

WORLD LEATHER

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

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Volume 36, Number 3



Quiet luxury

Leather Leaders: Guilherme Motta

Traceability and laser marking

Livestock and leather: 1,000 scientists speak up



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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 London-based brand Métier, whose 'quiet luxury' collections are winning over ostentation-averse customers in these challenging times.
CREDIT: MÉTIER



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FRANCE France's main leather industry association, the Conseil National du Cuir (CNC), has announced that the fifth edition of its Sustainable Leather Forum event will take place in Paris on September 11. Bringing together over 400 participants, the event aims to provide a platform for sharing best practice in the leather sector. International experts and representatives of major companies will take part.

PORTUGAL New figures from national industry body Apiccaps show that Portugal had 1,186 footwear manufacturing companies at the end of 2022. This represents a fall of around 10% compared to the figure ten years earlier. At the end of last year, the country's shoe manufacturers employed a combined total of 32,292 workers. This, too, represents a decline, of 6.7%, compared to 2012. However, at the end of last year, Portugal had 142 companies making leathergoods, up by 42% compared to 2012. These companies were sustaining 3,324 jobs at the end of 2022, a huge increase of 220% compared to 2012.

SPAIN The organisers of the Futurmoda exhibition in Elche have said preparations are well under way for this autumn's event, which will be the fiftieth in its history. Futurmoda focuses on materials and components for footwear manufacturers. It will go ahead in Elche, close to Spain's biggest footwear manufacturing hub in the towns of Elda and Petrer, on October 18 and 19. Organisers expect more than 300 exhibitors representing Portugal, Italy, Germany, China and Bangladesh as well as Spain.

UK Footwear brand Dr Martens has reported full-year revenues of just over £1 billion for the 12 months ending March 31. This figure represents a 10% increase in revenues year on year; this is the first time the brand's sales have passed the billion-pound mark. "Reaching this milestone is testament to the strength of our brand, our long-standing strategy and the hard work and dedication of our fantastic people globally," said chief executive, Kenny Wilson.

UKRAINE A project to renovate a leather educational scientific laboratory at Kyiv National University is complete. Leather chemicals group Royal Smit & Zoon provided support for the project. Work to renovate the laboratory began before the war between Russia and Ukraine but financial constraints made finalising the project difficult. Something that was outstanding was to equip the laboratory with furniture and, for this, the university reached out to Royal Smit & Zoon. The renovated laboratory is now open. Smit & Zoon said it was glad to have been able to contribute to leather education in Ukraine.

CAMEROON Leathergoods brand Lutz Morris has partnered the Jean-Félicien Gacha Foundation, a Cameroonian non-profit established by Hermès family members Ly and Frédéric Dumas. Artisans associated with the foundation were "given free rein" to create a special embroidery design for limited-edition versions of the Lutz Morris pouch-style Blaine handbag. Leather panels on the lid and at the front were hand-embroidered with glass beads in Cameroon, which the brand described as "in keeping with [the country's] long-lasting handcraft tradition".

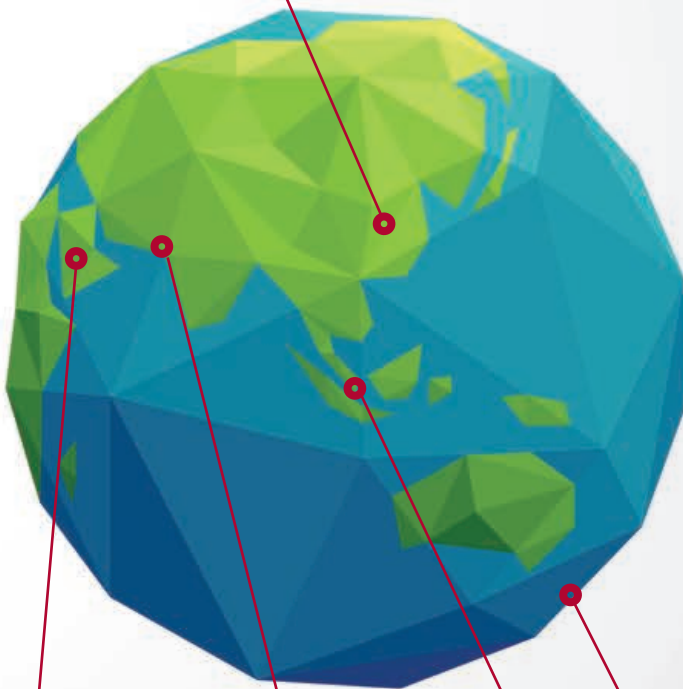
KENYA President William Ruto has highlighted the leather sector as among those with the most potential to create jobs and wealth for the country. Speaking at a recent conference he said the leather industry was operating well below its potential, despite having the third-largest livestock population in Africa. He said the leather industry had the capacity to deliver 80,000 jobs and revenues of \$100 billion.

TURKEY Leather chemicals manufacturers based in Turkey have begun to increase their presence in international markets. Having secured business in neighbouring countries, they have now begun reaching further into the international arena. Technical visits and product demos in Pakistan, India, Bangladesh, China, Vietnam, South Korea and Japan have taken place in recent months. Turkish leather chemical companies that are optimistic about making inroads into those markets include United Chemicals, Farben Leather and Chemicals and Debbag Kimya.

CHINA Automotive leather groups Bader and Lecapell have opened a new facility in Nantong, China. Senior representatives of the automotive industry were among the 200 guests at an event in mid-May to mark the opening. They said the Nantong facility represented a new chapter in a joint venture for the Chinese market that Bader, based in Germany, set up with Austrian group Lecapell in the 1980s.

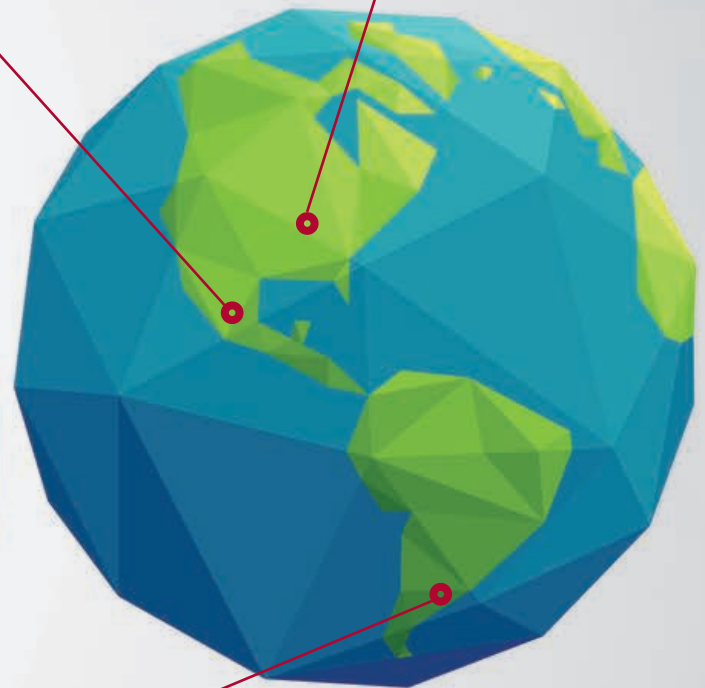
MEXICO Mexico's overseas trade promotions body, COFOCE, has said the country is now the world's largest producer of automotive leather. The country's Association of Industrial Supplier Companies (APIMEX) shared the detail in a report. APIMEX president, Fernando Padilla, confirmed that a majority of leather manufacturers in the state of Guanajuato, who are responsible for 60% of Mexico's leather exports, are focused on automotive leather now. They are supplying automotive groups including Nissan, Ford and Chevrolet, all of which have set up in Guanajuato's automotive hub.

US Automotive leather group Pangea has published its first sustainability report based on figures for 2021. Overall, Scope 1 and 2 greenhouse gas emissions amounted to 1.14 Kg CO₂e per square-metre of finished leather. In the same week the report was published, it announced that all its operational units are now certified as gold by multistakeholder body the Leather Working Group, something Pangea had set itself as a target.



PAKISTAN Pakistan's Trade Development Authority said it expected more than 200 exhibitors to take part in the 2023 edition of the International Textile and Leather Exhibition (TEXPO23) in Karachi in May. The Trade Development Authority formally hosted around 350 buyers at the event and a conference programme that ran in parallel included international speakers.

UNITED ARAB EMIRATES Luxury brand Hermès has relocated and extended its boutique in central Abu Dhabi, the capital of the United Arab Emirates. It first opened in the Etihad Towers in 2012 but will now relocate to the Galleria Mall. Located on the ground floor of the shopping centre, the new Hermès store follows the curved shape of the mall, the brand said. Designed by Parisian architectural agency RDAI, the store has soft shapes with a bright, open space in the interior set aside for its leathersgoods collections.



ARGENTINA Government figures in Argentina have confirmed cattle slaughter of 4.7 million head in the first four months of 2023, an increase of 12.3% compared to the same months last year. The average slaughter weight was 226.6 kilos, down by 1.3%. Meat exporters' consortium ABC said adverse weather conditions had led to an unusually high number of cows in the slaughter mix, reaching 47% of the total, up on the previous year's figure of 45.7%.

NEW ZEALAND The latest agricultural production census reported fewer dairy cattle, sheep and deer in New Zealand in 2022. A small decrease of 1% from the previous year was seen for dairy cattle numbers, at 6.1 million head. The herd peaked in 2014 at 6.7 million head. Beef cattle numbers have stabilised in recent years with figures in 2022 mirroring those of 2019 at 3.9 million head. Beef cattle numbers peaked at 6.3 million in the 1970s, while 2016 saw a historic low of 3.5 million head.

SINGAPORE Nine handbag brands and 17 footwear brands from Italy were among the companies that travelled to Singapore at the end of May to take part in an event called The Italian B2B Fashion Exhibit. This invitation-only event aimed to connect the Italian manufacturers to importers, distributors and retailers in Singapore and other parts of south-east Asia. Industry bodies Assopellettieri and Assocalzaturifici helped member companies travel to Singapore to take part in the event.



TFL publishes group sustainability report

Leather chemicals manufacturer TFL has published its first group sustainability report since incorporating the Lanxess leather business in 2021.

Data for group manufacturing sites in France, Italy, Germany, China, India and Brazil was given for energy consumption, CO₂ emissions (Scope 1 and 2) and water withdrawal and discharge.

Minor increases were seen for energy consumption and emissions from 2021 to 2022, but total wastewater discharge saw a decrease.

TFL told *World Leather* that the energy and emissions increases were in part due to the addition of the Lanxess leather business production activities but were also attributable to reduced production overall owing to the global downturn.

Focus on by-products

Automotive leather group Bader published its latest sustainability report in June, placing emphasis on sustainable uses of leather manufacturing by-products.

The use of collagenic waste materials was highlighted as one of the driving forces in the group's sustainability journey. Bader has set up a company called Avena to work on upcycling developments. An initial product to come from this is sustainable fertiliser.

The product, the Avena OPD-N fertiliser, comes in the form of a collagen fibre pellet, upcycled from leather processing operations. The partners have said it takes a much smaller amount of energy to make the pellets than it does to produce synthetic nitrogen fertilisers.

Gemata completes acquisition

Tanning machinery manufacturer Gemata has acquired a majority stake in Costa, a leading equipment manufacturer for advanced technologies in automotive leather, technical textiles, and the furniture industry.

Working together on the joint strategic project since April, the synergies of the two companies, which will continue to operate under their current brand names, aims to increase the value that the companies already bring to the market, with specific emphasis on the finishing and upgrading of leather and technical textiles.

Offering an extended product range with high expertise in customer assistance and an increased ability for support and customer service were listed as specific advantages the companies would bring to market with the new venture.



GSC Group launches digital tutorial series

Leather chemicals group GSC has launched a series of online video tutorials on its YouTube channel.

Showing the importance of leather testing, the series aims to broaden understanding of testing procedures and results that the modern leather industry has come to rely on to meet current legislation, in particular where the environment is concerned. The first series features three videos explaining the fogging test, a vital test requirement for the automotive leather industry.

Announcing the launch, CEO of GSC Group, Adriano Serafini (pictured), said: "We believe that making available to everyone a detailed illustration of many of the tests that customers ask us for; showing our know-how is an added value. The extremely positive feedback shown by the number of views confirms our intuition."

Digital investment

Leather chemicals producer Schill and Seilacher has announced a new software system to drive forward its digitalisation strategy, with the aim of strengthening competitiveness.

The SAP S/4HANA and Success Factors, an enterprise resource planning (ERP) implementation, is a software system that helps to support automation and various processes in areas such as finance, HR, and manufacturing, optimising the efficient use of resources and helping to improve transparency, the monitoring of processes, and reactions to market changes.

In a statement the company said: "This investment will help us to increase customer and partner satisfaction and further expand our position as a leading company in the chemical industry."

LVMH makes its move

Luxury group LVMH has taken a majority stake in one of Italy's most prominent leather manufacturing groups, Nuti Ivo.

LVMH has made the investment through its Métiers d'Art division, a specialist division that it set up in 2015 to help it secure access to high-end leather and other raw materials and, in its own words, "to protect, develop and ensure long-term access to artisanal savoir-faire on a global level".

Nuti Ivo was founded in Santa Croce sull'Arno in 1955 and has since expanded to encompass the Nuti Ivo, Lloyd, Everest, Papete and Deluxe tanneries in Italy and also has partnerships in Paraguay, Morocco and Hong Kong. The group now employs more than 300 people.

ZDHC compliance

German leather chemicals group Trumpler has successfully established compliance to the strict requirements of the latest ZDHC Manufacturing Restricted Substance List (MRSL), Version 3.1.

More than 600 products from Trumpler and Langro are currently displayed in the ZDHC Chemical Gateway and range from beamhouse auxiliaries to finishing agents.

Testing services provider Eurofins said Trumpler had been certified as ZDHC Level 3-compliant following analysis of chemical formulations and raw materials.

French leather chemicals group ATC has also achieved Level 3 certification for its leather products. Manufacturing sites at Montanay and Trevoux (Tanorga) were awarded the ZDHC certification by Eurofins.

Environment in mind

Luxury leathersgoods brand Hermès has opened a second leathersgoods-making facility in Ardennes, France, alongside the Maroquinerie de Bogny-sur-Meuse, which it opened 20 years ago.

The Maroquinerie de la Sormonne will employ 260 artisans, trained at the École Hermès des Savoir-faire, its apprenticeship centre. As well as the 260 saddler-leatherworkers, management, logistics and human resources roles will be based at the centre.

Workplace safety under discussion

A steering committee set up for a European Union-funded project called Green Deal Leather met in Valencia in late April to discuss workplace safety.

Members of the steering committee met to take stock of a recent study on injuries and accidents in the workplace and examine health and safety trends in the European tanning sector.

Green Deal Leather is a two-year project

with the overall aim of generating data at sector level on workplace safety and the carbon footprint of leather.

Representatives of the industry and of the trade union organisations that constitute its social partners met at the Inpelsa tannery in Valencia, run by current COTANCE president, Manuel Ríos. Leather manufacturers in France, Germany, Hungary, Italy, Portugal, and Spain were represented.

Deal extension

Leather chemicals manufacturer TFL continues to be the exclusive distributor for the resale of tanning and finishing products developed for the leather market by Dow. In a new announcement, TFL said the deal will hold for another three years.

Included in the deal are leather finishing products in the Rosilk, Hydrholac, Opti-Matt, Primal and Acrysol ranges, and products for wet-end processes in the Lubritan and Leukotan ranges.

Dow established a distribution deal with Lanxess in 2017 for leather products it had developed. After TFL's acquisition of the Lanxess organic leather chemical division in 2021, it was TFL that took over responsibility

for distributing Dow's leather products.

TFL said this new, three-year agreement would mean the continuation of a successful relationship that began more than 25 years ago. The original distribution agreement began in 1997 between Bayer, before its leather business was spun off to form Lanxess in 2005, and Rohm & Haas, which was acquired by Dow in 2009.

Investors home in on hub

Permira, whose portfolio includes Dr Martens, Hugo Boss and Golden Goose, has taken a majority stake in Italian luxury clothing and leathergoods manufacturer Gruppo Florence in a deal reported to be valued at over €1 billion.

Gruppo Florence, is a manufacturing hub, offering services ranging from product development to the production of high-end accessories, shoes and leathergoods for luxury brands. It generated revenues of more than €600 million in 2022.

USDA approval

Reutlingen-based Wet-green GmbH has achieved BioPreferred certification for its tanning agent Wet-green OBE 1, used

for Olivenleder, with a score of 100%.

Under the United States Department of Agriculture (USDA) platform, BioPreferred certification is awarded to products in the category of "Intermediates for textile processing materials", where a minimum 22% of the product comes from a renewable source, such as plant, animal, marine, or forestry feedstocks.

Doubts about lab-grown meat substitutes

A fresh study on the environmental impacts of lab-grown meat-like products, led by Australian professor Paul Wood, has confirmed that the economics of producing lab-grown meat at scale "just won't work" and will be less sustainable than traditional red meat production systems.

The research argues that the global warming potential of cell-based meat substitutes could be up to 25 times greater than the average for beef. "It might not be quite 25 times worse for the environment, but multiple studies have concluded that producing cell-based protein in a lab will be far more energy-intensive when it's produced at scale," Professor Wood said. 🌱



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New Fashion Pact co-chair as Hermès walks away

The chief executive of retail group H&M, **Helena Helmersson**, is the new co-chair of the Fashion Pact.

Thirty-two luxury, fashion and textile companies launched the Fashion Pact in 2019, signing a commitment to protect climate, biodiversity and the oceans of the world. Ms Helmersson replaces the chief executive of luxury group Kering, **François-Henri Pinault**. Former chief executive of Unilever **Paul Polman** is the Fashion Pact's other co-chair.

The Fashion Pact has also confirmed that luxury leathergoods group Hermès and high-end fashion retail group Selfridges have stepped back from the initiative. "Our membership base represents one-third of the industry," it said. "It is the largest grouping of companies committed to sustainability within the fashion and textiles industry. We believe it is normal for there to be fluctuations in the membership over time, with new members joining as others decide to pause."

There are currently 63 members in the Fashion Pact, with two more to be announced soon. Additionally, there are five more companies "in the pipeline", it said.

