

WORLD LEATHER

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

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Tapestry takeover roadblock
Leather Leaders: Kerry Brozyna
Carbon tool project complete
Kering counters criticism



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Cover image: Shell shoulder bag from the Kate Spade accessories collection. The brand is part of the Tapestry group, which is subject to a takeover bid by rival group Capri Holdings. Capri's bid has run into roadblocks.

CREDIT: KATE SPADE



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EUROPEAN UNION The European Commission has said that Chinese automotive groups face the prospect of tariffs of up to 38.1% on imports into the European Union of battery electric vehicles. It said its provisional conclusion from an ongoing investigation into the matter was that the battery electric vehicle value chain in China was receiving “unfair subsidisation”. It added that this was “causing a threat of economic injury” to European automotive manufacturers.

UK According to the recent UK Leather & Leather Goods Industry report, from Leather UK, the UK’s high-end leather sector saw significant declines in imports and exports in 2023. Exports dropped by 14.4% and imports by 20.7% compared to 2022, mirroring global trends of reduced demand amid economic challenges. This downturn followed a 2022 spike due to post-pandemic demand.

SPAIN LVMH Métiers d’Art, the grouping of specialised manufacturing facilities and skilled craftspeople that the luxury group set up in 2015, has increased its stake in Catalan leather manufacturer Riba Guixà. The luxury group first invested in the business, a specialist producer of Entrefino lambskin, in 2015. It has now become the majority shareholder of the business, increasing its share from 20% to 80%.

SWEDEN Leather manufacturer Elmo has launched its own leather academy to enhance knowledge and insights about leather. The academy offers a range of courses and workshops on sustainability, maintenance, materials and trends. Elmo said its aim was to ensure that finished product manufacturers can communicate the unique selling points of leather to their customers.

ITALY Italy’s tanning industry suffered “a large contraction in activity” in 2023 according to comments from the president of industry body UNIC, Fabrizio Nuti. Italy’s tanners had earned combined revenues of €4.3 billion, a fall of 6.5% year on year. In terms of volume, UNIC said the industry’s figures had fallen below 100 million square-metres of leather, declining by 9.5% compared to 2022. Mr Nuti said tanners supplying the wider fashion sector had suffered the most.

ROMANIA Automotive leather group Bader has acquired Romanian cut-and-sew operation Coindu. It will continue to operate the Coindu facility in Curtici in the west of Romania, officially renaming it Bader Romania. Around 800 people work at the site. Bader said the move marked “a significant milestone” in its long-term strategy in the European seat-cover market, with the Romanian facility serving as “a crucial hub” for offering cut-and-sew services to its automotive customers in this part of Europe. The group already runs seat-cover production sites in Bulgaria and Ukraine.

MOROCCO Italian leather manufacturer Nuti Ivo Group is to build a new tannery in Morocco, its second facility in the North African country. It will invest €12.2 million in the facility, which will process 11,500 skins daily, primarily sourced locally. The project will create 265 direct jobs. Nuti Ivo built its first tannery in Morocco in 2010 in Marrakech. It exports leather from there to Italy, China, and Thailand.

ETHIOPIA The Manufacturing Industry Development Institute (MIDI) has unveiled a new leather strategy to tackle key challenges and develop comprehensive solutions for the country’s leather industry. At the National Ethiopian Highland Leather conference, MIDI Deputy Director General Seleshi Lema highlighted the sector’s progress, noting successful international market trials supported by the Japan International Cooperation Agency (JICA).

SEYCHELLES Women’s organisations Entreprendre Au Feminin Ocean Indien Seychelles (EFOIS) and COMESA Federation Of Women In Business (COMFWB) Seychelles hosted a three-day training programme to teach women and young people how to make leather from fish skins. Philippe Michaud, a consultant at Seychelles’ Ministry of Fisheries and Blue Economy, said this will open avenues for new businesses and help the community and country.

URUGUAY Multi-stakeholder initiative the Global Roundtable for Sustainable Beef (GRSB) has announced Punta del Este in Uruguay as the venue for its 2024 conference. The Global Conference on Sustainable Beef will run for four days, September 30–October 3, with conference sessions focusing on progress in sustainability. This focus will encompass climate, animal health and welfare, and “nature-positive production practices”, the organisers said. They encouraged industry professionals invested in beef sustainability in all regions of the world to take part.

UZBEKISTAN An exhibition named Made in Uzbekistan recently took place in Ankara. At the exhibition, over 100 samples of leather, footwear, and wool products from more than 20 Uzbek companies were showcased. Plans were also made to establish training centres with Turkish experts and start shoe production in Uzbekistan.

BRAZIL The value of Brazil's exports of hides in the first five months of 2024 was just under \$550 million, an increase of 17.7% year on year. In terms of area, tanners in Brazil exported 17.3 million square-metres of material between January and May this year, an increase of 26.2%. On publishing the results, industry body CICB said the figures had been affected by the floods in the state of Rio Grande do Sul in April and May, but that tanners there had achieved an impressively quick recovery to keep exports on track.

TURKEY Reports from Turkey suggest that manufacturers of shoe upper leather are drifting away from the Tuzla leather cluster and moving to Bursa instead. Tanners say Tuzla's proximity to Istanbul has driven up labour costs and water-treatment expenses, encouraging them to choose the Bursa leather cluster. Tuzla is around 100 kilometres from Bursa.

VIETNAM Figures for the first four months of 2024 show that, while overall hide exports from the US are down in volume and value, wet blue exports continue to grow. Exports of wet blue increased by 26% in volume and by 22% in value. Vietnam imported more than 475,000 wet blue hides from the US from January–April 2024, paying \$136 million for them. These figures represent an increase of 108% in volume and of 107% in value.

JAPAN Luxury leathersgoods brand Hermès has opened a new store in the Ginza district of Tokyo. This is the company's second store in the Japanese capital's most famous high-end shopping district. The new store is on the first floor of a retail landmark, the Mitsukoshi shopping mall. Hermès said Ginza's vibrancy and bright lights were an important part of the inspiration for the layout of the store. An artistic display made of metal, that can only be seen from certain angles, and semi-sheer origami screens on the windows are part of this. The brand's leathersgoods and equestrian collections are on display at the rear of the store. There are now almost 300 Hermès stores in 45 countries around the world.

CHINA Commerce minister, Wang Wentao, has said accusations from the European Union of unfair competition from China are without foundation. During an official visit to the European Union in early June, Mr Wang said: “Fair competition should focus on promoting openness, cooperation, and mutual benefit instead of excluding others and building small circles.” His comments came in the context of provisional tariffs on imports into the EU of Chinese-made battery electric vehicles and other products.

NEW ZEALAND The New Zealand government has ended a plan announced by the previous government to charge farmers for gas emissions from the end of 2025, in a bid to curb global warming. However, the plan was unsurprisingly unpopular with cattle farmers, some of whom said it would make their businesses unprofitable. The government plans to set up a Pastoral Sector Group instead, to find other ways to reduce methane.



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New standard for bisphenols in leather

The International Organization for Standardisation (ISO) has released ISO 21235:2024, a new standard detailing the method for determining the total content of specific bisphenols in chemicals used in the leather tanning industry. This method is crucial for ensuring safety and quality in tanning processes.

The development of this method was significantly contributed to by Italian delegates from the Technical Commission UNPAC, including Tiziana Gambicorti, Franca Nuti, Francesco Troisi, Riccardo Girolami, and Massimo De Santis. Their expertise and persistence were instrumental in achieving this milestone.

ISO 21235:2024 outlines the procedure for quantifying bisphenol A, bisphenol AF, bisphenol B, bisphenol F, and bisphenol S using liquid chromatography (LC) with various detectors such as single quadrupole (MS), triple quadrupole mass spectrometer (MS/MS), ultraviolet (UV), diode array spectrometer (DAD), or fluorescence spectrometer (FLD). The document notes that while bisphenol S cannot be detected using FLD, the method can be adapted for other bisphenols if validated by the laboratory.

ICT salutes bid for “greater clarity”

The International Council of Tanners has made a contribution to efforts to make sure the ‘Consumer protection and automotive transparency act’ becomes law in the State of New York because New York is a powerful advocate for consumer rights in the US.

The leather industry organisation said at the start of June that it had decided to contribute \$15,000 towards advocacy efforts to have the bill passed. It said introduction of such legislation in New York is likely to lead to similar legislation in other US states.

It added that this could set a precedent for similar legislation in other parts of the world and that this would be a positive step in the protection of the identity of leather, particularly in the automotive sector, where it claimed there is “significant mislabelling”.

ICT president, Burak Uyguner, said: “The International Council of Tanners firmly believes in the importance of transparency and consumer rights. By supporting this bill, we are advocating for greater clarity in the automotive industry, ensuring that consumers are fully aware of the materials used in their vehicle interiors. This aligns with our commitment to promoting ethical practices and sustainability in the leather industry.”



Production of Audi Q6 e-tron at the car company's Ingolstadt site.

CREDIT: AUDI

Seasonal fluctuations in car-making affect Pasubio

Italian tannery Pasubio has reported revenues for the three months ended March 31 of €88.3 million, a decrease of €7.9 million compared with the first quarter last year.

It said: “Our business is seasonal. Our working capital requirements typically increase during the first and third quarters of the year and reduce towards the end of the year. OEMs typically slow down vehicle production during certain portions of the year.

“For instance, our European customers slow down vehicle production in August and during the holiday season in December during which they also often conduct internal maintenance and adjustments to inventory.

“Further, there are a fewer number of working days at the end of the year as opposed to the beginning of a year and this results in a reduction in vehicle production.”

It added that in the automotive industry, interest in electric vehicles is experiencing a notable increase. This surge is driven by growing consumer demand for more sustainable transportation options, bolstered by a variety of government incentives. However, despite these encouraging developments within specific industries, the overall economic outlook for 2024 remains “cautiously optimistic”.

The bill received its introduction to the New York State senate in March and is now in the hands of its committee for consumer affairs and protection.

Sales of tanning machinery lift Assomac

The main representative body of Italy's tanning and footwear machinery manufacturers, Assomac, has reported an increase of more than 12.5% in exports of technology to leather manufacturers during 2023 compared to the previous year.

Assomac said this is mainly due to a good sales performance in Europe, the Americas and Africa.

