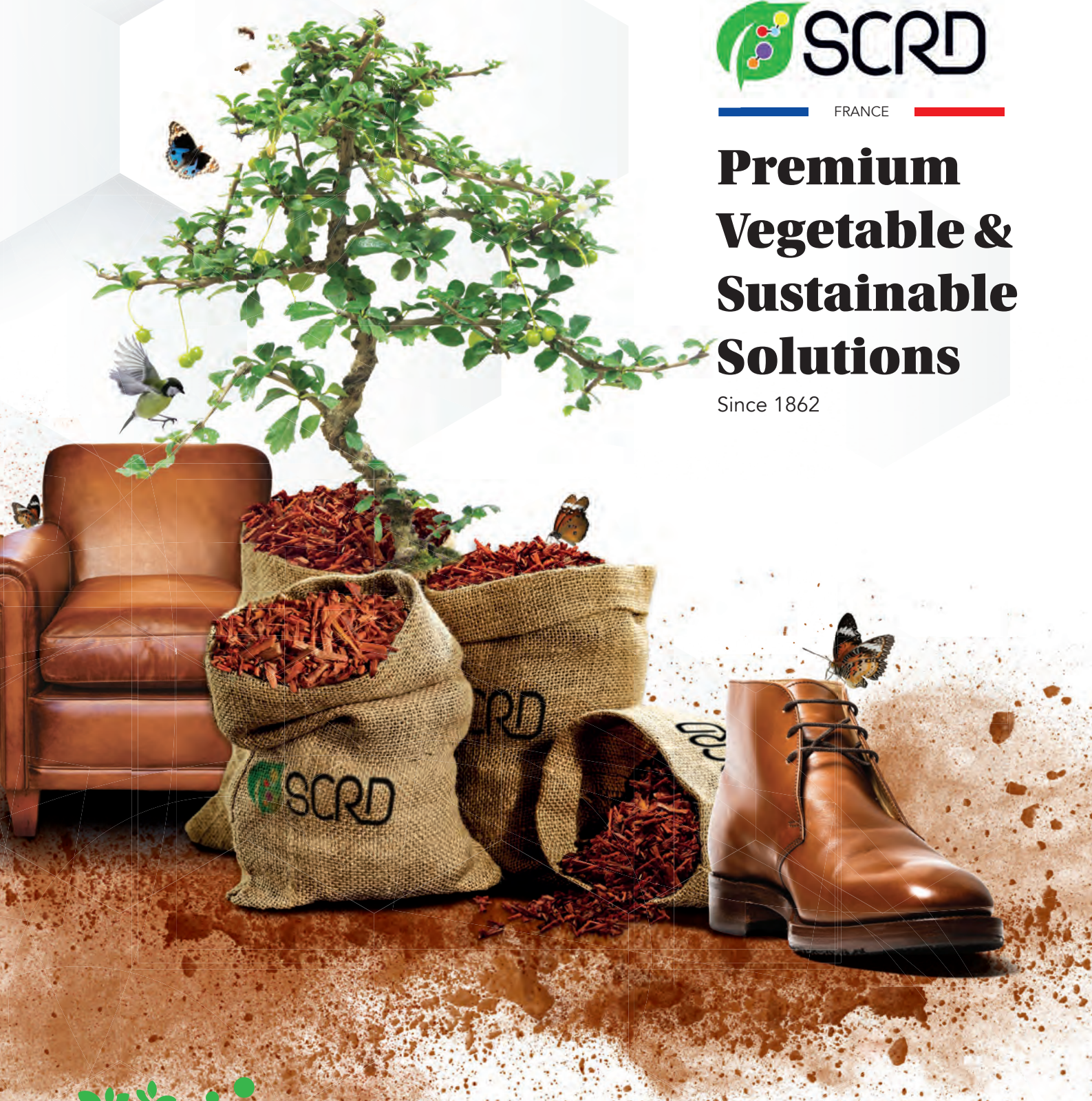




FRANCE

Premium Vegetable & Sustainable Solutions

Since 1862



For every SCR D bag purchased, we plant a tree

CONTACT US: 201 rue Louis Blériot - 76620 LE HAVRE +33(0)2 35 19 66 20



www.scrd.fr
www.vegdyes.eu

News

- 2 News map** News highlights from around the global leather industry.
- 4 Industry & Innovation** New technology, new ideas from leather industry suppliers and service providers.
- 6 Leatherscene** People from around the industry and famous lovers of leather who have made the headlines in recent weeks.
- 10 Backtrack** Headlines from www.leatherbiz.com, the industry's best and most complete news website.

Special Report

- 8 Last tango in Dubai** A second APLF event in the United Arab Emirates fell flat for some but at least provided confidence that covid-19 is no longer likely to put off exhibitors or visitors from attending upcoming major shows in Shanghai and Hong Kong.

Leather Leaders

- 14 A force for good** The new president of the International Council of Tanners (ICT), Bekir Burak Uyguner, sets out his priorities for the next two years.

Nothing To Hide

- 17 Nothing To Hide: Essay Fifteen** We bring our update of the Nothing To Hide series to a close with this new version of the fifteenth and final essay. The focus this time is on the industry's commitment to, and progress in environmental, social and governance (ESG) frameworks.

Technology

- 22 Automation revolution** An introduction to the series of articles we intend to run, in this and in future issues, on the rise in the use automation and artificial intelligence in the leather industry.
- 25 In where it hurts** Digital inspection technology is revealing the hidden cost of grading errors in tanneries.
- 28 Embrace the benefits** Suppliers of chemicals and machinery for leather manufacturing are already embracing the increases in sustainability, efficiency and safety that automation technologies can offer.
- 33 A cut above** Footwear manufacturer Berkemann has made the processes in its cutting room digital. Cutting technology and software systems from Zünd have led to better yield and less waste.

Leather and the Circular Economy

- 37 Thought Leadership: No turning back** A panel discussion at the recent CICB Sustainability Forum made it clear that Brazil intends to move forward with nationwide, industry-wide traceability technology.
- 42 Thought Leadership: Progress reports** Italy's leather sector now has two decades' worth of sustainability reports to show how far the industry has come.
- 46 Circular Stories: Open to debate** When a media company in Germany set up a discussion between tanner Thomas Heinen and anti-leather campaign group PETA, the result was a calm dialogue rather than a shouting match.
- 50 Circular Stories: Bags of courage** It takes bravery to be an entrepreneur in Argentina, the founder of leathergoods brand Tasche reveals.

Beast to Beauty

- 54 Always leather** Something that Italian designer Annagiulia Giannetti was sure of after completing a general fashion course in Florence was that her first love, leather, needed to be at the core of her creations.

At a Glance

IBC Advertisers' index



The World Leather team has been publishing a 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: A bag from Italian designer Annagiulia Giannetti, who sources most of her materials from a specialist leftover leather marketplace.

CREDIT: ANNAGIULIA GIANNETTI



World Leather iPad edition

The world's best leather industry magazine is now available to download on iPad from www.leatherbiz.com



@WTPworldleather



@WTPworldleather



[linkedin.com/showcase/wtpworldleather](https://www.linkedin.com/showcase/wtpworldleather)



@WTPworldleather

World Trades Publishing Ltd 2023.
Contributions: The editor welcomes news items, articles and photographs for consideration and possible publication but no responsibility can be accepted for the loss or non-publication of such material. Opinions expressed by individual contributors do not necessarily reflect the view of the editor or publisher.

• Whilst every effort is made to ensure accuracy in reproduction, no responsibility can be accepted for the technical content or for claims made by manufacturers for product performance that are published. Publication in World Leather cannot be construed as an endorsement for a claim or product by the publisher.

• World Leather is published 6 times per year by World Trades Publishing, The Old Stone House, Teeton, Northampton NN6 8LH UK. Price UK £90, ROW: £150 per year (six issues).

Graphic origination by WTP. Print by Bishops Printers, Walton Road, Portsmouth, Hampshire PO6 1TR, England. All rights reserved. ISSN 0894-3087

World Leather Publishing 2023: All rights reserved. No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means mechanical, electronic, recording, photocopying or otherwise, without the written permission of the publisher. World Leather®, Tannery of the Year® and Nothing to Hide® are registered trademarks of World Trades Publishing Ltd.



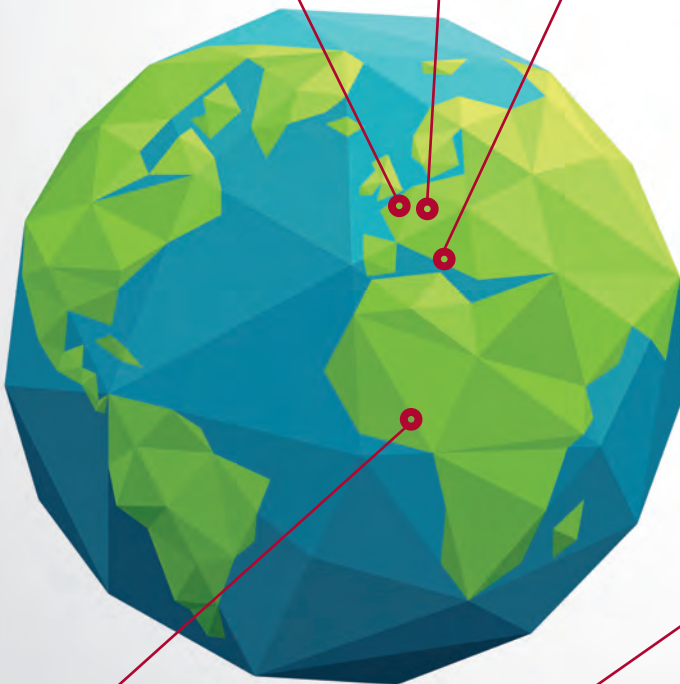
GERMANY German leather industry association VDL has won the authority to issue legal warnings to companies that misuse the term 'leather' in their advertising. Under competition laws in Germany, some trade associations have the right to issue legal warnings to companies whose marketing messages are likely to mislead or confuse consumers. VDL is now one of the organisations that have the credentials to take that action.

THE NETHERLANDS Finnish biomaterials company Spinnova has said its Respin project is moving forward. Respin involves taking fibre from leather waste to spin yarn that can then be woven or knitted. Spinnova has said that following the success of pilot trials, it has agreed with Ecco Leather to proceed towards commercialising the product and to go ahead with a feasibility study for the first commercial Respin factory. Its plan is to locate the first Respin factory in the Netherlands, the home of Ecco Leather and its principal tannery.

FRANCE Cattle slaughter in the European Union was down slightly in 2022 compared to the previous year. Recently updated figures give a total cattle slaughter across the 27 member states of just under 22.7 million head last year. This represents a decline of 1.6% year on year. As in previous years, France's total was by far the largest, with around 4.25 million head for the year, a fall of 4.4%. Germany's total was just under 3 million head, down by 8.4%. Spain, recorded figures of 2.6 million head, an increase of 2%, and Italy had almost 2.8 million head of cattle go to slaughter last year, up by 0.8%.

ITALY A prominent member of the Tuscan tanning industry, Piero Caponi, has died at the age of 87 after a short illness. Mr Caponi inherited a leather manufacturing group from his father and went on to become "one of the great tanners" of the region. He was a regular visitor to the Brotini Mario tannery in Castelfranco di Sotto until recently, and, according to local reports, will be fondly remembered for his generosity and pioneering spirit.

SWITZERLAND The Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) celebrated its fiftieth birthday in March. CITES was drafted as a result of a resolution adopted in 1963 at a meeting of members of the World Conservation Union. Now based in Geneva, CITES aims to make sure international trade in specimens of wild animals and plants, and in their by-products, including exotic hides, skins and leather, does not threaten the survival of any species.



BURKINA FASO Hide and skins broker Ivan Belloni H&S and tannery Mona Industry recently announced an exclusive agreement for the distribution of leather throughout Europe. The commercial agreement aims to strengthen the production capacities and sales network of the tannery. Set up in 2019 in Ouagadougou, the capital of Burkina Faso, the tannery produces a mix of sheep and goat leathers with a capacity of approximately 150,000 skins per week.

ETHIOPIA The Ethiopian Leather Industries Association (ELIA)'s All Africa Leather Fair event was held in Addis Ababa from April 20 to 22. The association expected more than 200 exhibitors, including tanneries, leathergoods manufacturers, garment producers and wider industry supply chain companies and institutions to take part. ELIA president, Redwan Bedada, added that 15,000 local and 2,000 overseas visitors were expected at the show.



ERITREA Leather production is one of a number of sectors in which the long-standing president of Eritrea, Isaias Afwerki, would like to see activity, investment and growth, even though he views the industry as being part of "the primitive economy". Laying out plans for development of Eritrea's economy earlier this year, Mr Afwerki said pastoralism generated a substantial proportion of the east African country's revenues and required investment to add value and reach its "full latent potential". He said this included leather manufacturing and the production of meat and dairy.

THAILAND The organisers of the APLF exhibition have announced that they will run APLF ASEAN in Bangkok for a second time. They launched the event in October 2022 and have now said it will do so again this year. The dates for the second edition will be October 25-27. They said they had taken the decision to hold the show for a second time "to satisfy the needs of all participants that wish to return to the heart of ASEAN to do business".

JAPAN Leathergoods brand Loewe has opened its first ever standalone store specialising in the repair and maintenance of its leather products. It has called the store ReCraft and is located in Osaka. The site houses a full-time leather artisan. "ReCraft is about the joy of craft beyond the new," Loewe said. "It is a commitment to breathing fresh life into long-cherished possessions."

US Automotive leather group Pangea received the "Excellent Technology & Development Award, 2022 for the 3D Surfacing – Leather" from Toyota Motor North America (TMNA), at the car manufacturer's annual R&D purchasing supplier developments business meeting in April. The highly prized award was given in recognition of a proprietary process to enhance design expression for leather on seat surface materials.



INDIA Campaign group Solidaridad has set up a pilot plant at Super Tannery Limited in Kanpur to convert fleshings into tallow oil. The pilot plant, capable of processing six tonnes of fleshings per day, will allow for the sustainable conversion of the waste into oil. Currently, much of the waste is sent to open incinerators where it is dried and burnt, whilst some is converted to tallow in open digesters.

PAKISTAN Pakistan's leather industry achieved export revenues of \$640 million in the first eight months of the current financial year, July 2022 to February 2023. This figure represents a fall of 3.1% year on year. This decline has come in spite of substantial growth in its footwear exports. Over the eight-month period, shoe manufacturers exported almost 16.4 million pairs, bringing in revenues of \$125 million, giving growth of 37.8% in volume and of 20% in value year on year. Tanners shipped 7.2 million square-metres of finished leather, earning \$113.9 million, falls of 27.2% in volume and of 15% in value.



ARGENTINA Figures for the first two months of 2023 show a substantial increase in cattle slaughter in Argentina. Official statistics for January and February show a combined total of almost 2.25 million head. Compared to the first two months of 2022, this new figure represents an increase of 12.3%. Full-year figures for 2022 showed cattle slaughter of 13.5 million head in Argentina. This was an increase of 4% year on year.

AUSTRALIA Figures from the Australian Bureau of Statistics suggest that the number of agricultural businesses raising beef cattle increased by 4% between 2016 and 2021. However, over the same timeframe, the number of farms raising dairy cattle across Australia declined by 23%. Meat and Livestock Australia said there were an extra 1,811 businesses running beef cattle in 2021 compared to 2016. However, there were 83,000 fewer dairy heifers (it described these as "the building blocks of a herd").

BANGLADESH The leather industry in Bangladesh registered growth of 2.5% in export revenues in the first nine months of the current financial year, reaching \$919.7 million. The period covers July 2022 to March 2023. Leather footwear exports contributed the largest amount with \$534.2 million, a small decline year on year. Shipments of finished leather contributed \$93.2 million; this was down by 19.5%. Growth came from exports of leathergoods; these products brought in revenues of \$292.3 million, up by 20.8% year on year.



IULTCS announces winners

The International Union of Leather Technologists and Chemists Societies (IULTCS) has announced the winners of its Young Leather Scientist Grants for 2023.

Under the current IULTCS programme, it awards research grants to three scientists under the age of 35. Its aim is to help support the work of young talent in the leather sector. This is the ninth year in which it has made the awards.

The Tyson Foods Young Leather Scientist grant for basic research has gone to Dr Ilaria Quaratesi from the Leather and Footwear Research Institute (ICPI) in Romania for her work on a project with the title 'Non-toxic and biodegradable supramolecular additive with flame-retardant and antimicrobial properties for the tanning industry'. The award is for €1,500.

Another of the awards, the Erretre Young Leather Scientist Grant for machinery and equipment, has gone to PhD candidate Vasanth Swaminathan from the SRM Institute of Science and Technology in Chennai, India, for a project called 'Reduction of carbonisation and gas emissions using mechanotronics-based intelligent laser beam machining for cutting leather with better environmental measures for operator health'. This award is for €1,000.

The Dr Mike Redwood Young Leather Scientist grant for sustainability and environmental research has gone to Dr Yue Yu from Sichuan University in China for a project called 'Controllable oxidation and degradation of lignin via H₂O₂/O₃ from biomass into a retanning agent for sustainable leather manufacturing'. This award is also for €1,000.

Water wins

Pro-leather campaign platform Leather Naturally celebrated World Water Day in March by reiterating the industry's commitment to best practice in reducing water consumption.

It quoted 2020 figures that put the average consumption of water in tanneries in Europe at about 600 litres of water per hide, or around 121 litres per square-metre of finished leather produced. It said this meant a pair of shoes made from this leather would have a water impact of 44 litres.

It added that innovative technologies are already in place driving further improvement.

Glutaral added to REACH recommendation list

The European Chemicals agency (ECHA) has added Glutaral to its most recent REACH authorisation recommendation list.

Glutaraldehyde is a tanning agent used in the production of wet white type leathers



Agents from Brazil's environment agency Ibama inspecting a timber operation for links to illegal deforestation.

CREDIT: IBAMA

New rules for cattle and leather

The European Parliament has approved a law to ban imports of commodities if they are linked to deforestation. An area larger than the EU was lost to deforestation between 1990 and 2020, according to the Parliament, with EU consumption causing around 10% of losses. The new rules are expected to reduce greenhouse gas emissions and biodiversity loss.

As we reported in December, companies will be required to collect precise geographical information about where the commodities they source have been grown, so that these can be checked for compliance.

They will also have to verify that these products comply with relevant legislation of the country of production, including on human rights, and that the rights of affected indigenous people have been respected.

Cattle and products that derive from cattle, including leather, are part of this. COTANCE, the tanning industry's representative body in Europe, lobbied unsuccessfully for leather to be exempt from these rules.

and its inclusion on the list will mean companies are required to apply for authorisation to continue using it.

Glutaraldehyde was entered on the Candidate list of substances of very high concern (SVHC) in 2021. At that time, industry representative body Leather UK put out a statement saying: "While the inclusion of glutaraldehyde on the candidate list is not expected to be a major issue for the leather sector, it does increase the risk that glutaraldehyde could be included on the REACH authorisation list, which would mean far more onerous obligations and the expectation that its use would ultimately be discontinued."

In the ECHA proposal, the volume range in scope of authorisation is between 1,000 and 10,000 tonnes per year.

According to ECHA, the European Commission decides which substances are included in the authorisation list and what conditions apply for each substance. If a substance is included on the list, it can only be placed on the EEA market or used after a given date, if an authorisation is granted

for a specific use. Authorisation processes aim to enhance substitution of substances of very high concern when technically and economically viable alternatives are available. Until this is achieved, the goal is to ensure proper control of risks for human health and the environment.