Gruppo Mastrotto celebrates 65 years

To celebrate its 65th anniversary, leather manufacturer Gruppo Mastrotto held an open day dedicated to the employees and their families. More than 700 guests joined the current management team, plus founders **Bruno** and **Santo Mastrotto**, at the event.

Chief executive, **Chiara Mastrotto**, said: "So much has happened since Bruno and Santo decided to bring a dream to life and create a company that would carve out a leading role in the tanning sector."

Sustainability manager

Automotive leather group Lear Corporation has appointed **Rachel Garwood** to a new position as sustainability manager of its leather division.

To further strengthen its global commercial team and bring greater focus to the leather division's efforts related to sustainability, Ms Garwood will oversee all aspects of sustainability for the global leather division, drawing on her "considerable leather industry experience".

She joined Lear in March 2022 in a business management role following 13 years at the University of Northampton's Institute for Creative Leather Technologies (ICLT).



Royal glove

Luxury gloves brand Dents had a hand in the coronation of **King Charles III** in London on May 6.

Dents undertook to renovate a glove originally worn at the coronation ceremony of the new king's grandfather, **King George VI**, in 1937. Dents made the glove for King George's right hand and it was presented to the king by livery company the Worshipful Company of Glovers.

One glove only is needed for the ceremony, for the monarch to wear to hold the royal sceptre for the first time. Following the 1937 coronation, Dents kept the glove in a private royal collection with the support of the Worshipful Company of Glovers.

Made in white, kid leather and embroidered with gilt metal thread at the wrist, the glove underwent full refurbishment before its reappearance at the 2023 ceremony.

King Charles decided to reuse the glove rather than commission a new one in the interests of sustainability and efficiency.

Smythson eyes Asia push

Leathergoods brand Smythson has appointed **Paolo Porta** as its new chief executive.

His former roles include spells at Hunter, Jimmy Choo, Burberry, Christian Dior and Stella McCartney.

Stefano Giacomelli, chairman of Smythson, said: "Under Paolo's leadership, the brand is primed to begin a new chapter in its development through the strengthening of its traditional markets in the UK and Europe but in particular to expand its presence in new, strategic markets such as the US and Asia."

Merit award

The International Union of Leather Technologists' and Chemists' Societies (IULTCS) has announced Professor **Jianzhong Ma** as the winner of its Merit Award for Excellence in the Leather Industry for 2023.

IULTCS presents this award once every two years in recognition of the achievements of "those of stature in our industry who have contributed significantly to our global understanding of the leather industry and its by-products".

It said winners of the award should be individuals whose past or current endeavours have had an extraordinary impact on our industry and provide an example for others to follow and added that **Professor Jianzhong Ma** "fits this profile perfectly".

Major honour for leathergoods chief executive

The president of Italy, **Sergio Mattarella**, has included the head of a leathergoods business based in the north-eastern province of Udine among 25 new business leaders to receive a prestigious national honour.

Each year on June 2, to mark Italy's

Republic Day, the country's president makes leaders from a wide range of business sectors 'Cavalieri del Lavoro', or members of the national Order of Merit for Labour.

Among the 25 new 'cavalieri' for 2023 is **Mario Biasutti**, chief executive of leathergoods manufacturing group Mabi International.

The company, which has its headquarters in San Daniele del Friuli in Udine and factories in Tuscany and Veneto, is a supplier of high-end bags and accessories to major luxury brands, including Chanel, Chloé and Givenchy.

Mabi International employs 300 people, and produces more than 120,000 bags and 300,000 small leather accessories each year.

Change in China for Rolls-Royce Motors

Automotive group Rolls-Royce Motor Cars has appointed a new regional director for China, with **Anthony Zhao** taking up the role on June 1, replacing **Leon Li**, who has left the company.

It said China was one of the world's leading luxury markets and of "crucial

strategic significance" to Rolls-Royce Motors.

Mr Zhao was head of sales in southern China for the BMW Brilliance joint venture. "Anthony has a deep understanding of the region and the ultra-high-net-worth Chinese luxury consumers, whose unique tastes and appetite for highly bespoke products attract them to Rolls-Royce's model range," his new company stated.

Name-change is no surprise

The Higg Index suite of tools, developed by the Sustainable Apparel Coalition (SAC) to help companies in the leather, footwear and apparel value chain measure sustainability, is now to be hosted under a new company name, Worldly.

In an announcement in May, Worldly said that it had been set up as long ago as 2019. It described itself as a public-benefit technology company designed to be a platform for hosting the Higg Index. In the announcement, Worldly said it was "the exclusive licensee of the Higg Index".

SAC's website lists press releases for 2019, but does not include an announcement on the setting up of

Worldly. What it does make clear is that, in 2019, SAC launched Higg Co as a spin-off and **Jason Kibbey**, who had been SAC chief executive since 2014, moved to become chief executive of Higg Co. Mr Kibbey is now listed as chief executive of Worldly.

What seems most likely, then, is that Worldly is simply a new name for Higg Co, although the May messages fail to spell that out.

First Lady calls

Entrepreneur **Franck Dahan**, the investor behind luxury leathergoods house Joseph Duclos, revived in 2021 under the creative leadership of artistic director **Ramesh Nair**, has expressed his delight at having welcomed France's First Lady, **Brigitte Macron**, to the company's flagship boutique in Paris.

Situated along the city's rue du Faubourg de Saint-Honoré, the address, found at number 54, also houses Mr Nair's workshop, where he and his team work on designing and developing the brand's high-end handbag, small leathergoods and perfume collections. 🌐



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

09 June 2023

Deforestation down in Brazilian Amazon
Capri commits to regenerative practices

08 June 2023

Cabin interiors on display at Hamburg event
LVMH prize-winner embeds NFC technology in leather
Pufferfish leather gets attention on World Ocean day
RLSD renews partnership with Institute of Digital Fashion

07 June 2023

Four groups dominate US luxury footwear market
UK leathergoods restorer launches aftercare subscription
SCTI collaboration for leather and textile chemicals

06 June 2023

Gelatine manufacturers in Turkey spread their search for hides
ICLT trip marks 20th anniversary

02 June 2023

TFL to address leather legal requirements at ALCA annual convention

01 June 2023

Capri confident of resilience in luxury sector

30 May 2023

US registers a 10% fall in cattle slaughter

25 May 2023

Milan palazzo is Kering's new headquarters in Italy
Fish leather for a personal touch
Single case of BSE in South Carolina

24 May 2023

Adidas and Prada launch football boot collaboration

23 May 2023

Recovering global economy boosts new Clarks parent group

African countries mull intra-regional supply chains

22 May 2023

Trade Development Authority prepares for Karachi leather event
Luxury leather in abundance for BMW concept car
LWG's Brazil trip exposes room for improvement on traceability

19 May 2023

Australian slaughter volumes increase
SLF wins sustainability strategy award

18 May 2023

Dubai showroom opening for Poltrona Frau
Strong performance from Burberry
Gruppo Mastrotto offers helping hand to community
Pecca group completes major stake in automotive seating company

17 May 2023

Bottega Veneta opens 'flagship' on China's JD.com
Tandy Leather reports steady results
Cordwainers footwear awards adds athleisure prize

15 May 2023

Steer weights reach highest on record in Australia
Carbon analysis results published by Ars Tinctoria

12 May 2023

Annual results reveal all-time high for Richemont
Leathersellers' Company hosts industry dinner

11 May 2023

Americas growth boosts Bentley
Q1 growth of more than 20% for Tod's
Adidas praises Ecco Leather's role in colourful collection

10 May 2023

Minerva Foods increases revenue
Signs of rebound for US beef
Universities need help to study leather football performance

09 May 2023

Ten-month figures behind target for Bangladesh leather
Australia-UK deal marks 'new chapter' for beef
Tyson cuts revenue forecast

05 May 2023

Growth for Ferrari in Q1
Leathergoods acquisition for OTB

04 May 2023

Slower global growth prompts revised outlook from Lectra
Validation for Stahl's CO₂ goals
Tanning exhibition promotes circularity
Freiberg leather days programme finalised

03 May 2023

Shang Xia saw a 34% drop-off in revenue last year
Record start for Porsche

02 May 2023

Biodegradable sneaker from Koio

28 April 2023

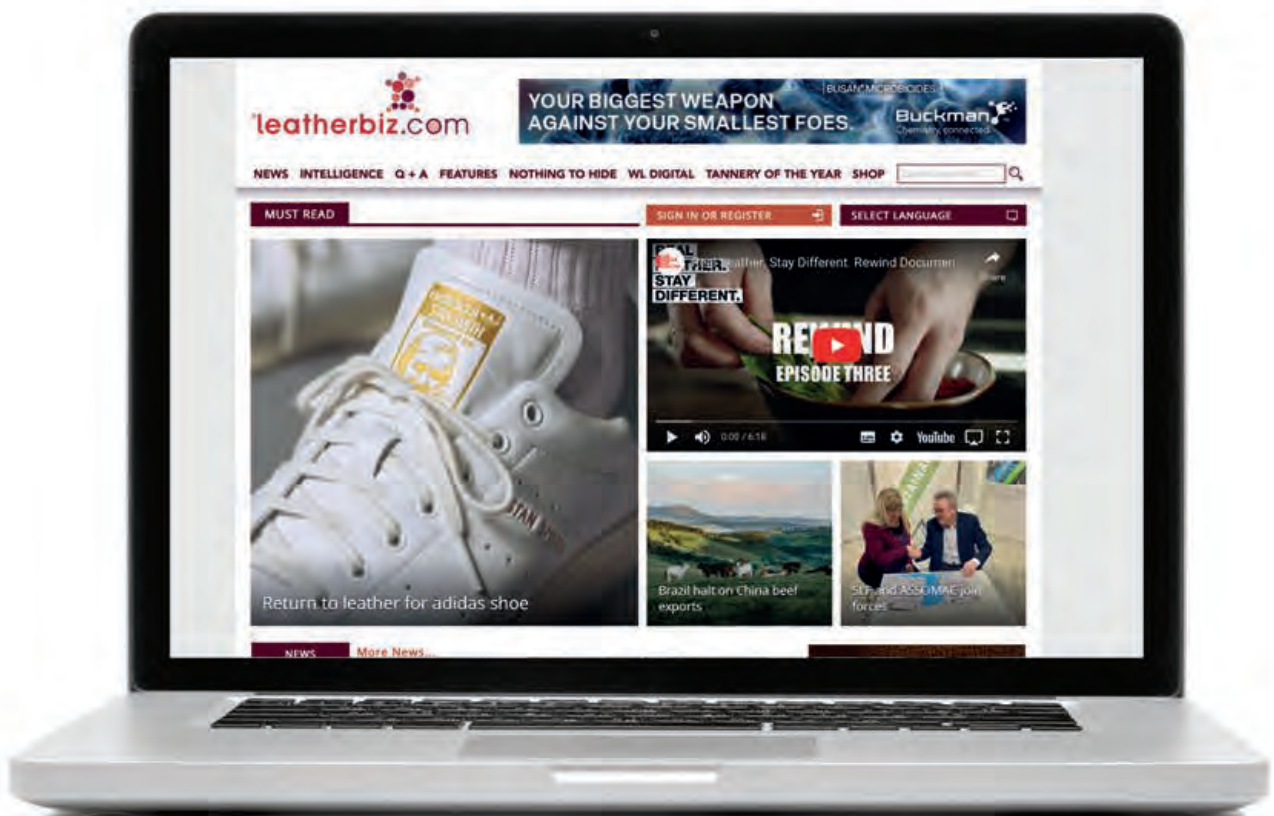
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As the largest leather manufacturer in the world, JBS Couros processes high volumes of hides. In recent years, though, it has focused not just on volume but on innovation, too, resulting in a string of new ideas for its leather collections.

Ideas factory

What is the extent of JBS Couros's activity now, in mid-2023. How many tanneries are there? How many employees? How many hides are you processing per month or per year?

JBS Couros was founded in 2009 as a business unit of the largest food producer in the world, JBS. Since the beginning, the business unit is an important part of the strategy to add value to JBS's production chain and has become the largest leather manufacturer in the world. JBS Couros has more than 7,000 workers in nine countries on three continents, with 22 plants, six business offices, three cutting plants, five logistics facilities, four showrooms, one private port terminal and two research centres. The company is responsible for producing large volumes of wet blue, wet white, crust and finished leather. We make quality products that are widely consumed by global automotive, furniture and footwear manufacturers and others. We offer branded products under our Kind Leather, Kind Leather EVO, Zenda, V-block and Conceria Priante brands, all of them focused on the high end of the market. Besides that, we have Leather Labs, an initiative aimed at e-commerce. It is an online shopping tool for professional buyers to source sustainable, Brazilian leather.

What are the particular challenges in running such a large group with operations in so many different parts of the world?

One of the main JBS business strategies is geographic diversification. Considering that our raw materials come from the production cycle of JBS meat plants, arranging a wide leather supply chain in strategic territories has also become an important asset of business to the company and its units around the world. This is linked to global awareness of reducing carbon footprint and is helping us move towards a carbon net-zero production chain.

It's now four years since JBS Couros introduced Kind Leather. What impact has Kind Leather had on your customers and on the wider leather industry?

The impact has been significant. JBS Couros brought innovation to the leather industry when it created Kind Leather in 2019. This new technique includes processing only a part of each hide, giving the hides we tan a new shape. This ensures better use of raw materials and allows scraps to go for use in the beauty, food, health and pharmaceutical industries. Overall, we are generating up to 93% less waste, consuming up to 62% less electricity and up to 52% less water. In 2020, we had

President of JBS Couros, the largest leather manufacturer in the world, Guilherme Motta.

ALL CREDITS: JBS COUROS

“Brazil’s vocation is to be the world’s breadbasket; it is at the forefront of protein production in the world, and JBS Couros plays an important role in this chain.”

an excellent result in a lifecycle assessment (LCA) of Kind Leather. The methodology was developed and applied by Spin360, an Italian company specialised in the leather sector. This result confirmed that JBS Couros has introduced design remodelling to the chain, confronting standards previously considered inherent to the production system. The research also confirmed Kind Leather has found a way to minimise environmental impacts for the sector.

During covid-19, JBS V-Block seemed to be an idea that was very much ‘of the moment’. How was this product, a range of leather with antiviral functionality, received at the time? Is it still part of the JBS Couros offering?

Our clients from all over the world were very accepting of V-Block and it is still in our portfolio; it is a high-quality offering. We developed it in nine months. It was not so much that there was a real demand for leather with antiviral functionality at the time, but it became an important option that added value to our customers’ finished products and to our own value chain. Besides that, V-block also proved the leather trade’s resilience in a time of global economic crisis.

In contrast, your EVO range, enhancing the durability and longevity of leather, seems like a very appropriate idea for the time ahead when consumers will see the economic and environmental benefits of long-lasting products. How well has this idea been received?

We see EVO being very well accepted by the market, mainly after the restrictive period of the pandemic. There was also a demand increase for upholstered surfaces and for coatings to have greater durability. Besides that, as markets and people have been demanding more sustainability and responsibility from every sector, a more durable leather like EVO has come to be of more value in addition to leather’s status as a natural solution resulting from a by-product from the food industry.

We often talk about the feel of leather as one of its main attractions. In this context, what difference can an idea like Leather Labs make?

Our Leather Labs platform also emerged during the pandemic as an idea for bringing consumers closer to the leather industry and promoting knowledge of the market. JBS Couros’s proposal with this project is breaking through some paradigms and prejudices about the world of leather, offering to consumers knowledge of the variety of the leather articles available and allowing them to get to know and admire many kinds of materials. Besides that, there is also a social proposal with the Leather Labs platform because it offers courses to help people find alternative ways of getting a complementary source of income and gaining knowledge about the importance of the circular economy.



JBS Couros is committed to ongoing investment in innovation and science.
CREDIT: JBS COUROS

It is now eight years since JBS Couros acquired the Priante tannery in Italy. Please sum up the contribution that Priante is making to the group, especially in terms of innovative ideas.

Conceria Priante is a very important business to JBS Couros. Through it, we have been able to connect to many important markets. Currently, Conceria Priante is our global centre for research and development. Today this unit receives inputs from our operations all over the world, and defines leather trends for us, always focusing on high quality and the wide variety of products we design for different segments. Product lines including Kind Leather, EVO, V-Block and Essntial, a collection of leather articles that give off a floral or wood aroma, emerged from there.

Brazil is still the group’s home. How do you view Brazil’s position in the global leather industry in the 2020s?

Brazil’s vocation is to be the world’s breadbasket. Its potential to fulfil this is due to its strategic geographic position, available technology and techniques that have developed over the years to raise cattle. It is capable of increasing production with a balanced use of natural resources. Brazil is at the forefront of protein production in the world and JBS Couros plays an important role in this chain. Thus, as one of the world’s largest food producers and a leader in protein processing, with a network of 25,000 active cattle suppliers throughout Brazil, JBS’s mission is to go beyond feeding the world. The company wants to meet this commitment in a balanced way and pushes all its companies, including JBS Couros, in this direction. One example of this commitment is that JBS was the first company in the protein industry to pledge to become net-zero by 2040. As part of this, JBS and JBS Couros understand that establishing a balanced production requires investment in innovation and science and the development of quality technology, keeping an environmental perspective at all times. 🌱

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WHAT ARE WE DOING?

we're generating value
for the Cartigliano's community

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Sustainable Development Goals

3 GOOD HEALTH AND WELL-BEING

WHAT ARE WE DOING?

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

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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

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Sustainable Development Goals

5 GENDER EQUALITY

WHAT ARE WE DOING?

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

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Sustainable Development Goals

7 AFFORDABLE AND CLEAN ENERGY

WHAT ARE WE DOING?

we are able to run plants with
renewable energy

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8 DECENT WORK AND ECONOMIC GROWTH

WHAT ARE WE DOING?

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

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12 RESPONSIBLE CONSUMPTION AND PRODUCTION

WHAT WE'RE DOING?

we generate energy through solar panels to feed our plants

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13 CLIMATE ACTION

WHAT ARE WE DOING?

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

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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 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"





Work goes on at one of Brazil's 214 tanneries.
CREDIT: CICB

The essence of Brazil

In this new series documenting the scope and status of the leather industry in some of its most important geographies, the first report focuses on Brazil.