In contrast, its member companies brought in revenues that were down by 4.6% year on year for exports of machinery for making leathers and shoes. This was in spite of a good performance in the Americas and Oceania, it said.

It said the figures for 2023 confirmed the resilience of an important sector for the Italian economy, but warned that 2024 had

started poorly, with exports falling by more than 20% in value in the first two months of the year.

Bio-based edge paint launched by Stahl

Stahl has announced a new high-performance, bio-based edge paint designed for luxury accessories.

The product, part of the Stahl Ymagine range, is said to offer excellent ageing and hydrolysis resistance, has high solids content, and is compatible with leather and synthetic materials. It complies with ZDHC and REACH standards and is available in over 2,000 colours, with custom colour matching options.

Georges Fonseca, global business manager at Stahl, highlighted the product's development process and its alignment with Stahl's ESG Roadmap to 2030, emphasising its environmentally friendly and high-quality nature.

The new edge paint is part of the Stahl Ympact family, focusing on renewable carbon solutions.



'New era' for Cartigliano

Tanning technology developer Cartigliano has launched a new start-up that will be entirely devoted to research and development, calling it Cartigliano Ricerche.

It said this launch had come about as a result of a major company restructuring. It explained that Cartigliano Ricerche would consist of a team of highly specialised people with expertise in areas such as physics, chemistry, aerospace and thermoelectrics. They will work with cutting-edge, artificial intelligence-enabled technology.

It said that setting up this new, dedicated company was "the start of a new era" for Cartigliano and would help it speed up growth.

Chemicals to undergo in-house assessment at JBS

Brazilian leather manufacturing group JBS Couros has established a new, in-house designation for leather chemicals.

It will use the new tool to assess products from chemical companies and decide which ones it can classify as Responsible Tanning Chemicals (RTCs).

There are four criteria against which JBS Couros will assess chemical products: biodegradability, hazardous substances, biogenic carbon and environmental impact. It will share its evaluation with suppliers.

"There is no sustainability without collaboration," said JBS Couros sustainability director, Kim Sena, at the time of the announcement. "Working with the chemicals industry towards increasingly sustainable products has huge potential. With RTCs, we hope to see concrete medium-term results in the continued reduction of the environmental impact of the leather production chain."

EcoVadis double for Pulcra

German Leather chemicals group Pulcra has been awarded the EcoVadis Silver Medal, ranking in the top 6% of companies assessed for sustainability. This follows a similar accolade for Pulcra Chemicals S.L. in Spain earlier this year.

The EcoVadis assessment evaluates companies on Environment, Labour & Human Rights, Ethics, and Sustainable Procurement. Pulcra's high ranking is attributed to improvements in environmental practices.

"This achievement reflects our dedication to sustainability and environmental responsibility," said Dr Holger Bender, CTO of Pulcra Chemicals.

Pulcra Chemicals plans to continue enhancing its sustainability efforts to maintain its leadership in providing sustainable chemical solutions.

Innovation award for Archroma

Swiss speciality chemicals producer Archroma has been honoured with an industry award for a leather industry product.

The honour recognises Archroma's Avicuero system, developed in collaboration with Dr Leather Ltd and made accessible through a partnership with leather chemicals company Trumpler and incorporated into its DyTan system.

Avicuero seeks to address environmental concerns by offering a chrome and metal-free method, using innovative molecules Black SL and TR22. This system reduces CO₂ emissions and energy consumption, while eliminating the pickling process and reducing salt usage.

Multi-million dollar investment for Pakistan

Pakistan's footwear manufacturing sector is set to receive a substantial investment from China.

A delegation from the Association of Guangdong Shoe Manufacturers visited Pakistan in early June, visiting factories and holding meetings with local footwear industry leaders and officials.

This visit was a follow-up to a trip to China that senior figures in the Pakistan Footwear Manufacturers' Association (PFMA) made earlier this year.

The result is a memorandum of understanding under which the Association of Guangdong Shoe Manufacturers will invest an initial \$7 million in shoe companies in Pakistan.

In a second phase, the Chinese industry body will invest a further \$70 million with the aim of helping their new manufacturing partners in Pakistan buy new technology for shoe design and construction.

PFMA chairman, Mansoor Ehsan, said this investment had the potential to create numerous job opportunities in Pakistan.

Toronto-based supplier becomes part of Garrett Leather

Toronto-based supplier of finished leather for furniture CTL Leathers has become a Garrett Leather company. Based just across the border in Buffalo, New York, Garrett Leather said it viewed the deal as an important step in its efforts to become "the premier destination for upholstery leather solutions".

CTL sources finished leather from partner tanneries in Europe, Asia and South America. It stocks 35 leather lines in more than 1,000 colours. It also offers furniture manufacturers other components, including legs, bases and mechanisms.

Company president, Cristina Gabbrielli,

said that joining forces with the US company would allow CTL "to leverage synergies and further elevate the level of service and support we provide to our valued clients". She said the two companies shared commitment to craftsmanship and customer satisfaction.

For its part, Garrett Leather also supplies leather to upholsterers and manufacturers, and has customers in aircraft, automotive, yachts, commercial and interior design markets, too.

Garrett Leather president, Max Brown, said: "By combining our resources and expertise, we will be better positioned to meet the evolving needs of our customers."

Solar energy project complete at Pajusco

Tanning technology developer Pajusco has completed a project to install solar energy panels at its headquarters in Montebello, near Arzignano.

It said its efforts to use solar energy at its factory demonstrated its commitment to "a greener future" and would give leather manufacturers around the world that the tanning drums Pajusco produces are being built "with the utmost respect for the environment".

COTANCE signs manifesto

The leather industry's main representative body in the European Union, COTANCE, has joined 14 other European industry associations, representing a combined total of 300,000 companies, as a signatory of the CheMI Manifesto, which advocate for improvements in the EU's chemical regulatory framework.

In the manifesto, signatories call on EU legislators to focus on:

- impact assessment: ensuring that the effects on downstream users of chemicals, especially manufacturing industries, are considered through comprehensive impact studies and setting sensible transition periods for regulatory adaptation;
- fair competition: advocating for enhanced market surveillance to ensure all products entering the EU market comply with relevant chemical legislation, protecting our businesses and consumers;
- boosting competitiveness: prioritising the competitiveness of European industries to strengthen our strategic resilience;
- and better regulation: supporting legislation that is evidence-based and effectively reduces unnecessary burdens, particularly for SMEs. 🌱



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COTANCE president re-elected

The chief executive of Spanish double-face and nappa producer Inpelsa, **Manuel Ríos Navarro**, has been re-elected as president of COTANCE, the leather industry's main representative body in the European Union.

COTANCE chose Mr Ríos as its president in 2020, but owing to the covid-19 pandemic, it was September 2021 before he was able to take up the role. He won re-election at a COTANCE meeting in Brussels on May 15.

Vice-presidents of the organisation will be **Jean-Christophe Muller**, chief executive of Tannerie Haas in France, **Fabrizio Nuti**, who runs the Nuti Ivo group of tanneries, and **Rino Mastroto** of Rino Mastroto Group.

Afterwards, Manuel Ríos said: "European leather is the smart choice. The general public is presented too often with news and images that cast a shadow over the leather industry. But we know that the leather industry in Europe will only have a future if it treats people and the environment well."

Creative director departs Chanel

Luxury group Chanel has confirmed the departure of its creative director, **Virginie Viard**.

After reports across the world's fashion press that Ms Viard was leaving, Chanel said in a statement on June 6 that it was grateful to her for her "remarkable contribution" to the company's creativity, its vitality and its popularity.

Virginie Viard had spent more than 30 years at Chanel, many of them working side by side with the late **Karl Lagerfeld**. She took over as the company's creative director in 2019.

New chapter ahead for Lanvin

Luxury ground Lanvin has named **Peter Copping** as its new artistic director. He will take up the role in September.

A graduate of Central Saint Martins and the Royal College of Art in London, Peter Copping has been working as head of couture at Balenciaga. He previously worked at Oscar de la Renta, Nina Ricci, Marc Jacobs, Louis Vuitton and Sonia Rykiel.

Chinese group Fosun International became Lanvin's majority shareholder in 2018 and set up The Lanvin Group.

Lanvin Group chief executive, **Eric Chan**, said the group was delighted to have secured the services of Peter Copping, whom he described as an "outstanding talent". He said this represented a new chapter for Lanvin and "fits perfectly with our commitment to meeting the evolving needs and desires of our clients".



Senior US figures ask for EUDR delay

The US government has sent a formal letter to the European Commission asking it to delay the implementation of the European Union Deforestation Regulation (EUDR).

EUDR seeks to guarantee that a list of seven commodities coming onto the EU market, including products from cattle, have no links to deforestation. It will start to come into effect at the end of this year, as things stand.

In its formal letter, the US has said it is worried about the impact EUDR could have on companies there, saying the work companies are being asked to carry out to prove compliance with the regulation is

presenting "critical challenges" to US exporters.

The Financial Times reported on June 20 that it had seen the letter. It said three senior figures had signed it: US secretary of commerce, **Gina Raimondo** (pictured), US secretary of agriculture, **Thomas Vilsack**, and US trade envoy, **Katherine Tai**.

It quoted the text as saying: "We urge the European Commission to delay the implementation of this regulation and subsequent enforcement of penalties until these substantial challenges have been addressed."

Mr Copping paid tribute to **Jeanne-Marie Lanvin**, the founder of the company, calling her "a visionary" whose interests and passions "extended far beyond fashion". He said this applied to him, too.

Pharrell continues ode to leather for LVMH

Music producer, singer and designer **Pharrell Williams** presented a fresh leathergoods range as part of his latest collection as creative director for Louis Vuitton menswear.

The collection was presented at the UNESCO headquarters in Paris and was inspired by the "spirit of travel".

Leather bags were adorned with metal plate charms inspired by archival trunk tags. The company said: "Bags are as luxurious as they are practical, ready for a world tour to connect with others."

New president for Alliance France Cuir

Alliance France Cuir, the main representative body of the French leather industry, has announced **Christophe Dehard** as its president for the next three years. Mr Dehard was elected at the organisation's annual general meeting on June 20.

Christophe Dehard succeeds the long-serving **Frank Boehly** in the role. Mr Boehly was president of Alliance France Cuir and its predecessor, the Conseil National du Cuir, since 2014.