Further expansion at PrimeAsia Vietnam

Leather manufacturing group PrimeAsia has announced a new expansion project at its tannery in Ba Ria-Vung Tau province in southern Vietnam.

This expansion, which the company aims to complete in 2024, will increase the facility's production capacity to 8 million square-feet of finished leather per month.

As part of the new expansion project, PrimeAsia Vietnam will add retanning and colouring capacity. It will develop a new retanning and colouring mezzanine at the site and will include eight new fully automated drums.

Several other major equipment upgrades will also be part of the project, including the

addition of a fourth pigment finishing line to support growing demand for athletic leathers, new drying and conditioning equipment, added equipment in the areas of splitting, shaving and buffing, and a significant upgrade to the wastewater treatment plant and solid waste handling technologies.

New equipment includes radio frequency drying technology from Cartigliano, which PrimeAsia has selected to be able to dry leather more uniformly, more quickly and with increased softness.

Developments at ISA TanTec

Tannery group ISA TanTec is moving its Auburn Laces and TrimTec divisions, makers of leather laces and trims, from China to its Vietnam facility in June.

They will be housed in Saigon TanTec, which is closer to its footwear customers. This will help the group react more quickly to market demand, it said.

Separately, ISA TanTec has announced a partnership with Other Half Processing (OHP) to develop and expand a regenerative hide and leather supply chain, which it has named "Raising Livestock, Regenerating Landscapes".

Verified using the Generalized Regenerative Agriculture Sourcing Specification (GRASS) protocol, which aims to support regenerative farmers and ranchers in the US, it marks the first commercially available US-based regenerative cattlehide supply chain.

Bioyarn to keep leather in use

Biomaterials company Spinnova published its annual report for 2022 in early April. In the document, the company said its Respin product, a yarn it makes from leather waste, enhances leather's circular-economy credentials.

Spinnova launched Respin in 2021 as a joint venture with Ecco Leather and wet blue, crust and split supplier KT Trading. It ran a pilot production trial of Respin at its plant in Jyväskylä, Finland, during 2022.

The success of this pilot led Spinnova and Ecco to announce earlier this year that they would forge ahead with plans to commercialise the product and would carry out a feasibility study for the first commercial Respin factory, to be located in the Netherlands, the home of Ecco Leather and its principal tannery.

Co-founder and chairman of Spinnova, Janne Poranen, has confirmed that Respin is now moving from its pilot phase to the industrial phase. Once made into Respin yarn, leather waste can be a key component of new woven or knitted materials for use in a variety of applications.

In its report, Spinnova said: "It is crucial

for any leather that is produced to stay in use and circulation for as long as possible, and Respin provides a solution to this through upcycling waste into new textile fibres."

Finishing masterclass from ATC

First-year students at the University of Northampton's Institute for Creative Leather Technologies (ICLT) had an introduction to practical leather finishing when representatives of leather chemicals manufacturer ATC presented a masterclass in March.

Using leather donated by Scottish Leather Group, students learned from industry experts Julian Osgood and Tony Beaumont how to create finish formulations and implement them in finishing techniques.

The week-long masterclass has been a regular fixture on the student calendar for more than five years.

ZDHC success

German chemicals group Pulcra recently announced that 350 newly introduced products are now registered and certified on the ZDHC gateway. This means that all leather chemicals in the Pulcra portfolio are compliant to the ZDHC MRSL.

The company said it regarded ZDHC certification as important recognition of its "commitment to excellence in sustainability and product safety". Pulcra said it firmly believed in a successful future for leather as "a highly sustainable natural material with a long tradition of craftsmanship and beauty".

Energy efficiency

Izmir-based tanning group Sepiciler are starting to reap the rewards after the completion of an energy efficiency project.

It has implemented improvements to process control, upgraded steam and hot water systems and put in place a new energy management system.

Early results have shown annual reductions in electricity use of 18%, natural gas savings of 40% and a reduction of 1,145 tonnes in CO₂ emissions.

TCLF partners sign Declaration

European social partners for the textiles, clothing, leather, and footwear (TCLF) industries have signed a joint declaration committing them to strengthen their engagement and joint work for a positive future for employers and workers in south-east Europe, following a two day conference in Bucharest.

With more than 400,000 workers, the TCLF sectors in south-east Europe are of significant importance but face increasing challenges, such as high energy costs,

increasing wage pressures, an aging workforce and difficulty in attracting younger generations. There is also concern about unfair purchasing practices among brands.

Secretary general of leather industry body COTANCE, Gustavo Gonzalez-Quijano, said: "The EU Social Partners of the TCLF ecosystem have done their part in mobilising their ranks in Bulgaria, Romania, Croatia, Serbia and North Macedonia. Now the ball is in the court of the governments in these countries for supporting their industry with effective strategies complementing the EU strategy for the TCLF sector."

ESG reports

Leather chemicals group Royal Smit & Zoon has published a new environmental, social and governance (ESG) report, covering its business activities in 2022.

It said highlights from the list of advances it made in 2022 include expanding the number of its products to have secured level-three conformance (the highest level) with the Zero Discharge of Hazardous Chemicals (ZDHC) programme. A first set of Smit & Zoon products achieved this in 2019; by 2022, the company has said in the new report, this expanded to include the whole of its key range of products.

Leather chemicals producer Stahl has also published its 2022 ESG report, outlining its achievements over the last year. These include a 3% reduction in CO₂e for Scope 1 and Scope 2 emissions, compared to the 2021 values, and progress with Life Cycle Assessments, with data now available for 160 products. The report also highlighted that 73% of sales revenue was realised through ZDHC level 3 products.

Sorensen Leather gets animal protection endorsement

Danish leather supplier Sorensen recently launched a new, fully traceable, leather collection called Vita.

Taking the Latin derivation for "life", Vita is the only leather approved by Dyrenes Beskyttelse (Animal Protection Denmark).

Produced in close collaboration with hide trading company Himmerlandskod, from their Nordjysk Naturkod project, the leather is made from hides exclusively from animals that pasture in North Jutland in Denmark.

Using laser engraving, the hides can be traced back to the individual animal, from farms that adhere to the strict requirements of the "approved by Animal Protection Denmark" scheme. Fewer than 50 farmers are certified by the scheme that has a high focus on animal welfare, including environmental measures. 🌱



Julian Osgood appointed as IUL chairman

The International Union of Leather Technologists and Chemists Societies (IULTCS) has appointed **Julian Osgood** as new chairman of its International Union of liaison and Communication Commission.

After many years of dedicated service, outgoing chairman, **Dr Christine Anscombe**, has decided to take a step back from the role, with Mr Osgood taking up the position with immediate effect.

With over 35 years' experience in the industry, Mr Osgood now works as a consultant for French leather chemicals company ATC. He started his career, after graduating from the British School of Leather Technology in 1987, with UK based Carr Tanning, where, coincidentally, Dr Anscombe was his manager. He spent a large part of his career at leather finishing chemical specialists Earnshaw.

SLTC hands over to new president

The UK's Society of Leather Technologists and Chemists (SLTC) held its 2023 international conference on April 22 as a hybrid event, hosted by the University of Northampton.

Following a varied programme of presentations during the day, the society held its annual dinner dance where the official handover of the presidency was carried out.

Handing over the presidency, **John Hubbard**, from FIRA International, presented the chain of office to **Professor William Wise**, from the Institute for Creative Leather Technologies (ICLT).

Leather sector responds

France's leather sector has reported export revenues of close to €18 billion for 2022, an increase of 22% compared to the previous year and double the figure for 2015.

On reporting these results, industry representative body, the Conseil National du Cuir (CNC), said 67% of total export revenues had come from shipments of leathers and 28% from footwear. It said footwear exports had increased by 26% year on year, with French manufacturers shipping 26 million pairs to Spain, 21 million pairs to Italy, 16 million pairs to Germany and 12 million pairs to Poland.

Only 3% of export revenues came from shipments of raw materials in 2022, but CNC said France was the world's third-largest exporter of raw hides and skins. Almost 75% of all raw French hides and skins exports went to tanners in Italy last year. The total value of raw hide and skin exports was €230.7 million, an increase of 5% compared to the figure for 2021.



COTANCE president attends Tashkent event

The current president of European leather industry body COTANCE, **Manuel Ríos**, (pictured) travelled to Uzbekistan at the start of April to attend the UzCharmExpo event as a guest of honour.

COTANCE said it welcomed the work that **Fakhriddin Boboev**, chairman of the national leather industry association, Uzcharmsanoat, is doing to integrate the leather sector in the central Asian country into the international leather trade.

After joining the International Council of Tanners a couple of years ago and leading a trade delegation to visit the Lineapelle and Tanning Tech events in Milan in 2022, Mr Boboev extended an invitation to the COTANCE president to travel to Tashkent this year to see the UzCharmExpo at first hand, with the aim of strengthening ties between European tanners and their Uzbek counterparts.

At the formal opening of the event, Manuel Ríos said: "Uzbekistan has great potential in the leather sector, with abundant raw material resources and a favourable trade and investment environment."

He urged tanners in Uzbekistan to lend their weight to efforts to make the global leather industry more environmentally responsible and increasingly connected to the digital economy. He said: "Tomorrow, every sale of leather will have to include certified data about the material's social and environmental performance."

He then invited leather manufacturers in Uzbekistan to take advantage of the opportunities that the recently launched Leatech international master's programme will present for helping develop future leather industry professionals.

Finished leather exports increased by 17% year on year, reaching €256.6 million.

Commenting on the figures, CNC president, **Frank Boehly**, said: "The French leather sector stands out for its exceptional savoir-faire and its commitment to making long-lasting products that will help the wider fashion industry become more sustainable. We are witnessing a genuine revolution in the way consumption works. In the face of this, our sector has been able to renew itself and adapt to the challenges of today's society."

Tax refund hangover for Burberry

The chairman of London-based leather-goods brand Burberry, **Gerry Murphy**, has joined a number of high-profile figures who are calling for the UK government to restore tax-free shopping for tourists.

Refunds of sales tax for shoppers from overseas ended after the UK definitively left the European Union (EU) at the start of 2021; an EU-wide policy of allowing shoppers from other parts of the world to claim back sales tax no longer applied in the UK from that point on.

As a result, Mr Murphy said the UK had become "the least attractive shopping destination in Europe for non-European customers", and he said internal data that Burberry has compiled proves this.

He told BBC radio that sales to US customers in Burberry's stores in London and other parts of the UK had now recovered to reach pre-pandemic levels again. However, over the same timeframe, its sales to US visitors to Burberry stores in Paris have doubled.

Shoppers from the Middle East are now spending two or three times more in Burberry's stores in Paris than they are in the company's outlets in the UK, he added.

"We are seeing very graphic evidence of business being diverted from the UK to our continental neighbours as a direct consequence of making Britain much less attractive," Mr Murphy said.

Question of quality

Following recent decisions from Puma and, later, Nike, to stop using kangaroo leather in their football boots, the chairman of Queensland-based specialist kangaroo leather manufacturer Packer Leather, **Lyndsay Packer**, has said the situation is a repeat of what the 132-year-old company has witnessed before.

Mr Packer explained that Nike had "walked away from kangaroo leather" in the 1990s, only to return to using the material. This time, both of the sports footwear brands have said they have developed synthetic upper materials that they believe will perform better than kangaroo leather.

In recent comments to media in Australia, Mr Packer said: "I don't mind competition against synthetics. After a few years, people will realise the quality isn't there. It goes in cycles."

Founders walk away from Restory

Specialist aftercare service provider The Restory, which repairs high-end leathergoods and shoes to keep them in use for longer, is to go into liquidation. Co-founder **Vanessa Jacobs** said her heart was broken.

She and co-founders **Thaïs Cipolletta** and **Emily Rea** resigned from the company in mid-February. One week later, Vanessa Jacobs said, the rest of the team working at The Restory were made redundant and that the company would go into liquidation.

The London-based business ran for six years, using high levels of customer service, a love of craftsmanship and a passion for sustainability to build what Ms Jacobs described as a company "to whom the world's leading brands could entrust their most important relationships".

She explained that "recent changes" had led the co-founders to walk away. In 2022,

new investors from the US became involved in running The Restory.

Minister wants schools that are dedicated to Made In Italy

Italy's minister for economic development, **Adolfo Urso**, has said he is working with his colleagues in the ministry for education to set up dedicated 'Made In Italy' high schools.

Mr Urso, who is also the country's first ever minister for 'Made In Italy', made the comment during a recent interview with leather-industry publication *La Conceria*.

He said he was conscious of the size of the challenge Italy faced in terms of professional skills training, adding: "I would define it by saying it's almost a revolution we need."

The minister said his aim was for the people working in Italy's main artisan sectors to become a new group of talented professionals. This has happened in other sectors, he pointed out, saying: "Our cooks have become chefs and our tailors have become designers."

It is to help drive this change in sectors such as leather and leathergoods

manufacturing that he wants to set up dedicated schools in which young people will learn techniques and skills as part of their high school education.

"It will be a school programme that will meet the needs of the professions by creating a new generation of people with the high level of competence and the profile required to maintain the excellence of Italian manufacturing," the minister said. "And these new generations will be increasingly able to compete in global markets."

Chair of Stahl's parent group to join LVMH board

Luxury group LVMH has proposed that the executive chairman of Paris-based investment firm Wendel, **Laurent Mignon**, become a member of its board of directors. Shareholders will vote on the proposal at LVMH's annual general meeting in Paris.

Mr Mignon only became the executive chairman of Wendel at the end of 2022. Before that, he was chief executive of investment bank Natixis.

Wendel is the majority owner of a number of industrial companies, including leather chemicals group Stahl. 



GreenTan®

Eco-friendly leather tanning system for our greener future.

 **GREENTAN**

GreenTan® C
GreenTan® M-5
GreenTan® N-90
GreenTan® T-22M

Tel: (603) 772-3741 • www.CHEMTAN.com

Last tango in...Dubai

When APLF headed to Dubai for the first time in 2022, the hopes were that it would fill the void that had been created by the pandemic lockdowns. With the second edition of the event now over, thoughts turn to what's next and it is hoped those thoughts are positive.

If the industry were to run on desire and hope, we would be booming. The APLF show in March is one of the flagship events that the industry pinpoints as the place to be, the incubator for ideas and discussions and the jumping off point for pricing structure talks.

It is true that the trade shows of late have been a strange landscape. Whilst still trying to come together as an industry, these meetings have taken place when, at some time or another, half the audience has been missing. So, heading to Dubai for the second time in as many years, the industry was filled with hope and optimism that had been partly generated from its previous visit to the Middle East. The experience from the more recent exhibitions, held in Milan and Chennai, were also adding to the tail winds of confidence.

Exhibitor numbers, down approximately 25% from the previous year, saw 341 companies, organisations and associations converge to occupy a good proportion of the 16,000 square metre exhibition halls. Representing 34 countries and regions, it was no shock that with 78 companies exhibiting, Italy took the number one spot here, closely followed by China with 64, although many of these were in the finished products section, Materials + and Fashion Access. India, Turkey and Pakistan filled the remainder of the top five slots, and it was good to see the latter two countries moving forward after such heart-breaking natural disasters in their respective countries.

In parallel to the Chennai fair, the chemical suppliers were more optimistic about their time at the show, but numerous comments indicated it was down to managing expectations. Where the show really saw lift-off was in the out-of-hall conferences.

Breakfast News

With newly installed chairperson Debbie Burton heading the campaign group, Leather Naturally once again held a breakfast meeting ahead of the second day. With a revamped website and the more proactive "Leather Truthfully" landing page, aimed predominantly at more mainstream journalists and those that write about sustainability issues, positive impact has been seen. Whilst benefiting from a small element of luck, with the Higg index debacle in the middle of 2022 making things a little easier, the campaign group was able to get material published on platforms with a combined audience of over 100 million and take part in conversations that had not been possible before, with Ms Burton saying: "We are at a turning point and have a

The Burj Khalifa, the world's tallest building, rising to 829 metres dominating the Dubai skyline. APLF hopes the sparkle will return to Hong Kong next year. ALL CREDITS: WTP





moment of journalist and consumer attention, and we cannot afford to let this go." In comparing leather related headlines from a year ago, with sustainability claims of vegan alternatives being called into question, it certainly looks like the worm has started to turn.

LCA levelling the playing field

Guest speaker at the meeting, Federico Brugnoli, from Spin360, will be a known name to *World Leather* readers, having featured heavily in its previous *Leather* and the *Circular Economy* section articles. In providing an update to the work being carried out between *Leather Naturally*, the *Leather Working Group* and *Spin 360* on industry LCA, Mr Brugnoli told the audience that *Ecoinvent*, one of the leading global providers of LCA data, is due to release an update to its datasets, with *Ecoinvent 4.0*. The encouraging news appears that these figures take into account methane emissions from the extraction and cracking of oil. The consequences of this are the worsening of the current dataset figures for synthetics.

One area of concern where LCA data is misused, is with the substitution of materials. Playing with numbers companies move to a perceived lower scoring material. Whilst good for them, it may not be good for the planet, as explained by Mr Brugnoli. Companies with high objectives may well be able to phase out higher scoring materials but those with lower objectives move in to take up the phased-out material. Ultimately, the use of LCA information should be the starting point to overall improvement and not seen as the end goal or a tool to preferentially substitute out materials.

Press conferences

The APLF press conference began with the encouraging news from China that all travel restrictions had now been lifted, the final piece being the resumption of tourist travel visas, plus it was noted by several contacts during the show that longer term visas arranged prior to the lockdowns would be resumed without need to reapply.

The clear need to hold an event closer to the main Asian markets, attempted by APLF for the past two years, is evidenced by a recent IPSOS study into consumer confidence. China posted 73.2 percentage points, as compared to 50.2 for the USA and even



Directors of the APLF (left to right: Frank Boehly, David Bondi and Grace Lee) welcome international press to Dubai for the last time, announcing that the event will return to Hong Kong in 2024.

"We are at a turning point and have a moment of journalist and consumer attention, and we cannot afford to let this go" DEBBIE BURTON, LEATHER NATURALLY

lower levels in Europe at around 25. Clearly there is great potential demand with the drive coming from China. When looking at GDP and speculation about economic growth, these forecasts are further supported, where, in 2023, China is expecting 5.2% growth and the ASEAN bloc is looking for 4.6%. Against the backdrop that the USA may manage 1.4% and with Europe essentially maintaining its flatline, "consumer demand will be far more buoyant in Asia this year than in developed western nations," said APLF director David Bondi.

In another press conference, hosted by the China Leather Industry Association (CLIA), principally to discuss the All China Leather Exhibition (ACLE), Mr Chen Zhanguang, vice chairman of the CLIA, was optimistic about developments in 2023 and felt that furniture leather would continue to grow, but saw a move away from leather for traditional fuel-powered cars; this however was countered with the expectation that a turning point could be seen with increased demand for leather seats in "new energy" vehicles.

China's leather industry supply chain imported a total of \$17.27 billion in 2022 and of this, almost \$3.3 billion accounted for leather to feed production. The conversion of this to exports saw a 19.3% increase year on year to a total figure of \$107.55 billion, with the biggest winners being footwear and bags.

With optimism, Mr Chen declared that the hard work preparing the 2023 ACLE show was well underway. Good job, too, as with seven halls occupying 80,500 square metres of space, the exhibition that has been missing for the past three years is seen as the focal point for many to claim a true return to normal. At the time of the press conference, it was claimed that all leather and shoe materials exhibition space had been sold out.