North to south, Brazil stretches for 4,400 kilometres, from Roraima to Rio Grande do Sul. At its widest point, it runs for another 4,300 kilometres east to west, from Espírito Santo to Acre. Brazil has more arable land than any other country on earth and is in the global top five producers of more than 30 different agricultural commodities, according to the US Department of Agriculture. It is also one of only a small number of countries with the potential quickly to increase its production and export of food to a hungry world.

Food includes meat, of course, and meat includes beef, of which Brazil exported almost 2.9 million tonnes in 2022, out of a production of 7.9 million tonnes (see figure 1). Its territory includes millions of hectares of open pasture land and, in its bid to feed the world, Brazil is going to continue to raise cattle and produce beef. Where there are cattle there are abattoirs, where there are abattoirs there are cattle hides, and where there are cattle hides there often are, logically, tanneries. This is as it should be because although hides are a by-product of the livestock, meat and dairy sectors with only a small economic value in themselves (so small that millions of hides go to waste each year), they

have great potential for adding value.

Processing hides creates jobs and turns a renewable, natural resource into a high-quality material that finished product manufacturers can use to make shoes, clothes, furniture, bags, automotive seating, aircraft interiors and many other things. To use leather to make these products very often means avoiding the use of plastic. The hides are there and can and should be used.

Leather in Brazil

Tanners and packers in Brazil earned just over \$1.2 billion from exports of leather, hides and skins in 2022, according to figures from national tanning industry association CICB. In terms of volume, CICB has calculated exports of 140.75 million square-metres last year. Finished leather contributed 57.4% of total export value, from a share of 48.3% of total area. Wet blue brought in 25.5% of value and had 42.9% of the area. Crust had 10.1% of the value and 8.8% of the area. Exports of finished leather contributed \$690 million, while the figure for wet blue was \$303 million and crust brought in \$121 million.



The value of shipments of wet-salted hides from Brazil more than doubled last year, reaching almost \$6 million, compared to \$2.75 million the year before. China, the US and Italy were the three most important export markets for Brazilian leather in 2022, contributing \$278 million, \$224 million and \$203 million towards the total respectively.

Brazil currently has 214 leather manufacturing production units operating across its huge territory. The states with the greatest concentration of tanneries are well known: Rio Grande do Sul has 76, São Paulo 38, and Minas Gerais 24. Brazil has 26 states and 22 of them have one or more facilities for processing hides for the production of leather (see figure 2).

These are figures that Ricardo Andrade shared soon after joining CICB as an advisor on institutional relations and sustainability at the start of 2023. And with his sustainability hat on, he said at the CICB Sustainability Forum in Novo Hamburgo this March that the number of Brazilian tanneries that have secured certification for their performance in sustainability increased from 60% in 2018 to 78% in 2021.

CICB would like this progress to continue and would like efforts to establish greater traceability of hides and leather from Brazil to yield fruit as well. These efforts focus on establishing traceability back to all direct and indirect suppliers so that the companies selling Brazil's leather or finished products made from it can give guarantees of animal welfare and of no ties to deforestation. CICB accepts the importance of this for maintaining Brazilian leather's position in existing markets and establishing itself in new ones. However, Mr Andrade observes: "It is easy to hear people talking about problems in Brazil with traceability, suggesting that we don't know how to put traceability systems in place or don't want to. I don't know which Brazil they are referring to because we have the knowledge and the tools for this." (See 'No turning back on traceability', page 37, *World Leather*, April-May 2023).

Field study

Brazil devotes 32.4 million hectares to raising cattle, a figure that is close to double the total amount of land devoted to agriculture in Germany. However, the area of land farmers are using to raise cattle in Brazil declined by 6% between 2000 and 2020. In spite of this, CICB

Figure 1: Brazil by numbers

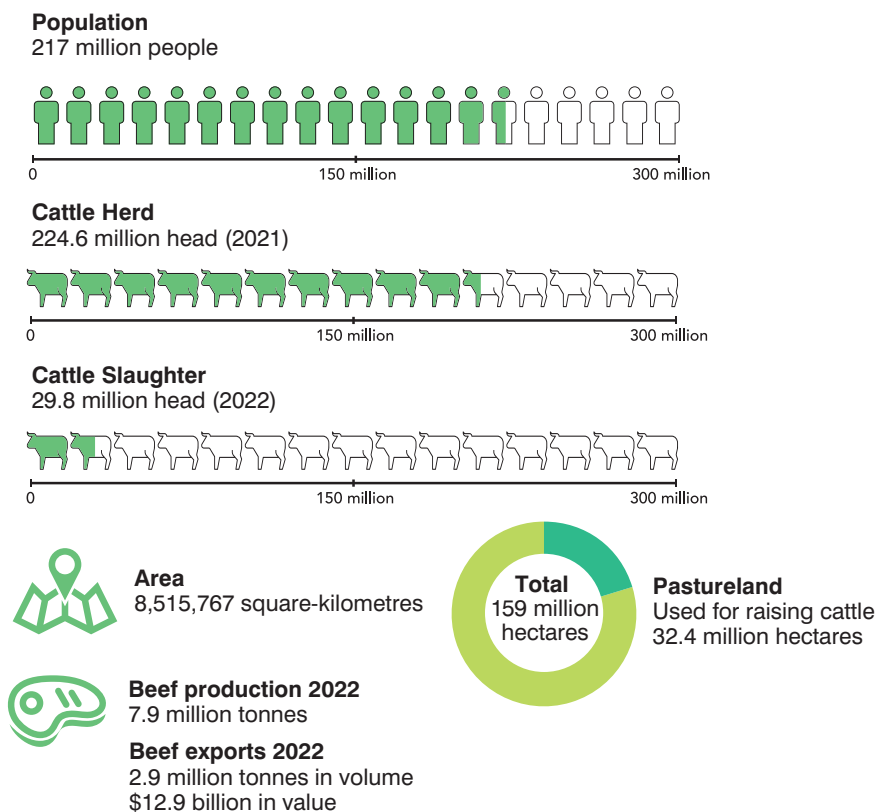
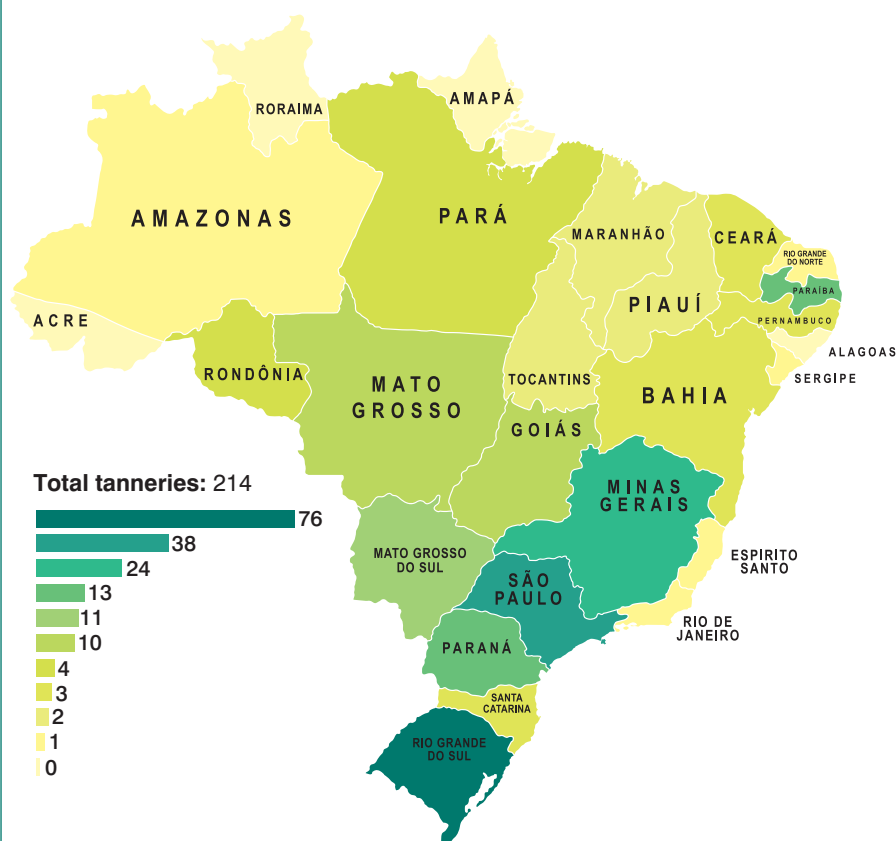


Figure 2: Number of tanneries





Ricardo Andrade at the 2023 CICB Sustainability Forum.



Brazil earned more than \$1.2 billion in leather exports in 2022.

CREDITS: CICB

points out, over those two decades, the size of the national herd increased by 20% to around 225 million head (national statistics body IBGE gave a total for 2021 of 224.6 million head) and productivity levels went up by 15%. “For many years now we have been working hard to build a Brazil that will be a major exporter,” Mr Andrade says, “and we can say that we already are a major exporter of meat and of leather to all parts of the world.”

Meat exports go to more than 150 countries, he explains, many of which, including the US and the member states of the European Union, impose strict requirements on exporters. Brazilian exporters have shown for years that they are able to meet those demands, he says. For leather, Brazil is the third-biggest exporter in the world. Of course, the pressures evolve as public opinion changes and now there is great emphasis on climate change, on deforestation, on the use of land and on animal welfare, all of which are also important topics for leather manufacturers, CICB insists.

Productivity gains

On the subject of the Brazilian livestock industry producing more

“For many years now we have been working hard to build a Brazil that will be a major exporter and we can say that we already are a major exporter of meat and of leather to all parts of the world.”

Ricardo Andrade, CICB

from less land, Ricardo Andrade says the land saving is significant in itself and is the result of crop rotation plans, improved cattle feeding programmes and other measures that are already in use in many areas. The figures show, he claims, that criticism linking the cattle industry in general to illegal deforestation is unjustified because they show that productivity can increase without the need for more land.

Another reason for CICB’s claims of greater sustainability in the livestock sector in Brazil is the steep fall in the percentage of cattle that are older than 36 months at the time of slaughter. IBGE’s figure for cattle slaughter in 2022 was 29.8 million head. In the late 1990s, 60% of these

would have been more than 36 months old. But by 2021, the presence of these older animals in the total had fallen to just over 10%. The benefit of this, from a sustainability point of view, that Mr Andrade points to is that if cattle are going to the abattoir at a younger age, they will ruminate for less time and, therefore, emit less methane.

In this, too, he admits to being slightly puzzled by the perception of Brazil as a carbon villain. “The whole country is responsible for 2.9% of global carbon emissions,” he explains, “while China, the US and the European Union, the three big trading bodies, are collectively responsible for more than 60%. It is not our 2.9% that is causing the biggest problem.” 🌱



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New crosslinker-free, water-based leather finishing system

Stefano Peratello, Davide Pellizzari and Armando Pizzolato
Lamberti SPA

An innovative water-based leather finishing system, Lamberti 1K, does away with the need for chemical crosslinkers. The use, in this system, of original synthetic polymers, suitably combined in the different finishing layers, provides articles with high chemical-physical performances without the disadvantage of the typical toxicity of chemical crosslinkers, and without the common problems of rheology variation that their use entails.

State-of-the-art water-based leather finishing systems involve the use of chemical crosslinkers. The reason for this is due to their ability to react with the functional groups of the polymers used in leather finishing: this contributes to the formation of a three-dimensional polymeric network which improves the chemical-physical properties of the finishing layer¹.

As known, the most commonly used crosslinkers are polyaziridines², polyisocyanates³ and, to a lesser extent, polycarbodiimides⁴. If on the one hand the use of these substances allows the improvement of the chemical-physical resistances, on the other hand it involves process, economic and environmental drawbacks.

From a process point of view, the use of crosslinkers in water-based finishing systems causes viscosity variation of the mixtures during the application phase, which obliges the finishing operator to carry out continuous checks and interventions to keep the application process under control.

The extent of reaction and the reaction rate of crosslinkers in aqueous systems, like all chemical reactions, are influenced by time and temperature respectively. The chemical crosslinking in water-based systems does not reach completeness at the end of the application but, in fact, it happens that the complete crosslinking and therefore the development of the chemical-physical resistances is completed in much longer times, which can exceed 48 hours⁵.

Last, but not least, is the aspect related to the impact on the environment and on the health and safety of workers. The crosslinkers used are all labelled as hazardous to health^{1,7}. European directives encourage industries to use, where possible, non-hazardous substances. Among these are the diisocyanates⁷ which belong to the family of chemical crosslinkers. It is therefore probable that, in the near future, the EU will place ever more restrictive limits on the use of these substances. Therefore, considering the increasing attention that is placed on these aspects, the elimination of chemical crosslinkers represents an undoubted advantage.

Viscosity variation over time of a topcoat when added with crosslinker

The viscosity variation of a water-based topcoat, when added with 3% isocyanate-based crosslinker, was measured in the company laboratory, using a Brookfield rotational viscosimeter, at T=20°C.

For the preparation of the mixtures:

Nova 2090/NF: Lamberti's water-based topcoat with 16% dry residue.

Reticolante 08: Lamberti's isocyanic solvent-based crosslinker with 70% dry residue and 12% free -NCO groups.

Table 1: the viscosity trend of the mixture over time and its % variation, at T=25°C.

t [min]	Viscosity [cPs]	Viscosity variation referred to the initial point (t=0) [%]
0	785	
1	620	-21%
3	605	-23%
5	595	-24%
8	580	-26%
10	580	-26%
15	575	-27%
20	565	-28%
25	565	-28%
30	555	-29%
35	555	-29%
40	555	-29%
45	555	-29%
50	550	-30%
55	550	-30%
60	550	-30%

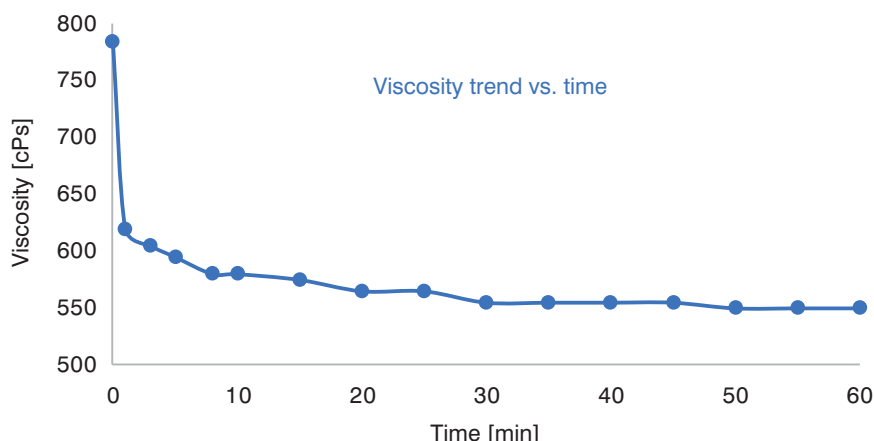
**Figure 1: Viscosity variation of the mixture, over time, after crosslinking**

Table 1 and Figure 1 illustrate that it is evident that, following the crosslinker addition, there is a significant variation in viscosity which continues over time, to stabilise only after approximately 1 hour.

This demonstrates the rheological instability of the crosslinked mixture which occurs during its application on the leather surface. Since viscosity is one of the parameters that regulates the weight of the product applied to the leather surface (g/ft²), both by spray application and roller coating, it follows that this variation requires the intervention of the line operator, to compensate for these variations and keep the weight constant.

Comparison between "state-of-the-art" technology and Lamberti 1K

To compare the "state-of-the-art" leather finishing technology with respect

to the new Lamberti 1K system, application tests were carried out on European bovine hides, previously treated with stucco and buffing, then finished according to the recipes shown in Table 2.

The recipes used had the purpose of preparing an embossed, matt leather article, suitable for furniture, with a waxy hand.

The weight of product applied onto the leather surface is expressed in grams per square foot (g/ft²) as per established convention in the tannery.

Table 2 shows:

- the high similarity between the two recipes and the unchanged number of steps. It follows that the tannery will not have to adapt or modify its processing methodology to use the new crosslinker technology;

- the embossing temperature required by Lamberti 1K technology is lower, given the absence of the crosslinker (polyurea) typically used in the base coat. This modification does not affect the embossing definition and leads to an economic advantage due to lower energy consumption.