Mr Dehard is head of by-product upcycling at meat processing group SVA Jean Rozé. This group processed more than 230,000 head of cattle, 68,200 calves and almost 250,000 lambs in 2023. Since 2018, Christophe Dehard has also been president of the French Federation of Hides and Skins.

He said: "I am very proud to take over the presidency of Alliance France Cuir and become the spokesperson of the 21 federations that make up our confederation. Our ambition is to promote, in France and abroad, a French leather industry that is world class and sustainable."

Royal visit

On Sweden's National Day, June 6, family-run leather manufacturer Kero Leather received a visit from **King Carl Gustaf** and **Queen Silvia** at its tannery in Sattajärvi, in the north of the country.

The royal couple toured the local leather museum and learned about the 95-year family legacy from owners **Emma** and **Tomas Kero**. "We are very proud and honoured by this wonderful visit," said Tomas Kero afterwards.

Tanners launch recruitment campaign

The tanning sector in France has launched a country-wide online recruitment campaign.

Launched at the end of June, the new programme offers information about



working in leather manufacturing and invited job-seekers to apply online to work at one of 43 participating tanneries throughout France, in which 1,700 “passionate professionals” are already working, the campaign says.

Applicants are able to use the website to upload their profiles in around 90 seconds and make themselves available to join them.

There are video testimonies from people already working in a variety of roles in the industry, including a leather technician, a hides and skins grading expert, and a leather dyeing specialist.

They talk about the work they do day to day, the training and qualifications they have been able to complete while working, plus the high levels of workplace safety and workforce inclusion the industry offers.

One of the workers says in her testimony: “My advice would be that people should come to see for themselves what we do in our bovine and small-skins tanneries. Anyone who is curious and open to new adventures should come and join us.”

Prime minister pays tribute

The prime minister of Ethiopia, **Dr Abiy Ahmed**, has paid tribute to the director of the hub that the United Nations Industrial Development Organisation (UNIDO) runs in Addis Ababa.

After five years in the post, **Aurelia Calabrò's** term of office, which included work with the leather sector in Ethiopia, ended at the end of June.

Presenting her with an award to thank her for her work, the prime minister said Aurelia Calabrò was “a true friend of Ethiopia”, who had developed a deep understanding of local context and had shown “an unwavering commitment to the nation's development”.

Kering creates chief brand officer role

Luxury group Kering has appointed **Laurent Clauquin** to the role of chief brand officer.

This is a new role within the group; Kering said on making the announcement that its aim was “to enhance the appeal of Kering's corporate brand”, increasing its “visibility and influence”.

Mr Clauquin joined Kering in 2005 and has been president of its business in the Americas since 2012.

Board appointment

TEGEWA, the German industry association of manufacturers of process and performance chemicals, has appointed **Joachim Henkmann** to its board for the 2024-2026 term. Mr

Henkmann, who currently serves as the global marketing director for Leather at Stahl, brings extensive experience in the leather coatings industry to his new role.

As a sector association within the German Chemical Industry Association (VCI), TEGEWA plays an active role in the VCI and the European Chemicals Industry Council (CEFIC). The organisation maintains close contacts with both European and national chemical associations, as well as with organisations in the customer industry.

Repair business launch

Co-founders of specialist repairs service provider The Restory, **Vanessa Jacobs** and **Emily Rea**, have launched a new software company that will operate in the same arena, calling it Circulo.

London-based The Restory launched in 2017 offering brands and consumers a repair service that had high levels of customer service, a love of craftsmanship and a passion for sustainability at its core.

New investors acquired a controlling stake in the company in 2022. Unhappy at some of the changes the new investors wanted to make, the founders walked away in February 2023. One month later, The Restory went into liquidation.

Ms Jacobs and Ms Rea are now using their “battle-tested” knowledge and experience to launch Circulo, with software development specialist **Karm Khanna**, and a former colleague at The Restory, **Vipaasha Sheel**.

At the time of Circulo's launch, Vanessa Jacobs explained that it would work as a software service (SaaS) solution that will enable brands, retailers, repair providers, and repair-focused start-ups “to build and manage repair businesses in whatever way meets their goals”.

She said new repair-focused start-ups are launching every month across a range of categories and that repair, as a business sector, is growing at 6.5% per year. She added: “We are here to make repair profitable, scalable, and seamless with smart software.”

New president for Mexico's AQTCCL

Royal Smit & Zoon's technical service manager for the Americas, **Armando Escobedo**, has been elected president of AQTCCL, Mexico's national leather chemists' and technologists' association, replacing **José Luis Rico Tapia** in the role.

Based in León, Guanajuato, Armando Escobedo, joined Royal Smit & Zoon in 2022 after a long career in the leather chemicals sector. In previous roles, he worked for BASF in China and for Stahl in Germany.

No longer niche

Director of sales and marketing at Olivenleder, **Thomas Lamparter**, has said that recent conversations with automotive groups have convinced him that the vegetable-based pre-tanning agent is “no longer a niche product”.

In February, Italian leather chemicals group Silvateam acquired a majority stake in the company that developed Olivenleder, wet-Green GmbH. Silvateam said it viewed Olivenleder, which uses residues from the olive oil industry, as an ideal complement to its Ecotan range of technologies. Both involve the use of only 100% bio-based, natural products in the making of leather.

In May, Thomas Lamparter and the director of Silvateam's leather business unit, **Antonio Battaglia**, visited three major automotive groups. After these visits, Mr Lamparter said the buyers they spoke to were well informed and showed “a high level of interest”.

One factor he highlighted was that Silvateam's ability to produce Olivenleder at scale was making the product competitive, price-wise, with conventional tanning technologies.

He said people in the automotive teams they talked to were receptive to the high bio-content in leather made using Olivenleder and Ecotan, and suggested that this was something consumers would like.

There were also conversations about using Olivenleder and Ecotan certification for leather in car interiors, with the material being upcycled into organic fertiliser at the end of life and supporting new plant growth.

Volkswagen CEO calls for level playing field

The chief executive of the Volkswagen brand, **Thomas Schäfer**, has said he believes it was inevitable that Chinese car companies would make big inroads into the European market.

His comments came after official figures showed an increase of almost 40% year on year in the volume of cars imported into the European Union from China in 2023.

Speaking at a *Financial Times* event called Future of the Car in May, Mr Schäfer said the European market was bound to be attractive to Chinese automotive manufacturers because it offers “the strongest margins”.

He insisted that competition was good, saying: “It keeps you on your toes and drives innovation.”

But Mr Schäfer made it clear he does not support suggestions that the European Union should impose higher tariffs on imported cars from China to help European manufacturers stay competitive. 🌐

GREENPRINT



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

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

28 June 2024

Last call for International student design competition

27 June 2024

Chanel-backed start-up creates new avenue for offcuts

26 June 2024

Assocalzaturifici laments difficult first quarter for Italian shoe producers
Pakistan enhancing leather supply chain transparency

25 June 2024

Commission still working towards a 'smooth implementation' of EUDR
Success for Brazilians at Riva Schuh

24 June 2024

Venice palazzo to showcase Bottega Veneta leathergoods

21 June 2024

Polène launches Seoul flagship store
Bangladesh footwear exports see shift
Deadstock collection introduced by Grenson

19 June 2024

Södra invests in sustainable tanning
Top talent celebrated at Cordwainers awards
Resurgence in tourism boosts luxury in 2023

18 June 2024

IULTCS Congress dates announced
MLA suggests methane predictions might be outdated

17 June 2024

Greater inclusion of people with disabilities at Hermès

14 June 2024

ES Study reveals leather's superior biodegradability
EU court rejects Nike's trademark

13 June 2024

Italian tanners' association names board

12 June 2024

Another judicial administration case for luxury leathergoods in Italy

10 June 2024

Good growth in value for US beef exports

07 June 2024

LHCA takes Samsung to task
Centenary celebration for production in Huningue

06 June 2024

Biggest ever trade mission to Colombia for Brazilian shoe brands

EU elections: manufacturing sectors 'must not be left behind'

Honorary citizenship for Tod's owners

05 June 2024

NY car interiors bill wins the support of the international leather community
Cartigliano launches program for aspiring leather technologists

04 June 2024

Perforation creations at Rolls-Royce
Pangea highlights success in sustainability report
Bridge of Weir drives Bond's Jaguar revamp

03 June 2024

Goat meat production soaring in Australia
First stone laid at Hermès factory in Loupes
Lagos Leather Fair 2024 to feature 'Pitch-A-Leather-Biz' session
Bursaries available for UK leather crafters

31 May 2024

Bangladesh - cash incentives for exported leather products

30 May 2024

EU approves new Ecodesign Rules
Assopellettieri opens new headquarters in Florence

29 May 2024

Hermès reopens central Beijing store after renovation
SBTi approves Bader emissions targets
Luxury rivals team up on surplus materials platform

28 May 2024

Hüni and Dose announce strategic partnership

24 May 2024

Americas move at Bentley as Christophe Georges returns to HQ
Great Britain bans live animal exports
Leather handbags provide inspiration for Nissan

23 May 2024

Second-hand leathergoods appeal to young French consumers
COTANCE raises concerns over EUDR implementation timeline
Why Europe must develop a strategy for sustainable livestock value chains

22 May 2024

COTANCE makes EU aware of leather's €125 billion contribution
Chanel to expand in China despite industry trends
Funding will help LHCA promote leather as a sustainable material
Silvateam celebrates 170th anniversary with Vivaldi Concert

21 May 2024

Vietnamese province to boost leather and shoe production
Worldly introduces new sustainability tool

20 May 2024

Fall in Pakistan's leather-sector exports causes 'significant concern'
International group gathers in Baeza for specialist CITES course
Adidas continues leather push with SPZL celebration




leatherbiz.com

AT THE CUTTING EDGE OF
 LEATHER INDUSTRY COMMUNICATION



Contact Matthew Abbott matthew@worldtrades.co.uk for more information



Natural materials versus oxymorons

Earlier this year former vice-president and general manager of footwear group Wolverine Worldwide, Kerry Brozyna, was named as the new president of the Leather and Hide Council of America (LHCA).

What early impact have you been able to make on the Leather and Hide Council of America?

We have discussed our vision, mission and values and we are simplifying and strengthening the wording. We are also changing tack, as an organisation, to go a little bit more on the offensive. We have set our goals for 2024. We came to them a little late because, although there was already work to do, of course, the announcement of my appointment was in February. We were able to have some formal sessions in Washington DC soon after that where we put our goals on paper, and those are now going to be reinforced.