Silver lining

With hope that the Chinese government will help drive consumption, China has some ground to make up. Demand is clearly there and, given their conservative single digit forecast figures for GDP, the effort will undoubtedly be made to get back in front. The size of the market cannot be ignored, and domestic suppliers cannot satisfy their own market alone, representing a huge opportunity for the industry.

Whilst this trade show in Dubai may have fallen flat for some, there were positives to be drawn and the feeling that the pandemic was no longer an issue was tangible. With the main trade shows that bring a personal connection with the Chinese market clearly stamped in the diary, it is now just a waiting game to see if the assumed missing piece of the puzzle can complete the picture – Shanghai for the ACLE in 2023 followed by a return to Hong Kong for the APLF in 2024. 🌐



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.

25 April 2023

Brazil-China beef alliance signals positive shift
LVMH celebrates leathergoods success

24 April 2023

Positive first quarter for international car sales
Textile Exchange offers leather insights in Material Change report

21 April 2023

Inventory challenges hurt Stella International in Q1
Coach launches new circular sub-brand

20 April 2023

Record revenues for Lanvin Group
'Animal welfare-secured nappa' makes it into the Polestar 4

19 April 2023

Patou hopes digital IDs will reassure buyers
Citizen Watch joins Leather Working Group

18 April 2023

Lower cost of leather helps Natuzzi 'navigate difficult times'
Leather industry journalist dies
Lobatse leather park seeks investors for further phases

17 April 2023

USMEF finds grounds for hope as US beef exports stall
More than 20% growth for Hermès in Q1
Porsche joins LWG for sustainable leather commitment

14 April 2023

China imports down in 2022
Humans wore leather clothes 40,000 years ago

13 April 2023

WWF call to action wins support from Bridge of Weir
Synthetic car interiors a cause for concern

12 April 2023

Double-digit growth continues for LVMH
Wet blue shipments to Italy bring a little good news on US hides
Chloé Vertical provides digital traceability
Corium Club gathering announced

11 April 2023

Sustainability focus for new Hermès workshop
Turkey confirms new strain of FMD

06 April 2023

Ecco leather range takes inspiration from linen
Uptick in UK car sales

05 April 2023

Four free sessions on Russety tanning this month
Uzbekistan leather event takes place
Cromogenia celebrates with reforestation project

04 April 2023

Levi's leather revival
Tannery tours inspire next generation of leather workers

03 April 2023

Allen Edmonds: quality is the original form of sustainability
Italy next for LVMH's Métiers d'Excellence tour
Zünd to showcase productivity and efficiency at Interzum

31 March 2023

Leather has search appeal

30 March 2023

APLF attracted 5,000 visitors
COTANCE's Traceability Cluster will increase trust in industry, says Oeko-Tex
Italy poised to ban lab grown meat
Volumes up, values down for Brazil's leather exports

29 March 2023

Italian 'guests of honour' begin to land in Hainan
Price war in China hurts Tesla
US Cattle on Feed down 4%

28 March 2023

Nine finalists for LVMH Prize for Young Fashion Designers
Mercedes-Benz commits to increase its investment in China

27 March 2023

New international shopping district proposed for Guangzhou
Prominent Tuscan tanner dies
China lifts Brazilian beef ban

24 March 2023

Team Europe Initiative visit to Bangladesh tanneries

23 March 2023

COTANCE complains of loophole in EU greenwashing proposal
Milan car interiors discussion has Pangea's support

22 March 2023

Decline in demand for double-face goes on
Australian event confirms increase in Dublin Declaration signatories

21 March 2023

US hide exports continue to fall
UNIC and Distretto Veneto della Pelle sign schools agreement

20 March 2023

Alarm in Turkey as ministry confirms foot and mouth outbreak
Confidence around Shanghai show this year, CLIA says
Tokyo date for French glove brand
Suede expert dies



Visit the **new** and **improved** site



CUTTING-EDGE TECHNOLOGY - WEALTH OF EXPERIENCE

Contact Simon Yarwood simon@worldtrades.co.uk for more information

AGENDA 2030
Sustainable Development Goals

1 NO POVERTY

WHAT ARE WE DOING?

we're generating value
for the Cartigliano's community

AGENDA 2030
Sustainable Development Goals

3 GOOD HEALTH AND WELL-BEING

WHAT ARE WE DOING?

we take care of employees'
wellness sharing an annual
economic bonus

AGENDA 2030
Sustainable Development Goals

4 QUALITY EDUCATION

WHAT ARE WE DOING?

we believe in the professional
development of employees by
organising specific training courses

Cartiglio Responsible

AGENDA 2030
Sustainable Development Goals

5 GENDER EQUALITY

WHAT ARE WE DOING?

we are a mechanical/manufacturing
industry where 34% of the
employees are women

AGENDA 2030
Sustainable Development Goals

7 AFFORDABLE AND CLEAN ENERGY

WHAT ARE WE DOING?

we are able to run plants with
renewable energy

AGENDA 2030
Sustainable Development Goals

8 DECENT WORK AND ECONOMIC GROWTH

WHAT ARE WE DOING?

we protect our employees with
appropriate remuneration and
opportunities for professional growth

AGENDA 2030
Sustainable Development Goals

12 RESPONSIBLE CONSUMPTION AND PRODUCTION

WHAT WE'RE DOING?

we generate energy through solar panels to feed our plants

AGENDA 2030
Sustainable Development Goals

13 CLIMATE ACTION

WHAT ARE WE DOING?

we produce plants to reduce mass and volume of civil and industrial sludges. Results: lower disposal

AGENDA 2030
Sustainable Development Goals

16 PEACE, JUSTICE AND STRONG INSTITUTIONS

WHAT ARE WE DOING?

we support local political institutions and sports associations for the integration of adults and children

Cartigliano 2030 Technologies

AGENDA 2030
Sustainable Development Goals

9 INDUSTRY, INNOVATION AND INFRASTRUCTURE

WHAT ARE WE DOING?

we invest 10% of annual turnover in R&D by collaborating with universities and technical schools

AGENDA 2030
Sustainable Development Goals

10 REDUCED INEQUALITIES

WHAT ARE WE DOING?

we believe in the capacity of individuals regardless of religion, gender and origin

AGENDA 2030
Sustainable Development Goals

11 SUSTAINABLE CITIES AND COMMUNITIES

WHAT ARE WE DOING?

we promote the demographic growth of the Cartigliano's community through "Progetto Giano"





Bekir Burak Uyguner is president of his family's leather manufacturing company, Uyguner Deri, based in Istanbul. He is president of the Turkish Leather Industrialists' Association and of the Turkish Leather Employers' Association. He is also a member of the board of directors of the Istanbul Leather and Leather Products Exporters' Union. On March 13, 2023, he added to this long list of responsibilities by becoming the new president of the International Council of Tanners (ICT).

A force for good

Congratulations on taking up the presidency of the ICT. What will your priorities be for your two-year tenure?

To promote leather well and to make people understand that we are a force for good. It's a difficult time, you know. I think you have to be a tanner to feel the pain. I feel the pain; I feel it locally and internationally. One side of the problem is raw material and traceability, and the other part is the new EU regulations for chemicals, because if the EU makes regulations, basically everyone else follows. We are all doing our best to do something with our by-products. We try to do better every day in terms of water use and energy use. Maybe that's not true of absolutely all the tanners in the world, but if you look at what the Europeans (the Italians, the big guys in Germany, the Austrian guys, the Spanish people) are doing, they take it really seriously. And still in the eyes of the average person a tannery is what they have seen in the famous picture taken in Fes in Morocco.

[Editor's note: Morocco attracts some 11 million tourists annually. Its oldest city, Fes or Fez, was founded in 789 as was its tanning industry. The dyeing pits in the city centre are a tourist attraction but have no relevance to modern leather manufacture.]

With more scrutiny on greenwashing now, will people come round to understanding the leather industry better?

If we don't push for it, I don't think so. We are the ones who have to do something about it. Every other day you see stories about material from pineapples, apples, olive leaves and so on. It's nearly always a non-woven material coated with acrylic and a little of whatever plant they want to mention in the product's name. What we have to do is to tell our story over and over and over again without getting tired. We have to create some good public relations messages and show people what we are doing.

What should we show?

It seems to me that the news media in many parts of the world wants to show that it's cool to be vegan. Fine. These people are against meat but it looks as though they are against leather even more than they are against meat. As long there are also some people eating meat, there is no way of avoiding it: we need the leather industry. Brazil is slaughtering 40 million head of cattle per year. It's probably more or less the same in the US. We have almost 8 billion people in the world and we have more than 1 billion people who are undernourished. They don't have access to proper food and we cannot waste one molecule of protein. You don't



have to turn everything into a piece of finished leather. Once we learn how to select better in the raw or in the lime, the hides that are not suitable for leather production will be part of food industry. This is how it is in Africa today. Today for our colleagues in Africa, their competition is from people who eat hides. Colleagues in Uganda and Kenya have told me that food sellers there give the butchers money to put more holes in the hides deliberately so that tanners won't buy them.

In Turkey's case, how many tanneries are operating across the country at the moment?

The official number was close to 500 bovine and sheepskin tanneries a couple of years ago in seven or eight different clusters, but now tanning is becoming more centralised. The main areas for bovine are Tuzla, Bursa and Gerede. There is also one in Anatolia, in Nigde, and some in Izmir. The volume of hides being tanned in Turkey is increasing because we have built a very strong gelatine and collagen industry. We have five companies producing edible gelatine. Across the whole of Turkey, the volume of hides processed in 2022 was probably around 10 million. It's not huge but it's not small. Turkey's leather and leather products exports had a value of about \$2 billion in 2022, between 18% and 20% higher than the corresponding figure for 2021. So 2022 was the real recovery year following covid-19. The figures for the first two months of 2023 have shown further increases, of more than 15%, but we have seen a slowdown since then, mainly because our exchange rate against the dollar is less competitive than last year. We also paid for two salary increases last year and the cost of energy went up. We hope to keep the growth up, but the exchange rate is not helping now.



New president of the International Council of Tanners, Bekir Burak Uyguner. CREDIT: UYGUNER DERI

How many people do these companies employ?

Around 20,000 people work in our tanneries. I cannot give an exact figure for the wider industry.

How many square-metres of finished leather do they produce each year?

Of those 10 million hides, maybe 30% go for soaking and liming and then directly to the gelatine manufacturers. That leaves 7 million hides for producing leather.

How important are export markets for your member companies?

Earnings from exports of finished leather in 2022 were about \$300 million. We have a strong shoe industry too. Our shoe manufacturers are mostly small companies rather than big ones but they are good and they export footwear with a value of \$1 billion per year.

We know that Russia has long been an important market for leather-sector exporters in Turkey and that trade has continued in spite of the war between Russia and Ukraine. But we also know that the European Union is an important market for Turkey, in particular Germany and Italy. How is it possible to maintain good relationships with all of these trading partners in a time of conflict?

Russia has been a big customer for many years. But we have had our own political tensions with Russia, too, and the relationship has not been as strong since about 2015. Now the export market for Turkish leather is pretty

diversified and Russia is no longer the number-one customer. The European Union is number one now and Germany on its own is bigger than Russia. But yes, Russia is an important customer for us; that remains a reality. And today, with all the sanctions that are being enforced on trade between Russia and western countries, Russia is buying more from other markets, and Turkey is probably one of those markets. But we are not seeing any dramatic increase in the numbers.

As you know, the entire world was deeply saddened by the loss of life and devastation that Turkey and Syria suffered after the earthquakes in February this year. If our information is correct, there was little leather and or leathergoods production in the worst-affected regions, but can you say what you think the effect will be on the country as a whole, including the leather industry, as it rebuilds and recovers?

It was very sad. There were only a few leather-sector companies affected and they were small, but it was a very sad situation and the number of casualties [more than 57,000 across Turkey and Syria] was very high. If you look at the overall picture, the regions that were badly affected accounted for 7% or 8% of Turkey's gross domestic product. That means the rest of the country, which has the remaining 92%, has the capacity to help those regions build themselves back up again. But it was extraordinary: two earthquakes registering more than 7.5 on the Richter scale, both very shallow, hit within nine hours of each other. We feel deep sorrow for our losses but we are strong and we will rebuild. 🌍



Since 1920, the tannin behind the world's finest leathers



Natural, sustainable, and carbon neutral,
beautiful leather begins with **NTE Mimosa**.





Executive summary

There are countless stories of tanneries and leather businesses not only making improvements to their surrounding environments but also contributing to the communities they are based in, while looking after their workers over and above the norm. Over the years, *World Leather* and *leatherbiz.com* have highlighted many of these stories, through our Tannery of the Year visits and reports, in news stories and in features in the magazine. These companies range from the biggest leathergoods and chemicals groups to small, family run tanneries. They prove how hard many businesses work to be good citizens – and how often these stories go unheard by the wider public. 🌱

*Investment in workers supports families
and the wider community.*

PHOTO CREDIT: DEVIN ON UNSPLASH

About this essay

This essay highlights prominent examples of corporate social responsibility in action, something we more commonly now refer to as environmental, social and governance (ESG). The original text, published in 2015, used examples from visits to tanneries around the world as part of the Tannery of the Year Awards programme, which was launched by *World Leather* in 2009 to celebrate examples of good practice in the global leather industry. At that time, there were a number of groups attacking leather and leathermaking, not least so-called animal rights groups, which tried to claim the industry was cruel and polluting. While these voices have quietened somewhat (perhaps as people start to recognise that more plastic is not what the world needs), it is still important to tell these stories. We have updated this article to show recent examples of how tanneries and leather-focused companies have responded to ESG commitments, with a particular focus on how they interact with, and help, their surrounding communities.



Vivobarefoot, Pittards and Soul of Africa enable workers to earn a good living through shoemaking and have donated money to local schools and charities.

PHOTO CREDIT: VIVOBAREFOOT

Nothing to Hide: Companies care

There is a rich reservoir of evidence of good practice across the industry when it comes to leather companies' impact on the environment and on their workers.

When Essay 15 was published in 2015, we looked at corporate social responsibility and how companies were tackling their commitments with in-house standards, targets and practices. Many of the examples were from our Tannery of the Year visits, the reports of which can be found online, and which contain detailed examples of not only sound business practices and environmental stewardship but also show how many go the extra mile to look after their employees and surroundings. CSR is now more commonly referred to as environmental, social and governance (ESG), sometimes used as a measure for outside investors to determine a company's worth or its strength and growth prospects. *Leatherbiz.com* and *World Leather* magazine continually show how leather-sector businesses have set stringent environmental goals, including working towards generating zero waste, dramatically reducing water use or becoming net zero carbon companies. ESG is a vast topic so, for this article, we have selected a few examples of companies' achievements, with a particular focus on how they improve local communities, look after employees or help people in need.

Tanneries gain recognition

Italian leather manufacturer Gruppo Mastrotto published its second sustainability report at the end of 2022, showing solid results in each aspect covered: environment, economy and society. There were reductions in CO₂ emissions and in waste production, and the report confirmed that 100% of the group's electricity supply is from certified renewable sources. Last autumn, the group won an award from an organisation called Difference In Addition (DNA), which recognises inclusion and diversity projects in Italy. Mastrotto's winning project involves bringing people with learning difficulties into the workplace to enhance their personal and professional development. People taking part in the project contribute to the company's productivity by assembling leather colour charts and samples to present to customers all over the world. "These colleagues are following a development path that focuses on building self-esteem, autonomy, skills and practices that will help them feel fulfilled in the workplace and in their personal lives," Gruppo Mastrotto said.

Turkish tanning group Sepiciler was named Tannery of the Year for

Europe in 2013 and since then has continued to improve its processes and products. The company provides free meals and a high level of health insurance for workers and their families. It gives them shopping vouchers at new year and at major festivals, and lays on buses to transport them to the factory. It offers casual work on special projects to people in the village of Caybasi, the Torbali plant's closest neighbours. Sepiciler also makes donations to the village school and has carried out other acts of charity such as handing out firewood from its supplies to local people in times of exceptionally cold weather.

Less than 10 kilometres from the tannery, Sepiciler has installed a solar energy plant on land the family owns there. When operating at full capacity, it will contribute to Turkey's national energy supply six times the amount that Sepiciler consumes in making leather. Creating 600% of its own energy consumption through this renewable resource will cut Sepiciler's carbon footprint by almost 11,500 tonnes of CO₂ equivalent per year, the company has calculated. The Sepici family has also converted a family house in Izmir into a school, a joint initiative with Aziz Üstel, one of Turkey's most famous TV presenters.

Industrial group Tata was praised at the International Association for Volunteer Effort (IAVE) Awards in Germany for its programme of encouraging team members to take part in voluntary community initiatives. The leather and leather products business unit of Tata has contributed to this wider effort. In Dewas, India, where the company runs its main tannery, volunteers have helped run health and hygiene camps at various local schools, helped clean up the Kshipra River, donated a Braille machine to a school for visually impaired children, distributed clothes to people in disadvantaged communities, planted trees and taken part in community sports events. Initiatives in Chennai, where Tata International runs a leathersgoods factory, have included donating food and clothing to a local orphanage; mentoring sessions, sports, art and public speaking competitions for local schools; and donating to an eye health clinic for children.

Helping hand

Brazilian packer and tanning group Marfrig launched a programme to offer employment to refugees. It began by offering jobs to 40 people from Haiti, Venezuela, Bolivia and Cuba at its plant in Várzea Grande, in the state of Mato Grosso. Human resources director Jairo Agosta said the presence of people from other countries has allowed Marfrig to construct a multicultural environment, "breaking down prejudice and discrimination, generating a healthy culture for the company, as well as giving dignity and citizenship for people arriving in our country in search of work and a better quality of life".

Scottish Leather Group is on track to reach its goal of zero waste by 2025, as well as net zero carbon emissions. The group, which runs tanneries in Paisley, Bridge of Weir and Glasgow, has used 100% renewable electricity since 2017 and converts its process waste into energy. It sources water from its own loch – it is then treated, recycled or discharged back to the same river. A further benefit of water recycling is heat recovery, accounting for up to half of its water heating demand. In terms of community involvement, SLG works with local primary schools to promote the leather industry and help students to learn about the tannery; it facilitates work placements and funds scholarships for older children and also donates to local hospices and charities.

Tanning group PrimeAsia launched its Responsibly Raised Initiative in 2020, aimed at engaging suppliers and customers to increase transparency, optimise use of resources, promote good labour conditions and sound animal welfare standards. In 2021 PrimeAsia joined forces with World Wildlife Fund (WWF) to strengthen those efforts. "We believe in collaborative approaches and the idea that complementary abilities have the power to drive positive changes," commented Jon Clark, PrimeAsia's CEO. As part of this tie-up, last May it launched its Augmented Sourcing Policy, through which it aims to trace all hides sourced from South America back to the farms. It already has in place a system in which all wet blue hides are physically stamped to give traceability back to the slaughterhouse through its Responsibly Raised Initiative.

Shoemakers shine

Tannery group and leathersgoods manufacturer Pittards was established in the UK around 200 years ago and has been dealing with Ethiopia for half that time. With the largest livestock herds in Africa, the country provides access to skins, and in particular hair sheep, prized for gloving leather. Pittards began investing in the country in 2005, buying a tannery – which was the first global winner of *World Leather's* Tannery of the Year programme – and subsequently setting up four factories to make gloves, garments and some footwear. But it was a relationship with the Clarks shoe family that eventually led to the formalisation of its shoemaking facilities in 2017, after former head of the company Lance Clark sought Pittards' help to find workers for his Soul of Africa project. Supplying leather from its tannery, Pittards employs more than 100 people making for Vivobarefoot, co-managed by Lance's son Galahad and his cousin Asher, alongside some other production.