State-of-the-art vs Lamberti 1K

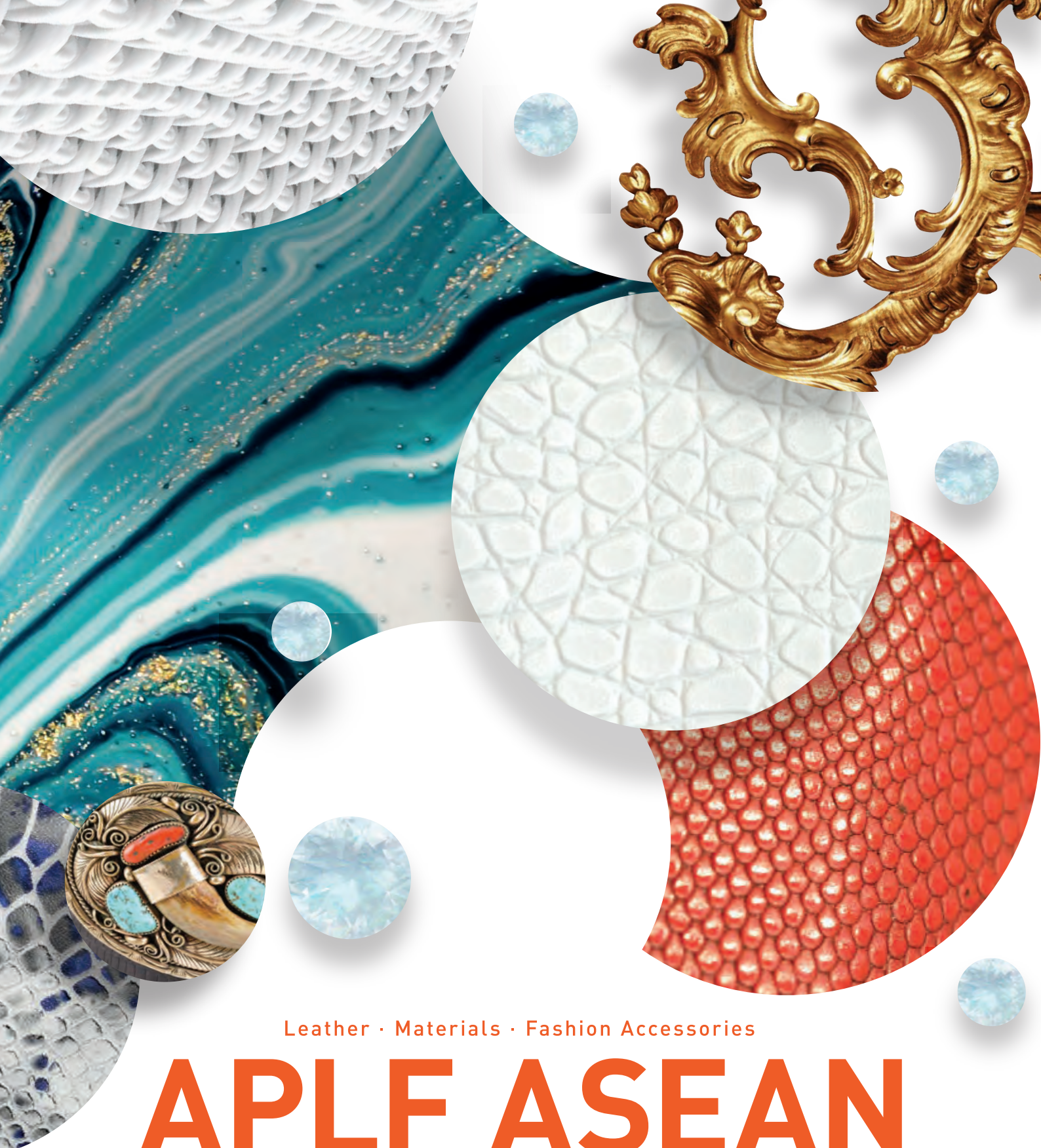
From the process point of view, the following advantages can be seen:

- Viscosity:** as shown in Figure 1 and Table 1, the crosslinked topcoat mixture undergoes a viscosity variation over time; this requires the need to continuously monitor the applied weight by modulating the application parameters. In the case of the new crosslinker, conversely, the viscosity remains constant over time.
- Waste production:** in the state-of-the-art, the quantity of topcoat to be crosslinked is calculated by considering the theoretical consumption based on the quantity of hides and their size; despite this, it is common to work in excess so as not to run out of mixture to apply. The leftover topcoat mixture can no longer be used, as the crosslinker reacts with the mixing water over time and therefore it must ultimately be disposed of. In the case of the new crosslinker technology, the leftover product can be reused without any problem for subsequent productions, thus eliminating waste.

Table 2: Application recipes comparison. State-of-the-art vs Lamberti 1K

State-of-the-art technology					
Products	I	II	III	IV	Operation
Water		500			I) 1 x 12 g/ft ²
Lamfix W 499		500			II) 1 x 1 g/ft ²
Lambinder C 181	1000				
Lambinder C LC/08			1000		Embossing
Nova TC 6				1000	(120°C/200 atm)
Reticolante 05	10		20		
Reticolante 08				30	Milling 8h
Pigment	150		100		
					III) 1 x 4 g/ft ²
					IV) 1 x 3 g/ft ²
Viscosity (s)	40"		30"	25"	

Lamberti 1K					
Products	I	II	III	IV	Operation
Water		500			I) 1 x 12 g/ft ²
Lamfix W 499		500			II) 1 x 1 g/ft ²
Lambinder C 1K 701	1000				
Lambinder R 1K 800			1000		Embossing
Nova 1K 900				1000	(100°C/200 atm)
Reticolante 05					
Reticolante 08					Milling 8h
Pigment	150		100		
					III) 1 x 4 g/ft ²
					IV) 1 x 3 g/ft ²
Viscosity (s)	40"		30"	25"	



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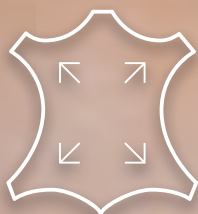
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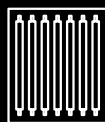


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**Table 3: Chemical-physical tests carried out on leather articles.**

UNI EN ISO 11640	Wet rub fastness	State-of-the-art: 450 cycles Lamberti 1K: 800 cycles
UNI EN ISO 11640	Dry rub fastness (1000 cycles)	State-of-the-art: 4/5 (grey scale) Lamberti 1K: 4 (grey scale)
UNI EN ISO 11640	Determination of flex resistance (1000 cycles)	State-of-the-art: Satisfactory, no breakups Lamberti 1K: Satisfactory, slight surface crease
UNI EN ISO 11644	Adhesion test	State-of-the-art: 16 N/cm Lamberti 1K: 17 N/cm
UNI EN ISO 17233	Cold crack (20°C)	State-of-the-art: No breakups Lamberti 1K: No breakups
UNI EN ISO 17076	Abrasion resistance Taber (1000 cycles CS10 – 1kg)	State-of-the-art: 4/5 (grey scale) Lamberti 1K: 4 (grey scale)
UNI EN ISO 17228	Colour fastness to aging	State-of-the-art: 4/5 (grey scale) Lamberti 1K: 4/5 (grey scale)
UNI EN ISO 105-B02	Light fastness	State-of-the-art: 4/5 (grey scale) Lamberti 1K: 4/5 (grey scale)

- **Impact on working capital:** the crosslinker must be added to the mixture just before applying, therefore the tannery must allocate warehouse space to a substance that has a very high unit cost. By working with the new crosslinker technology, warehouse costs are reduced.
- **Work environment:** as previously mentioned, crosslinkers are dangerous and labelled products; consequently, they require particular attention during their use. In addition to specific staff training for the use of dangerous products, it is necessary to subject the staff to health surveillance. In the case of crosslinker free systems, these procedures are no longer required.

the two technologies. Lamberti 1K after 100,000 cycles does not show breakage but only a more marked crease in the stressed area compared to state-of-the-art technology (see image 1a and 1b, optical microscope 62X).

The look of the finished article obtained with Lamberti 1K is totally comparable to that obtained according to the state-of-the-art, satisfying not only the resistances required, but also the characteristics of appearance and touch.

Lamberti 1K technology provides leather items with high chemical-physical performance, combined with excellent aesthetic characteristics. From a process point of view, the Lamberti system is easier to use as it is free from

rheological instability problems. Furthermore, by avoiding the use of chemical crosslinkers harmful to health and the environment, a significant step forward is taken towards the use of products and technologies capable of reducing both the environmental impact and the risks to workers' health. 🌱

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Chemical-physical test results

The leather articles produced according to the recipes in Table 3 were subjected to a series of chemical-physical tests whose details and the values obtained are shown in Table 4.

Results and conclusions

Table 3 shows the results obtained for each of the properties analysed.

The following is evident:

- Lamberti 1K provides significantly superior wet rubbing results compared to the state-of-the-art technology.
- All other values are almost equivalent for the two technologies.
- There is a different behaviour of the finishing layer in the flex test between



Image 1a: State-of-the-art

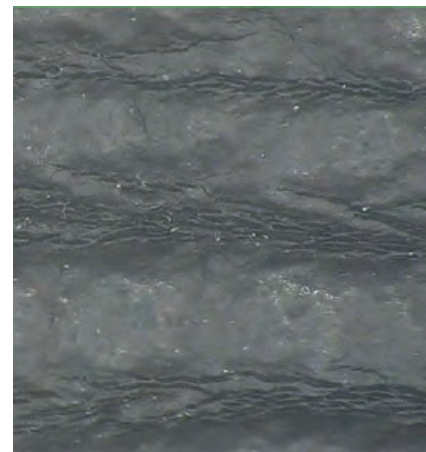


Image 1b: Lamberti 1K

More marked creasing appearance with Lamberti 1K process



Cr(III), Cr(VI), vegan claims covered at SLTC 125th

If there is a positive to be found in covid-19, it is the ability to cope with communication hiccups. Elisabetta Scaglia, the chemical and environmental manager at Italian tanning industry association UNIC, was all set to deliver the Procter Memorial Lecture in person at the 125th Annual Conference of the SLTC which was held at The University of Northampton on the 22nd April.

Industrial action, in Italy, however, scuppered her travel plans and the University of Northampton Audio Visual Services (think Zoom on steroids!) came to her rescue. Taking the disruption in her stride, Ms Scaglia started her online presentation with a brief introduction to the global use of chromium, and its occurrence in the earth's crust before moving onto the history of chrome tanning, the mechanism for Cr(VI) formation as an oxidation product of Cr(III), and vice versa with the reduction of dichromates to create the tanning capable Cr(III).

With the globally accepted limit for the presence of CrVI in leather set, at present, to three parts per million, discussion moved to possible causes of oxidation scenarios where the carcinogenic CrVI could be formed; these included the use of unsaturated fatty acids, as found in some fish oils, exposure to ultraviolet radiation (light) and excessive temperatures (at low relative humidity), where these circumstances can increase the presence of free radicals leading to favourable conditions for the oxidation of Cr(III) to Cr(VI).

The versatility of chrome tanning was acknowledged by Ms Scaglia, with current chemistries all working in harmony with the process and it was also noted the recovery potential of chromium from leather shavings and wastes, due to the relatively weak bonding between the chrome and the collagen, providing a source of chrome tanning material but also collagenic materials for other industries, such as cosmetics and agriculture.

The regulatory landscape for Cr(VI), is commonly known to be under review for "safe" limits in leather, currently at 3ppm but with suggestions to lower this to 1ppm. Challenges continue. Difficulties in testing methodologies still prevail, unable to define Cr(VI) concentrations in leather below 3ppm with any level of confidence.

Also under review are the workplace safety limits, with regards to air quality. The limit values for professional exposure, currently standing at 0.010mg/m³ of air, is to be halved from January 17, 2025, bringing it down to 0.005mg/m³.



The 125th SLTC annual conference was once again held in the Senate building at the University of Northampton, Waterside campus. Northampton University is home to the world renowned Institute for Creative Leather Technologies (ICLT)
CREDIT: SHUTTERSTOCK



With the uncertainty surrounding other possible alternatives, with glutaraldehyde now under scrutiny as well as bisphenols on the European chemical's agency "watch lists", Ms Scaglia finished by urging the attendees to lobby their respective associations, to help avoid the 1ppm restriction without having proper and robust test methods.

Sustainability and Materials

An analysis of alternatives to leather was presented by Gustavo Defeo from ARS Tinctoria in Italy. Running over the past two years, a project on radiocarbon analysis comparisons has been carried out by Mr Defeo and his team. With plastics pollution, in the form of micro- and nano-plastics becoming increasingly problematical, and with a growing market in vegan alternatives to leather, the ability to substantiate claims made by the manufacturers of these materials is now evermore under the spotlight.

With recent legislation, in the form of the Green claims directive, as part of the EU Green Deal to protect consumers from exaggerated claims, the presentation gave an overview of how these policies established the objective parameters to be considered with regards the chemicals and materials used and in doing so the definition criteria for biodegradability, compostability and renewability.

Presenting an update on the various commissions (ASTM and CEN) quantification methods for biomass/fossil origin, Mr Defeo explained what the position was of the commissions and the testing background. Working on a "worst case scenario" leather, metal-free tannage, with synthetic fatliquoring materials, and finished with synthetic polymers, all from fossil derivatives, the biobased content was found to be 65%. Looking at a best-case scenario, a traditional vegetable tanned "vachetta" leather returned results of 96%. Keen to associate some context, Mr Defeo emphasised that results such as these should be given in all transparency, in that at 96% bio content, the remaining 4% must be expressed as petroleum or fossil based – in practice this would see some of the alternatives, in specific relation to the presentation, bio fabricated materials containing cactus extract should be labelled as having 36% petroleum derivatives.

Touching on the proliferation of bio-based plastics, the issues surrounding their ability to decompose or not, or even exhibit the same breakdown characteristics into micro- and nano-plastics, the substitution of vegetable oils into the manufacture may not have solved the biodegradation issue, with Mr Defeo urging care to be taken so as not to continue the generation of microplastics.

Also on the agenda

Other papers presented at the conference included:

- Practicalities of handling polymer spheres in full scale production, by Vikrant Pratap, Qualus
- Helping to reach the top of the world – Everest 70, by Dr Christine Anscombe, SATRA
- Leather degradability: Its past and future by Karl Flowers, Authenticae
- Review of research papers by current students of the ICLT, by Mohammed Kashif followed by Simov Stoyan
- Mulberry: Made to last, by Rosie Wollacott Phillips, Mulberry.



Gustavo Adrian Defeo presenting an update on European Standards involved in determining biobased content in products and the radiocarbon analysis research done by the ARS Tinctoria laboratory in Italy on the "so-called" sustainable alternatives to leather.

CREDIT: WTP

The SLTC Awards

For "Outstanding contribution to the leather industry", the Axel Landmann award was presented to Rachel Garwood.

Ms Garwood joined the leather industry in 1989, studying for a biological science degree whilst at the BLMRA (British Leather Manufacturers Research Association), later to become the BLC, where she worked for 19 years in a varied role, ranging from problem solving and research for the tanners through to business development and training with manufacturers and retailers. She rapidly became an expert on raw materials and microscopy under the guidance of the late Betty Haines.

During her time at the BLMRA she also went on to take an MSc in Leather Technology, studying at the British School of Leather Technology, achieving a Distinction. In 2008 she moved to the University of Northampton taking on a new role as a Senior Lecturer in Leather technology, where her experience, enthusiasm, global contacts, and business acumen were recognised by the University. In 2011 she was promoted to Director of ICLT. This was a role she held and excelled at until October 2021 when she moved on to work as Business Manager for Lear Group, before becoming Lear Group Leather Division Organisation Sustainability Manager in May this year.

Other awards presented at the conference included:

- Professional grade of Licentiate, to Maria-Simona Canea and Tanyaradzwa Mapfumo.
- Professional grade of Associate, to Juan Francisco Hidalgo Ruiz, Deborah Taylor, Tichaona Ndhlovu and Bryre Andre Groenewald.
- Professional grade of Fellow, to Jon Ayres, Arnold Britten, Stephen Hems, and Martin Heels
- Life Membership, to Iain Mcfadyen & Stephen Robert Trantum

The in-person/online hybrid event was attended by 59 delegates in person with a further 12 taking part from various countries including Indonesia and Tanzania. The conference was followed in the evening by the SLTC Annual Dinner Dance. 🍷



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Laser marking in leather processing

At the 2023 CICB Sustainability Forum in Brazil, Domenico Feltre, sales manager of tanning technology company Feltre Srl, presented new technology for marking hides to link them to traceability systems.

Any initiative to increase traceability in the leather industry must have clear connections to wider sustainability strategies. This is the view of Domenico Feltre, sales manager at Feltre Srl, the tanning technology company his family has run in Veneto for more than 50 years. He adds that “the three Es”, ethics, economy and environment, are the pillars on which companies must build their sustainability strategies. Companies cannot pursue a sustainability programme unless they work hard to balance economic stability, care for the environment and social ethics.

It is the last of these, ethics, that comes to mind first for him on contemplating the question of hide traceability. A label that offers guarantees about the authenticity of the product is important in these days of widespread counterfeiting, he says. He explains: “Hides have been marked for years, including in the form of cattle-branding, before they reach the tannery. But it is difficult these days to present branding as an ethical practice.” Once inside the tannery, marking systems that use perforations have become common.

Bonds of transparency

Traceability equals trust, he insists, a chance to enhance “the bond of transparency between companies and consumers”. This is true in all sectors, but is, arguably, particularly pertinent to the leather sector after a number of years of “being in the spotlight, not to say under attack from various powerful lobby groups”.

In this context, cattle-branding would be a practice best consigned to the past in his opinion, while perforation systems can easily damage hides. Feltre Srl has come to the conclusion that laser marking is a much better solution for hides: the markings can endure for the whole tanning cycle and beyond, the company says, without making perforations in the material. “The fibres remain in good shape,” is Domenico Feltre’s way of putting this, “and the hide retains its strength.”

The system that Feltre has developed is called Leather Tattoo because it creates a tattoo using laser technology. It is already in use among major leather manufacturers and hide traders. The technology provider points to space-saving on hides as one of the benefits; the marking system it has developed is customisable but can take up 30% less space on each hide than the perforation systems that tanners have traditionally used. It takes only a few seconds to mark each hide and the system can work in every tannery in the world, according to Domenico Feltre, without holding up the production flows that are the tannery’s lifeblood. On the subject of customisation, he adds that adding a logo or a brand symbol using laser marking is also possible; it would take up more space, but would offer what he calls “evidence of commitment and professionalism” and give customers assurances about a product’s authenticity.



Domenico Feltre presenting the Leather Tattoo system at the 2023 CICB Sustainability Forum.

CREDIT: CICB

Distinguishing marks

Processors can choose whether they want to apply the ‘tattoo’ at raw stage, with or without hair on, or at wet blue. Images he shares show clear markings on a hair-on hide at the raw stage, another at wet blue, another at crust and another on a finished piece of leather. Feltre’s examples consist of eight digits, the first five to refer to the lot each hide comes from, the other three to the place in the sequence of each individual piece.

“Our research shows that laser is the only technology that can deliver a simple, permanent, effective system that will allow you to trace each hide at every stage within the tannery and beyond,” he explains. “That’s why we have chosen to take the Leather Tattoo approach.”

He does not use the term ‘tattoo’ in any frivolous way.



Damage caused by a marking system that perforates the hide.



A clearer, more legible and less damaging mark from a laser system.

CREDITS: FELTRE SRL

Instead, he views it as a way of offering traceability in an unequivocal, indelible, clear and simple way. Connected companies can use the laser-markings, surface engravings on each hide of a unique, indelible code that can be easily identified and traced throughout the production chain, to certify their processes, tasks that Domenico Feltre insists must become smarter. The depth of the engraving in Feltre's system is easy to adjust to suit the thickness of the hide; engraving a bull hide will require "more intensity" than marking a calfskin, for example.