What are the current goals and priorities of the organisation?

It is all about membership, changing minds and the lab. To break that down a little bit, the LHCA has done a tremendous job with members and in providing great value for those members. We want to take that great progress and engage the 'after-burner'.

What changes will there be for your members?

We will increase our membership, which is open to all businesses and organisations working with or in the leather and hide industry. We have 78 members right now but there is a greater opportunity in the US. There are many companies who are still on the sidelines. Over the last couple of years we have had good growth and have added some key partners. More members mean more dues, greater strength, more investment and a more powerful voice in the industry. We also want to increase participation. We have our board of directors, plus an executive committee and a foundation committee for the lab. This is a small sub-section of our members. We are going to take that small sub-set and grow it significantly to allow more board participation for our members. If you increase participation, you increase strength and learning, and you increase the likelihood of membership for a longer period of time.

What do you have in mind for 'minds'?

We are going to take what we are doing now across all of our platforms and all the work with our international partners, such as our 'Real Leather, Stay Different' student



New LHCA president, Kerry Brozyna, at APLF 2024 in Hong Kong.

CREDIT :WTP

design competitions and the recent independent lifecycle assessment (LCA) study into the carbon footprint of making leather from US cow hides, and we're going to develop more powerful reports that detail what we are doing to move us closer to our target. That target is very simple. It is to increase the value and the volume of hide and leather exports from the US. We have a wonderful partnership with the US Department of Agriculture, which provides funding to increase the volume and value of our exports of this great commodity. We are part of a global industry and contribute to a global voice. That is the only way we are going to fight the detractors and win. And we can win because we have facts on our side. We just need a loud enough voice to get those facts through all the subterfuge and false narrative.



Natural choice. Boots from a recent joint project between US footwear brands Timberland and Vans.

CREDIT: VF CORPORATION.

What have been the main achievements of the Real Leather, Stay Different campaign during the five years it has been running so far?

Our social media programme delivers hundreds of thousands of engagements every year. Since its inception RLSD has generated some 280 million impressions and reached 86 million people, including students at 100 or more colleges. This means 86 million people have been interested enough to click and they will have walked away with maybe just a little bit more knowledge about the leather industry. We are going to continue pushing on this.

Please explain in more detail the links between LHCA and the Leather Research Laboratory at the University of Cincinnati.

The Leather Research lab is a wholly owned entity of LHCA and it is a tremendous tool. We are going to grow the customer base of the lab. We are focused on growing its customer base to make it an even more powerful tool. Our lab, in addition to being a great testing facility for many customers, is also a teaching facility. We run multiple leather courses each year, short three-to-five-day courses for new members of the tanning industry. They get a basic knowledge of the technical side of the business and of the business side as well. In addition, Steve Lange, our director, works very closely with our host, the University of Cincinnati. He teaches or co-teaches courses related to materials at the university.

How do you plan to leverage your experience from Wolverine Worldwide in your new role?

It was an incredible 11-year opportunity for me with Wolverine Worldwide. Wolverine is committed to continuous learning for its teams. I was enrolled in multiple Harvard Business School courses, funded by the company and held in Wolverine's headquarters in Rockford, Michigan. The courses were specific to executive leadership, transformation and innovation. After one course, I was tapped to run an innovation workstream, leading other executives and brand leaders in the project. There were tremendous opportunities for leaders that took advantage of the training. Wolverine Worldwide also funded a portion of my executive MBA. An executive MBA is for experienced business people with at least ten years' work experience. I plan to use all these tools and teachings to strengthen and grow the LHCA.

Before Wolverine, you held senior roles at leather manufacturing companies. In what ways do you think your experience of running tanneries will help you as president of LHCA?

It's been an incredible career; three decades of passion for leather. And passion, I would say, is what is going to drive us forward. We promote the leather and hide industry, but we also work to protect it. We have such a versatile, durable, sustainable product that we make and move to our



“I would like leather to be looked at, in essence, as a plastic-killer; we are in a perfect position to do it.”

customers. And then look at the supply chain. Our hide producers provide beef, an incredible protein, for the world. While they are doing it, they follow proper methods, best efficiencies and strive to eradicate waste. One method for eradicating waste gives us an incredible product, the hide. We must convince our customers and their consumers that leather is a sustainable and durable product. Why would we use something like plastic that is drilled from the earth, and manufactured, when we have this incredible natural material that is available and plentiful? And I'm fine that we have an allocation for carbon. No problem. We will take it; but let's make it fair. We will take it, even though, whether or not we do, the hide is going down one of two paths. It is either going into leather or it is going to waste. Regardless of whether we decide to use the hide or not we, as a global community, need to stop using plastic. I would like leather to be looked at, in essence, as a plastic-killer. We are in a perfect position to do it.

In what ways will your extensive experience of the industry in Asia, specifically in Vietnam, China and Thailand help you?

We are so much better represented as a global community. I think that when you talk about Vietnam, China and Thailand, where I've had a lot of experience, and you add Indonesia and India, these are countries where many finished products are being made. Specifically shoes, and shoes use the greatest percentage of the total leather supply. These countries are incredibly important to our leather suppliers. They are sourcing US hides. We will continue to lever those areas and I will use my experience of the cultures and the people to help wherever I can.

You mentioned the lifecycle assessment (LCA) of US cowhide production that LHCA has commissioned. What has been the initial reaction to it since LHCA presented it at *The Economist Sustainability Summit* in London in March? What impact do you expect this study to make in the months ahead?

It has generated a tremendous amount of excitement and there are multiple discussions under way already. The Higg Index did a lot of damage to the leather industry. We had many brands who looked at the Higg Index as the new Bible for materials. The publishing of our LCA, and sharing the data in the LCA, is the way that we win back the hearts and minds. The Higg Index came out with opaque data. They wouldn't publish the real basis of it so there was no way to challenge or even understand it. But it was accepted as real. We have to act a little bit more quickly as an industry than we did when the Higg Index came out and, again, be more on the offence. We want to be ahead of issues rather than behind them. Once the LCA is completed it will be peer-reviewed and shared.



Beef cattle in Nebraska. US farmers produce valuable protein for the global market and, in trying to keep waste to a minimum, generate high-quality hides as a by-product.

CREDIT: US DEPARTMENT OF AGRICULTURE/PEGGY GREB

At the time of your appointment, you described the leather industry as being in “rapid evolution”. Can you expand a little more on what this evolution consists of, and what specific opportunities you see for the industry, in the US and globally, in this changing landscape?

We are in a position where we have lost a significant share of the material pie, the material volume that is manufactured into finished products. As an industry we are moving a lot faster, and with a sense of urgency, to regrow our share of the market. LHCA and its international partners and friends will strive to bring out the truth, and for there to be one, powerful message for the industry. LHCA will provide a simple one-pager on the LCA outcome to be shared with the global leather industry and with customers and consumers. Everyone should see and have access to the data. The evolution is that we are going from being an industry that, when the bad stuff came at us, we ducked to avoid it, to being an industry that goes out looking for the bad stuff that could hurt us further down the road and addressing it before it does. There are a few key things that we have to get across as an industry, including the fact that using natural materials in finished products is good. Whether that is leather or another natural material, that is people's choice, but we must convince them not to use plastic. Finally, suppliers and brands must stop using the term 'leather' to describe things that are not leather. For instance, using a term such as 'vegan leather' is misleading. It is an oxymoron. ☹️



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SLTC conference includes an introduction to zooarchaeology

The 126th Annual Conference of the Society of Leather Technologists and Chemists was held in Northampton on 27th April 2024 and attended by 67 delegates, both in person and online.

With nine papers being presented, the programme was headlined by the Wolstenholme Memorial Lecture. Titled "Parchment – a Millennium's Worth of Dated Untanned Hides," the lecture was delivered by Professor Matthew Collins from The McDonald Institute, at Cambridge University. Professor Collins explored the field of zooarchaeology, where he and his team analysed animal remains from archaeological sites to gain insights into historical human-animal interactions, integrating concepts from archaeology, biology, ecology, and anthropology. His lecture underscored the surprising documentation of historic hide treatment trends found in parchment records across Europe's archives and libraries. He discussed how politics, animal husbandry, and agriculture influenced the manufacturing of many of the ancient texts.

Focusing on the extensive archives housed at the Norfolk County Record Office in the UK, which holds approximately 12 million preserved parchment (goat and sheep origin) and vellum (calf origin) documents, Professor Collins and his team have dedicated a decade to analysing over 7,000 parchment documents. They employed proteomics, a large-scale study of proteins, to identify, characterise, and quantify the proteins present in these parchment samples. Utilising ZooMS (Zooarchaeology by Mass Spectrometry), they extracted proteins from untanned parchment and employed mass spectrometry to pinpoint unique protein markers. This innovative approach provides insights into the species, age, sex, and other characteristics of the animals represented in the parchment. Interestingly, although the record office prohibited the cutting of samples from the archived material, and collaborating with conservators who were cleaning medieval texts, Professor Collins' team discovered valuable protein in the waste generated by the cleaning process. Pencil erasers, found to be remarkably effective in cleaning the parchment, also contained valuable protein ideal for analysis.

While the analysis might initially seem complex, it proved to be quite manageable in practice. To illustrate this, the presentation highlighted a project in Denmark where school children analysed a large collection of archaeological leather uncovered during the construction of the Copenhagen metro. Sponsored by Novo Nordisk, Denmark's largest pharmaceutical company, the project surprisingly identified traces of horse leather within the collections. These findings date back to a period when the use of horse leather was prohibited, adding an intriguing historical dimension to the project.



Professor Matthew Collins.

CREDIT: MATTHEW COLLINS

Further detail

A more detailed analysis employing liquid chromatography and tandem mass spectrometry (MS/MS) can be used to examine the amino acid sequences in the parchment skins. This method allows for determining the age of the animal at the time of slaughter. Typically, vellum is sourced from young calves aged between six and eight weeks, whereas parchment almost invariably originates from adult sheep and goats.