Both Vivobarefoot and Pittards pump money back into the communities, with Pittards building a new classroom each year at the local school and investing in clinics. Vivo says Soul of Africa has created more than \$2 million in wages and helped 18,000 children with their education since its foundation in 2003. Both companies also support Brave Hearts Ethiopia, a non-governmental organisation that helps orphaned and vulnerable children. "Brave Hearts supports families to foster orphans, and they go back to a drop-in centre for education," says Pittards CEO Reg Hankey. "It works fantastically well."

Spanish footwear brand Pikolinos launched a collection inspired by social responsibility to add to the Maasai Initiative it launched in 2014 to bring employment to Maasai women in Kenya and Tanzania. Pikolinos Solidarity supports a project much closer to home. Comprising two styles of each of the brand's Alcudia and Madeira sandals and one style of its Wha handbags, the products in the collection are the work of artisans from Defora, a specialist footwear project founded in Elche by a local shoemaker, María de los Ángeles Brotons. The people who work at Defora are adults with learning difficulties. Pikolinos said it regards its support of Defora's work with this special collection as "an example of sustainable fashion in its purest form". Through the Juan Perán-Pikolinos Foundation, the company partners over 70 NGOs and more than 16,000 families benefit from these projects every year.

High-end training

In a similar vein, luxury group Kering recently signed a partnership charter with France's labour, employment and integration ministry with the aim of giving young people, vulnerable individuals and people with disabilities better access to jobs. Kering said it was committed to recruiting young people, paying particular attention to those from disadvantaged urban areas and those with disabilities. It said it was also committed to recruiting young people on work-study programmes across all of its occupations and offering internships. It plans to establish partnerships with companies specialising in the employment of disabled people across France and will join forces with universities and schools to promote workforce integration, make its recruitment more diverse and improve its training practices.

Kering's brand Gucci also announced a series of ESG initiatives across Puglia, to coincide with catwalk presentations in the Castell del Monte citadel in Andria in southern Italy. One of the projects will be to support a women's refuge in Andria; the local municipality runs the refuge to help women who have been victims of abuse create paths to independence. Gucci will also support the work of local environmental non-profit organisation Legambiente Andria, specifically in an urban reforestation initiative and by contributing to the creation of a park that will serve as a memorial to victims of the covid-19 pandemic. In 2019, the Gucci North America Changemakers programme launched with a focus on increasing inclusion and diversity across communities and within the fashion industry. The programme awards scholarships of up to \$20,000 dollars and provides mentorship and virtual internship opportunities through Gucci America.

Chemicals targets

Leather chemicals suppliers have also focused on ESG improvements and many now produce detailed reports to show their progress and targets.

Silvateam was among the winners at Italy's national sustainability awards in 2022. It was named in the top 100 performers for good practice in ESG and came top for governance. Ratings were calculated by a technical partner, specialist Switzerland-based consultancy RepRisk, and by an academic partner, the ALTIS business school of Milan's Sacred Heart Catholic University.

Netherlands-based Royal Smit & Zoon's ESG report for 2022 showed it had expanded the number of its products to have secured level-three conformance (the highest level) with the Zero Discharge of Hazardous Chemicals (ZDHC) programme. A first set of Smit & Zoon products achieved this in 2019; by 2022, this expanded to include the whole of its key range of products. All of its facilities have ISO 14001 and 45001 certification in place, confirming them as environmentally and occupationally sound places to work. EcoVadis, the French body that assesses companies' performance in environmental management, labour and human rights, ethics and sustainable procurement, maintained its gold rating for Smit & Zoon in 2022, putting the leather chemicals group in the top 9% of all the companies EcoVadis has assessed.

Smit & Zoon CEO Marc Smit commented: "ESG is about keeping pace with the constantly evolving ESG landscape, stakeholder expectations and regulatory requirements. For us, it is mostly about



Tanneries and leather companies seek to look after both the environment and their workers, creating pleasant and inclusive places to work.

PHOTO CREDIT: SHANE ROUNCE ON UNSPLASH

making the right choices for the next generation."

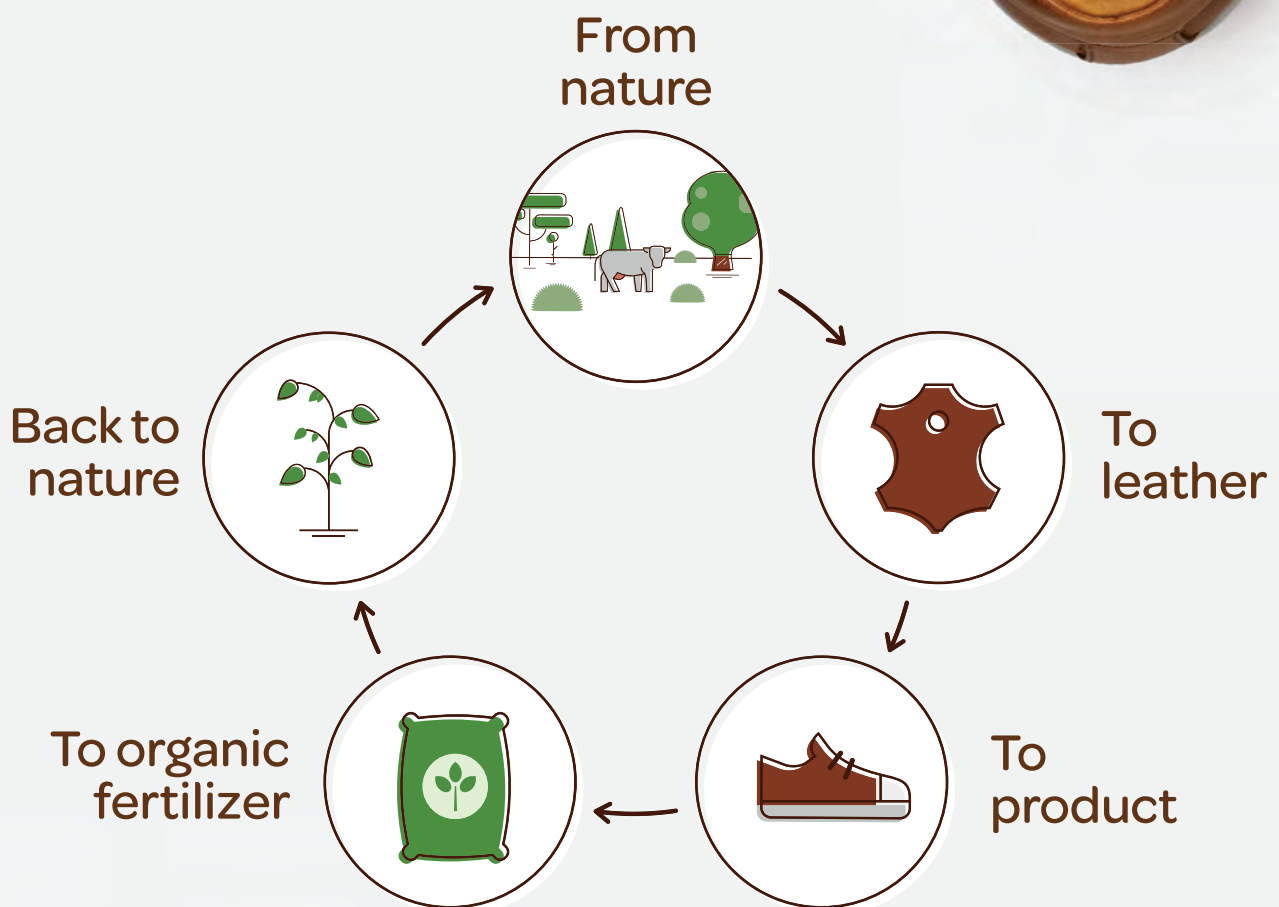
Leather chemicals producer Stahl's ESG achievements in 2022 included a 3% reduction in CO₂e for Scope 1 and Scope 2 emissions, compared with the year before, and Life Cycle Assessment data available for 160 products. Its report also highlighted that 73% of sales revenue was realised through ZDHC level 3 products. The company also improved on its 2021 Ecovadis Gold rating, being awarded a platinum medal in 2022, putting them in the top 1% of companies assessed by the Paris-based platform.

As part of their road map to 2030, the company also established a Diversity, Equity and Inclusion (DEI) steering committee to strengthen these aspects across the business. Stahl's chief executive, Maarten Heijbroek, said improvements could not have come at a better time as Stahl was now introducing a new purpose, "Touching lives for a better world, because a safer and healthier world is the ultimate goal".

These examples are just a few that have stood out from many stories that *World Leather* covers – and strives to uncover – around the world. Proving that, for the leather industry, ESG really matters. 🌍



The first truly
bio-circular leather
with a proven path
back to nature



Ecotan leather is free from metals, glutaraldehyde and other hazardous substances. **At the end of its life, it can be recycled into a fertilizer for organic agriculture.**

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.

In this issue and further into 2023, we will be looking at the increasing use of automation and artificial intelligence in the leather industry.

Adopting A and AI in the tannery

Despite the many challenges faced by the manufacturing sector with increasing energy costs, rising inflation and supply chain issues and even more recently the worries of impending recessions, a Forbes poll of 150 US manufacturing executives in December 2022 found that the majority (60%) were optimistic about the future, with another third suggesting they could “see light at the end of the tunnel”. Though the landscape may have changed since then, the poll also highlighted that for technology, 72% were looking to invest in workforce automation with 58% considering artificial intelligence (AI) systems. What then of the leather industry?

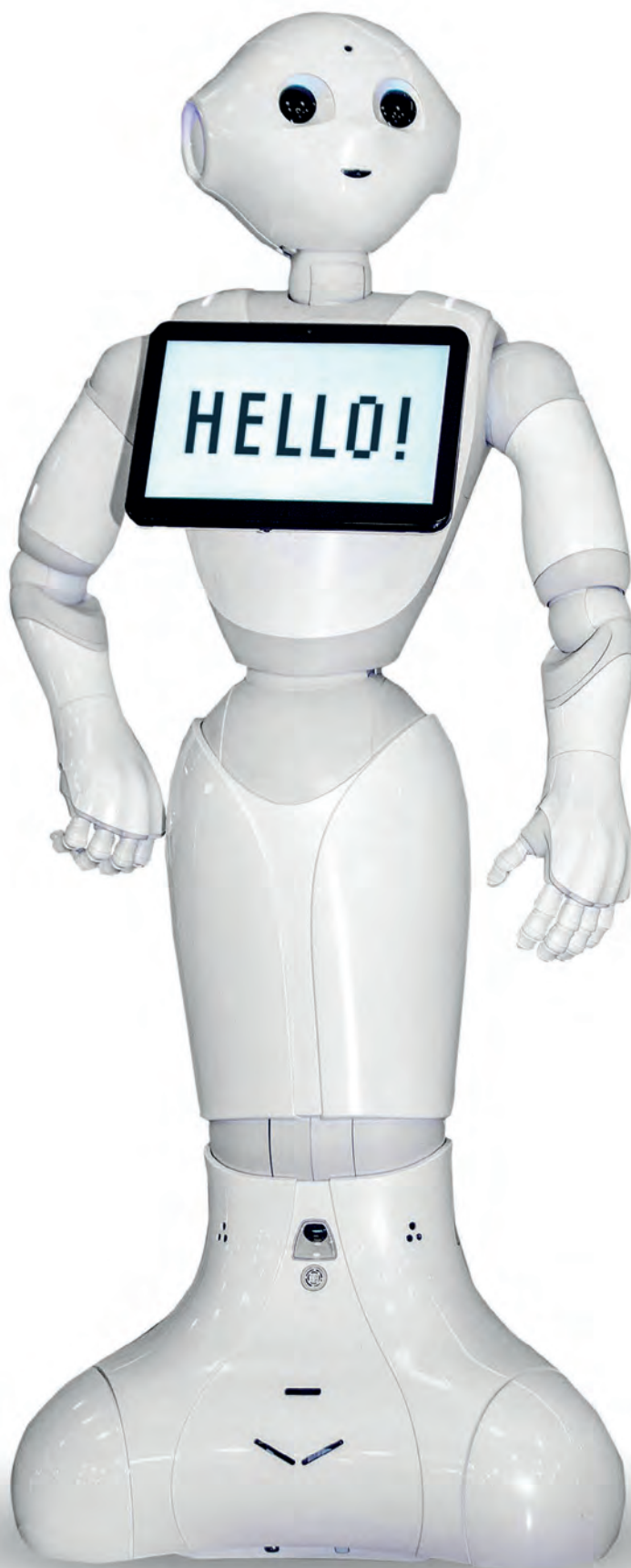
The leather industry has traditionally been heavily reliant on manual labour to get the job done. In a process that has often been described as art meeting science, can technology replace that human element. The short answer is ‘no’, the organoleptic properties of leather require a personal interaction. Nevertheless, as we have seen with the expanding Industry 4.0, described by McKinsey and Co as the fourth industrial revolution and is “the next phase in the digitisation of the manufacturing sector, driven by disruptive trends including the rise of data and connectivity, analytics, human-machine interaction, and improvements in robotics”, the leather industry is certainly making up ground on this – Lanxess even patented the term Tannery 4.0 in 2017.

AI in practice

In the spirit of embracing AI systems for the leather industry, the following was generated using an app-based program when asked to discuss the use of automation and AI in the tannery.

Tannery automation is a process of using modern technology and automation to streamline the leather tanning process. The use of automated systems can help to reduce labour costs, increase efficiency, and improve the quality of the leather product.

One of the significant advantages of tannery automation is that it can help to reduce the environmental impact of the tanning process. By using automation, it is possible to minimise the amount of water and chemicals used in the tanning process, which can reduce waste and improve safety for workers.



CREDIT: SHUTTERSTOCK.COM



Another advantage of tannery automation is that it can help to improve the consistency and accuracy of the tanning process. With computer-controlled machinery and sensors, it is possible to manage various stages of the tanning process, such as soaking, fleshing, and dyeing, to ensure that the leather is processed consistently and accurately.

The use of tannery automation can also help to reduce production time and costs. Automated systems can operate around the clock, with minimal downtime for maintenance, which can help to increase production output and efficiency. Additionally, by reducing the need for manual labour, tannery automation can help to lower labour costs and increase profitability.

However, the implementation of tannery automation can be expensive, and it may require significant investment in new equipment and technology. Additionally, it may require skilled operators to operate and maintain the automated systems, which can add to the cost of implementation.

In conclusion, tannery automation can offer several benefits to leather manufacturers, including increased efficiency, improved product quality, reduced environmental impact, and reduced labour costs. However, it may require a significant investment and skilled operators to implement successfully.

It further went on to list automation possibilities:

1. **Leather processing automation:** This automation involves using machinery and computer systems to automate various stages of leather processing, such as soaking, liming, tanning, and drying.
2. **Inventory management automation:** Tanneries use automated systems to manage their inventory, such as RFID tagging and barcoding, to track the location and movement of raw materials, finished products, and other supplies.
3. **Quality control automation:** Automation is used to inspect and sort leather products based on quality, using computer vision technology to detect defects such as scratches, discoloration, and tears.
4. **Environmental management automation:** Tanneries often use automated systems to monitor and manage their environmental impact, such as wastewater treatment, air pollution control, and energy management.
5. **Maintenance automation:** Tanneries use predictive maintenance automation to monitor the condition of equipment and machinery and predict when maintenance is needed, helping to prevent breakdowns and minimise downtime.
6. **Data analysis automation:** Tanneries use automated data analysis systems to process large amounts of data and extract insights, such as market trends, customer preferences, and production efficiencies.

Whether we will see the advent of the “lights out” factory – at the end of a day or at weekends – is highly debatable and probably a step too far. For some, the human interaction is a price worth paying for the “attention to detail”, but what is clear, automation and artificial intelligence in the leather industry can provide objective benefits that warrant investigation and exploitation for a sustainable future. 🌱

PERFECT LEATHER

SUPPORTING YOU SINCE 1868

TRUMPLER

SIMPLY GOOD CHEMISTRY



TRACK THE ENTIRE
TANNING PROCESS



Collect all the data during the tanning process
with our traceability system

B  **TRACE**

www.gerelettronica.com

Exposing the hidden expense of grading errors

Open to subjective anomalies, manual inspections have always plagued quality control in the tanning industry. Although every hide is unique, meat processors, tanneries and end-users have a clear need to treat each hide as a 'fungible commodity', which can be objectively classified, graded, priced, and traded. This is particularly important for large industry players, whose repeat business transactions represent the bulk of their recurring daily trading. These operations, whilst clearly fundamental to the bottom line of any company, can be open to subjective anomalies, but advances in digital inspection, such as the Numerical Hide Quality (NHQ) system from Hidexe, could give substantial savings and more.

Digital inspection solutions usher in sustainable, disruptive, Leather 4.0 technologies, combining highly accurate cameras and automated machine-learning/artificial intelligence algorithms to:

- eliminate a considerable amount of slow, tedious, and error-prone manual tasks during the tanning process (inspection, data recording, data transcribing and grading);
- materially reduce related waste (raw materials and rejected outputs).

NHQ can produce error-free data feeds in real time, which can be shared securely via a public or a private cloud with inventory accounting, nesting, traceability, and reporting systems, to name a few. The cornerstone of this new technology is the extremely accurate visual identification and measurement of all hide/leather defects, powered by sophisticated optical equipment and real-time processing of large quantities of data.

Digital inspection makes quality control, auditing, and tracing extremely easy and intuitive, providing a versatile platform for many operational synergies. In terms of speed, accuracy and cost, these systems help tanneries to significantly cut their production waste and boost their profits, whilst greatly improving their sustainability credentials. In addition to highly

Table 1: Sorting Error cost

		250 days/year	
Production		2,000 hides/day	500,000 hides/year
Grading Error	25%	500 hides/day	125,000 hides/year
Avg. Size	5.00/m ²	2,500 m ² /day	625,000 m ² /year
Delta per grade	7.00 €/m ²	17,500 €/day	4,375,000 €/year
Retan Cost	7.00 €/m ²	17,500 €/day	4,375,000 €/year
Finishing Cost	7.00 €/m ²	17,500 €/day	4,375,000 €/year
Sorting error cost	125,000 hides/year	€52,500/day	€13,125,000/year

Table 2: Additional potential error costs based on 25% grading error

Resorting cost	2.00 €/m ²	5,000 €/day	1,250,000 €/year
Discount downgraded hides	10.00 €/m ²	25,000 €/day	6,250,000 €/year
Reworking cost	10.00 €/m ²	25,000 €/day	6,250,000 €/year
Discount reworked hides	10.00 €/m ²	25,000 €/day	6,250,000 €/year
Discount stock lot	30.00 €/m ²	75,000 €/day	18,750,000 €/year
Additional potential error cost		€155,000/day	€38,750,000/year

Tables 1 and 2: In the multifactor financial analysis, the largest impact on the net present value (NPV) of a project to install these systems comes from three key variables:

- average human error in grading,*
- price delta (difference) per grade*
- reduction of labour costs.*

While the assumed error rates and price deltas are easily observable inputs, labour cost savings have been excluded from this modelling exercise.



accurate, unbiased, computer-generated grade assessment, the latest innovations can recognise virtually any hide identification, thus allowing for easy traceability. This important feature can be used systematically for supply chain audits and inventory stocktaking. Externally, clients are more likely to sell their hides to the company than to the market because they will be able to trust and audit the results with ease and remain confident that all purchases are adequately compensated, based on hide grades and other pre-defined characteristics.