No structural damage

Safe to use and easy to clean, the system has seven settings to help tanners make sure the codes they carve into the hides will remain readable and sharp. It is better to put the marking on the grain side of the leather, he says, so as not to affect greatly the network of linked fibres in the corium layer. A mark of between 0.05 and 0.1 millimetres in depth there, where the fibres are more compact and vertical, will do little to the horizontal fibres of the corium layer. "The structure of the hide will remain intact," he says, "and will still retain the whole of its tear-resistance properties." This level of marking is enough for the tattoo to remain readable, including by

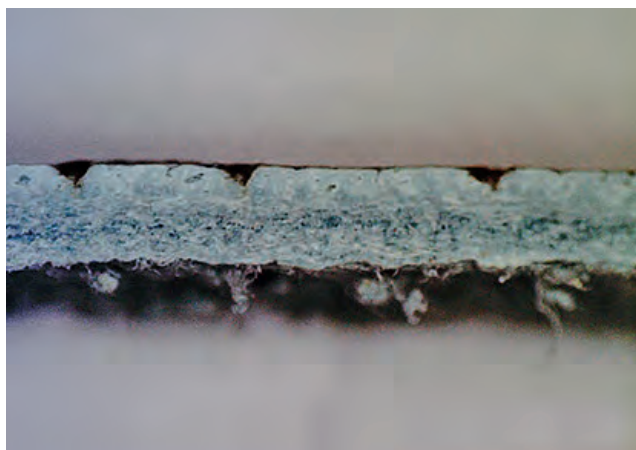
automated devices such as optical character recognition (OCR) readers and scanners.

Laser technology has already been in use in tanneries for years, Mr Feltre continues. His company first became involved in trying out lasers in tanneries five years ago. He says early attempts fell short of the levels of reliability customers required. "It was for this reason that we invested in the search for new solutions and have created a tannery-proof laser," he explains. "We have commitment to creating machines and systems specifically for the tanning environment, machines and systems that will last a long time. This, too, is an important aspect of sustainability."

Longevity is a quality that Mr Feltre believes the Montorso Vicentino-based technology provider also demonstrates. Based on the doorstep of the Arzignano-Chiampo tanning cluster and with strong contacts with leather manufacturers in all parts of the world, he says the company is proud to be able to work with tanners every day. "It's 50 years this year since we began," he adds, "and we still feel the same curiosity about this industry and the same passion for it." Commitment to helping the leather industry innovate and advance is an indelible mark that Feltre Srl wears like a tattoo. 🌱



On the surface, where the fibres are more compact and vertical, Feltre's Leather Tattoo leaves a mark of between 0.05 and 0.1 millimetres in depth.



A microscopic view showing that laser marking causes no damage to the integrity of the fibres in the corium layer.

CREDITS: FELTRE SRL

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GER Elettronica says tannery automation and process control can flag up important improvements that leather manufacturers can put in place.

CREDIT: GER ELETTRONICA

Data's role in the fight

Companies in industries as diverse as automotive, chemicals and food are using data to achieve a competitive advantage. GER Elettronica believes it is time for leather manufacturers to follow suit.

Tanning technology provider GER Elettronica has a new tannery process analysis system called BE Process; several leather manufacturing groups have already put it into their facilities. Using the CICB Sustainability Forum in Brazil in March as a platform, the company's chief executive, Cesare Dal Monte, provided a detailed presentation of the technology and emphasised that the key advantage it offers is the capture and presentation of data.

It works by having a sensor at the start of the leather manufacturing process to capture details such as the size, weight and colour of each hide. The system then tracks the movement of each hide as it moves through the tannery. Its purpose is to yield data that GER believes industry players ought to capture, study carefully and use to counter, with science and facts, unjustified comments about the resource-intensiveness of leather manufacturing.

Self-defence

Mr Dal Monte argues that these fact-based counters to anti-leather messages are necessary. "We are under attack from those who see the leather industry as the great polluter of the world and we have to defend ourselves," he says. "And to know our processes inside and out, based on data, is our first weapon." Data is important; he laments that arguments are often based on emotions or on opinions rather than on data. "Opinions are words," he explains. "Numbers are facts. And this is why we are introducing this new solution."

The GER chief executive explains that the technology provider spent four years developing BE Process. And as well as providing support for presenting leather as a sustainable material par excellence, the data the system generates will flag up good opportunities for improvement in the way tanners make leather. Data that emerged from GER's own work with the system, preparing BE Process for use on the tannery floor, contained "a lot of surprises". For example, if, on measuring the thickness of lime splits, the technology finds the material 0.2 millimetres outside the target thickness, it won't just flag this up, it will tell the tanner exactly where on the hide adjustment is required to hit the target. This will lead to savings and help increase margins, GER states.

Wider connections

With sensors tracking every single hide as it goes through each process, from raw material receipt to shipment of finished leather, the volume of data the system generates is substantial. GER Elettronica's offering includes servers to store that data and a proprietary software application called I.Data to analyse it. The technology provider's recommendation is that tanners use it in conjunction with another of its systems, BE Trace, which can provide customers with assurances about the animal the hide came from and the farm where the animal was raised. "It isn't easy to do this, tracing a single hide, all the way through the production process," Mr Dal Monte says, "all the way from start to finish."



He says laser technology, which he describes as “flexible, clean and very modern”, is a critical tool in GER's technology, although he concedes that it can take a little longer to mark each hide using a laser. “Our calculation for laser marking of raw hides is 12 seconds per hide, compared to, perhaps, three seconds using perforation,” he explains. Artificial intelligence-based readers, installed at strategic points to capture the markings as the hide moves through the tannery, are also part of the set-up. Smartphones will only be able to read some of the markings some of the time, he says, and do not represent a viable alternative.

Broader view

It is all about accumulating the data and working with it. BE Process first makes information available to individual machine operators about the flow of work they have contributed to, flagging up any issues or inconsistencies, as in the example of missing the target on lime split thickness. Team leaders will see these too on interfaces that the system provides; this is to give them a view of what is happening on a number of workstations at the same time. One benefit Mr Dal Monte points to from this is that it gives an opportunity to prevent errors from affecting an entire batch of hides. “If something goes wrong on one hide, the system will show that,” he explains. “But if something is wrong with five or 10 or 15 hides, the system will flag up that there could be something going on that could affect the entire batch and that you need to take action quickly.”

He explains that the experience so far of the five or six leather manufacturers that have been the pioneers of using BE Process, with BE Trace, indicates that starting the installation at the wet end brings benefits. “These are the most critical phases,” he says, “where making a bit of effort and investing a little money can bring big returns. You can see why a finished hide you have produced turned out the way it did and you can go and make some real improvements on the process.”

Mr Dal Monte's opinion is that “real improvements” would not be hard to identify. Returning to the thickness target example, he points out that an operative using a hand-held calibration device would easily be able to find a few spots



Cesare Dal Monte argues that the leather industry has an important ‘weapon’ at its disposal in the data that advanced technology systems can collect.

CREDIT: CICB

on the hide where the thickness was in keeping with the target and conclude that the hide passes that particular test. “The system that we are presenting to the market will automatically measure that hide at 400 different points every square-metre,” he says. “So, for a hide of 5 or 6 square-metres, it will give 2,000 or 2,500 measurements that the system will register and store and it will be on this data that tanners can base their

calculations, not on just three or four measurements.” Measuring hides much more accurately and hitting targets more frequently will lead to savings on water, energy and chemicals.

Cesare Dal Monte insists: “All other sectors, including automotive, wood, chemicals, food and so on, are already using data to secure competitive advantages. Data will be our future too.”

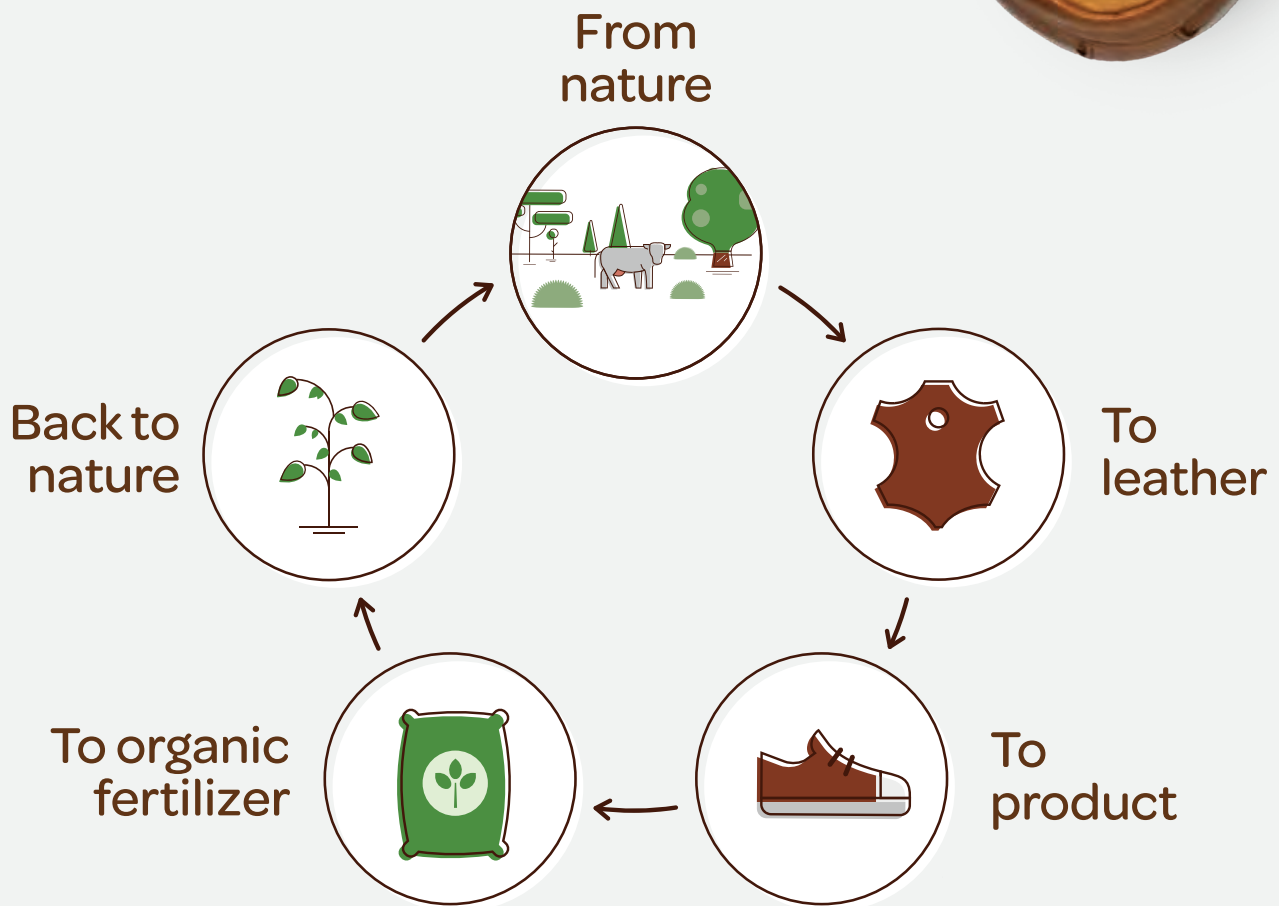


The BE Process system measures the effect on each individual hide of the processes it goes through in the tannery.

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Leather products are eminently repairable



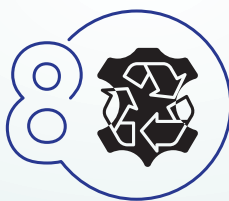
Leather is in keeping with sustainable consumption and sustainable production and, thus, supports the UN's Sustainable Development Goals (SDGs)



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

Strong support among scientists for livestock farming

At the end of the first quarter of 2023, the United Nations Agency the Food and Agriculture Organisation (FAO) gave new estimates for cattle slaughter and availability of hides. Its figures offer a comparison between 2020 and 2021, the most recent years for which these statistics are available. The Rome-based organisation has put the global cattle herd size at just over 1.5 billion head in 2021, up very slightly, by 0.4%, on the figure for 2020.

It has estimated the total number of raw cattle hides that the meat and livestock sector generated in 2021 at 331.9 million, which is an increase of 1% compared to its estimate for 2020. We know that millions of these hides will have gone to waste. As an illustrative figure, the Leather and Hide Council of America has calculated that only around 55% of the world's supply of hides makes its way into the leather value chain. This may be a painful truth for the global leather industry, but it is also possible to look at it from the opposite point of view: if 55% of those hides do make their way into the leather value chain, a nine-digit number will continue to be needed to show the volume of hides going into tanning drums for the production of finished leather.

More than 1,000 scientists with high levels of knowledge and expertise about the contribution livestock can make to human wellbeing and to the health of the planet have signed the Dublin Declaration, committing themselves to making their evidence-based arguments heard in the public square.

Cause for celebration

As long as livestock farming continues, hundreds of millions of hides are going to be available every year for humanity to use to produce material for shoes, bags, furniture, car upholstery, clothing, interior design, gloves, aircraft interiors and many other applications. If people are sincere about limiting the production and use of plastic, it may not be long



before making these products from leather instead becomes a genuine cause for celebration in the eyes of millions of consumers. This could only prove less than true if livestock farming were to become a thing of the past. Livestock farming is changing (increasing the yield of meat and milk while reducing emissions), but it is not going away. Far from it. It is here to stay, and so is leather.

In addition to the FAO figures, another cause for confidence about the future of cattle farming and, therefore, about hide availability is an increase in the number and the stature of the people who are speaking up for meat and livestock in the public domain. At the end of 2022, hundreds of scientists signed a pledge to support and contribute to efforts to show scientifically that livestock farming brings benefits to society. This pledge has become known as the Dublin Declaration. These scientists support it because they want to increase availability of healthy and safe food with high nutritional values as the global population grows. At the same time, they want to make sure animal production systems are sustainable.

Precious resource

“Livestock systems must progress on the basis of the highest scientific standards,” they have said. “They are too precious to society to become the victim of simplification, reductionism or zealotry.” Signatories also explained that by recycling “the large amounts of inedible biomass that are generated as by-products”, farmed and herded animals “are irreplaceable for maintaining a circular flow of materials”. Further along the value chain, leather is part of that picture, too. Within days of its launch, the Dublin Declaration had more than 300 signatories, with scientists from South America, North America, Africa, Europe, India, Australia and New Zealand pledging support. By the start of June 2023, this figure had increased to 1,065 scientists from 63 countries.

Three of these signatories took part in a discussion that multi-stakeholder group European Livestock Voice hosted in Zaragoza in northern Spain at the end of March. The focus of the discussion was to examine what the future holds for the livestock industry in Europe in the context of the European Union’s Green Deal and its 2020 Farm To Fork strategy. The trio of Dublin Declaration



Left to right: Dublin Declaration signatories, Dr Pablo Manzano, Professor Frédéric Leroy and Professor Alice Stanton, at the discussion organised by multi-stakeholder group European Livestock Voice hosted in Zaragoza, Spain in March.

Credit: European Livestock Voice

signatories presented arguments from two different perspectives, nutrition and the environment, in favour of the continuation of livestock farming.

For Professor Alice Stanton, an expert in cardiovascular medicine, member of the Royal College of Surgeons in Ireland and a contributor to Ireland’s national food strategy programme, the challenge is to find ways to provide the entire global population with affordable access to varied, nutrient-rich whole foods that are produced sustainably from plants and from animals. She contrasts whole foods with those that are ultra-processed. As in most things, there is a spectrum here, but the FAO has a four-step classification system called NOVA with whole foods at grade one and ultra-processed at grade four. “For grade four,” Professor Stanton explains, “multiple industrial processes have occurred to the food, so much so that the original source is not recognisable.” Sweet foods, junk foods, pasta sauces, biscuits and so on are all in this category. They contain multiple additives, colourants and flavours, particularly excess salt, sugar and trans fats, the professor points out.

What she refers to as “the huge crisis that is facing our populations” is that, in the western world and, increasingly in low- and middle-income economies, up to 60% of the calories that people consume are from ultra-processed food. “Manufacturers even use multiple chemicals to glue these foods together,”

Professor Stanton says. “And, yes, 60% of calories that people consume in the US and in excess of 50% in the EU are from ultra-processed foods.”

Under attack

She has no objection to Farm To Fork’s contention that, in general, people are eating too much of some foods and too little of others, notably fruit, vegetables, legumes, nuts and seeds. But she views as unbalanced Farm To Fork’s insistence on citing red meat as one of the food categories that consumers should cut back on. The original Farm To Fork strategy document from 2020 says: “Current food consumption patterns are unsustainable from both health and environmental points of view. While in the EU, average intakes of energy, red meat, sugars, salt and fats continue to exceed recommendations, consumption of whole-grain cereals, fruit, vegetables, legumes and nuts is insufficient.” Trans fats and ultra-processed foods merit no specific mention here, Professor Stanton points out, while in her eyes the text represents one of many instances of red meat coming “under particular attack”.

In 2007 the health authorities in the UK presented eating recommendations that came to be called the ‘Eat Well Plate’. In these recommendations, at least 25% of all calories were from animal-source foods. By 2019, when the EAT-Lancet Commission published, to great fanfare, its ‘Planetary Health Diet’, the recommendation for calories from



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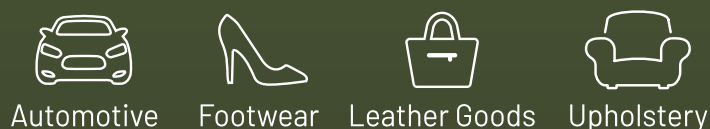


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animal sources had fallen to 12%, with 6% coming from meat, fish and eggs, and 6% from dairy. But there are some grounds for optimism, Professor Stanton points out. “Some of the authors of the Eat-Lancet reference diet have come out in public and said that the Eat-Lancet reference diet is inadequate for micronutrients,” she says. “And they have proposed that the adequate diet for adults should, once again, have a minimum of 25% of calories coming from livestock foods, with red meat going up from 1% of the diet up to 4%. The next version of the Eat-Lancet reference diet will be much more flexible.”

The authors she refers to include Dr Jessica Fanzo, professor of global food policy and ethics at Johns Hopkins University in Baltimore. Dr Fanzo contributed to a paper with the title ‘Estimated micronutrient shortfalls of the EAT-Lancet Planetary Health Diet’, published in March this year. To its credit, the journal that carried this paper was *The Lancet* in its Planetary Health journal. “Dr Fanzo was a member of the first Eat-Lancet Commission and is also a member of the second,” Professor Stanton says.