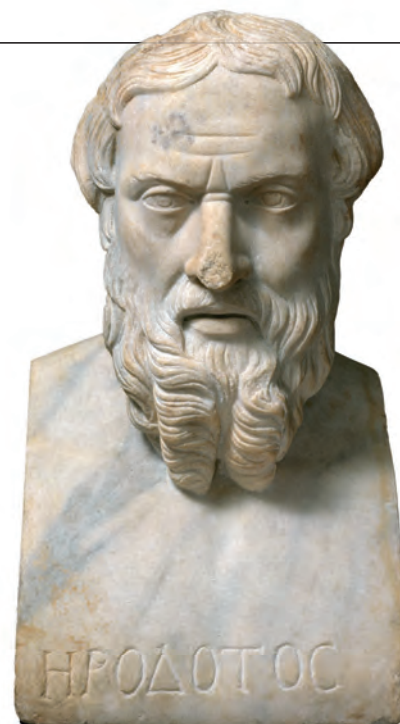
Professor Collins shared his disappointment and confessed to his fixation that the MS/MS analytical techniques employed could only identify 25% of the samples, leaving the rest unidentifiable. When applied to ancient samples, the success rates plummeted, sometimes



Professor Collins shed light on an ancient anecdote recounted by Herodotus, thought to have lived from 484-425 BCE, concerning the Scythian warriors. According to the tale, these warriors allegedly fashioned covers for their quivers from the skin of their slain foes, described by Herodotus as “thick, shining, and the brightest white of all”. Upon examining quivers discovered at monumental burial sites, known as Kurgans, in modern-day Ukraine – where the Scythians originated – researchers found them to be very light-coloured in parts and brightly adorned with leather covers. Analysis revealed that a small proportion, approximately 4%, was indeed crafted from human skin, among the hundreds of artefacts unearthed.

A Roman Reigns copy (2nd century AD) of a Greek bust of Herodotus from the first half of the 4th century BC.

CREDIT: WIKIMEDIA COMMONS/THE METROPOLITAN MUSEUM OF ART



to less than 0.5%, mainly due to protein peptide damage from age. In pursuit of solutions, ongoing efforts involve utilising software tools and refining algorithms. Encouraging progress has been observed, particularly citing language systems, leading Professor Collins to liken amino acids to a form of language due to their structured nature and patterned composition. While recent advancements have shown promising results, further refinement is necessary.

Waste adds to leather circularity

Richard Peace, the Product Development Manager at Gen Phoenix, formerly E-leather, delivered a presentation titled “Reimagining Leather Waste: Enabling Material Circularity on a Grand Scale”. Mr Peace provided an introductory overview of the material they produce, upcycling bovine wetblue splits and shavings. He outlined the extraction process of leather fibres, stressing the importance of maintaining their inherent properties through sorting, drying, and milling operations. Many stages of the process are patented, and he highlighted that the fibre generation process remains a closely guarded secret.

The formation of a thin fibre layer, known as a web, involves applying heat and pressure, resulting in sheets with tissue paper-like characteristics. However, strength is imparted through a physical process called “hydroentanglement”, where high-pressure water bonds a three-layer structure consisting of a textile core sandwiched between layers of the leather fibre web. This composite material closely resembles unfinished leather, offering attributes such as bulk and hand feel from the leather fibres, while strength and stretch are provided by the textile core. This flexibility allows for tailored properties to suit various end uses and markets, from aviation seating and footwear to leathergoods.

Subsequent processing, including dyeing and fatliquoring,

“12 million parchment and vellum documents represent just one county archive out of 47 in the country.”

follows standard leather-making practices but is expedited due to the material's lower density. Film finishing, using release paper, is employed to enhance final aesthetic and performance properties.

Since its inception, the company claims to have diverted close to 10,000 tonnes of leather waste from landfill; it has a 6 million square metre manufacturing capacity.

Bisphenol analysis

Addressing the topic of bisphenols, Dr Andrew Ballantyne from the Institute for Creative Leather Technologies presented on “Understanding the Bisphenol Content of Leather – A Study of Chemical Type and Processing Method”. Bisphenol A (BPA) has been identified as an endocrine disruptor, impacting the intricate endocrine system responsible for regulating various organ functions through hormone secretion and feedback loops. Consequently, chemicals like BPA can have widespread effects on both the body and the natural environment. Despite this, the EU continues to produce, import, and utilise over 1,000,000 tonnes of BPA annually.

Concern also arises regarding related substances such as Bisphenol S (BPS) and Bisphenol F (BPF), which, though less researched, have shown endocrine-disrupting properties in Zebrafish, rats, mice, and humans. Both BPS and BPF are frequently found in leather, with BPS serving as the starting material for sulphone replacement syntans, and BPF emerging as a by-product in phenolic syntan



Fatuma Ali of Sulha Africa.

CREDIT: SLTC

production. Due to environmental concerns, the EU is proposing restrictions on the total bisphenol content in leather, aiming for 10 mg/kg, with a temporary higher limit of 500 mg/kg between 2025 and 2030. Compliance with these regulations poses both regulatory and environmental challenges.

Despite EU regulations being "on hold," there is limited public information available regarding the presence of bisphenol compounds in leather chemicals and their transfer into leather. Urgent research is required in this area. To address this gap, ICLT used high-performance liquid chromatography (HPLC) to analyse bisphenol content in sulphone and phenolic syntans and their incorporation into leather. Significantly, considerable variations in BPS and BPF content were observed. Sulphones exhibited BPS concentrations ranging from 207 to 41,200 mg/kg, with most exceeding 6,000 mg/kg, while phenolic syntans ranged from 240 to 563 mg/kg. Some products contained both BPS and BPF. Notably, bisphenol content was higher in belly areas compared to the official sampling position (OSP), typically by 12-14%, raising questions about the adequacy of the OSP for ensuring EU regulation compliance.

Furthermore, a comparative study of four different leather processing approaches revealed significant variations in final leather BPS and BPF concentrations depending on the point of syntan application, with potential reductions of up to 25-35% in bisphenol content achievable.

"The EU continues to produce, import, and utilise over 1,000,000 tonnes of BPA annually."

Safeguarding Indigenous knowledge

Fatuma Ali of Sulha Africa presented on indigenous and traditional leather practices in Africa, with a focus on sustainability and the potential risks to this heritage. The study concentrated on the Lamu Archipelago in Kenya, one of the most economically marginalised regions in the country, and highlighted the artistic skill and sustainable aspects of these practices. The inhabitants of the Lamu Archipelago are descendants of the Wangozi people, literally "the people of the skin," an ancient civilisation with extensive leatherworking knowledge. The presentation also explored nature-based solutions, such as plant-derived dyes and environmentally friendly tanning agents, emphasising their alignment with modern eco-friendly production methods. It acknowledged the threats posed by rapid modernisation, globalisation, and changing lifestyles to these traditional practices, stressing the importance of recognising and safeguarding them to prevent the erosion of this culturally rich legacy.

Other papers presented

- Insights into the development of an alternative tanning system by Matthew Dunning, Trumpler.
- Zeology tanning toolkit: assessing the progression of tanning by Callum Mackay, Royal Smit and Zoon.
- Future collaborations to preserve the past – insights from the Leather Conservation Centre by Rosie Bolton and Arianne Panton.
- Attempting to calculate SATRA's organisational carbon footprint – the pitfalls and benefits by Christine Anscombe.
- The future of global leather education by Deborah Taylor and Stephen Trantum, Supporters of Leather Education and Science (SOLES).

The conference concluded with the presentation of the Axel Landmann certificate, an award recognising outstanding contributions to the industry. This year's recipient was Reg Hankey from Pittards. In a pre-recorded acceptance video, Mr. Hankey expressed his gratitude to the selection committee, describing Axel Landmann as a dear old friend who had been very inspirational during his formative years. He highlighted sustainability as the industry's major challenge moving forward. Mr. Hankey urged every leather technician to consider people, the planet, and resources in their decisions, to counter the globalisation trend, and to return to basics as much as possible. He also thanked his wife, citing her as a real inspiration for supporting and encouraging him for 47 of his 52 years in the trade.

Outgoing vice president John Hubbard passed the chains of office to Deborah Taylor. The vice president will serve for one year before assuming the presidency of SLTC for a two-year term. 🌍

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Captivating luminescence: A close-up of photoluminescent leather, showcasing its light and texture transformation before and after activation.

CREDIT: VIRTUO DESIGN LIMITED

Shedding light on leather: innovation for traditional leather products

Innovation in leather goods plays a pivotal role, continually challenging existing boundaries and standards. A notable advancement in this domain is GloTech leather, distinguished by its use of photoluminescence to introduce a glow-in-the-dark element into conventional leather products.

Photoluminescence is a phenomenon characterised by the absorption of photons, the smallest units of light, by certain materials, followed by their subsequent emission as visible light in the absence of external light sources. This distinctive property serves as the cornerstone of the unique attributes of GloTech Leather in contrast to conventional leather. With the capacity to absorb both natural sunlight and artificial light, it can emit light in the dark for extended durations (up to seven hours,) while adhering to essential physical and chemical test criteria.

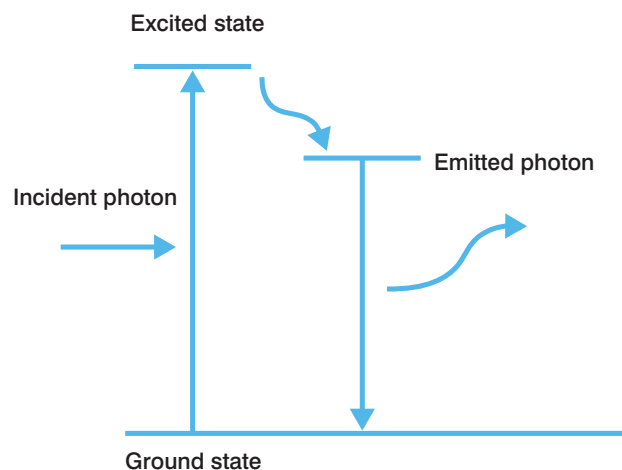
Graphically delineating the process of photoluminescence reveals its fundamental components:

Excitation: Upon exposure to photons from a light source, a material absorbs this energy, prompting electrons within the atoms of the material to transition to higher energy levels.

Relaxation: Subsequently, the excited electrons return to their original energy levels, releasing the absorbed energy in the form of photons during this process.

Emission: The emitted photons possess lower energy levels compared to the absorbed photons, typically falling within the visible light spectrum, and thereby showing as luminescence perceptible to observers.