On the cost side, the primary benefits stem from the elimination of grading error-related mistakes, combined with a significant reduction of manual work that goes into inspection, manual data recording, manual transcribing of data into other databases, plus having to deal with

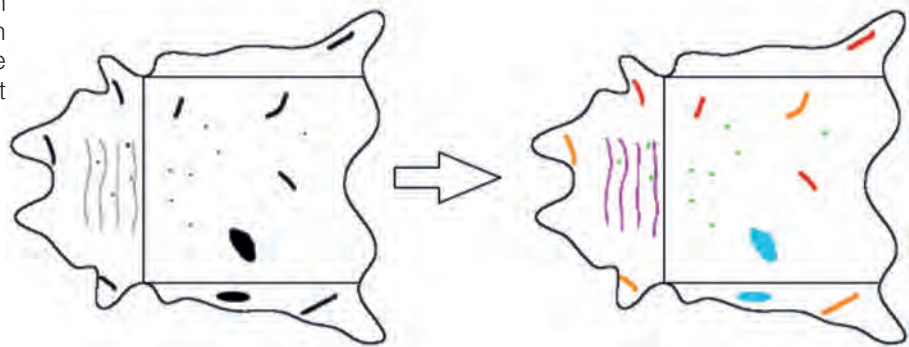
complaints and disputes stemming from inaccurate grading.

Although the positive cash flow impact for labour has not been modelled, one can indisputably state that automation will simplify and considerably accelerate the work of all hide inspectors, regardless of the existing production set-up. Hide inspection jobs are extremely physically demanding, since inspectors must endure long hours standing on their feet in an ergonomically poorly designed workplace, impacting their concentration, posture, stress levels and general wellbeing. These HR considerations are even more complex, since these jobs can suffer from high staff turnover, made worse by the constant loss of technological skills and industry experience every time an inspection specialist leaves the company.

Measuring the primary benefits of

the auto inspection technology is relatively straightforward, since this technology, once installed, will allow tanners to immediately eliminate substandard hides at the wet blue/wet white stage, greatly reducing waste at the finished stage. Therefore, for the same quantity of finished product, a reduced spend on energy, chemicals and water on an ongoing basis can be realised. There are also secondary long-term positive effects, many of which can only be qualitatively described and measured, such as the company's Environmental Social and Governance ratings or customer satisfaction. The importance of ESG or Life Cycle Assessment ratings cannot be underestimated, as there is now a clear trend towards additional life-cycle transparency demanded by various industry stakeholders, including independently verifiable audits. 🌱

Graphical representation of both batch quality and detail can be stored or shared giving further control over production, stock management or cutting integration. With the ability to recognise almost any hide defect, the automated grading system allows the user to remove the subjective aspect of grading altogether. Processing over 10,000 datapoints in a matter of seconds, leather is graded to definable criteria, and the system can be configured to understand individual customer requirements. Working on the acceptable number of defects, their location or type, such as cuts and scratches, veins or growth lines, automation and digitisation can provide each hide or skin with an origin and quality passport, where other information such as animal ear tag information can be attributed. It ensures that the grading is performed correctly, first time every time.



CREDITS: NHQ



Excellent - Bisphenol optimized syntans to achieve high leather quality



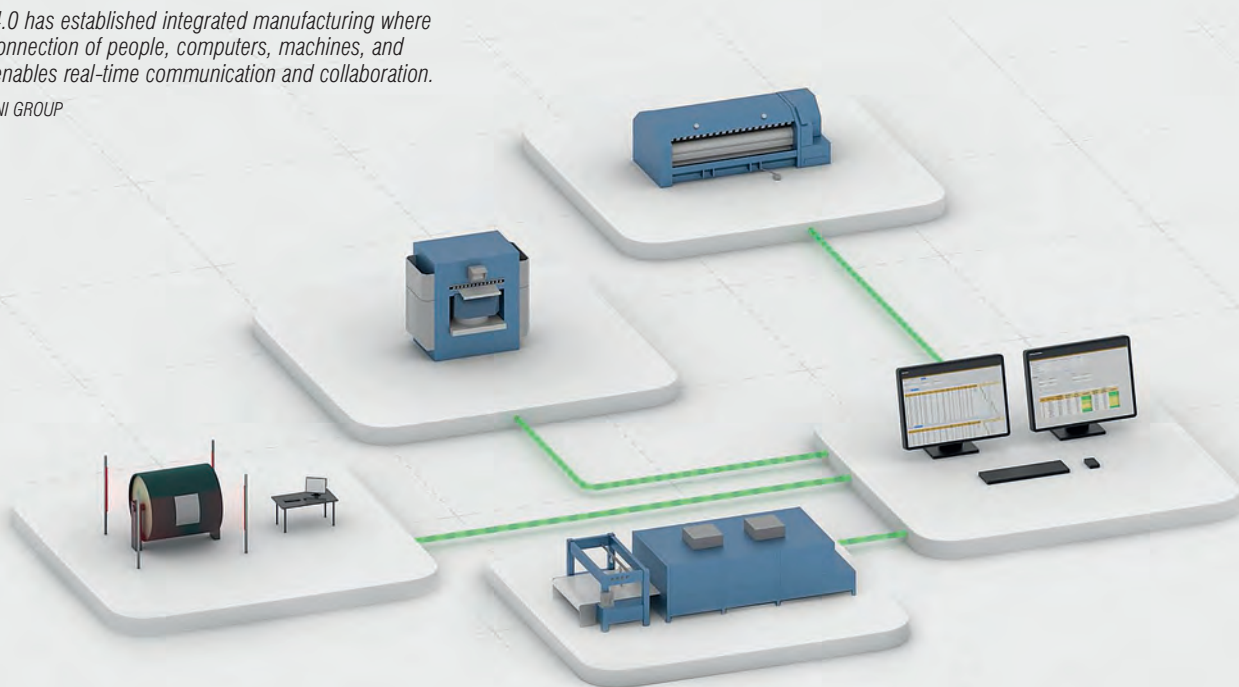
Through dedicated research we have developed a core range of bisphenol optimized syntans. The first, TANIGAN® BN-O Liq, TANIGAN® LF-O Liq and TANIGAN® DS-O Liq, have already been launched. These TFL pioneering syntans address the latest regulatory challenges ahead of time with a BPS content < 0.1% and are completely free of BPF. These remain an essential part of wet end processing ensuring the required leather tightness, fullness, softness and fastness attained. They also consume less energy in their production and have a lower carbon dioxide footprint. You can expect further product launches adding onto these essential “building blocks” shortly.

TFL – Great chemicals. Excellent advice.



Industry 4.0 has established integrated manufacturing where the interconnection of people, computers, machines, and systems enables real-time communication and collaboration.

CREDIT: HUNI GROUP



Automation in the industry

Automation is seen in all levels of the production and supply chain. Whilst some areas are more heavily invested than others, all stand to benefit, directly and indirectly, from the technology that is available.

As a “traditional” business, the leather industry has made a slower shift into Industry 4.0 than some. Coined in 2011 in Germany, Industry 4.0 refers to the fourth industrial revolution, characterised by the integration of digital technologies into the manufacturing process where machines and systems are interconnected and communicate with each other. Providing data in real time that can optimise production processes and improve decision making, it encompasses a range of technologies such as the Internet of Things (IoT), artificial intelligence (AI), robotics, big data, and cloud computing, among others.

AI is currently a hot topic in the mainstream media and whilst there are concerns that it could result in job losses, most recent political moves have been surrounding the privacy issues the current systems have.

Overall, Industry 4.0 is seen as a transformative shift in the manufacturing industry that has the potential to create new business models and drive innovation.

Going digital

In viewing this shift, Stahl, headquartered in the Netherlands, launched its digital transformation strategy in 2021. It is a ten-year companywide strategy to evaluate its current systems and way of working. Utilising new digital tools to improve traceability and transparency of products using blockchain technology, it was implemented, along with planned investment in artificial intelligence and automation,

to better empower employees. With the potential to bring new products to market faster and to boost the efficiency of production, the use of AI has led to a better understanding of product formulation processes but also helped to enhance forecasting capabilities.

At the time of the roll out, Marc Benioff, CEO salesforce, explained, “Digital transformation is the process of using digital technologies to create new, or modify existing business processes, culture, and customer experiences to meet changing business and market requirements. This reimagining of business in the digital age is digital transformation.

It transcends traditional roles such as sales, marketing, and customer service. Instead, digital transformation begins and ends with how you think about, and engage with, customers.”

Automation

Similarly, United Chemicals, a 30-year-old company that also specialises in the production of leather chemicals, moved to improve their production plant in Aliağa, 40 kilometres north of Izmir, Turkey. In doing so, the company shifted to a fully automated plant, deriving many benefits, from improved productivity to reduced health and safety risks.

Using apps designed for smartphones and computers it became possible to monitor the machines and control the automation processes in production in real time.

With these monitoring and predictive features, production



lines can be monitored continuously. Using sensors, various parameters can be observed such as process temperature, machinery running time, oil pressures, and even more subtle elements such as sound. Through built-in alarm systems, technicians can be alerted if critical changes are observed, providing the opportunity to detect problems that may cause production interruptions in advance, or present health and safety issues.

The production manager of the company, Burcu Uçan, who recently celebrated her tenth anniversary at the company, further explained the sustainability benefits of the state-of-the-art facility.

"Small changes in our automation processes allowed us to reduce our natural gas and electricity consumption. We have saved more than 915.540 kwh energy per year. For example, by making software updates on our PLC software program for productions that have exothermic reactions, we have reduced our natural gas usage by 5%; and by replacing our high-pressure steam boiler with a steam generator, we have reduced our natural gas consumption by 30%. By making a non-costly modification in our valves, we have saved 515.540 kwh of energy annually. The compressor, which had to be left on at night for reactor cooling or heating and works 24 hours a day, was modified at zero cost, resulting in 2280 fewer hours of operation per year and an annual energy saving of 515,540kwh."

Don't underestimate the costs

TFL global head of manufacturing, and general manager for TFL France, Patrick Marias, explains the cost-to-benefit balance. With manufacturing execution systems (MES) installed in different parts of the world, TFL recognises the part that automation has played in its expanding business, with plants in Italy, France, Germany, and China all having full systems installed and with a partial system employed in Brazil. MES is a comprehensive software system that monitors, tracks, documents, and controls the process of manufacturing goods from raw materials to finished products. With regards the automation of the plants, generally speaking where labour costs are higher, then the level of automation employed is also higher, but provided a payback is viable, then TFL plans to install new regulation [automation]



Production quality is also positively impacted through the implemented changes. Standardisations are better controlled as human errors are all but eliminated. Additionally, flexibility in terms of making changes to processes through data comparison allows for revisions and improvements in processes.

CREDIT: UNITED CHEMICALS

loops. By doing so, direct labour cost savings are realised, or operator hours can be reassigned where there is more added value.

Having regulation loops in all the plants, benefits seen by the company include increased reliability over human actions, the health and safety impact that robotics bring, especially where repetitive lifting of bagged product is concerned, where workers can avoid musculoskeletal strains, but also the power of data storage, where process parameters can be recorded in a single database and then analysed, giving a better understanding should there be a quality problem.

"As a consequence, having more automation in a plant also dictates the need to dedicate more hours to maintenance with trained people. This also has a cost that should not be underestimated," Patrick Marias says. "Nevertheless, the balance of benefits against cost is always positive in the short, medium and long term".

Automation for tanneries

Process control specialist Hüni outlines that automation can help streamline processes and reduce the time needed to process hides, by using technology to control and execute tasks, manual functions, and autonomous mechanisms to optimise the production chain. The scope of automation is enormous and extends far beyond the factory floor and the company's primary business.

Four categories of automation can be considered at the global level:

1. Operational automation: Intelligent equipment and sensors that monitor operational performance and collect data to assist management in making decisions.
2. Control automation: Programmable devices (such as PLCs or CNCs) embedded in devices, equipment, and machines that apply operational logic to programmed processes.
3. Supervisory automation: Systems that monitor data and readings from sensors and controls.
4. Informational automation: A system that organises the flow of information from the various layers of industrial automation to facilitate overall operation control.

Traditional manufacturing processes can be very wasteful. However, the world has seen a massive shift towards automation to support companies in better performance. Hüni understands the importance of accuracy, precision, and safety and has developed concepts to deliver all levels of automation to the market. Being a well-known provider of efficient dosing systems to support the leather industry, the company recognises that using conventional methods without automation is demanding and inefficient.

Safety is a major concern for companies when handling acids.



Workers handling acids run the risk of serious injury if proper safety measures are not taken. Automation can help improve safety by reducing the need for manual handling of acids. Solutions for liquid chemical preparation, powder chemical preparation, acid preparation, water dosage, and drum process controls are among the core businesses of Hüni.

When companies adopt a new automated method of work, the process control automation represents a “seismic shift”, and 99.9% of the time, there is no going back to a manual module of work. The advantages discussed in terms of benefits are labour savings, reduced operation time, and increased safety for operators. Nevertheless, it must be noted that the most significant gain is the assurance that the process is being followed as the recipe stipulated, with a substantial increase in quality and standardisation.

In recent years, Hüni has launched two products, DataCollect and Advanced Planning System, aligned with industry demands.

DataCollect is the solution to connect to PLC machines from various machinery suppliers and different production stages to extract productivity in pieces and the parameters that were produced in the production batch. Automated sensors installed inside the drums are used to control the temperature, oxidation, and pH in soaking, liming, tanning and retanning. Displaying the result in real time to operators and registering it, minute by minute, in the database gives the



By applying artificial intelligence, Stahl were able to gain better understanding of product formulation processes and drive forecasting abilities, among other benefits.

CREDIT: STAHL



opportunity to analyse graphically. This ensures that the leather is processed consistently and produces a higher quality product standard.

There is also a growing need to automate bureaucratic and administrative activities related to production management and production control. Therefore, the Switzerland-based company has introduced an Advanced Planning System (APS). The APS provides an intuitive and straightforward planning and scheduling system that enables precise management of production orders per machine. This feature optimises production runs, minimises set-up time between production batches, and maximises production output. By using data analytics and algorithms to optimise production processes and machinery usage, it enables demand forecasting, inventory optimisation and production scheduling, ensuring the availability of raw materials and finished products at the right time. As such, APS represents a significant step forward in the digital transformation of the tanning industry as it gathers information.

By adopting these automation technologies, the tanning industry can become more sustainable, efficient and safe, preparing itself for future challenges. This transformation is critical for the industry to meet the future needs of the competitive world. 🌐

TFL are no strangers to robotics and automation and have even used them for more social aspects, seen here at the IILF in 2020.

CREDIT: WTP

A NEW BREED OF AMERICAN

Leathers

SINCE  1992



National Beef



Taking the Lead in Quality, Innovation, and Sustainability

We don't just make consistently beautiful, premium leather. We're leading the industry in technologically advanced processing. That means you can always count on our entire selection for a high quality supply. As the largest tannery in the world with a deep commitment towards environmental responsibility, National Beef® Leathers is raising the bar for a premium product.

Honored to Sponsor



LEATHER
NATURALLY



nationalbeefleather.com

National Beef Packing Company LLC. © 2023

BASOCHROM®

Leathermen's Friend

Premium tanning agents

BASOCHROM® has a worldwide reputation for leather tanning substances of the highest quality.

Advanced, transparent processes and more than 50 years' experience in the development and production of chrome tanning substances ensure consistently high standards.

Our own quality control laboratory monitors the products carefully during the whole production process. Additionally, first class third party laboratories continuously monitor, control and confirm the quality of our products.

Voelpker Spezialprodukte is your guarantee for top-quality products.



Völpker Spezialprodukte GmbH
Fabrikstr. 1 • 39393 Völpke • Germany
Tel. +49 39402 962-0 • Fax +49 39402 215
mailbox@voelpker.com

www.voelpker.com

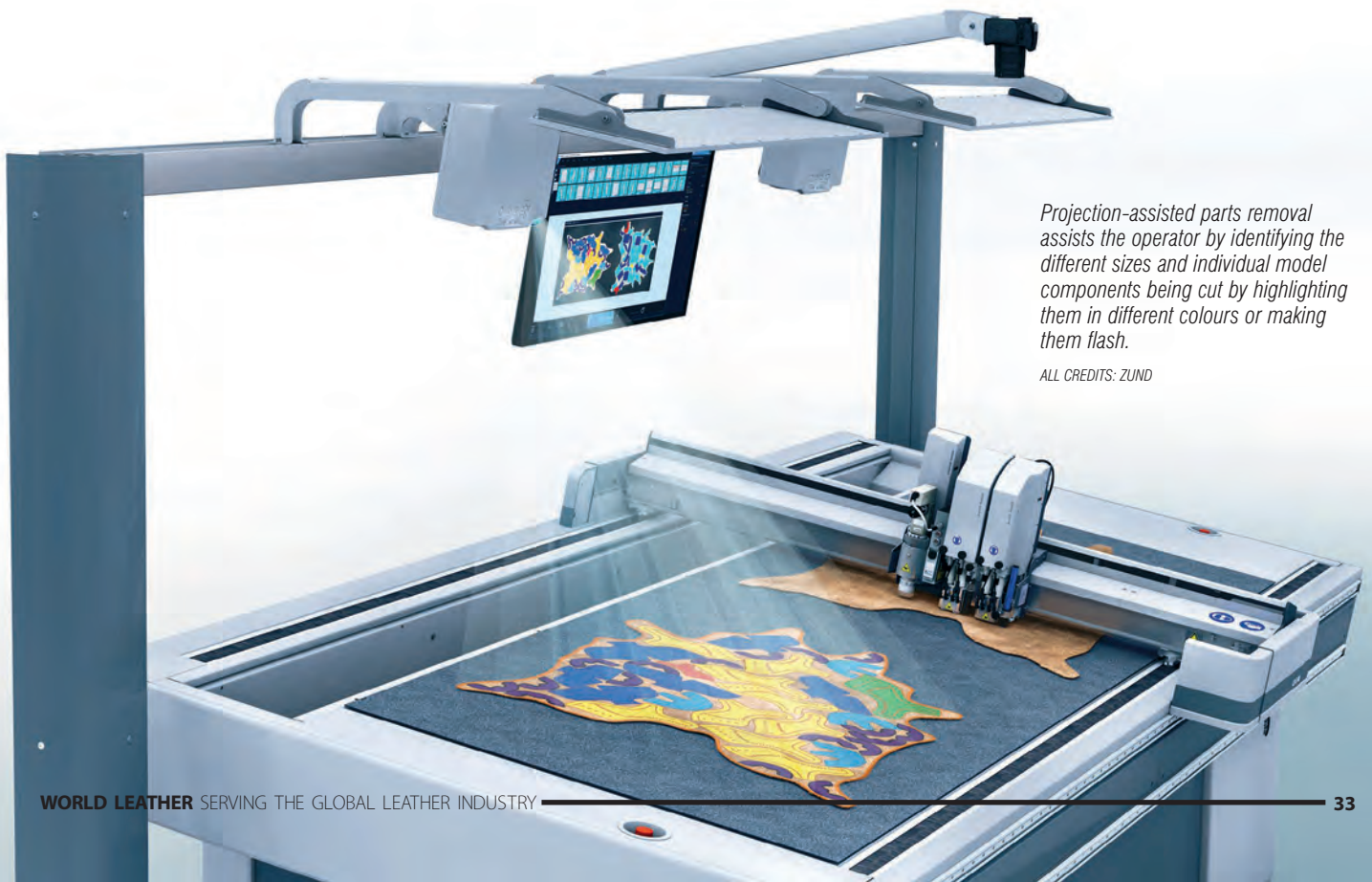
Digitisation of leather in shoe manufacture

Daniel Bischof, Zünd Systemtechnik

Germans have something of a reputation for frugality. Sure, it is a cliché, but there's a grain of truth to it all the same. The example of the German shoe manufacturer Berkemann demonstrates that a combination of frugality, expertise, and consummate skill in digitalising processes can propel other shoe manufacturers in the country to the very top. The company has been working to completely digitalise its cutting rooms and relies on digital cutting technology and software from Zünd Systemtechnik. New automation technology as illustrated here should assist in leather stepping back into the limelight of shoe production.