Health risks

In the view of the Irish cardiologist, a healthy diet needs to do two things: protect people against nutritional deficiencies and lower the risk of serious health impacts, including cancer, heart disease and strokes. She draws attention to studies on these subjects in which red meat has, again, come under attack, notably the Global Burden of Diseases, Injuries, and Risk Factors Study (GBD), led by the Institute for Health Metrics and Evaluation (IHME) at the University of Washington. The IHME presents these studies as “the most detailed scientific effort ever conducted to quantify levels and trends in health”. The original GBD analysis appeared in 1990 and used what IHME now regards as “very simple methods”. A 2017 GBD study was the first to use a new forecasting approach. It said excessive consumption of red meat was associated with 25,000 deaths. The 2017 study highlighted 15 dietary risk factors and red meat was the least important of them. In a follow-up GBD study in 2019, the conclusion was that red meat was associated with almost 900,000 deaths, a figure 36 times higher. The 2019 study suggested that



Cattle on the Estância Coxilha ranch in southern Brazil.

Credit: Victor Wortmann

“We need more balance in the livestock debate and we have to mobilise the scientific community around this. Scientists are being intimidated, not to say bullied, by a few people with loud voices.”

PROFESSOR FRÉDÉRIC LEROY.

any consumption of red meat at all was a health risk.

A group of scientists, including Dublin Declaration signatories and Zaragoza panellists Alice Stanton and Frédéric Leroy, a professor in food science and biotechnology at Brussels Free University, questioned the 2019 GBD conclusion. “We wanted to know if this was reliable,” Professor Stanton says, “and to ask where the evidence was. We also wanted to know what would happen with [dietary] deficiency deaths if any red meat consumption was regarded as harmful. We were joined by the World Cancer Research Fund and the Academy of Nutritional Sciences in saying GBD had to produce the evidence and that we had to be able to interrogate it, and we eventually got our letter published in *The Lancet* [in April 2022].”

In the three years in which the 2019 GBD analysis had gone largely unchallenged, the report was cited in hundreds of articles and scientific papers and nine policy documents. On October 10, 2022, the GBD collaborators published a paper in the journal *Nature Medicine* with the title

‘Health effects associated with consumption of unprocessed red meat: a Burden of Proof study’, resulting in what Professor Stanton calls very different conclusions. She explains: “What they said in this paper was there is little or no evidence that red meat causes any harm whatsoever and that the weak evidence that is there is certainly insufficient to make any policy recommendations or decisions. The optimal intake of red meat is certainly not zero and could be as high as 200 grammes per day.”

Food diversification

It is early days, but the *Nature Medicine* paper presenting these different conclusions only had 18 citations by early this June. The original message seems to have filtered much more readily into the public consciousness. This is in spite of the tireless efforts of Professor Frédéric Leroy to secure a fairer hearing for meat and livestock on social media.

He is interested in all kinds of foods and likens the bugs he has tried to the shrimps available on Belgium’s North Sea coast. “They’re a bit dry, but



crunchy,” he says. “You could have them as an appetiser, but you could never feed yourself entirely on insects within our cultural frameworks.” Professor Leroy says he respects the search for alternatives to meat. He is “all for diversification”, and for offering more choices in people’s diets “as long as they fit the criteria”. These choices must offer food that is nutritious and can be sustainably produced. He divides the alternatives that are emerging into different categories. “We have to distinguish between them because they come with different implications,” he explains.

With regard to the first category, laboratory-produced meat substitutes, he says these products will not become a regular part of many people’s diets in the near future, if they ever do. “The technology involved comes from the medical field,” he says, “and there are serious bottlenecks in place with respect to upscaling the whole process. I think it’s a non-discussion at the moment.”

Plant-based fast-food represents the second category. He describes these products in this way because they are usually, if not always, “on the ultra-processed side” and are presented as part of fast-food culture. “They often come in the form of burgers and sausages, foods that people will put lots of sauce on and put in a bun. You can hardly taste the original food; the original taste is masked because it is not very attractive and that’s because the food comes from protein isolates that are processed to a point at which they become palatable and they are then hidden in fast-food condiments. I don’t see this as particularly beneficial.” Frédéric Leroy views this connection to fast-food culture and its dependence on ultra-processed food as something that “amplifies the problem we’re already facing”.

The third category is insects. Insects have long been part of human diets but here again scaling up production and consumption of insect-based food is going to be a challenge. The barriers in this case may be more cultural than technological, the professor concedes, although the technology is not straightforward and also subject to bottlenecks. Instead, his view is that people who want to have a plant-based diet can and should still make the shift away from processed and ultra-processed foods to whole foods a key part of the dietary change. “There are



Locally produced food on sale at a market in the south of France.

Credit: Shutterstock/cmnaumann

plenty of recipes already in our culinary heritage that are based on plants and we could use these instead,” he argues.

Help from herbivores

A vegetation ecologist who has become a specialist in the environment and livestock, Dr Pablo Manzano works at a research institute called the Basque Centre for Climate Change near Bilbao. He too is a signatory of the Dublin Declaration. He picks up the gauntlet of defending livestock farming (and, by extension, meat and leather production) against attack on environmental grounds. The European Commission describes Farm To Fork as being “at the heart of the Green Deal”, and in the Green Deal, it says it wants Europe to become “the first climate-neutral continent” by 2050.

If the suggestion that red meat is bad for human health is tough to uproot from public consciousness in the 2020s, the suggestion that livestock farming is a major threat to the environment is probably even tougher. Messages that activist Greta Thunberg tweets to her 5.5 million followers, for example that if current agricultural systems remain in place we will run out of land and food, are hard to counter in a few words. It is definitely a challenge to transmit “the complexity of the issues”, Dr Manzano says. But he has a try anyway. “I always say that the best animal production system outperforms the best crop system by far,” he says. “But the worst animal production

system is outperformed by far by the worst crop production system.” He points out that, outside vegetation ecologist circles (there are only around 400 of them around the world, he reckons) little is known and understood about the role that herbivores have played in shaping our planet over the last 15 million years. “If we want functional landscapes, we need a lot of herbivores,” he contends. “There used to be big herds of herbivores migrating around. Now we have very few ecosystems that conserve that.”

He points to the Serengeti ecosystem in Tanzania as one of only a few exceptions to this. What he says he has learned from observing this ecosystem so far is: “If we can imitate those primeval systems of herbivores, we are going to match high sustainability in terms of biodiversity and ecosystem functionality. And even if it is going to be expensive, because it’s true that, for example, mobile pastoralism or regenerative adaptive grazing have higher demands on manpower, they are also able to achieve higher productivities. This is also something that is not well understood.”

Rural communities

It could also improve food security and food sovereignty, including in the European Union. This may make food more expensive, but Dr Manzano’s view is that most countries in Europe can afford to pay more for good food and that many consumers will support this if

it genuinely promotes (in the face of huge challenges in countries including France, Italy and Spain of rural unemployment, rural poverty and rural depopulation) more vibrant rural societies. Consumers on lower incomes can receive support to have access to the high-quality, nutritionally balanced food these rural communities will produce and there will be more income in the places the food comes from.

Making this vision a reality will do nothing to harm Europe's prospects of becoming carbon neutral by 2050. But this, too, is complex, Pablo Manzano explains, not least because of the layers of complexity in the way greenhouse gas emissions are accounted for in current calculations. "Herbivores are an ecological niche," he says. "The methane that is emitted in those natural systems has to do with the amount of cellulose that is in the diet. We know that one way to reduce greenhouse gas emissions is to reduce the amount of cellulose in the rations that animals get."

The Basque Centre for Climate Change has carried out a study to compare emissions in the Serengeti ecosystem with those in neighbouring areas in which Maasai peoples keep livestock with very low input. In the study, the emissions per hectare in the Serengeti, which came from the wildebeest, zebra and buffalo that roam there, and the emissions from the Maasai peoples' sheep, goats and cows in the neighbouring area were the same. "Not 90%, not 80%," Dr Manzano insists, "exactly the same. According to our data, the emissions per hectare from the cows, goats and sheep, and emissions per hectare from the wildebeest, zebra and buffalo were the same."

Imitate nature

He says this means that the emissions from the domestic livestock cannot be considered anthropogenic. If the Maasai peoples were to stop raising their domestic animals on the neighbouring grasslands, wild herbivores would arrive from the Serengeti to eat the grass. The cellulose would prove irresistible to them and the same amount of methane would be emitted. "It is logical," Dr Manzano says. "These emissions are part of the natural ecosystem. So these graphs that we see in our data that say that cows in Africa or in India are emitting a lot of methane are ignoring that this methane is part of the natural cycle of carbon and should not be counted as anthropogenic greenhouse gas emissions."

We can and must achieve sustainable livestock production, and Dr Manzano concludes that this can happen with the current numbers of livestock that the FAO figures quoted at the start of this article provide. The numbers are at the same levels as nature produced and supported 100,000 years ago, he insists. "Yes, we have to alter the ways in which we are producing livestock," he says, "but we can achieve that. It's all about imitating what nature has done for the last 15 million years."

Professor Frédéric Leroy explains that the whole point of the Dublin Declaration is for scientists working on questions surrounding livestock farming to bring balance to the debates and discussions, and for evidence-based approaches to have prominence. "Things can move if we insist on evidence," he says, "but we have to mobilise the scientific community around this. Scientists are being intimidated, not to say bullied, by a few people with loud voices. With the Dublin Declaration, we have more than 1,000 scientists saying that we need more balance in the livestock debate. We want to be part of this conversation." 



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RECYCLED

The US Federal Trade Commission (FTC) has noted an increasing number of consumers interested in buying “environmentally friendly” goods, and has asked for public feedback on updating its Guides for the Use of Environmental Marketing Claims (known as Green Guides). Launched in 1992 – and updated in 1996, 1998 and 2012 – the aim is to help companies avoid making claims that are unfair or deceptive. They are not federal regulations in themselves but clarify when companies’ marketing violates federal law. “Consumers are increasingly conscious of how the products they buy affect the environment and depend on marketers’ claims to be truthful,” says Bureau of Consumer Protection director Samuel Levine.

The Leather and Hide Council of America (LHCA) believes the guidelines need updating to reflect developments in environmental science and technology, including the increased application of lifecycle assessments. This, the LHCA believes, would help address greenwashing and the use of vague or misleading terminology by products purporting to be ‘green’. The guidelines should also consider the environmental impact of a product throughout its entire lifecycle through to its disposal to provide a correct accounting of its environmental footprint.

In his submission to the FTC, LHCA president Stephen Sothmann explains how the leather supply chain is “keenly aware” of the impact deceptive marketing practices can have on consumer behaviour and buying decisions and how, every

The LHCA has called on the Federal Trade Commission to publish stricter rules in its Green Guides for companies that try to pass plastics off as better for the environment than leather.

year, US hides and skins derived from food-producing animals are wastefully disposed of in landfills or incinerators. This not only affects the environment by releasing carbon that has been sequestered by the hides and skins back into the atmosphere but also damages the climate during production of the oil-based plastics.

Mr Sothmann said: “The consumer is being misled by greenwashing claims, particularly in the textiles sector that’s driven by petroleum-derived synthetics, which often masquerade their products as being “green” or good for the environment. They do this by using vague or opaque language in their marketing materials, terms such as vegan leather, cruelty-free leather, plant-based leather or ecoleather, masking that they are actually made with plastic.”

Brands have been so successful in reorientating the fashion business around products made of virgin plastic that they have had to turn to the developing world for



waste management, polluting local communities and contravening international agreements on the control of hazardous waste, he adds.

Carte blanche

While the most recent revision of the guides does warn businesses about making any unqualified general environmental benefit claims, the omission of key terminology has emboldened some businesses to make unsubstantiated claims of a product or textile's sustainability. "This regulatory vacuum undoubtedly harms consumers and businesses but it also stands in the way of appropriate private-sector solutions to environmental hazards, leaving well-intentioned market participants searching for real science-based tools," says Mr Sothmann.

LHCA takes a particularly strong stance against the word 'vegan', which is being used on a multitude of products to promote the idea of being animal and planet-friendly. "I am not aware of any certification schemes that would provide consumers with the assurance they may want or need to justify that a material is indeed vegan," Mr Sothmann tells *World Leather*. "For example, if the material is plant-based, did the plant producers use pesticides or other chemicals to kill animals during production? If so, this should be disclosed, or the label should include additional justification behind the claim. Currently, companies have carte blanche to use these descriptors in any way they deem fit."

In the absence of guidance on the precise conditions that could substantiate a sustainable or vegan claim, he recommends the commission explicitly dissuade business in non-food sectors from using these claims.

Fines issued

The FTC extended the deadline for public feedback and has organised webinars to discuss the terms 'recyclable' or 'recycled content'. It also anticipates discussion and feedback around carbon offsetting, 'compostable', 'degradable', 'ozone-friendly', 'organic' and 'sustainable', with more than 7,500 public comments received so far.

Each year, companies are sued for breaching the rules. Retailers Kohl's and Walmart were fined \$2.5 million and \$3 million respectively for marketing rayon textile products as bamboo. Both were also charged with making deceptive environmental claims,

Leather labels and enforcement: Sothmann's view

Q When it comes to labelling products, FTC's Leather Guides were last opened for comment in 2019, but the pandemic disrupted any updates. It states: "If all or part of a product is made of non-leather material that appears to be leather, the fact that the material is not leather, or the general nature of the material as something other than leather, should be disclosed. For example: Not leather, imitation leather, simulated leather, vinyl, vinyl-coated fabric or plastic". But does this labelling go far enough?

A There are two separate issues, both of which need to be addressed by the FTC in the future. The first is the question of the labelling language itself. No, I do not believe that language is strong enough in the current guides. As has been demonstrated by numerous studies, consumers are generally confused or unaware of what "vegan" means when applied to materials or textiles. People generally understand what that term means as it relates to food and drink choices, but there is no definition associated with other materials. In theory, companies could advertise "vegan sidewalks" or "vegan steel" and it would be the same absurdity as "vegan leather". There are no definitions, no certifications, no actual backing to support those claims.

The second question is with regards to enforcement. There again, the FTC needs to be more proactive. However, it also falls to industry and consumers to bring cases to the FTC for enforcement, so more needs to be done on this front as well.

Q Do you see a time when the US follows the examples of Italy, Portugal and some other countries where the misuse of 'leather' is enforceable by law?

A There is much to do before that may become a reality in the US, but the same arguments are indeed taking place here as they are in Europe. Many commodity groups, such as dairy, meat and leather, all take umbrage with the fact that synthetics companies are using the good will of the name of the commodity to market a substitute or fake product. At some point, it may come to a head in the US that these types of products will indeed gain legal protection, but we are likely many years away from that taking place. We do not refer to polyester as "synthetic cotton" for example, so there is precedence here as to how new materials should be identified for the consumer.



Credit: LHCA

suggesting "bamboo" textiles were made using ecofriendly processes while, in reality, converting bamboo into rayon requires strong chemicals and results in hazardous pollutants.

While this can act as a deterrent, there are many examples of companies circumnavigating the advice. The FTC has asked whether the guides are necessary; LHCA believes that so long as the Commission is tasked with the authority to put forward "rules which define the specificity acts or practices which are unfair or deceptive acts or practises in or affecting commerce", the

guides are the proper avenue for federal influence over disparate industries. There has been no deadline announced for the updates to be published, but observers suggest the consultation period will extend throughout this year, at least.

"We believe it's important to take a stand on behalf of naturally derived materials, and the consumer, and call for an end to greenwashing in marketing that's responsible for causing so much confusion and damage to the environment," concludes Mr Sothmann. 🌱

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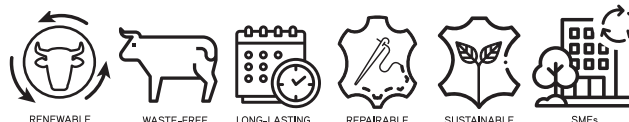
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The makers of all long-lasting, repairable products are set to benefit when economies become genuinely circular.

Credit: Micam

Waste not, want not



A tennis shoe recently had an unfortunate encounter with a rotary cutter and survived to tell the tale (visually) thanks to the skill and creativity of a Paris-based shoe repair expert, Maximilien Mauriès. He took on the task to help France's Conseil National du Cuir (CNC) demonstrate the reparability of shoes and other products made from leather.

CNC has shared a series of videos showing products, in this case a shoe donated by Angers-based brand Sessile, apparently meeting a gruesome end. Sessile sources leather from Italy for its shoe uppers and uses veg-tanned leather from Portugal in the linings. For the exercise with Maximilien Mauriès, it donated a shoe all in white leather, except for a navy blue tongue tip and heel cap, offering it up to the rotary blades of a milling machine. The video shows the machine's blades shaving the top of the toe-box before ploughing into the lace and tongue and chewing up a large piece of the vamp, stopping just short of the quarter.

Next we see Mr Mauriès puzzling over the damaged product. He seems intrigued at first, perhaps over what might have caused such damage; perhaps CNC kept it secret. Then he shrugs and starts drawing and cutting out the new leather parts he needs, fits them into place and stitches them into the shoe. Next, he punches out some new eyelets and relaces the product, leaving it looking as good as new. "Leather products can be repaired," CNC proclaims at the start. Then, as the video progresses, it urges consumers to

Public support in France for repairing shoes and keeping them for longer has come at a good time. A new anti-waste law is about to provide financial incentives for mending and keeping footwear in circulation.

take advantage of this and to take any imperfect leather products they have around the home to local repair shops for restoration. After it has shown in full Maximilien Mauriès's mastery of the repair process, it ramps the message up, concluding with a hashtag proclaiming that leather and leather products can be indestructible.

It has won instant support for this campaign from another industry organisation, the Fédération Française de la Chaussure (FFC), or French Footwear Federation. One of the clear results of a consumer survey FFC carried out in the early part of this year was that an overwhelming majority of people viewed reparability as an important factor when choosing shoes. In fact, 90% of participants in the survey said they agreed with the notion that all shoes should be repairable so



that people can wear them for longer. The timing of this was important; the survey coincided with fashion brands in France beginning to have an extensive, new anti-waste law, AGECE, at the forefront of their minds.

Force of the law

First presented in 2020, AGECE, (the name comes from 'anti-gaspillage pour une économie circulaire', 'against waste for a circular economy') has five main aims. It seeks to end the use of single-use plastic, to make sure consumers are better informed about the products they buy, to combat waste, to act against 'built-in obsolescence', and to encourage brands and manufacturers to make better products. There is much to unpack in this, so it is probably just as well that the French government has an AGECE vision that runs until 2040.