Figure 1: Schematic representation of a principle of photoluminescence (PL) spectra



CREDIT: RESEARCHGATE



“Its emergence represents a move towards innovation and is pushing the leather industry into new territories.”

Virtuo Design Limited created GloTech Leather, exhibiting a technology designed to work with different types of leather while preserving their natural qualities and aesthetic appeal. The company says the special pigment system ensures exceptional durability and longevity, setting a new standard in leather applications with a minimum lifespan of 40 years. The CEO, Evrim Kadioglu Marriott, is an experienced leather engineering expert. Meltem Etcheberry and Jean-Emre Etcheberry are also key figures in this development with their expertise in the field. Meltem is chief strategy officer, responsible for business development, brand consulting, networking, and strategic decision-making within the company, while Jean-Emre is the chief creative officer, overseeing design partnerships, IT, artificial intelligence projects, and art initiatives. The company has also collaborated with other industry experts to overcome technical challenges and bring this innovative leather to life.

Since the company's recovery after the pandemic, they have focused on collaborative product development, such as introducing the Virtuo-Design brand and recently unveiled the world's first glow-in-the-dark genuine leather phone case made for the iPhone 15 Pro and Pro Max.

Offering potential use in many industries, including footwear, fashion, interior design, and automotive upholstery, high-end automotive companies have shown interest in its glow-in-the-dark feature for enhanced customisation options for their premium clients. The use of this leather is expanding to furniture, handbags, and art projects, showing its adaptability and versatility. Despite its unique glowing properties, it looks and feels like traditional leather.

Mrs Kadioglu Marriott told *World Leather*, “Trade shows like Lineapelle and APLF have responded positively to this leather, inspiring creativity and showing its potential. “Its emergence in the leather industry represents a move towards innovation and is pushing the industry into new territories. For Virtuo Design Limited and our partners, GloTech Leather represents a new way of doing business, opening up new markets and collaboration opportunities.”

To meet the growing demand, the company has teamed up with several tanneries in Turkey to increase production efficiently, ensuring a steady supply without sacrificing quality. Additionally, an emerging partnership with Inorca, part of the KH Group of companies, focuses on recycling and repurposing leftover production materials.

Inorca transforms offcuts, scraps, and unused leather into new, versatile leather panels, promoting a zero-waste approach while preserving the desirable properties of the original leather. This initiative has gained prominence through its collaboration with Coachtopia, a circular sub-brand of the US leathergoods brand Coach that embraces sustainability and circularity.

With these efforts, GloTech Leather aligns itself with contemporary environmental practices for a sustainable future in leather production. 🌱

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CREDIT: ERRETRE

Easy traceability: tracking finishing processes

Erretre, the Italian machinery manufacturer, is focused on supporting the international leather industry in establishing robust traceability processes to ensure the sustainability of its products. This involves tracking industrial processes and obtaining genuine licenses to certify product sustainability. Implementing such a traceability process offers significant strategic advantages in terms of energy efficiency and maintaining consistent product quality.

Established 50 years ago, Erretre has been a pioneer in the leather industry and has consistently pushed the boundaries of innovation. Originally a technical studio, the company has evolved by introducing advanced technologies in leather milling and finishing to meet increasing demands for quality, productivity, and sustainability in the sector.

A key aspect of this evolution was the early adoption of digitisation in milling processes, including the introduction of proprietary printed electronic boards in 1993 for automatic and digital data collection. Unlike conventional finished product marking systems, it highlighted the use of machine-generated data to directly monitor and track production processes, allowing for deeper and more detailed traceability beyond just the finished product.

Traceability is crucial as it establishes transparency and accountability across the supply chain. It allows businesses and consumers to trace the journey of products from origin to market, ensuring ethical sourcing, quality control, and compliance with regulations. In industries such as food, fashion, and electronics, traceability helps mitigate risks including fraud, contamination, and unethical practices. It

supports sustainability efforts by identifying inefficiencies and improving processes. Ultimately, traceability builds trust between businesses and consumers, empowering informed decisions and promoting responsible practices that benefit both people and the planet.

Erretre's implementation of process data traceability shifts away from marketing claims, instead becoming a fundamental strategic choice aimed at ensuring the success of its client tanneries. The digitisation of production processes, through proprietary software and hardware, generates a real trace of how the leather has been processed. This equips the tannery with effective tools to respond to diverse production requests and control semi-finished products, taking into account the natural differences of the leather.

Implementing traceability systems can help companies reduce production costs and improve the quality and yield of the finished product, leading to a competitive advantage with this in mind, Erretre offers drums equipped with advanced sensor technology and controlled by software to facilitate precise control of process variables in tanneries. Tanneries are under pressure to increase production while maintaining or improving quality, and drums, equipped with sensors and



tracking systems, enable effective monitoring and management of production processes, ensuring compliance with quality standards and offering precise control over operational efficiency.

The implementation of this technology automates various tasks for technicians, reducing the need for manual monitoring of processes. With data collected and analysed by automated systems, technicians can make well-informed decisions without having to oversee every detail. This is particularly beneficial when managing a significantly increased production volume. Using specialised leather milling and finishing technology enables the tannery to more effectively meet market demands for fast, high-quality production.

Its Leather Crafting Automation Software (LCAS) is an advanced version of the company's original milling process control software, designed to control and manage the main machines and plants. The platform provides real-time graphic visualisation of the process and allows for the creation of custom recipes, facilitating the management of various processing variables and the optimisation of results. The user-friendly interface enables operators to monitor process progress, evaluate consumption, view historical data, and receive notifications regarding any anomalies, discrepancies, or problems, including remote alerts if needed.

In 2003, M.O.Re (milling organisational resources) was introduced — software specifically tailored to enhance the management of the milling department. This scheduler allows customers to optimise production scheduling, maintain direct control over individual machines, and centralise the creation, management, and scheduling of machining operations. By monitoring production data in real time, the software oversees the smooth operation of the entire drum battery and generates a comprehensive report on its productivity.

Collaboration

The Italtannery Project, led by Erretre, aims to enhance traceability throughout the tanning process. Collaborating with other participating companies such as Bergi, GER, Bertech, I-Tech, and Huni, they strive to automate and align all technologies involved in the tanning process. The goal is to provide machines and systems with a common language for communication and data exchange, enabling tracking of production and optimisation in terms of consumption and final product quality.

This approach not only improves internal coordination but also helps save resources and improve quality output. The ability of Erretre's systems to track production significantly helps tanneries to manage the challenges imposed by increasing and complex market demands, ensuring that technicians can maintain precise control over production with less direct effort, resulting in greater efficiency and quality of the final product.

In an industry that is often saturated with systems not dedicated to the tanning industry, often adapted by engineers from outside the industry, Erretre firmly believes in the importance of traceability and sustainability of processes as the most useful tools for the commercial success of client companies. 🌐

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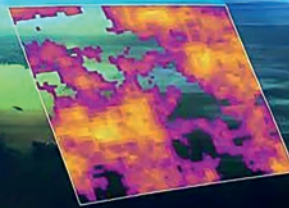


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MethaneSAT orbits the Earth 15 times per day at an altitude of approximately 560 kilometres (about 348 miles).

CREDIT: METHANESAT



If methane can be measured, it can be managed

There has been a lot of focus on animal agriculture recently. While it is important to take action to reduce its impact, it is important to recognise that the role of animals in agriculture is part of a cycle. The emissions they produce are balanced out each year by the static herd numbers. However, there are currently limited real-time methods to measure and manage emissions from all sources. This raises the question of whether animal agriculture is being unfairly criticised. It is clearly easier to target animal agriculture than the large fossil fuel companies, but technology is now emerging to better address the unintended consequences of oil production.

Methane tracking satellites play a crucial role in the fight against climate change by monitoring and addressing methane emissions, a potent greenhouse gas with a significant short-term impact on global warming. The urgency of accurately tracking methane's sources and distribution is highlighted by its pronounced environmental effect compared to carbon dioxide. Equipped with a range of instruments and sensors, specialised satellites employ advanced technologies like spectrometry to gauge methane concentrations in the Earth's atmosphere by analysing methane's absorption of sunlight across various wavelengths. Furthermore, they utilise advanced techniques such as hyperspectral imaging to pinpoint specific methane sources on the Earth's surface, including natural gas infrastructure, landfills, agriculture, and wetlands.

The data gathered by methane tracking satellites provide invaluable insights into the global sources, distribution, and trends of methane emissions. This information is indispensable for policymakers, researchers, and industry stakeholders as they collaborate to devise effective strategies for reducing methane emissions and tackling climate change head-on. Notably, the MethaneSAT project, led by the Environmental Defence Fund (EDF) in partnership with private industry players, represents a significant milestone in this endeavour. This ambitious initiative has recently deployed a

satellite outfitted with cutting-edge methane-detection technology to furnish high-resolution methane data on a global scale. The project's extensive coverage and sophisticated instrumentation hold promise for enabling more precise and effective methane mitigation efforts worldwide.

Moreover, MethaneSAT embodies a broader trend of collaborative efforts among environmental organisations, scientific institutions, and private industry to leverage advanced technology in addressing climate change. The project's collaborative framework encompasses partnerships with entities such as BAE Systems, Harvard University, New Zealand Space Agency, and Google, among others, illustrating a multi-sectoral commitment to advancing climate science and environmental stewardship. Upon achieving full operational status, MethaneSAT has the potential to revolutionise methane emission monitoring and mitigation efforts by providing accurate, real-time data.

It is projected that by 2025, MethaneSAT will offer comprehensive information on at least 80-85% of total oil and gas operations, with the ability to track these operations on a production basin basis. This data-driven approach is instrumental in identifying opportunities for reducing methane emissions, bolstering regulatory oversight of methane-producing activities, and facilitating the transition to cleaner



energy sources. In a recent podcast, Mark Brownstein of EDF said: "This data, I believe, will, over the next five years, significantly drive down methane pollution from the oil and gas industry, and that in turn will have an appreciable impact, so the science tells us, on the rate of warming on our planet."