There is an L of a difference between digitalisation and digitisation. The latter is when you convert analogue data and digitise it; the former goes much further to improve processes using digital technology. The Berkemann company understands the subtle difference and continues to move in the direction of improving its processes. The shoe manufacturer has been making comfortable shoes for over 130 years. Comfort is all about a good fit, high-quality materials, durability, and sustainability. For Christoph Kannengiesser, its head of technical projects, comfort is also about "listening to one another, being aware of customer needs, and constantly seeking out opportunities for further improvement". Kannengiesser is the driving force behind the end-to-end digitalisation of shoe manufacturing, using Zünd's state-of-the-art capture, grading, and cutting technology.

Not surprisingly, Berkemann is steeped in tradition. Founded in Hamburg in 1885 by Heinrich Adolf Berkemann, the Berkemann Group today employs around 1,000 people and has production and administration facilities in Germany, as well as Croatia, the Czech Republic, and Hungary, where it has a further four production plants. "In Hungary, the land of shoemakers and famous 'Budapest-style' shoes, we manufacture comfort shoes using the craftsmanship and expertise of our specialists. Manufacturing our footwear in the heart of Europe allows us to respond quickly to market demands, while keeping our delivery routes short and supply chains transparent," explained managing director Thomas Bauerfeind at a recent event to mark the 25th anniversary of Berkemann Hungary.



Projection-assisted parts removal assists the operator by identifying the different sizes and individual model components being cut by highlighting them in different colours or making them flash.

ALL CREDITS: ZÜND



Economically sustainable cutting and Mind nesting leather

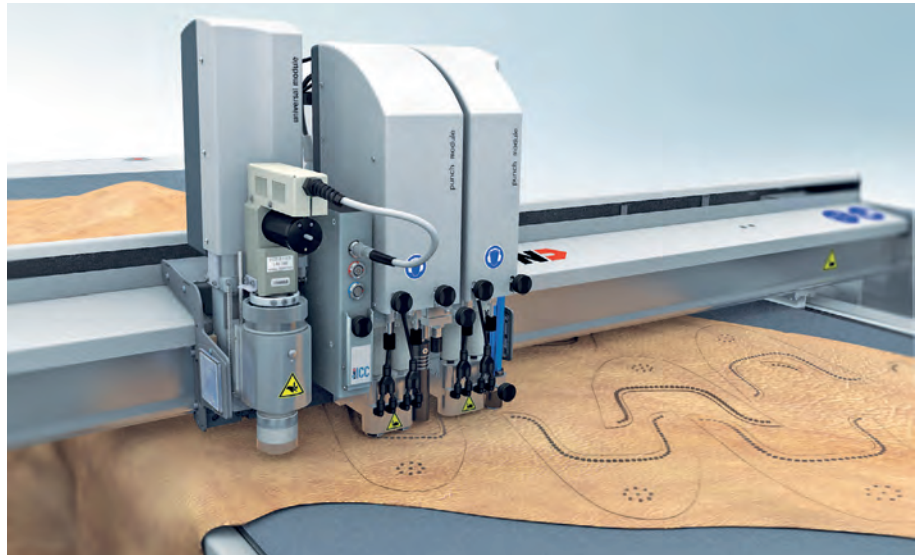
Sustainability is a key area of focus at Berkemann and permeates everything related to production. At the end of the day, however, it also needs to make sense economically. As Christoph Kannengiesser says, “This is an important aspect of our investment in Hungary. Substituting the strip steel previously used for cutting dies was an important factor in our efforts to digitalise cutting at our plant in Kiskunfélegyháza.” However, he says that in the evaluation process, digitalising the leather grading process was even more of a pressing concern since only digital grading and measuring of leather hides enables repeatable processes downstream.

Nesting processes, on the other hand, have been common at Berkemann for many years. That is why another criterion in its decision was that nesting with the new Zünd’s Mind software had to be at least as good as its current processes, and preferably even better. “In most instances, we have become more efficient with Mind nesting. We are able to nest parts more effectively on a hide that has been digitally captured and graded beforehand,” explains Kannengiesser.

Digital inspection and hide grading in less than five minutes

Kannengiesser is effusive when it comes to digital grading. Berkemann has invested in two MindCUT Diva systems (Digital Inspection and Virtual Annotation). Employees who had to be reassigned after the swing-arm clicker presses were replaced with Zünd cutters can now grade full hides on the new system in less than five minutes. “To use the Diva, I still need skilled personnel who know our collections and are familiar with different qualities of leather and grain direction. These people know exactly how far into the shank areas they can place each pattern.”

Making sure the quality and quantity of leather delivered actually matches what was ordered was, according to Kannengiesser, a task that was once nearly impossible but has now become routine: “The Diva allows me to photo-optically document and measure any skin. It’s an elegant solution that helps prevent under-deliveries. If we order 500 metres, we’d be happy to receive 505 metres but certainly not 490. And if I’m ordering a premium product, I want to make sure that’s precisely what I’m



With modular design, the Zünd cutters allows quick configuration of the required tooling. The resulting flexibility enables almost instantaneous changes in production requirements, saving both time and money.

paying for. MindCUT Diva offers us a powerful tool that does all that. It makes us much more efficient, while allowing us to keep a very close eye on our leather suppliers.”

From manual work to digital production

By introducing these digital solutions, Berkemann is generating enthusiasm for working in the cutting shop among the younger, computer-savvy generation. They prefer working on modern, computer-controlled production systems rather than outdated cutting presses. For staff who had previously been working on those presses, the transition to digital cutting was a major change. “We guided people through the process and gradually familiarised them with their tasks. We received excellent support from Zünd along the way.”

As of the end of 2020, Berkemann has been using a total of eight digital cutting systems from the technology company at its production facilities in Hungary—four L3 C-56 cutters and two older LC-2400 cutters. In addition, Berkemann invested in a Zünd G3 L-2500 cutter for cutting synthetic and other rolled materials and is using its S3 M-1200 cutter in the pattern-design department.

“We have been using Zünd cutters in our Hungarian operations for 20 years, so we’ve gained a lot of experience when it comes to the durability, precision, and service of these machines. If the latter isn’t any good, even the best technology will be of no use to you. They have been taking care of us very well indeed.”

Savings and more savings

Digitalised cutting offers tremendous savings potential. For one thing, it eliminates the need for dies. This alone saves Berkemann around €100,000 a year in strip steel. And making dies also takes time. “Now that we no longer use dies, we’ve been able to shorten our internal production processes by several weeks. We don’t have to wait for dies to be made anymore, or spend time setting them up, and so on. Once the file is created and we have the pattern ready to go, we can head straight into production. A whole slew of additional tasks and communication has fallen by the wayside. Before, when we were making a shoe model in different materials, we would have to order up to three different sets of dies. Today, we can do all this virtually and make quick, last-minute changes without having to pay for tooling that isn’t needed or waste any time.”

Impact on yield

The digital advances have positively impacted yield by streamlining production processes, reducing waste, and increasing efficiency. By utilising Zünd Digital Cutters, Berkemann has been able to create customised shoes more quickly and accurately, reducing production time and material waste. Additionally, the implementation of a digital ordering and inventory system has improved the accuracy and speed of their supply chain management, leading to more timely and cost-effective production. Overall, these digital advances have allowed



Berkemann to increase production yield while maintaining high quality and customisation standards for their products. Last but not least, the digital solutions ensure that the jobs have become more attractive, which is an important factor in times of skilled labour shortages.

Scan-to-order workflows benefiting shoe manufacturers

One special feature of Berkemann's production process is the scan-to-order workflow. This is an offline process in which hides are digitised and cut pieces are nested on the MindCUT Diva system using Mind software, rather than on the cutter. After visiting customers, the sales reps enter the orders on their laptops and transmit them to the head office in Thuringia. Orders are then bundled in the data processing centre and forwarded to Purchasing and Supply Chain Management, where the amount of material required to fulfil the orders is calculated.

The square-footage calculations from the CAD system are supplemented with additional factors. The various shoe parts are laid out on the resulting area – provided the available material is of the same quality and grade – and added up to arrive at the total actual square footage required for the order.

Once the order quantity has been determined, production can begin. Berkemann's production is exclusively made-to-order. The variety of models is enormous, while an order for a particular item can sometimes be as small as 20 pairs. "We consider those cases more sample production than industrial custom manufacturing. Either way, we must be able to work

as flexibly and efficiently as possible. There are other cases where we have higher volumes of up to 2,000 pairs of one article, for example, a shoe model in one colour, in 14 different sizes."

The employee charged with cutting goes to the warehouse with their hide horse, scans the orders, and gathers the necessary material accordingly. At the same time, the cutting job is prepared at the cutter. All the operator has to do is double-click to confirm the job, lay out the barcoded hide on the machine, click on the markings, and cutting begins. "The barcode, which I also scan into the cutter, tells me which hide I have in front of me, and the appropriate nesting is applied automatically. In other words, this is a foolproof process that also prevents further errors. It ensures a very high level of repeatability and accuracy," according to one of the cutters.

The scan-to-order workflow has made Berkemann much more flexible. With the ability to nest different models on the same material, the company has seen even more increases in productivity. All of this is based on existing CAD data made available for nesting via the Model Importer. To ensure one does not lose track after cutting, the cut parts are illuminated in different colours. "The great thing about projection-assisted parts removal is that we can highlight the different sizes and individual model components we are cutting, by using different colours or making them flash. In practice, we have shown that our investment in Zünd technology has paid off within a year. I don't think there's any better way of demonstrating the success of this project," says Mr. Kannengiesser. 🌐

HEUSCH BLADES

YOUR SAFE CHOICE IN TIMES OF INSTABILITY

For more information please contact us: Tel +49 (0)241.168 95 - 211 www.heusch.de

YOUR ROAD TOWARDS SUSTAINABILITY

Our new S-Range product line offers sustainable solutions that contain up to 100% of renewable components. Combine environmental friendliness with excellent results and meet the requirements of today's leather manufacturing.

Ask us for more information:

leather@zschimmer-schwarz.com



ZSCHIMMER & SCHWARZ

zschimmer-schwarz.com



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

No turning back on traceability

Brazilian tanning industry body CICB hosted a successful edition of its Sustainability Forum at Fimec in Novo Hamburgo in March. At this year's event, the theme was 'Paths To Traceability' and a large audience heard presentations and comments from all parts of the leather supply chain. At no point was the complexity of the path to traceability more in evidence than in the animated panel discussion, chaired by CICB executive president, José Fernando Bello, that brought the forum to a conclusion.

Two of the four speakers, Francisco Olavo Pugliesi de Castro and Fernando Sampaio, represented meat and farming industry organisations. The other two, José Roberto Pacheco from Midori Autoleather and Alisson Granemann de Medeiros from Viposa, represented the leather manufacturing sector. What follows is an account of the main points of discussion.

The aim of the CICB Sustainability Forum was to help build consensus and partnerships across the value chain on traceability. In the discussion panel, though, Francisco Olavo Pugliesi de Castro's pro-farmer colours were on full display from the outset.

Mato Grosso, where Mr de Castro is from, is home to 33 million head of cattle, which farmers there raise to help feed the world. He is a third-generation beef cattle farmer at a ranch called Fazenda Paulicéia near Rondonópolis; he is also

Leather manufacturers in Brazil are in dialogue with partners in the meat and livestock supply chain to put in place a national traceability programme. The path to traceability is complex, but a decision on which system to use is close now and, crucially, all parties agree that there is no turning back.

a qualified vet. He has senior roles in the National Agriculture and Livestock Commission (CNA) and in a group working to eradicate foot-and-mouth disease from Brazilian farms. If Mato Grosso were an independent country, he explains, the only places in the world that would have larger cattle herds would be India, the US and what remained of Brazil. He is proud of the livestock-rearing traditions that his country, his state and his family can lay claim to.



CICB executive president, José Fernando Bello, chaired an intense panel discussion on the future of traceability in livestock farming, meat production and leather manufacturing in Brazil at the 2023 CICB Sustainability Forum.

Credit: CICB

Zero Deforestation on the doorstep

He accepts that the work to take traceability forward is essential because there is a real need to demonstrate that products from Brazil and elsewhere carry no link to deforestation. He says the CNA is completely committed to putting in place tools that farmers in all parts of the country will be able to use so that the commission can establish “a definitive traceability network”. A group has been working inside CNA for some time now to decide on the best tagging, tracking and biometric technology to use and is now putting the finishing touches to a proposal that he says the entire meat and leather value chain will be able to present to the federal government in the coming months.

Some aspects seem clear to him already. In terms of timing, for example, CNA’s proposal is for the traceability data-capture to take place not at the birth of the calf, but at the moment the animal moves away from the farm where it was born and begins its journey along the supply chain. Mr de Castro says the reasons for the leather industry’s desire to engage with its upstream partners on traceability are also very clear to him. He continues: “Naturally, the hides you use belong to our cattle first, but the first people who have to take on the responsibility of looking after the hides are the livestock farmers.” This makes them a fundamental part of any traceability programme the other stakeholders decide on and it means that how they present the technology to the farmers is of great importance.

He does not view moves to make the traceability system obligatory as a good idea. Instead, the farmers should choose to take part and comply willingly in chipping their animals and capturing the biometric data.

Packers’ punch

CICB executive president, José Fernando Bello, maintains that the tanners’ organisation has a good relationship with the livestock farmers that CNA represents. There is ongoing, meaningful dialogue and plenty of openness, he insists, but he accepts that the day-to-day discussions that leather manufacturers have on questions surrounding circularity, traceability and sustainability are much more likely to be with the meat companies. It is from the meat companies, after all, that they source hides, usually after the animals have moved several times along the supply chain. “Tanneries trade with the meat industry, but the strategic sectoral actions involve the entire production chain,” he says.

According to Fernando Sampaio, sustainability director at Abiec (Brazil’s meat exporters’ association), good traceability initiatives have already come to light in slaughterhouses and in tanneries, although he acknowledges that there is often a gap between the two when it comes to sharing data. In the face of this information gap, he believes it makes sense to divide this discussion into two parts because, for him, there are two connected but different fundamental questions to address here. The first is to find the best way to trace the animal’s path, from its place of origin to the slaughterhouse. That means tracing the identity of the animal, and of the farm and of the farmer, three crucial pieces of information.

Secondly, details of the animal and its health records have been in place for some time. This is essential for food safety requirements at home and in many export markets. But Mr Sampaio says a consensus has been building up for a long time that this needs to go further. “Our companies want Brazil to be the biggest and best exporter of meat in the world,” he explains. “That means having systems in place that work at the highest level too. In a country the size of Brazil, of course, it is a challenge to put new systems in place. Nevertheless, I can say that there is a very clear understanding among meat companies and in the ministry of agriculture that Brazil needs a new public policy on the traceability of cattle and meat.”

Four pillars

The follow-up question that arises from this centres on exactly what extra detail, what extra information a system needs to be able to capture to take traceability programmes forward. Fernando Sampaio raises the social conditions of workers and the impact on communities of indigenous people as obvious and important examples. There are tools available already that allow companies to include this information in the data they capture, but no common set of criteria about exactly what to include. “Different markets around the world have their requirements, as do individual companies,” he explains. “But there is something else. If a farmer fails to fulfil the criteria the system sets out, what measures will we be able to put in place to support that cattle producer to help things on the ground get better? Just to cross the farmer’s name off your list of approved suppliers doesn’t bring any improvement on the ground because the farmer would still be there, continuing to raise cattle in the same way as before.”



A representative of livestock farmers, Francisco Olavo Pugliesi de Castro, says it will be essential to convince small-scale farmers in rural communities that traceability will benefit them too.



The sustainability director at Brazil's meat exporters' association Abiec, Fernando Sampaio, believes the new programme should include measures for helping farmers who do not initially comply. He does not want anyone in the country's vast meat and leather supply chain to be left behind.



Midori Autoleather's José Roberto Pacheco says product quality and product safety have been of great importance in the automotive industry for a long time. This has helped pave the way for suppliers to engage with extensive traceability programmes.



Sustainability lead at Santa Catarina-based leather manufacturer Viposa, Alisson Granemann de Medeiros, confirms that questions come in every day now from customers asking about hide traceability, all the way back to start of the supply chain.

Credits: CICB

Four pillars he picks out are to put a traceability system in place, for the system to include well defined criteria and good controls, to have a programme to help farmers that do not initially meet the criteria to improve, and to have accurate mapping so as to be able to home in on the areas that present the greatest risk to the beef and leather supply chain.

Leather perspectives

From a leather industry perspective, CICB's José Fernando Bello insists that serious work is already going on in tanneries to keep track of the provenance of hides and to share information with customers. Even so, commentators in all parts of the world still seem keen to speak and write about links they perceive between Brazilian leather and deforestation, "sometimes telling the truth, sometimes spreading lies", and he wonders how leather manufacturers can build even stronger links upstream partners and make

progress on this together.

Alisson Granemann de Medeiros, who leads on sustainability for Santa Catarina-based leather manufacturer Viposa, recalls that, within living memory, the only answer tanners needed to give to any question about where they sourced hides from was to identify the packer company or slaughterhouse. Not now. He explains: "Now, with such intense focus on deforestation in the Amazon and in other regions, questions come in every day asking us about the farm that supplied the packer firm and the farm that supplied that farm, all the way back to the animal's birth. In the large universe of suppliers, it is often difficult to obtain data, but we see an evolution in this sense."

He hopes new traceability tools will open up "a great opportunity for dialogue" with partners all the way along the supply chain. "Transparency is of the utmost importance," Mr de Medeiros says, "and it's a good thing for us to join forces



with our partners in the supply chain to make sure we have in place the information our customers are asking for.”

A bit further north, in the state of São Paulo, automotive leather producer Midori runs an extensive operation, and has done for 50 years now, since its Japan-based parent group acquired a local leather manufacturer, Curtume Atlântica. Today, its manager for new projects is José Roberto Pacheco. In asking him for his thoughts on traceability developments, the CICB executive president makes the point that this whole debate comes, for Midori, in the context of the particular demands of the automotive sector. Customers in the automotive industry, Mr Bello says, are famous for being the most forthright of all in terms of the requests they make of suppliers.

Mr Pacheco makes the point that meeting the stringent demands of automotive customers does bring one benefit for suppliers: they are already used to working with traceability systems. “Product quality and product safety have been of great importance in the automotive industry for a long time, so, today, we have traceability [of where the car was assembled and of which companies supplied the raw materials] built into the process. We are used to that, but traceability for social and environmental reasons from automotive companies is increasing. We are under pressure to provide more precision for our automotive customers.”

He points out that car companies are serious in their pursuit of alternatives to leather and, as far as he can tell, not only because of price, but also because of genuine concerns about animal welfare and a genuine desire to respond positively to the preferences of consumers who want vegan alternatives. “It’s going to be a lot of work,” he says.