Something that may jump out right away for leather industry representatives are some of the passages in AGECE that refer to waste from the food industry. Everyone should know that hides are waste from the food industry. It would be beneficial if hides mattered more to packer companies and cattle farmers, but their motivations are meat, milk and money. So dimly does leather's light shine for them that 5.5 million hides went directly to waste in the US in 2019, followed by 4.8 million more in the same country in 2020.

Much of what AGECE says about waste from food focuses on the leftovers and vegetable peelings that people generate at home; it points out that this material has the potential to be turned into compost or as a source of energy. By January 1, 2024, all communities across France must have decided on the systems they will use to sort food waste at source and extract the greatest value they can from the material. Again, it is clear the teams that drafted the text of AGECE were not thinking of cattle hides here, but the principle is the same: we must put waste, including food waste (including hides, therefore) to the best use we can.

Benefits of investing in leather

Here is an interesting AGECE add-on, one that our Leather and The Circular Economy section has been interested in from the beginning of the series in 2020. From now on, the law says, procurement teams spending public money on behalf of public bodies must invest in products made from materials that support the idea of putting waste to good use. Waste, in the legal text, is any material that the person or entity that generates it intends to get rid of. This definition works for hides. The text then says that recycling this waste includes any recovery operation by which "waste, including organic waste, is reprocessed into substances, materials or products for the purposes of their initial function or for other purposes". This definition also works for leather.

Under the law, any article of footwear that public procurement teams buy must have a minimum of 20% of recycled fibres in its material mix. Furniture must have 20%. Car seats must have 20%. There is a powerful message here that leather industry leaders must try to put across: investing in products made from leather can help the buyers stay on the right side of the new law.

Money talks

AGECE will impose financial penalties on companies that do not comply and there will be a 'polluter pays' policy. Something of particular interest to FFC and to specialists such as Maximilien Mauriès is that the government intends to use



Carefully crafted, made-to-last footwear from Limoges-based brand JM Weston.

Credit: JM Weston

some of the money it collects in this way to subsidise repairs. It said owners of consumer electronics and of sports equipment would be able to benefit from these 'repair funds' from 2022. Before the end of this year, there will be a fund for shoe repairs, too. Paris-based footwear- and clothing-focused non-profit Refashion will manage this. Managing director of FFC, Michelle Guilloux-Bonnet, says the details of exactly how the repair fund will work are not in place yet. Her organisation's member companies will contribute to it, but she says this will cause them no alarm as they have been paying for years to help fund recycling and waste management companies that handle shoes when consumers throw them away.

FFC regards reparability's higher profile as good news. In the months and years ahead, the organisation thinks this development could reduce consumer and brand confidence in non-leather shoes, the construction of which, in many cases, would test the skills of even an expert such as Mr Mauriès.

On the other hand, it says AGECE also gives shoe manufacturers an opportunity to display a strong commitment to responsible production and to product longevity. Another point FFC makes is that the new law includes provision for promoting pro-repair, anti-waste habits among consumers. It says there will be spending of more than €150 million between 2023 and 2028 to convince the public that it makes sense to make mending great again, especially if it is subsidised.

For Michelle Guilloux-Bonnet, it is only right for consumers to receive help and encouragement to break away from throwaway. But she believes footwear manufacturers will benefit too; the makers of all responsibly made, long-lasting products will benefit in the circular economy. 🌱



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The Leather & Hide Council of America represents our industry at home and around the world. To ensure a healthy commercial future it is increasingly focused on developing an industry-wide sustainability program underpinned by a comprehensive Life Cycle Assessment for leather.

- Our Industry Sustainability Program brings together the many programs we run to champion best practice in sustainable leather sourcing, design, production, distribution and communication. For leather to maintain and grow market share, we must reassure brands, manufacturers and consumers that the industry is committed to ensuring sustainable practices are prioritised across all stages of production.

- Our work continues with industry certification partners to develop supply-chain traceability to empower commercial partners and consumers to make the best purchasing decisions. This will enable brands, businesses and consumers to find the most sustainable products while arming them with the knowledge and insight to counter misinformation and generalisation about the sourcing of hides.

- Our Life Cycle Assessment for leather will publish its first report this year in partnership with industry leaders including ranchers, packers, tanners and manufacturers. This will set the standard for transparency and trust in the materials sector while countering some of the misinformation spread by advocates of oil-derived plastic 'alternatives' to leather.

Our aim is for the ISP to become the primary source of trusted information on leather production, sourcing and sustainability standards. Our mission - to secure a bright future for leather.

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LEATHER AND HIDE

COUNCIL OF AMERICA





A recent leather goods collection from Danish leather suppliers Sørensen Leather has taken leather traceability and animal welfare one stage further, having been endorsed by Animal Protection Denmark. The collection, “Vita”, takes its name from the Latin derivation for life, and claims to be the only leather collection in the industry to carry such endorsement.

Meeting with approval



The subject of animal welfare and its association to the leather industry has been widely reported by World Leather over the years. Any tanner will tell you of the paramount importance that animal welfare plays in the quality of the hide. Animal stress is a key factor in leather quality issues, where the negative impacts of stress have a bearing, such as prominent veins present in the resultant leather, not to mention other damage that can occur to the hide if the animal is in a distressed state at the abattoir. With this message being broadcast and the visible work being done by the supply chain, taking it one stage further back seems to have been fundamental to Sørensen Leather. “Over the past few years, we have been receiving a lot of requests to offer traceability on our collections, but we believe that traceability for itself, doesn’t focus on a very important aspect, namely animal welfare.

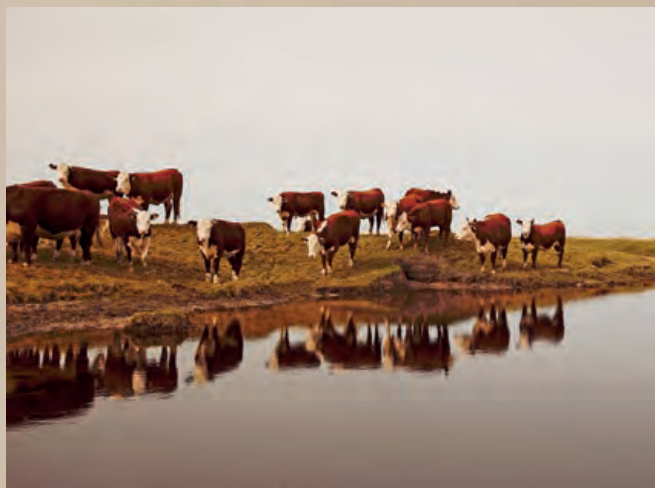
“We wanted to offer a collection that could be traced back to the farmer, while at the same time, having a high focus on animal welfare. Which is why we reached out to Animal Protection Denmark, to figure out which requirements our hides should live up to.” Louise V. Sørensen, CEO & Partner at Sørensen Leather told *World Leather*.

Origins count

Scandinavian hides have always had a connotation of good quality. The husbandry methods and climate lend themselves to produce a premium product, and the company has reinforced this by working in close partnership with suppliers that guarantee hides of 100% Danish origin.

A unique component to the partnership can be found in the farms where the cattle are bred. Working with Himmerlandskod, Denmark’s second largest beef producer, the hides for this collection come exclusively from animals bred and raised for their Nordjysk Naturkød (North Jutland Natural meat) project. The cattle are of selected breeds that provide healthy, robust, and placid animals that thrive on the free life. Left out to pasture for almost six months, of which a minimum of ninety days is on approved natural grazing areas, consisting mainly of meadows, salt marshes, grasslands, heaths and bogs, the cattle form an extensive regenerative farming practice in the Jutland peninsula.

Mainly grazing the natural areas in the summer, the objective of Nordjysk Naturkød is to preserve and protect the natural areas and landscapes in North Jutland, which are



North Jutland, effectively an island, separated from mainland Denmark by the Limfjord. A wild and remote place, historically the area was best served for cattle and dairy farming as soil fertility led to lower intensity farming viability where vast grassland pastures for cattle abound. Credit: Jesper Johansen

otherwise threatened by overgrowth. Through grazing, the open and bright landscape is preserved alongside the biological diversity that it creates.

All farmers affiliated with Nordjysk Naturkød are approved by Animal Protection Denmark, proof that Himmerlandskod takes animal husbandry extremely seriously. Looking to maximise on quality rather than quantity, livestock are never subjected to long distance transport, with the animals being slaughtered and processed in the Himmerland region, where a limited number of farms and cattle form part of the partnership. The exclusive nature of the project means that only forty-seven farmers are involved.

Animal Protection Denmark

To ensure that the animals are raised under ethical conditions, whereby animal welfare and respect for the animals is of utmost importance, where the cattle are healthy, live a good and respectful life, all farmers in the collaboration are approved by Animal Protection Denmark. Established in 1875, Animal Protection Denmark operates at a national and international level, engaging in animal welfare projects with



the aim of being the most influential organisation in the sector, and, through international cooperation, create tangible results for animal welfare in line with their vision of ensuring a genuinely sustainable relationship between animals, humans, and nature.

To qualify, farms undergo annual audits and are subjected to both announced and unannounced visits by the scheme's auditors, guaranteeing their continuous compliance with the strict guidelines defined by the label. Some of their requirements are to keep animals free to range on pasture during the summer and keeping them in a loose housing system where they can move around freely when indoors and providing, as a minimum, enough space for the cows to stand up and lie down in a natural manner. The scheme also sets out specific requirements for the bedding used and

that the animals have access to good quality feed, free access to drinking water at all times and that farmers perform daily inspections to make sure they are not injured or appear stressed.

With such close quarter working, traceability of products is also ensured as the animals are registered, tagged and identifiable. For Sørensen Leather, the two go hand in hand, where each element has equal importance. "On top of the traceability, we have secured and verified the animal welfare. To us traceability alone, is not equal to animal welfare."

A life well lived

The chrome free, full grained leather has the most minimalistic aniline finish, allowing the true character to show through, offering a fingerprint to the unique identity that each animal had in life. Utilising the unique information that is recorded for each animal, by way of an ear tag assigned to the calves shortly after birth, a corresponding number is laser engraved onto each hide with information kept on a database. Customers can be assured that should they wish to, the exact details of the cow that produced the hide can be traced back to the farm.

With fewer than fifty farms involved in the project, a limited number of hides, approximately 100 per month, are used exclusively by Sørensen Leather for this collection. In a selection process that sees only certain hides taken for the aniline leather, natural markings such as growth lines and wrinkles and the acceptance of other "signs of life", such as healed scars and insect bites, are celebrated and prove the authenticity that defines the collection. The remainder of the hides are used for other collections where surface finishing is a little more involved, and further adds to the Sørensen Leather zero waste policy where no hides are wasted.

The expansion of the project will ultimately depend on availability and customer demand but according to Sørensen Leather, the expansion of this range is very much on the cards, with thoughts of adding new colours but also to develop other collections along the same concept lines. ☺

Sørensen Leather has an understandable appeal to architects and designers. The iconic Drop Chair is by Arne Jacobsen from Fritz Hansen. The sphere is a co-creation with Norm Architects of Copenhagen.

Credit: Jonas Bjerre-Poulsen





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Leaders occupying different vantage points in the story of Brazilian leather reveal how they are working together to connect the dots backwards, to find a more accurate and transparent path forward.

Influencer dynamics



During a seminar on traceability, transparency and circularity in the leather supply chain at industry exhibition Lineapelle in Milan in February, senior manager for traceability at US fashion group Tapestry, Earl Shank, spoke alongside the senior director for beef and leather supply chains at nature conservation organisation WWF, Fernando Bellese. They addressed the topic of leather sourcing in the contemporary Brazilian and South American context. The title of their talk was 'Building more sustainable supply chains: leveraging collaboration to fight deforestation'. Altogether, six presentations were delivered as part of the seminar, which was jointly coordinated by Italian tanners' association UNIC and the fair's organisers.

A hot topic

Ties between WWF and Tapestry, owner of high-end footwear and leathersgoods brands Stuart Weitzman, Coach and Kate Spade, became closer last year, following receipt by WWF of a grant from Tapestry's non-profit arm, the Tapestry Foundation. "We are just now finalising the rules of engagement," Mr Bellese said of progress made so far, but the main goal is to facilitate a pre-competitive environment in which industry stakeholders and "leading companies" can work together to develop a deforestation- and conversion-free (DCF) supply chain, starting with Brazil. It is hoped that the initiative could eventually take root elsewhere on the continent, but for now the emphasis is on using Tapestry's funding to establish focus groups, implement reforestation projects and support local cattle-raising communities, particularly through the creation of new incentive tools, around which "there is a lot of work happening", the WWF spokesman explained. Market arrangements and relationships, including with indirect suppliers, are especially ripe for improvement, he suggests.

Mr Shank clearly agrees. Tapestry will not cut and run, as he puts it, on its Brazilian leather supply partners. Citing his co-presenter, who himself appeared to reference data most accredited to a 2019 paper authored by Green Canopy researcher Christina MacFarquhar, the brand's senior manager

The tale of Tapestry's heritage is closely woven with the history of flagship leathersgoods brand Coach, founded in Manhattan in 1941. Prior to 2017, the group was known as Coach, Inc
All credits: Tapestry



for traceability proposed that similarly minded international buyers of Brazilian leather should harness their economic leverage to spur positive change on the ground, since 80% of the country's leather, by his calculation, is exported. Despite the risks involved, "the opportunity we see is to be that partner that helps spark the acceleration of a DCF standard," he told the audience. In other words, it is important that Tapestry retains its seat at the table, lest it lose its influence to inspire positive social and environmental changes in and around the leather supply chain.

Given that Brazilian beef production is projected to increase in the coming years, the challenge – or opportunity – to make the most of its associated materials, instead of simply letting them go to waste, will likewise only grow, Mr Bellese concurs. Regarding deforestation and other issues, "the worst thing that can happen" is that businesses merely steer clear of specific regions to avoid the problem, rather than facing it and ultimately becoming "part of the solution". WWF and others are there to help, he said, but ignoring what could otherwise be addressed, perhaps collectively, serves to further weaken the wider supply ecosystem. If a departing company's link in the chain is later replaced by an operator with lower business standards, as has been the case "many times before", according to the beef and leather expert, who worked at leather manufacturing groups JBS Couros and PrimeAsia before joining WWF, it is not hard to imagine how the ripple effect could end up making things worse for the broader community.

The measure of a market

Tapestry and its peers in Europe, China and elsewhere have a role to play in making sure customers' views on DCF supply chains are relayed to producers, in Mr Bellese's view, to provide them with impetus for improvement. Fostering this kind of healthy dialogue with suppliers is essential, not only in the current climate, but also for maintaining market access and operational sustainability in the context of ramping up DCF-related regulations around the world. WWF pilots under way in Brazil, Paraguay and Argentina, for example, can certainly point to where reimaged approaches could fill in the gaps, as well as use the value of different incentive mechanisms. Systems designed to monitor varying degrees of traceability are already in place. Stirring innumerable new ideas into the mix is likely to result in more confusion than clarity, he opines, hence the need to work together to identify, interrogate and scale viable existing solutions, as opposed to trying to reinvent the wheel in a vacuum.

Things may not be simple in Brazil, Mr Bellese says of his native land, but they are also not that complicated. Confidentiality laws do make it harder to obtain information from indirect suppliers, who, at the moment, must volunteer the data required, but there are things the industry can do to resolve tensions in this area. One workaround he suggests is to offer monetary incentives for traceability records and key figures, potentially leading to answered questions, better practices and new routes forward. Other tools available include WWF's DCF implementation toolkit, downloadable from its website, made to connect stakeholders with suitable resources to support them in mapping out their next steps, based on a series of survey responses. Users are sometimes invited to form groups in which they may exchange knowledge and share their experiences. To a similar end, the not-for-profit works closely with partners such as the Centre



Tapestry's vision for its leather supply partners looks beyond tick-box certifications. Rightly so, as the material represented 54% of its total material usage by weight last year.

for the Brazilian Tanning Industry (CICB) in-country, in addition to UNIC and the Institute of Quality Certification for the Leather Sector (ICEC) in Italy, US materials standards body Textile Exchange and global multistakeholder organisation Leather Working Group (LWG) to continually advance its own understanding.

Counting the cost

Tapestry, for its part, has been working since 2019 towards being able to trace at least 95% of its raw materials by 2025. Calculated by weight, leather represented 54% of its material use last year, according to its corporate responsibility report. Two major targets for the company's leather usage specifically include ensuring 90% of its supply is sourced from tanneries that meet either LWG gold or silver standard by 2025, plus being able to trace at least 10% back to regenerative farms, recycled stock or "next-generation materials" by 2030. According to the report, 80% of the leather Tapestry brands used in 2022 was tanned in a LWG gold or silver tannery. In mid-April, it joined circular economy charity Ellen MacArthur Foundation's network and fashion initiative advisory board, which it followed with the launch of a new sub-brand from flagship company Coach, Coachtopia, in select markets. Targeted at Gen Z, the debut collection features bags, small leathergoods and footwear, all made from upcycled or recycled materials. Near-field communication (NFC) chips added during leather finishing provide a window into each article's design, impact and journey "over multiple lives", with an emphasis on the materials.

Venturing into the realm of DFC supply chains in South America is testament to Tapestry's ambition and sensitivity as customers mature and flesh out their awareness of sustainability and its many strands, and still fresher faces begin to enter the arena. In providing WWF with seed funding for its DFC leather project, however, the group has demonstrated a commitment to leaving a far deeper legacy, inclusive and respectful of all parties involved, especially those in situ. "We knew this problem was bigger than just us," Mr Shank told the audience in Milan, "and we knew we could take it on as a business and do our best, but we knew it [would be] best solved by a collaborative approach by all parts of the value chain." 🌱



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Class of 2022. The programme equips students with sewing, tailoring, design and business skills to pursue sustainable income opportunities.
Credit: Odongkara Emmanuel Okeny

Weaving a new narrative



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SMEs

A non-profit working with artisans and entrepreneurs in Uganda has received a grant from New York-based charity the Fashion Impact Fund to help women participate in a fashion and design course. Artisan Global's aim is to equip people with design and business skills to pursue sustainable income opportunities and use fashion "to ignite community change in northern Uganda". The funding will enable women to be active participants in the economy, says Lauren Shipley, one of three co-founders at Artisan Global: "We strive to contribute to an equitable workspace, creating the opportunity for disadvantaged women to become leaders in the community."