Around the world in 90 minutes

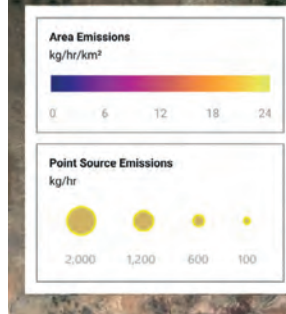
MethaneSAT circles the Earth 15 times daily, but it is not alone in its mission to gauge greenhouse gases. While other satellites track CO₂ levels, they lack the precision needed to pinpoint emission sources. TROPOMI, launched in 2017, specialises in mapping methane globally, boasting a vast image capture of 2,600 km. Despite its comprehensive coverage, it falls short in emission source identification due to limited sensitivity. GHGsats, on the other hand, focuses on pinpointing emission sources with its 30km swath. MethaneSAT, positioned between TROPOMI and GHGsats, excels in mapping larger areas per orbit, with its 200km swath. Its high-resolution imaging, with pixels representing 1km areas, offers detailed insights into methane concentrations worldwide.

Primarily, emissions monitoring will focus on oil and gas production. However, the New Zealand Space Agency, serving as the satellite's mission control, will oversee the monitoring of agricultural emissions. Initially, the satellite will fly over New Zealand several times each month to track trends in major dairy regions. This phase will gauge emissions from ground level to the upper atmosphere, detecting levels from as little as 2-3 parts per billion (ppb). This initiative will serve as a pilot to potentially expand into a global system.

Dr. Sara Mikaloff-Fletcher, the science leader of the project's agricultural program and from the National Institute of Water and Atmospheric Research (NIWA), emphasised the opportunity to pioneer this capability globally. She clarified that the intention is not surveillance but rather employing a precise tool to monitor methane emission shifts, highlighting the goal to avoid any misconceptions of monitoring livestock activities but to act as a means to provide assessments on the

Partnering with Google Earth Engine allows the generation of emissions data using a combination of satellite imagery, AI-generated heatmaps, and specific point sources.

CREDIT: GOOGLE



effectiveness of new methane reduction policies or technology.

There are some drawbacks to the new monitoring equipment. The most notable one is that it cannot monitor at night as it detects methane molecules by analysing their unique absorption patterns of sunlight. This also means that cloud cover and certain weather events at high altitudes could cause inconsistencies in the data. Additionally, it is currently not feasible to monitor methane emissions over water. However, there are ongoing studies aimed at observing the sun's glint on the surface of water and using it to gather data on offshore methane emissions.

Unintended consequences

To address the pressing need for accurate analysis of methane emissions, within the leather industry context, one should understand the relevance of the recent alterations to the Ecoinvent data sets. Datasets used in assessing the Ecoinvent database are a widely used collection of life cycle inventory (LCI) datasets providing detailed information on the environmental impacts associated with various products and processes. These datasets cover a wide range of materials, energy sources, and processes used in different industries.

The Ecoinvent v3.9 database underwent a recent update to align with the 2019 global supply dynamics of natural gas and crude petroleum oil. This update broadens the geographical scope of the database, incorporating

information on the production and consumption of these resources across various countries and regions. Additionally, it integrates data on natural gas flaring and methane emissions. Notably, these updates prompted a revision of critical Life Cycle Assessment (LCA) datasets, revealing that the CO₂ impact of materials such as polyester is nearly 30% higher than previously calculated. This adjustment implies that the carbon footprint of other synthetic fibres, derived from crude oil, could be significantly greater than previously estimated by tools like the Higg Index, owing to the updated datasets essential for numerous European LCAs.

Examining the origins of emissions may cast a light on the animal agriculture sector, but ignoring this reality will not resolve the issue. It is essential to address it directly. As extensively documented, global meat consumption continues to rise, with the FAO projecting a 20% increase by 2050. It is crucial to establish robust measurement systems to accurately assess emissions from the industry, which supplies the essential by-product for leather production. This endeavour, coupled with technological advancements, particularly in detecting gases like biogenic methane, aims to provide further scientific validation to the misunderstood role of cattle in the biogenic cycle. This effort also seeks to clarify differentiation from fossil fuel emissions; the analysis should hopefully show that raising cattle for food and nutrition is not the real bogeyman that media are happy to portray. 🌱



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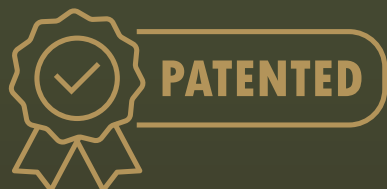
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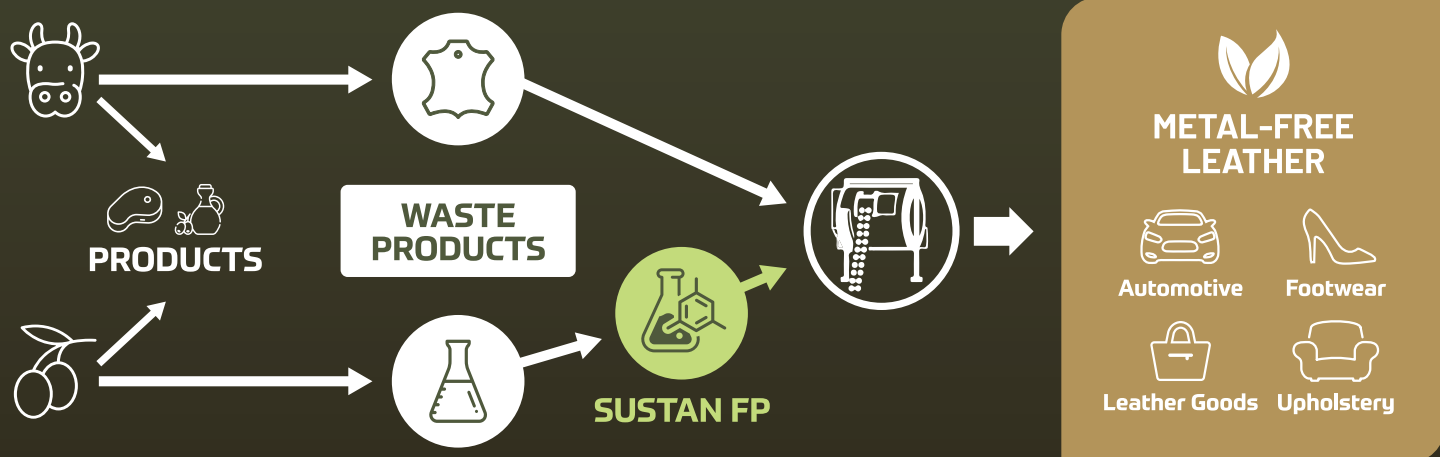
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Leather and the circular economy



Leather uses renewable raw materials



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



The material is long-lasting



Leather products are eminently repairable



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



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



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



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



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



Leather manufacturing supports green employment commitments

Credit: WTP/Flaticon

Tanners do good work

Europe's leather industry has brought its Green Deal Leather project to a conclusion and has shared an average figure for the carbon footprint of bovine leather produced in the European Union.

Green Deal Leather launched in September 2023 with a focus on workplace safety as well as on carbon footprint. Main project partners were industry representative body COTANCE and trade union organisation industriAll Europe.

On the first point, they have made it clear that they know there is still room for improvement in safety in the workplace, but their study of figures for the period from 2019 to 2021 shows a fall of 16% in tannery-related accidents. The study spans seven EU countries (Italy, Spain, France, Germany, Portugal, Hungary and Austria) where the total number of incidents fell to 1,102 in 2021. More than 90% of those accidents were of "minor severity" and 15% of them occurred when people were travelling between work and home. "With the project's preliminary results serving as a baseline, we must now work together to achieve zero accidents," says industriAll secretary general, Judith Kirkton-Darling. There is no sustainability without workplace safety, the project partners insist.

Average figures

On carbon footprint, the project's headline finding is an average figure of 8 kilos of CO₂-equivalent as the carbon footprint of 1 square-metre of finished bovine leather

A European Commission-backed project has shown that tanneries can successfully use the ECO2L tool to calculate the carbon footprint of their product.

produced in the European Union. Audited leather manufacturers in Germany, Austria, Italy, Spain and Portugal collected carbon footprint data from their own operations and have, through the project, been able to use the ECO2L tool, developed over the last ten years by German national industry association VDL, to translate the data into carbon footprint measurements that are easy to share with customers.

COTANCE has explained that some participating tanneries registered lower figures than the average, and some higher. The lowest the project recorded was around 4.2 kilos of CO₂-equivalent per square-metre of leather, while the highest was closer to 12 kilos. Its secretary general, Gustavo González-Quijano, points out that the discrepancies in these figures stem from the huge diversity in leather production in Europe. Different hide thicknesses and different treatments produce



“We want tanners to see for themselves how well they are doing with regard to environmental responsibility.”

ANDREAS MEYER

different results and this has inevitably led to a range of figures, he says.

He adds that an average of 8 kilos puts European bovine leather at a similar level for carbon footprint to that of many plastic-based synthetic materials. “It is a good comparison,” he says. “The Green Deal Leather project deliberately took no account of the upstream carbon footprint of livestock, just as analyses of synthetic materials take no account of the impact of the petrochemicals that make the plastics they use.”

Taking into account the upstream carbon footprint of a cow is still a controversial question when it comes to leather’s carbon footprint. Even in the industry, there are differences of opinion. Some say all of the environmental burden should be on the livestock farmers and meat and dairy companies that raise the cattle and send them to slaughter. Others say the leather industry should accept its share because it derives economic benefit from the hides becoming available. The COTANCE secretary general explains that the upstream CO₂ emissions would dominate the overall calculation for leather so much that differences between tanneries would become invisible.

Beyond the numbers

Mr González-Quijano believes it is important to view leather manufacturers’ use of the ECO₂L tool as something more than a way of putting a number on the carbon footprint of the material they produce. “It will flag up areas for rapid improvement for the industry,” he says. “It will give an opportunity to explain the implications of the figure and show why customers should be cautious about other information they may have seen online about the carbon footprint of leather.” He says that, even though leather and synthetic materials have more or less that same carbon footprint when they leave their respective places of production, the comparison changes radically when you include factors such as durability and product longevity. “Then, leather triumphs,” he insists.

On the question of rapid improvement, he explains that much can still happen to lower the impact of the chemicals that tanners use, and he adds that much can still be done in leather production, too, most notably in waste reduction. “We are keen to achieve these improvements,” he says. “We are highly committed to environmental protection in this industry. And to improve, you need to measure and establish reliable references.”