Money talks

Agreeing with this, José Fernando Bello points out that applying tracing technology of any kind to Brazil’s entire cattle herd will be a huge task; the herd is made up of 220 million head he points out. This will require substantial financial investment as well, and he asks Francisco Olavo Pugliesi de Castro where the funding will come from, prompting a frank response. “In rural communities,” he says, “no one will install new technology into their operation unless they see what they will gain from it. Cattle producers are not going to put those systems in unless there is a financial benefit for them. If it is clear to them that they will gain from this, I believe they will push implementation through quickly. But it’s knowing how to pitch this to farmers in rural communities that is the key. You have to make it clear to them that they will benefit.”

His answer to the question is that the market as a whole must pay for the technology because all players along the supply chain will benefit, including tanners, because they will have good access to hides that meet all the traceability requirements of brands and finished product manufacturers. “If one wins, we all win,” he concludes, “including tanners because you will have wider market access.”

Midori Autoleather’s José Roberto Pacheco responds to this by saying that passing any extra cost on to customers in the automotive industry will not be easy and could even push them to speed up the replacement of leather among some car companies. The other tanner on the panel, Viposa’s Alisson Granemann de Medeiros, expresses sympathy for this point of view. He argues that leather manufacturers who have worked hard on previous projects to demonstrate the



The panel discussion that closed the 2023 CICB Sustainability Forum had a large number of industry professionals in the audience.

Credit: CICB

sustainability of the material they produce have been through this before. “The difficulty is in being able to say specifically what the added value of the new initiative will be,” he explains. But Mr de Medeiros also expresses optimism about the value-add a country-wide traceability technology solution could bring, with all the stakeholders involved benefiting.

CICB’s Mr Bello wonders if car companies that choose to use synthetic fibres instead of leather in seat covers will, in addition to having to work with lower-quality materials, face a second problem. He asks if the car makers will be required to put in place traceability programmes for the synthetic materials too. “Will they have to find out which barrel of oil provided the raw material for the fibres?” he asks.

The road ahead

No one on the panel imagines that the producers of synthetic materials will ever have to jump through that particular hoop, but they accept that in the beef and leather supply chain there is no turning back on traceability now. “It’s a path of no return,” Francisco Olavo Pugliesi de Castro says. And on behalf of meat exporters, Fernando Sampaio says he is sure too that the traceability technology system will become part of the value chain in the near future. “This is what the market is demanding, so, yes, there is no turning back,” he says. “This is an important period of change.”

José Roberto Pacheco also agrees, saying the automotive industry is not willing to wait for this any longer. “The path is there in front of us and there is no turning back,” he says, “so let’s move forward.”

Precisely for this reason, his leather industry colleague, Alisson Granemann de Medeiros, says he hopes for agreement soon on exactly what tool the Brazilian livestock, meat and leather sectors will use to make progress along this path. “That’s why this edition of the CICB Sustainability Forum will prove to be important,” he says. “This is where we can bring the discussions we have been having to a successful conclusion, bring any remaining doubters on board and move forward together.” 🌱

Black Line

Your **next drum** is not just a drum



easier and
faster loading
and unloading



+ 20%
dust
extraction



+15%
milling
efficiency



spotless
humidity
control*

*Wet White and
Vegetable tan safe

Black Line Milling drum

Completely redesigned dedusting unit for greater efficiency, time and energy savings. New software with full control of energy and product consumption in real time.

Reduced consumption and high performance for the most advanced Erretre milling drum. Choose **innovation**.



INDUSTRY 4.0
easy remote production
monitoring



more



Italy's leather manufacturers employ a total of 17,831 people, with 85% of them on permanent contracts. A little more than 18% of them are women.

All credits: UNIC-Lineapelle Group

Twenty years of sustainability reports



RENEWABLE



WASTE-FREE



LONG-LASTING



SUSTAINABLE



MARINE-FRIENDLY



SMEs



RECYCLED

Italy's national tanning industry association, UNIC, unveiled a new sustainability report at the Lineapelle exhibition in Milan in February, covering the activity of Italian leather manufacturers in 2022.

This document marks an important milestone for UNIC because it is the twentieth annual account of the sustainability successes that have come to light in Italy's tanneries. The reports constitute a goldmine of data and real-life examples of what leather manufacturers can achieve and are achieving in environmental, social, and corporate governance (ESG). "This started," UNIC deputy director, Luca Boltri, explains, "because we felt the need to communicate, to share what the tanners were doing."

He says the series will continue and he has no doubt that the look, feel and nature of the reports will develop in future years. Looking back over the last two decades, though, he says it's already interesting to see how much has changed. "If

For two decades now, every year Italian tanning industry representative body UNIC has been sharing details of the sustainability successes of its member companies in a dedicated report.

we compare the discussion we have now to the ones we were having 20 years ago, it's clear that things have changed," he explains. "We have always tried to take a holistic approach to this, and what you can see is that the number of issues that we now include as part of sustainability has increased a lot."

“Leather is sustainable by nature; this is part of its inimitable appeal,”

LUCA BOLTRI, UNIC

Size is no obstacle

This latest report paints a full picture of the leather manufacturing sector in Italy in 2022. Together, 1,154 companies produced 111 million square-metres of finished leather and 8,000 tonnes of soling leather. This created revenues of €4.2 billion, 66% of Europe's tanning sector revenues last year and 23% of the world's. Those companies employed a total of 17,831 people, with 85% of them on permanent contracts, 18.2% of them women and 15.7% of them originally from countries other than Italy.

“We do have a number of big groups, each employing hundreds of people,” Mr Boltri continues, “but if I tell you the report puts the average number of employees at our companies at 15, you will see that the Italian tanning industry is mostly made up of small and medium enterprises (SMEs), mainly family-owned.” One of the important consequences of this, looking back over the 20 years of these reports, is that it was and, in many cases still is, difficult for SMEs to know how sustainable they were. In response, UNIC has developed tools to help companies collect the data they need to contribute to industry-wide assessments.

Each of the three elements, the E, the S and the G, feature extensively in the reports that now result from these assessments, including this most recent one.

Environmental examples

In environmental terms, the report gives a water-consumption figure of 116.6 litres per square-metre of finished leather in 2022. UNIC calculates this to be down by 13% on the figure for 2003. “Water, after raw hides and skins, is the most important raw material in the tanning process,” the report says. “The wastewater generated must be suitably purified, to remove pollutants and return water that is compatible with environmental ecosystems.” Figures for water that has been processed in the common effluent treatment plants that the industry has in place in Tuscany and in Veneto show average reductions of 97.4% in chemical oxygen demand, of 99.5% both in suspended solids and in chromium (III) salts, of 96.3% in total nitrogen and of 41.2% in chlorides. Luca Boltri says he regards these figures as “absolutely remarkable”.

Use of renewable energy accounts for a share of more than 80% of all the electricity Italian tanneries purchased in 2022. The report calculates that their overall energy consumption last year was 25% lower than the figure for 2003.

Another important ‘E’ consideration is the solid waste that results from tannery processing: sludge, shavings, trimmings, splits and more. “We now have an established system in Italy for recovering and reusing this waste,” Luca Boltri explains. “For example, it goes into bio-stimulants and fertiliser for agriculture, into gelatine and collagen products for the food industry, and into granules for use in the construction industry.” At the moment, 72.5% of all the solid waste is recovered for use in these ways, with the other 27.5% going for disposal. This translates into 1.38 kilos of useful waste for



Deputy director, Luca Boltri, at the launch of UNIC's latest sustainability report in Milan in February.

each square-metre of finished leather and 1.17 kilos of disposed waste, of which 97% is certified as non-hazardous.

Italian tanners have also achieved reductions in the volume of chemicals their production processes consume. Compared to 2007, the first year in which the UNIC reports captured a figure for this aspect of production, last year's chemicals consumption was 6% lower, with a figure of 2.1 kilos of chemicals per square-metre of finished leather.

Social life

We hear less talk of corporate social responsibility these days but it is this concept of businesses taking note of the positive impact they can make on people and communities that puts the ‘S’ into ESG. In the new UNIC report, coverage of this category includes details of accidents at work, of which there were 565 among leather industry workers in 2021 (the most recent year for which national accident insurance body INAIL, which monitors workplace health and safety, has figures). This includes accidents that occurred to people while travelling between home and the tanneries at which they work. Overall, the figure is almost 60% lower than the one registered for 2003. “Working in the Italian tanning industry is safe,” Mr Boltri insists, “and is becoming more and more safe all the time.”

School is an important ‘S’-word, too, and the report also captures education and training activity in the Italian leather industry last year. There were 108 courses for students in high schools, fashion institutes and universities across Italy and beyond, with 3,800 young people taking part. Representatives of retailers, brands, design companies and finished product



manufacturers also had ample opportunity to learn about leather last year from UNIC and its member companies. It ran 47 courses for supply chain partners, attracting 1,667 professional participants.

'G'-force

Corporate governance issues that are high on the whole industry's agenda now include raw material traceability, animal welfare and deforestation.

In this context, Italy's institute for certifying the quality of leather, ICEC, already has a string of certifications in place and these, according to UNIC, "play a fundamental role" in helping its member companies fulfil their governance responsibilities. Two examples are ICEC TS 410 and ICEC TS 412, which focus on the upstream supply of products and materials, including traceability checks on hides, skins and semi-processed leather. In the case of TS 412, these checks go beyond the seller of the material.

UNIC relates in its most recent report that it has been working for a number of years already with the University of Milan to map and verify the real animal welfare conditions in the markets that supply the Italian tanning industry. "What has emerged is that more than half the hides and skins processed come from EU slaughterhouses and farms, which are regulated by one of the most evolved regulatory system in the world on this subject," it says.

The other 50% of the hides and skins Italian tanners process comes from outside the EU, but from sellers that have, nevertheless, adopted legislation or regulations on animal welfare, UNIC states. ICEC has developed a certification project specific to this.

When it comes to deforestation, "the entire supply chain" has projects in place to eliminate links to farms developed through illegal deforestation practices, according to the association, in many cases working closely with campaign groups with expertise in this area of accountability and governance. Specific examples include work with the US National Wildlife Federation and the World Wildlife Fund to develop a project called Deforestation and Conversion Free Leather. This aims to implement a system of mapping farms to confirm that they are not located in areas affected by illegal deforestation.

Taking all of these aspects into account, Luca Boltri says in conclusion



Wastewater treatment at Chiampo in Veneto. Water consumption in Italian tanneries has fallen by 13% in the last 20 years.

that, for an industry such as leather manufacturing, sustainability is like oxygen. And he adds that, without the deep commitment that 20 years of annual sustainability reports are a testament to, Italy would simply not have the strong tanning sector it has today. "Leather is sustainable by nature," he adds. "This is part of its inimitable appeal. It comes from food industry waste, animal by-products,

and the waste from tanneries can be recovered and reused by other sectors, and this is particularly true here in Italy. Leather is a purely bio-based material; at least 85% of it is collagen, which is fully biodegradable. It is an alternative to plastic and also offers high levels of durability and reparability among its unique features in terms of performance. It is circular by nature." 



A bright, modern facility in Solofra in the south of Italy. Much has changed since UNIC's first sustainability report in 2003.

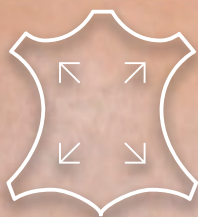
more



Fratelli  *Carlessi*

CRC

Cell Rotary Conditioning



LEAVE THE CONTROL TO THE LEATHER

Now is the hide that tells the machine how to expand

CRC is able to achieve uniform and repeatable results regardless of the volume or type of leather being processed. By combining an independent cell system with air flow control, it is possible to process leather in a short time and at low temperatures, **reducing working time and energy consumption.**

In addition, the intelligent tensioning of the leather allows to obtain its maximum yield with surprising results.



Independent cells



Automation in workstations



Better air flow distribution



Distance between leathers optimized

Fratelli  *Carlessi*

Via Ferraretta, 1 - Arzignano (VI) 36071 - Italy | Tel. +39 0444 478313 | info@carlessi.it | carlessi.it





An outdoor boot from Swedish footwear brand Lundhags made from Terracare leather from Lederfabrik Josef Heinen.

Credit: Lundhags

Opposing points of view



RENEWABLE



WASTE-FREE



LONG-LASTING



SUSTAINABLE

A prominent sports industry media company in Germany, Ebner Media, recently invited leather manufacturer Thomas Heinen to take part in a discussion with a senior representative of campaign group PETA. Most people in the industry are aware of the visceral anti-leather stance that PETA takes in many of its public statements and from the outset Ebner Media billed the discussion, part of a series it produces called the SAZSports Podcast, as controversial.

It may have wanted sparks to fly, but the resulting conversation was calm, dignified and constructive, which will surprise no one who knows Thomas Heinen. He runs Lederfabrik Josef Heinen GmbH, the company that his family set up in Wegberg, North Rhine-Westphalia, in 1891, and is currently first vice-chairman of Germany's national leather industry association, VDL. He has long been a thoughtful contributor to industry initiatives and was an early pioneer of using labels, certification and skillful storytelling to give footwear brands and other customers the reassurance they need about leather's circularity and

Promising controversy, a sports media group in Germany recently set up a discussion between senior representatives of campaign group PETA and the country's leather sector. Respectful dialogue won the day.

sustainability credentials. Lederfabrik Josef Heinen launched an in-house sustainable leather brand, Terracare, almost 15 years ago. It says Terracare defines its production standards and represents a commitment to making high-quality finished leather in an environmentally friendly, resource-efficient and socially compatible way, using local raw materials.

“There has been a huge number of changes for the better, in recent years; the leather industry has achieved an incredible amount.”

THOMAS HEINEN

Song of liberty

In a spirit of respect and openness, Mr Heinen explained all of this in the discussion with the campaign group, which was represented by Johanna Fuoss, its spokesperson in Germany for clothing and textiles. Curiously, Ms Fuoss opened with a celebration of her organisation's success in helping to make fur coats and collars a thing of the past in fashion. In response, Thomas Heinen offered a breakdown of the four-week process involved in sourcing raw material from meat companies and traders, using it to make finished leather and delivering the leather to customers. Clearly fur is not part of that.

Next, Ms Fuoss talked about her concerns about restrictions to animals' freedom and their ability to live in their own “social structures”. She said humans really only know our own world and our own emotions and, therefore, cannot really have a clear idea of what animals experience. She confirmed that, in her opinion, livestock farming, feedlots and leather production are all wrong. In principle, she opposed keeping pets at home too because, she said, too many are kept in conditions that are not “species-appropriate” and the animals are made to be unfairly dependent on people. “We wouldn't like to live with such a lack of freedom,” she said.

Her organisation's short-term aim is to educate the public on the unfairness of all this and to encourage people to make animals' lives as free and fair as possible. Then, in response to a question from the host, Florian Bergener, she acknowledged that an immediate mass liberation of livestock and pets would not be a good idea because the extent to which these animals have become dependent on humanity would make it impossible for them to survive. Her “big vision”, she confirms, is that, in time, no animals will live in captivity. But she added, intriguingly, that she did not like the contribution that stray street cats and dogs make to the current challenge because new litters come along too frequently; targeted sterilisation programmes are her suggested solution for this.

Respectful people

This, too, has little connection to the work that Thomas Heinen and other leather manufacturers do day in day out. He politely pointed out that the desire for nourishment is inherent in all living beings and that human beings were no different. “A lion will eat a gazelle without thinking about it, just as a snake will eat a mouse,” he said. “People are part of this chain too. But it is still very important to treat animals well. I believe slaughter can be respectful and appropriate.”

He accepted that processing animals in abattoirs for food is never going to be an attractive spectacle, but he insisted it was entirely feasible for this activity to take place with respect. “Farmers, people in the meat industry and tanners are not blood-thirsty brutes running around with knives in our hands,” he pointed out. “We are respectful people and



Managing director of Lederfabrik Josef Heinen and vice-chairman of German leather industry association VDL, Thomas Heinen.

Credit: Lederfabrik Josef Heinen

everyone one of us has an interest in these processes working correctly, not least because this is important for achieving high-quality products. No one has an interest in allowing the animals to suffer.”

Hunter-gatherers

Ms Fuoss said she found “very difficult” any comparison between animals in the wild and even our ancient ancestors hunting for food and consumers today having access to meat through farmers raising captive animals solely for that purpose. In the past, the animals people hunted had freedom; livestock today has none, she argued. At the same time, other sources of protein are available to us now.

Of course it's true that most people do not hunt their own food any more, Mr Heinen said in response, but it is also true that most people who choose not to eat meat, among whom he includes himself, do not spend their time growing the plants that they will eat. “Most of us have other work to do,” he pointed out. “We have the principle of the division of labour.” He explained that people who have jobs in banks, schools, hospitals or offices would be unable to find time to go to the forest to hunt for food, even if they had the equipment, the knowledge and the skills to do this successfully. Instead, they rely on specialists to bring food to market on a large scale.

However, he went on to say he agreed that large-scale factory farms were not the best way of making that food available. He said he liked the increase in smaller, organic farms on the landscape, adding that he hoped there would be more and more operations like these in the future. They may



PETA's Johanna Fuoss wants footwear brands to stop clinging onto the leather industry. Thomas Heinen says the use of leather makes it perfectly feasible to keep and wear outdoor boots for 15 or 20 years, making these an unbeatably sustainable product.

Credit: Lundhags



not represent exactly what Johanna Fuoss envisages when she talks about allowing animals to live in species-appropriate freedom, he added, but they are on the path towards it and are a far cry from factory farming.

Painful practices

She then began to list instances of poor treatment of cattle that her organisation has highlighted in the past, focusing at first on India and Bangladesh. Then she said investigations in Germany had also revealed poor practice there, including animals going to slaughter before being properly stunned. On bad practices in Asian countries, such as deliberately inflicting pain on the animals to make them move from one place to another, Mr Heinen said no right-thinking person would support them. On the situation in Germany, he said there were outliers there, as well, "as there are everywhere", but that, in Germany, "animal rights are part of our basic laws, laws that are well established and enforced very strictly". He said it was impossible to argue that there were never transgressions, but that for the most part the slaughterhouses stuck to the rules. "If they didn't, they would be closed down," he said.

He went on to say again that, if for no other reason, operatives in abattoirs are careful in their treatment of animals before slaughter because it makes economic sense. "If the animals suffers, the meat can become unusable," he explained. "That's why everyone involved in the process does everything in their power to make sure everything runs properly."

In the right direction

In the face of a dismissive stance from Ms Fuoss regarding certifications and audit systems, which she suggested were rife with not just greenwashing but also "humane-washing", Thomas Heinen said it was important to keep things in perspective. "If you ask me if I have all the answers and a perfect set-up, it's clear that I don't. No one has. But I try continuously to do better and I think my customers do too. We're trying to make things in the best way we can. It's not perfect, but we have come quite a long way."

His strong conviction, he explained, is that it is important to

keep moving in the right direction. "I have been doing this, with my father, for a couple of decades," he said, "and I know there are worlds between the way my father and I work today and the way my grandfather and my great-grandfather worked. There has been a huge number of changes, changes for the better, in recent years. The leather industry has achieved an incredible amount." As an example, he said that many of the chemicals Lederfabrik Josef Heinen uses now are biodegradable; any that are not are on the way out and will soon be replaced by biodegradable products.

Job justified

"What I think is that leather is an extremely useful material," Mr Heinen explained. "The end consumer can keep wearing leather products for a very long time. If you take outdoor footwear as an example, you can wear the same pair for 15 or 20 years without any problem if the product is made of leather." He compared this to polyurethane shoes with a lifespan of between six and 12 months and highlighted the stark difference between the two types of shoe in terms of their impact on the climate. "For me, all of this makes the job of being a tanner and running a tannery absolutely justifiable," he said.