After an interview process, 10 women aged 18 to 31 were selected for the nine-month course. Tutor Veronica Lonyera has extensive experience as a fashion designer and has mentored dozens of aspiring designers and tailors throughout northern Uganda, mainly economically marginalised young women and single mothers. She will be joined by Jelinda Patricia, whom she taught for six years before forging a career as a designer and later qualifying as a teacher herself.

The students will have the opportunity to incorporate leather into their designs — the tutors see leather, cow-horn and kitenge fabrics, as well as rare barkcloth from the matuba tree of southern Uganda, as major forms of expression for identity. The course will introduce the students to a variety of

A project that empowers women by providing training in fashion-related skills and leatherwork in Uganda has won international funding.

locally sourced materials, including leather and fabric taken from used shoes, and will teach them how to incorporate themes of sustainability into their work. "There is a huge opportunity for scaling and accelerating the fashion industry throughout Uganda and East Africa," says co-founder Ketty Promise.

Material loss

Uganda is home to a sizeable livestock population – 14.8 million cattle, 16.9 million goats and 4.7 million sheep in 2019, according to government figures – which should, in theory, bolster domestic leather-using manufacturers. But access to good-quality raw material is limited. Almost 40% of raw hides and skins offered to tanneries are rejected due to defects and between 5% and 10% of skins purchased develop holes during the liming and tanning processes, according to a government-funded report.

Another problem is that Uganda's few remaining tanneries mainly produce wet blue and between 80% and 90% of this is exported. Only 10% is tanned to finished leather, leaving little affordable material for domestic manufacturers. Uganda's tanneries were also affected when a substantial number of Chinese tanneries — their main customers for the wet blue — closed around 2014 for environmental reasons. A political landscape that discourages investment in footwear and leather products and weak enforcement of quality standards also hold the sector back, according to East African Community (EAC) research.

To address this, the EAC Leather and Leather Products Strategy and Implementation Roadmap (2020-2030) was set out in 2018. It aims to transform the sector so more of the leather can be finished and used domestically — adding value and creating jobs — while also increasing trade of leather and leather products between East African countries. From a 0.28% share of GDP, it hopes the leather sector can provide a 4-5% share in the space of 10 years, creating 500,000 jobs and training 2,000 small and medium enterprise entrepreneurs in the process. It cites improvement of livestock husbandry practices, modernising footwear and leathergoods manufacturing facilities, improving quality control and infrastructure, facilitating investment in tanneries and strengthening governance, policy and supporting services as chief among priorities.

Leather handicrafts

Specific to Uganda, a government survey in 2019 revealed leather and leather products are among the most economically viable handicraft products produced by artisans in the country, followed by basketry, mats and jewellery. The survey provides a baseline for the state's \$1.5 million Handicraft and



Tutor Veronica Lonyera making a beautiful, lined leather handbag. Credit: Artisan Global

Souvenir Development Project, which offers training in design, quality management and marketing. The project also provides machinery: Kampala-based Big Leather Goods, a manufacturer of shoes, handbags, wallets and belts, benefited from a skiving machine and a sewing machine. However, its managing director, Stephen Alibaruho, told local press the business had suffered since the pandemic as people did not have enough disposable income to buy new shoes.

The country does have some shining examples of leather production: Leather Industries of Uganda (LIU) was visited by *World Leather* as part of the Tannery of the Year competition in 2017. There, we discovered a business that had turned its fortunes around: from almost

being forced to close because of pollution issues a decade before, to investing in Italian and Indian technology that helped reduce its water consumption and waste by more than 50% over the space of a few years. LIU became the first tannery in sub-Saharan Africa (excluding South Africa) to work with Leather Working Group (LWG), undergoing and passing its first audit in 2016, and developed a bursary programme for high-performing pupils from low-income families in the area around the tannery.

Unlocking potential

These types of bursaries and funding schemes provide much-needed routes to employment for young people, who also use their subsequent earnings to support their families and communities. The course in the city of Gulu goes further than just teach sewing and design skills, it equips students with the knowledge to start businesses and seek out markets for their unique products. The programme includes guest lecturers from other regions of Uganda to expand cross-regional collaboration and introduce the students to an array of fashion styles. The students also attend educational field trips and networking events and learn about marketing, social media and branding.

Uganda has one of the world's youngest populations, with more than three quarters below the age of 30, but more than 40% of these working-age young people, or 9.3 million, are unemployed, according to the Uganda Bureau of Statistics. Devon Feldmeth, co-founder of Artisan Global, says, "We believe the solutions lie within the community, and it is our role to mobilise the resources, mentorship and storytelling to support young people in unlocking their full potential." 

Table: Estimated value lost due to export of wet blue from EAC

Leather product	2013	2014	2015	2016	2017
Wet blue/crust (USD)	152m	181m	138m	100m	106m
Finished leather	532m	634m	485m	350m	372m
Unfinished leather	380m	453m	347m	249m	-267m
Lost in leather shoes	729m	870m	665m	479m	511m

Source: compiled by EAC/consultant (2018)



Cut & Check

For many years, the industry has been looking for influential voices that could break away from the cocoon we find ourselves in and get our message across to the masses. Tanner Leatherstein, a social media savvy craftsman with a penchant for cutting up luxury leathers, could well be that voice.

Volkan Yilmaz may be an unfamiliar name to many in the industry, but under the pseudonym Tanner Leatherstein, it is well known on social media, the platform he uses to educate his more than one million followers.

Born and raised in Turkey, Volkan grew up in the leather industry. The family-owned tannery was his childhood playground where he learned to experiment with leather chemistry alongside the tannery technicians. In 2009, following an unexpected 'green card' lottery win, he moved to the USA and seemingly turned his back on leather. Following various jobs, he studied for an MBA at the University of Illinois and soon became a corporate consultant.

Realising that the corporate world was a bad fit for him, he returned to leather and started to teach himself leathercraft, ultimately opening an online shop to sell his products. After seven years, his own brand, PEGAI, now has a team of six at their Dallas workshop and more than 30 artisans are crafting his designs at his family run workshop back in Turkey. As for the social media content, he says that "on the side, I have been creating content to help people demystify the leather space".

Did the name Tanner Leatherstein come about specifically for your social media persona?

No, the name Tanner Leatherstein came into existence about ten years ago, even before I started PEGAI. The name "Leatherstein" came to me first and I bought the domain to keep it for the day I would go back to leather. A couple of days after, it occurred to me that Tanner would be the perfect name for this leather "crazy" person, so I bought that domain too as it was available. I associated myself with it two years ago and started using it as my personal brand. So, the brand is kind of 10 years old in my head but two years old as my personal brand out in the world. I describe it as "if we get a chance to pick our own names at the time, we realise our mission in this life...that would be the name I would go with".

Do you have any formal training for either making leather or making leathers?

No formal training in leather. My main expertise is in the tannery, tanning leather. Mainly sheepskin tanning for nappa and shearling-type production in our tannery growing up, but I also had a chance to produce some goatskins, suede, and other full-grain articles. Then I managed a couple of tanneries, one in Turkmenistan and one in Armenia, making cowhide production for shoes and small goods articles, before moving to the USA. I chose to study business instead, as the leather school in Turkey was not in the top league like the ones in Northampton or Germany, and going to those wasn't an option at the time. However, I would have loved to study at one of the top tanning universities. Crafting is also self-taught

Volkan Yilmaz, otherwise known as Tanner Leatherstein, has taken social media by storm, educating his followers on all things leather and leathercraft.

CREDIT: TANNER LEATHERSTEIN





through various online videos and endless hours of practice. I am not an expert in crafting. I formed my workshop team of skilled craftsmen who worked in formal productions for top leather brands in Turkey. We transferred a few of those veterans and started to train our craftsmen in my hometown, and now we have more than 20 craftsmen, who had no prior experience, creating amazing work through this training programme. All of them are much more advanced than I am in crafting.

When did you start examining leathergoods for quality, etc., and how do you decide what to “review”?

About a year ago, starting with a hunch, I decided to buy some products from high-end brands, see the quality for myself, and help people demystify those large price tags. Once some of those videos got attention, people started requesting other brands and products to review, and we made a list, ranking them in order of popularity.

Did you expect the sort of following you have when you started?

I always thought people would be interested to know and understand the leather space better since it is a commonly liked material yet less well understood. But I didn't expect the quick audience growth at the beginning.

In general, do the prices the brands charge offer value for money in the long term?

If we are talking about the high-end luxury brands, those prices are about the prestige you are buying. It is not about the leather. If you wanted to get a good leather product and didn't care about the status, then no, it doesn't offer the value for those prices. But if you want the prestige, then absolutely it does because there are only a few brands who can sell you that status. If you are only interested in leather quality, you should look at small craftsmen and new upcoming brands for value to price ratios in leather products. I am very happy to see so many of these brands coming into the space, providing value to the leather customers with great prices. I aim to explore all these newcomers on my social media channels, as this is by far the most frequent request I receive from the audience.

The term “vegan leather” gets thrown around a lot – do you have a view on it?

I love warning people about the misuse of this term. I greatly respect the vegan lifestyle and the companies working towards true leather alternatives using vegetable sources. I believe most vegans would be unhappy to know that these days all PU, faux or fake leathers are labelled vegan because of a trend, yet they are simply petroleum derivatives and not as sustainable as these customers think them to be.

You must get asked about what to look for when buying leathergoods – what would you say are the most important factors?

Well, it is a feeling thing; you don't need to know much. Just listen to your senses. Truly good leather shows variances and imperfections. So, you look for those first. Then you touch it, good leather has a lively vibe. It feels different to touching plastic objects. Then you smell – neutral and earthy tones are good signs of leather but if you detect disturbing and chemical smells it is not a great sign even if it is leather. Lastly,

“I believe most vegans would be unhappy to know that these days all PU, faux or fake leathers are labelled vegan because of a trend, yet they are simply petroleum derivatives and not as sustainable as these customers think them to be.”

read the labels and descriptions; artisans and brands, proud of their leather, love to talk about it. Search for keywords such as full grain, top grain, aniline, semi aniline, nappa, vegetable tanned, etc. to understand the materials. If you see generic terms such as cow hide or genuine leather, then it means there is not much to talk about it in terms of leather. And finally, check the price and compare it against your accumulated feeling about this product, that's it.

As a direct communicator to the consumer (public) how do you think we as an industry could improve on this?

Being open and honest about leather in simple language to help people better understand this great, but a bit mysterious, resource so they can make educated choices regardless of what they want to do with it. I don't think the leather industry provided much information to the customers, so some brands enjoyed this mysterious aspect by leveraging the historical luxury image of leather to justify some of these super high prices. I think as people come to know and understand the true world of leather, everyone will be happier with their choices in leather purchases. Clear labelling and descriptions will go a long way to help people understand what they are looking at. As an industry, we can improve the way we label and declare our leathers.

Other than Leather Naturally, are there other industry bodies you follow or are aware of?

Yes, "is it leather?" is another initiative working with this mindset. I am in touch with both groups as we align in our missions to increase our impact on helping people understand leather better.

What does the future look like for Tanner Leatherstein?

Future is leather for Tanner Leatherstein. Two years ago, I found this overwhelming sense of clarity connecting all the dots in my life up to that point during a flight back from an incredible holiday in Maui, Hawaii. I had to write it down at that moment as the ideas flooded into my head. I was, for the very first time, so clearly feeling that I was here to help people to better understand and experience leather. That was my life purpose. I had never felt that before, and I knew exactly what way I needed to head towards from now on, and that's when my content initiatives on social media started. And literally, everything changed in my life for the better. I am enjoying every workday as never before and just rolling with the inspiration I feel that day. So now this is the only way I know how to live. There are no plans, goals, or ambitions. I wake up and follow my instincts on how we can help people better understand and experience leather today, and ideas come in a way that I can't plan for them. So, I don't know what is in the future, but it will be fun with leather, that much I know. 🌍



Regardless of ever-changing social sensations, authentic luxury has the ability to keep a low profile.

Just right

Renewed interest in concepts like “quiet luxury”, “stealth wealth”, “stealth luxury” and even, over the past couple of years, in an “old-money aesthetic” when it comes to self-presentation and dress offers something of a flashback to the fashion fall-out following the 2007-2008 financial crisis. At that time, Kering-owned luxury leathergoods company Bottega Veneta’s softly woven intrecciato designs under then-creative director Tomas Maier afforded less-affected clientele opportunity for more discreet, ‘in-the-know’ indulgences. Perhaps these wealthy consumers were not as likely to attract unnecessary attention to themselves, given the rocky economic context. Now, as we face more uncertainty, these buzzwords have taken on fresh prominence in what has become a much noisier, social media-driven landscape.

Ironically, short-form videos on TikTok, where get-the-look-for-less shopping and style “dupes” are popular, have acquired special significance. Content with the tags “stealth luxury”, “stealth wealth”, “old-money aesthetic” and “quiet luxury” were generating approximately 1.7 billion, 630 million, 460 million and 135 million views, respectively, as of early June this year. Their mass appeal could be said to jar with creators’ ostensibly low-key or ‘under-the-radar’ luxury outfit goals, but they do also serve as a useful ‘trendiness’ barometer and their collective cultural impact is sizeable.

Visual literacy

The pop culture conversation surrounding a “ludicrously capacious” Burberry Tote leather tote bag in the brand’s vintage check pattern, a key moment during episode one of television series *Succession*’s fourth and final season, is a case in point. A snobbish exchange between the two small-screen protagonists revolves around an outsider’s disproportionately large handbag against the backdrop of an expressly unflashy, but still polite, family birthday party for billionaire media tycoon Logan Roy. Mr Roy’s son-in-law is cuttingly, albeit humorously, repulsed by its very presence: “What’s even in there? Flat shoes for the subway? Her lunch pail? It’s monstrous. It’s gargantuan. You can take it camping. You can slide it across the floor after a bank job.” The idea is that the bag, and by extension its carrier, is not only inappropriate for the event, but hopelessly out of place, and even undignified. Social media users subsequently chimed in with expected clamour, as the episode aired and in conversations that followed.

So much so, Burberry’s chairman, Gerry Murphy, was asked to share his thoughts on the scene by the BBC in the spring. “It generated lots and lots of interest in Burberry bags, generally,” he said. “There is a very interesting market for big bags, and I think that the *Succession* exposure would have done that no harm.” The slight was not directed at the brand itself, Mr Murphy added, continuing that “the comment would [still] have been made if the bag had been from any other well-known brand”. Never the less, one hardly had to read between the lines to see how, in true quiet luxury circles, the clash and volume of the print, not to mention the self-consciously ‘professional’ manner in which the bag was slung over its selfie-taking wearer’s shoulder, likewise contributed to the faux pas. The din from Burberry’s brasher early 2000s nova check days (and its rather questionable association with contemporary British “chav” culture), seemed uncontrollable at one point and, perhaps, still rings just loudly enough to mean something, symbolically, to viewers old enough to remember.

*Based in Mayfair, Métier London’s brand more understated bags and luggage frequently accompany the show’s cast on their travels, suggesting it has at least one fan in *Succession*’s wardrobe department.*

CREDIT: MÉTIER





Burberry's Title tote apparently triggered Succession's viewers in no small way.

CREDIT: BURBERRY

US actress and businesswomen Gwyneth Paltrow's subtly expensive, refined take on courtroom dressing during her recent ski accident trial, relating to a collision at a Utah country club in 2016, similarly provoked and delighted onlookers earlier this year, for reasons equally telling. At the crux of all the commotion, on this occasion, was the obvious fact that Ms Paltrow was not out of place, either on the slopes or in a legal context, despite – or perhaps precisely because – it was not immediately obvious which brands' products she was wearing. Another quiet, but nonetheless resounding win in the "stealth wealth" stakes: she took home only a single dollar in damages after her acquittal. All things considered, Ms Paltrow drew the gaze, but ensured that viewers' focus remained fixed on her personal performance and the all-round, 'easy' harmoniousness of brands Gwyneth and Goop, not to mention the dignity of her defence. Primarily thanks to the cut of a few thoughtfully chosen pieces and the quality of the logo-less fabrics used to make them, she did not distract or detract from proceedings by stirring up more drama or capitalising on the fashion house advertisement opportunities presented by her in-court, on-camera outfits. The fashion rumour mill of course went into overdrive, with some of the most well known "old-money aesthetic" and "stealth luxury" brand names cropping up: Loro Piana, Bruno Cucinelli, Hermès, Max Mara, The Row.

In good taste

Among the very many things said in the wake of the death of the UK's longest-serving monarch, Queen Elizabeth II, last September following a 70-year reign, was that Her Majesty "never put a foot wrong". This extended to the realm of her

ensembles. She patronised the same London handbag label, Launer, for decades, for example, rarely seen without one to hand and reportedly owning as many as 200 of its leather bags at any one time. So much so, the brand's telltale clean lines and understated, decidedly uncapacious, proportions almost melted into the serenely coordinated whole that was her symbolically mighty, though in reality quite petite, stature on the world's stage.

Notably, as a great lover of the British countryside, The Queen was also definitely not immune to the appeal of a classic Burberry piece or print, having been spotted sporting one of its checked scarves on various occasions throughout her life. She even granted the company a Royal Warrant for weatherproofing back in 1955, only the business' second since receiving its initial warrant from King George V for tailoring in 1919. King Charles III would later grant Burberry its third, for royal outfitting, in 1990 as the then Prince of Wales.

As today's surviving monarchies, by their very nature, continue to show the rest of us the hard-won legacy of their forebears, perhaps life's real luxuries can be counted in terms of quiet and steadfast confidence in one's own tastes and decisions. 🌱



Métier's leathers goods fit perfectly with "stealth luxury" attitudes and aesthetics.

CREDIT: MÉTIER

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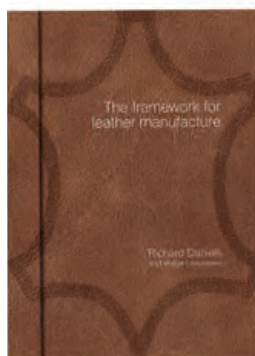
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