He suggested that Johanna Fuoss was unlikely to agree, and he was right about that. At the end of the discussion, she said hoped that finished-product manufacturers would never accept leather as a sustainable material, no matter how it was made. She added that she wished footwear manufacturers and others would stop "clinging onto this industry" and invest instead in the development of animal-free, plastic-free alternatives.

In his closing remarks, Thomas Heinen made the point that, as long as people eat meat, there will be an important role for skilled people who can produce a high-performance, highly sustainable, versatile material from a by-product of the meat industry. But he said he was glad to have taken part in a discussion in which mutual respect had shone through and expressed hope that the leather industry could maintain a dialogue with PETA and other campaign groups and find common ground with them. 🌱



DEEPCOLOR



LESS WASTE, MORE NATURE

gemata.com



Start-up leathergoods brand Tasche's commitment to quality and to using local veg-tanned leather and local artisan talent to make its products has earned it the Argentinean government's 'Seal of Good Design'.

All credits: Tasche



For people on the move



RENEWABLE



LONG-LASTING



SUSTAINABLE



SMEs



GREEN JOBS

Industrial engineer and entrepreneur Yamila Isaurralde has taken time and care to build up and bring to market her leathergoods brand, Tasche. The company name comes from the German word for bag, but its base is in Arroyo Seco, Santa Fe, Argentina, and Ms Isaurralde's insistence is that it will make its products locally, sourcing all the vegetable tanned leather it uses from Argentinean tanneries..

Her leathergoods dream was a long time in the making. She qualified as an industrial engineer and had a ten-year career, between 2008 and 2018, in a series of multinational companies, mostly connected to the automotive industry. During this time, she decided to bring a first business idea to life, a designer footwear brand she called Isaury Calzados, launching it in 2012. Devoting evenings and weekends to this project, after a full day's work, she kept the idea going for years, pausing only to have her first child in 2015.

"The footwear brand was partly a hobby and partly a desire to run my own business," she says now, "but having a child meant a radical change in my life, as it does for many people,

Leathergoods entrepreneur Yamila Isaurralde turned her back on a career in industrial engineering to launch Tasche. Tapping into the knowledge and skills of a Tuscany-trained local artisan helped her turn an important corner.

and I decided to go in a different direction." Her decision was not to give up the hobby and concentrate on the day job, though. By 2018, Ms Isaurralde had turned down two career opportunities at the automotive firm she worked for and stopped making shoes to concentrate instead on turning a new vision into reality.

Parents of small children are on the move a lot, with lots of kit to carry: spare clothes, nappies, wipes, drinks, snacks and toys on top of all the usual tools of daily life such as phones, keys and money. Yamila Isaurralde looked around and felt there was a dearth of stylish, high-quality backpacks and bags for people in this position: people on the move, people like her. “There was hardly anything available worldwide, as far as I could see, not just in Argentina,” she recalls. So she began to work on Tasche, choosing ‘People on the move’ as the brand’s slogan.

The bravest of the brave

Setting the company up was far from an easy decision to make. She explains: “People from other countries often struggle to understand how hard things like this can be in a place with the economic ups and downs and instability that we have. I think it’s always been the case, and it most certainly is the case today, that being an entrepreneur in Argentina is a high-risk activity that is only for the bravest of the brave.”

In March 2023, the country’s official statistics agency, Indec, confirmed that the annual rate of inflation had reached 102.5%. This was the first time since 1991 that the figure has gone beyond 100%, but rates have consistently been high enough to discourage a generation of professionals from embracing entrepreneurship. Ms Isaurralde asked a large number of friends and colleagues to join her in launching her bag brand, but no one would. “Who would walk away from a secure, well paid job in a multinational company that allows you to live a comfortable life?” she asks rhetorically. It is not that Argentina has no entrepreneurs, she insists, just that the business environment is challenging enough to put many professional people off.

Lessons learned

Among the benefits of her initial foray into footwear was the knowledge of leather she acquired and the contacts she built up among people in other small leather-sector companies, as well as among the artisans operating in local workshops. She knew what she wanted to make and knew how she could produce it if she could get the prototyping and modelling right. In parallel, she embarked on a study programme to learn more about setting up and running a business, focusing on weaknesses she felt the Isaur



Tasche says its products are ideal for people who are always on the move.

Calzados experience had exposed, and, with the support of her family, launched Tasche in 2021.

Early wins included being able to spend more time with her toddler and to work alongside Sebastián Rodríguez, a childhood friend who had gone into advertising and art directing. He was among the many who turned down a chance to become a business partner at the new brand, but he did agree to work there and immediately set about helping the founder establish an identity strategy for the brand as well as launching its early marketing and communications campaigns and designing the Tasche website.

Another part of those early discussions involved framing the values of the brand. This quickly resulted in a commitment to making the company’s bags in Argentina using materials produced in Argentina. “This is one of the pillars that matter the most to us,” Yamila Isaurralde says. “Governments come and go; some build domestic industry up, some seem to make things worse. For me, as an industrial engineer, it’s important to value what we make here and promote it. It’s a personal thing; I value what we can produce here in Argentina.”

Natural resources

Argentina is home to major tanning groups and leather manufacturers of high renown and they had their pick of the 13.5 million cattle hides produced domestically in 2022, more than France, Italy, Germany and Spain combined. Perhaps, in the early days, a greater test of Tasche’s ‘Made in Argentina’ resolve was securing the leathergoods artisanship it needs to make its bags.

The province of Santa Fe has leathergoods workshops, as Ms Isaurralde had found out years earlier when she began to



An earlier foray into footwear helped Ms Isaurralde prepare for life in the bag business.



produce her own shoes. Rosario alone, the province's biggest city, has several and is only 30 kilometres from her base in Arroyo Seco. But when she began to commission the first Tasche prototypes, she found the divergence between the first bags that came back from the ateliers and the product images she had in her mind (and thought she had transmitted clearly) frustrating. And then something magical happened. At another of the local operators she approached, she found herself in the company of Salvatore Procopio, one of the Rosario-based artisan makers of bags and briefcases, but one with an unusual personal story.

Tuscan traditions

He is one of four brothers from a Rosario family, with ten years between him and the eldest. On leaving school, his oldest brother began working in a local footwear factory. He enjoyed the work very much, and soon set up his own children's shoe manufacturing operation and offered work to his brothers. Eventually, all four brothers became partners in the business, but in 1975, Salvatore Procopio decided it was time for him to fulfil a lifelong dream and travel to Italy, where the family has its roots. Like millions of people before him, he found the allure of Florence too powerful to resist and decided to try to find work there. A footwear factory was his first thought, but he quickly realised that the Florentine focus is much more on bags.

"I was 24 years old and knew nothing about leathersgoods," he says. "It was a completely different set-up." There are transferable skills, however, and a local leathersgoods atelier soon took the young Argentinean artisan on as part of its leather-cutting team. At first, he concentrated on cutting large pieces for use in briefcases. "Little by little, thanks to my fellow workers, I learned the trade," he continues. "I got involved in shaping the briefcases, in stitching and so on. I learned mostly by imitating what I saw the others do."

He continued working and learning in this way until 1986, when he decided to devote himself to design, signing up for a formal training course. This kept him in Italy. In fact, he remained there for 38 years in total, working in leathersgoods the whole time and becoming a specialist in moulding and shaping bag designs. He became well known in the Tuscan design community as someone who could look at a drawing of a product idea and create a mould for it. "Designers used to send me these by fax," he recalls. "That was what counted as advanced technology in those days. And the drawings didn't always come with measurements. The task was to turn that into a real product, not just creating a mould, but trying it out too. I loved the work."

Homecoming

On returning to Rosario in 2013, he carried on designing and making bags, but also established a reputation as a good teacher of new generations of leathersgoods artisans, an activity that has since taken him to different parts of Argentina.

When Yamila Isaurralde shared her design ideas for Tasche backpacks and bags with Mr Procopio (not by fax), she had a similar experience to that of the Tuscan designers decades before. At last, here was someone who could turn her vision into reality. An initial meeting led quickly to an invitation for the Tasche founder to visit the Procopio workshop and, from that moment, Ms Isaurralde has not looked back. She explains: "We spent the next two years developing Tasche



Salvatore Procopio and Yamila Isaurralde.

products together, strong Italian coffee on the go and Salvatore teaching me and telling me his thousand and one tales of his life and times in the industry. Salvatore is part of Tasche, too, and I have such happy memories of those times. We still see each other and work together, although at a less intense rhythm these days. I go less often to his workshop but we still meet up once a week, just to catch up, if not for work reasons, and to drink coffee."

Seal of approval

The fruits of all this include a range of products based on the theme of 'People on the move': a tote bag called 'Whole Day', a backpack called '24/7', another called 'Duo', a clutch bag called 'Trevelin' and some small leathersgoods. Last year, an agency of Argentina's economics ministry, the product development and industry secretariat, awarded its 'Seal of Good Design' to Tasche. This is a distinction it gives to products that stand out for their innovation, their design quality and their commitment to local sustainable production.

There is a team of five people, comprising two artisans, Sebastián Rodríguez, Ms Isaurralde and another colleague, Florencia Ripoll, and sales are coming in. "We don't have a big volume of sales yet," the founder says, "but it is growing and production is increasing to keep pace." The brand's clients, so far, tend to be professional people on the move, living in cities, coming and going between home and work, work and the gym, the gym and going out in the evening. Yamila Isaurralde says they are likely to be between the ages of 25 and 60 and likely to identify with the brand's core values: slow fashion, sustainable manufacturing, local materials, local production and long-lasting products with timeless designs.

She says her sincere hope is that more and more people, in Argentina and beyond, will embrace a commitment to sustainable production and consumption. "I think it's the only way," she insists. "We're certainly going to keep evolving and improving our products to adapt them to this new, circular economy." 🌱

synbios.com

We follow nature, naturally.



LEVEL 3 CONFORMANCE WITH ZDHC MRSL



As an early career leathergoods designer navigates her post-graduation, we learn how leatherwork has shaped her life so far, and how her personal relationship with craft has inspired a less-than-conventional approach to doing business.

The road less travelled



Italian designer Annagiulia Giannetti, who calls leather “literally my obsession”, traces her passion for the material back to the age of six or seven, when she first discovered and fell in love with the world of horse-riding. Her enthusiasm was so contagious that her entire family went on to take up the hobby, leading her father, a native of Tuscany, to purchase his very first horse soon afterwards. “It all began from there,” she says.

With hindsight, family ties to the region and its riding traditions, such as those of the horse-mounted butleri herders in the Tuscan Maremma region, known for their distinctive saddles, would prove significant in terms of how leather would weave its way into the story of Ms Giannetti’s early years. She recalls childhood trips to Selleria Gianoli, a saddlery in Pavia, where “the smell of leather was unmistakable”. She became especially fascinated by the practice and technique of saddle-stitching. Another memory centres on family visits to the village shoemaker, their go-to for saddle repairs closer to home. The designer was so enchanted by this craftsman’s work that she began spending hours with him in his shop, just to observe his artisanship and learn all that she possibly could. Now, looking back, early moments such as these feel particularly meaningful.

Forging her own path

Deciding to specialise in leatherwork, though, was almost too scary at first, Ms Giannetti explains. She initially didn’t want to risk going down a road that might end up “too specific”, so instead elected to pursue a more general fashion programme at Polimoda in Florence, which resulted in a four-year love-hate relationship with the wider world of fashion design prior to her graduation in 2021. Tellingly, every free moment was spent honing her leathergoods skillset and working on independent leather projects. So much so, she imagines being able to begin her university studies all over again, only this time focusing on what she actually likes and is good at: leather craft. Incidentally, Ms Giannetti was similarly none too impressed with her experience of luxury group LVMH’s Women@Dior career mentorship initiative, but for different reasons. Despite being one of only two Polimoda students to be picked for the 2020 cohort, she “never met or even talked with” her mentor and “honestly expected a lot more” to come from her participation.

That said, her time in Florence, disrupted somewhat by covid-19 lockdowns, during which time she returned to her rural hometown of Pianello Val Tidone in Emilia-Romagna, continuing



Her latest handbag, a new shape, demonstrates Ms Giannetti’s confidence with macramé, which at once takes centre stage and yet never overtakes the purity or beauty of her design.

ALL CREDITS: ANNAGIULIA GIANNETTI

her education remotely, was fruitful. “Florence is the right place to be if you want to know more about leather,” she states. Indeed, it was at Polimoda that the designer encountered the problem of leather waste for the first time. The students would receive unwanted hides and skins from various companies on a weekly basis and the seed of an idea to purchase only surplus or deadstock leathers began to germinate in her mind, primarily as a way to keep perfectly useful, high-quality, natural material in circulation. Although upcycling may be something of a quick win in today’s responsible business arena, the downside of this manner of sourcing includes indirect support for overproduction. Another challenge is, of course, the unpredictability of the quality of the leather and the colours available at any given time.



Possibilities abound with deadstock leathers, although there is always a degree of uncertainty regarding factors such as colour and material quality, which ongoing education in the field is helping Ms Giannetti to navigate for herself.





Use of scoubidou for plaiting to construct her super tactile and colourful phone holders takes the designer back to her childhood, when she first encountered the knotting craft.



Woven and stitched strips of leather surplus have similarly been used to decorate past boot collections.

Nowadays, the designer buys her leather exclusively via Zerow, a marketplace-like platform for leftover materials and upcycled finished products based in Italy. Through involvement with Scandicci leather waste collection and sorting hub Zerolab, as well as its work alongside local leathergoods start-ups like Sieme, Zerow is itself linked to Aspri, the Association of Recycled Leather in Italy (Associazione Pelle Recuperata Italiana), founded in 2020. Aspri was established to facilitate the redirection and repurposing of the approximately 800,000 to 1.6 million square-metres of excess leather produced by domestic manufacturers each year, according to data from Italian tannery association UNIC and the European Commission. Ms Giannetti calls her relationship with the Zerow team excellent and, acknowledging the progress she has made in recent years, notes that she no longer selects her material (predominantly nappa) based solely on colour, but also now carefully examines its more exacting requirements and quality standards.

Desire lines

An additional, still atypical, element to Ms Giannetti's practice is her decision to do away with prioritising the names of her designs when it comes to sales. Instead, each product, all of which she makes by hand, is given a title that reflects the number of hours that went into creating it. A top-handle bag constructed from seven different leathers and suedes, priced at \$1,115, is listed only as '30 Hours' on her website, for instance, whereas a mini bag, formed using macramé knots, is entitled '12 Hours' (\$335). Shoppers must slow down and reconsider the real

artisanal value behind their purchases, she suggests. Naming her leathergoods in this way seemed like "a good starting point".

Besides different styles of handbag, another key part of the current line-up is chunky, plaited mobile phone holders that can double up as bag straps (2.5 hours to make; selling for just under \$125), belts and tops in the style of an overbust corset, again pieced together through knotting thin strips of discarded leather. The designer has previously dabbled in footwear, pet accessories, homeware and other types of apparel. All can be customised, from colour to construction, dimensions and leather sourcing. At least for the moment, Ms Giannetti frames her leatherwork as a project, rather than a brand. The main aim is to stay on the upcycling path, lest the pursuit of growth or mass recognition begin to detract from her own sustainability principles. Without the positive response she received when her final Polimoda graduation collection showed at Pitti Uomo during summer 2021, she may not have been moved to set up an official e-commerce channel at all, she explains.

Of course, this is not to say the early passion for expanding her creative skills repertoire has abated. As before, she remains curious, always energised by the desire to learn, experiment and improve, never taking the quick or easy route. Various leatherworking techniques may be present in a single piece, for example, which is not a simple task. Next up on the horizon is studying the art of basket weaving and perhaps continuing to explore refurbishing old furniture, something she has been pursuing in her leisure time, in her own fashion and "obviously always using leather".

WORLD LEATHER

Advertiser's Index

Company	Page	Company	Page
Carlessi	45	Mimosa	16
Cartigliano	12-13	National Beef	31
Chemtan	07	TFL	27
Erretre	41	Trumpler	23
GER	24	SCRD	IFC
GeMaTa	49	SilvaTeam	21
Heusch	35	SynBios	53
Leatherbiz	11	Voelpker	32
Leather Hide Council of America	BC	Zschimmer Schwartz	36

Head Office

The Old Stone House, Teeton, Northampton NN6 8LH, UK
Tel: +44 151 928 9288 E-mail: wl@worldtrades.co.uk

Editor	Stephen Tierney
Deputy Editor	Clare Grainger
Commercial Manager /Technical Editor	Matthew Abbott
Assistant Content Developer	Charlotte Robson
Consultant Editor	David Buirski
Graphic Designer	Tim Button
Social Media/Digital Marketing Assistant	Valona Hamiti
Subscriptions	John Collins
Administration	Lisa Fabian-Smith
Publisher & CEO	Simon Yarwood

Worldwide Sales Offices

China/Hong Kong/Taiwan:

Ringier Trade Publishing Ltd.
 1001 Tower 3, Donghai Plaza, 1486 Nanjing Road West,
 Shanghai 200040 China
 Tel +86-21 6289 5533
 For China: Marco Chang, General Manager. E-mail: marco@ringiertrade.com
 For Taiwan: Kelly Wong, Taiwan manager. E-mail: kwong@ringier.com.hk

India:

S Sankaran, 106 Vepery High Road, Periamet, Madras 600 003
 Tel: 91 44 25386566 Fax: 91 44 28343685
 E-mail: indianleather@yahoo.com

Indonesia:

Niran Rapi BSc., Gedung Cahaya Palmerah 3rd fl, #307
 Jl. Palmerah Utara III No.9 Jakarta Barat 11480 Indonesia
 Tel: +62 021 5329343 / 5329014 Fax: +62 021 5329344
 E-mail: esdekatraco@centrin.net.id

Mexico:

Mr. Gennaro de la Garza, Calle Schubert 520, Col. Leon Moderno,
 Leon, GTO. C.P. 37480
 Tel: +52 477 712 1882 Fax: +52 477 712 1882
 E-mail: genarodelagarza@hotmail.com
 or delagarzagenaro@yahoo.com.mx

Pakistan:

Abdul Rab Siddiqi, Office M – 2, DADA Garden, Jamaluddin Afghani Road,
 Sharfabad, Karachi 74800
 Tel: 021-34893095 Mobile: 0333-2323166
 Email: arsidqi@yahoo.com





ISP

INDUSTRY
SUSTAINABILITY
PROGRAM

CHAMPIONING LEATHER FOR THE FUTURE

The Leather & Hide Council of America continues its work to represent our industry at home and around the world, and is determined to build on recent successes.

- Our **Industry Sustainability Program** launches this year, combining the many programs run by L&HCA to champion best practice in sustainable leather sourcing, design, production, distribution and communication, from farm to retail to consumer and beyond.
- Our work continues with Sustainable Leather Foundation and Leather Working Group to develop **supply-chain traceability** to empower commercial partners and consumers to make the best purchasing decisions.
- Our **Life Cycle Assessment** for leather will publish its first reports this year in partnership with industry leaders including ranchers, packers, tanners and manufacturers. This will set the benchmark for transparency and trust in the materials sector while establishing leather's relative sustainability credentials.
- Our **Real Leather. Stay Different.** campaign and design competitions continue to grow. Reaching hundreds of millions of today's consumers and tomorrow's influencers, there is an international competition and regional versions in the Nordics, the UK, China Mainland and Taiwan Region. This year they have expanded to include the Philippines and an African Talent Leather Design Showcase across ten countries.

Visit our website today to find out more. USLeather.org

LEATHER & HIDE
COUNCIL OF AMERICA