Energy control

We have told the story of ECO₂L before. To recap quickly, VDL launched it in 2012 as a label that would present finished leather as being “energy controlled”, the phrase from which the name comes. In 2022, VDL announced an upgrade to the original ECO₂L. Version 2.0 is still about making tanneries more energy-efficient, but this now includes scope-three data. Scope three brings the impact



The Green Deal Leather project has established an average of 8 kilos of CO₂-equivalent for the carbon footprint of bovine leather produced in Europe. However, the huge diversity in tanning methods and hide thicknesses that the project covered revealed a figure of almost half the average for some types of leather.

Credit: Alliance France Cuir

from external suppliers into the calculation, including data from the chemicals that tanners use to make leather. This makes it possible to calculate the carbon footprint of the leather the tannery produces. Energy efficiency is still the core aim of the process. VDL’s insistence is that products can only be sustainable if manufacturers are able to bring them to market in an energy-efficient manner. Calculating carbon footprint too is an added bonus.

Good work

In the eyes of VDL managing director, Andreas Mayer, using ECO₂L to calculate the carbon footprint of a square-metre of their finished leather and comparing the result against the EU average will help tanners show their customers and the wider community that they do good work. They take raw material that would otherwise go to waste and transform it into something circular, renewable, versatile, high-performance, long-lasting and breathtakingly beautiful. “Tanners, traditionally, have not enjoyed a good image,” Mr Meyer suggests. “This is why tanneries usually had to be on the edge of town and the people who ran them usually had to keep their heads down and stay quiet.”



FROM THIS



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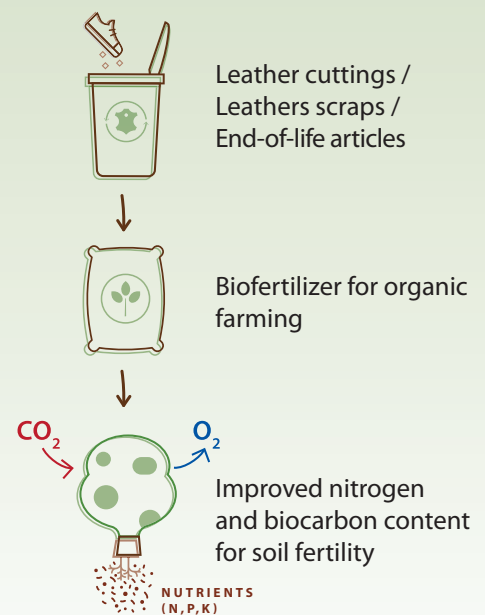
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ECO2L is a programme that has been running since 2012 to help leather manufacturers become more energy-efficient. Now, tanners can use it to calculate their product carbon footprint as well.

Credit: Alliance France Cuir

Open to the world

Extensive work went into calculating the Green Deal Leather average figure. The production analysis covered 10.2 million square-metres of finished leather, with the ECO2L tool recording the data, independent auditors checking the figures and a peer-review process counter-checking their plausibility.

The ECO2L tool has gone into active service in tanneries all over the world and the VDL managing director wants more

He believes this has had lasting repercussions. Events lasting several days with the circular economy as their theme take place in a number of countries around the world now. Leather never features. When the organisers contemplate case studies and forward-thinking in the circular economy, the leather industry does not cross their minds. There can be no doubt that the leather industry is an ongoing source of strong stories and the excellent examples; we know because *World Leather* has published a dedicated section on leather and the circular economy since the start of 2020. The total number of articles that have appeared in this section so far is 148 and we know that there are many more to come. But, as in the scenarios from years gone by that Andreas Meyer refers to, the industry remains out of sight and out of mind for many.

“We do not have a very high profile,” the VDL managing director says again. “I think those old attitudes towards tanneries are part of the reason why. We have made the ECO2L tool available because we want to show people how good we are. But it’s like in the 100-metres sprint final at the Olympics. You cannot just talk about it. You have to run the race and show what you can do. And another part of this is that we want tanners to see for themselves how well they are doing with regard to environmental responsibility.”

A fair comparison

His insistence is that, until now, making a fair comparison between the different impact of different types of leather has been difficult because of the number of ways that exist to produce the material.

“You have to look at the whole process,” he continues. “If you compare chrome tanning to tanning with plant-based products, for example, you might initially see an improvement with the plant-based system, but then realise that when you include the impact of finishing and cleaning you are not saving overall. It’s not just about one chemical versus another. And if you want to dehair hides, you need to use chemicals. If you choose not to and decide to produce hair-on hides, you will consume more energy. And if you decide to recover waste material and do something with it, this also will mean using more energy. It’s complex. This is why you have to look at the whole system.”

leather manufacturing companies to take up the invitation, too. There is a process to follow and work to do before tanners can tap into the benefits the tool can deliver. They will need to request and fund an onsite ECO2L audit. There are guidelines and a downloadable preparation mechanism to help make sure the audit goes smoothly. The resulting data will go into the ECO2L tool to deliver product carbon footprint figures for the product mix of the audited tannery. The organisation that carries out a peer review to make sure the results are plausible is research and testing organisation FILK Freiberg Institute.

As well as the carbon footprint data, audited tanneries also receive ECO2L certification, which they can use as part of their promotional efforts for three years. “Participants do not have to be members of VDL,” Mr Meyer makes clear. “We are open to the whole world.” 



The Green Deal Leather average gives leather a similar carbon footprint to that of many synthetic alternatives. But when you factor in durability and longevity, leather wins hands down.

Credit: Alliance France Cuir



A Gucci Dionysus handbag in exotic leather on sale in Shanghai in 2023.

Credit: Shutterstock/Robert Way

Angry reaction from Kering to greenwashing claim



RENEWABLE



LONG-LASTING



SUSTAINABLE

Luxury group Kering says it has no intention of ending its use of exotic leather and has insisted that the practice is in keeping with its wide-ranging sustainability commitments.

At its annual general meeting in Paris in April, a representative of a prominent animal rights organisation took the microphone and accused the group of hypocrisy owing to alleged poor practice at a supplier of exotic skins in Thailand. He claimed that in spite of previous “grand declarations” Kering has made with regard to animal wellbeing, nothing had changed.

In an animated and forthright response, chief executive, François-Henri Pinault, said he was not prepared to listen to any accusation of greenwashing. Mr Pinault insisted that, in terms of sustainable development, Kering has high standards and is determined to keep making progress in all areas, including in animal welfare.

He said the group would investigate the particular claims around the supplier in Thailand and that, if they were true, it would take action. He added that the group was willing to carry on its dialogue with campaign groups, but he made it clear that this changed nothing about Kering’s determination to continue to use responsibly sourced exotic leather.

A question about animal welfare in the Kering supply chain prompted a sharp response from the group at its annual general meeting this spring.

Turbulent times

Mr Pinault’s extolling of exotics comes at a turbulent time for the group. He describes 2023 as having been “a particularly difficult year”. Kering’s 2023 revenues fell by 4% year on year to reach €19.6 billion. “From the middle of the year onwards,” the chief executive says, “we began to encounter a deterioration in the macro-economic situation in our main markets, particularly in China and the US. This happened at the same time as a number of our brands, especially Gucci, are in a process of significant evolution of their operating models. This combination of factors led to a disappointing performance last year.”

With the most recent official figures showing a decline of 11% in the group’s sales revenues for the first quarter of 2024, which fell to €4.5 billion, Mr Pinault says he knows

shareholders have felt “disappointed and frustrated”. He adds that the group’s leadership team feels equally disappointed and frustrated, and no one more than he is himself. He insists that the group has plans in place to bring about improvement and that sustainable sourcing and responsible production are integral to that.

Sustainability at the heart

The group’s chief sustainability officer, Marie-Claire Daveu, says she can point to a large number of projects that the group is engaged in that prove its commitment to sustainability is central to its strategy. In spite of wars and economic uncertainties, she says the group is determined to stay on track to bring about a transformation that began in 2005, inspired by the vision of François-Henri Pinault. “He put sustainable development at the heart of what we do,” she says, “in response to the expectations of consumers and of campaign groups.”

Achievements in 2023 included the announcement of a new target. It now aims to reduce its greenhouse gas emissions by 40%, giving itself until 2035 to meet this, with its figures for 2021 as the baseline.

Its sustainability performance in 2023 earned it rare praise from the Carbon Disclosure Project (CDP), a specialist non-profit that has been working since the start of the century to help organisations of all kinds build strategies for reducing carbon emissions. Last year, more than 20,000 companies received a CDP score for the way they manage their environmental impact. Of these, only ten received a ‘triple A’ rating; Kering was a member of that select group.

Biodiversity pledges

Ms Daveu highlights progress on biodiversity, too, with the publication of a second edition of a specific strategy document with the title ‘Bending the Curve on Biodiversity Loss’. References here to exotic leather include an obligation on the part of suppliers to know, and to be willing to share, where skins come from. By next year, the requirement will extend to full traceability up to the farm, with those farms, in turn, having to maintain “the best ecological and animal welfare standards”. The group has also pledged to support regenerative farming projects that will protect 1 million hectares of “irreplaceable habitat” outside its direct supply chain by 2025.

Many in the industry have heard Marie-Claire Daveu speak at various exhibitions and conferences about these initiatives and her passion for them always comes across clearly. Seldom, though, has she sounded as passionate about them as she did at the Paris meeting in April when Mr Pinault asked her to add to his initial response to the campaign group’s intervention.

Questioner questioned

The criticism centred on a supplier of, specifically, python skins that works with one of the tanneries that Kering owns, a Tuscany-based manufacturer of exotic leather. The Tuscan facility is one of two in the group that is dedicated to making this type of material. The allegation was that the supplier in Asia was keeping snakes in poor conditions. The source of this information was an investigation that the campaign group said it had carried out itself. “In spite of Kering’s grand declarations about animal welfare, nothing has changed,” the questioner claimed.

François-Henri Pinault stopped him in his tracks and said he was not prepared to listen any accusation of greenwashing.



Sustainability director, Marie-Claire Daveu, says the programmes Kering has in place include animal-welfare audits and strict controls over the skins that go into its exotic leather.

Credit: Sustainable Leather Forum

Mr Pinault repeated that, in terms of sustainable development, Kering has high standards and is determined to keep making progress in all areas, including in animal welfare.

Close up and personal

Sustainability director, Marie-Claire Daveu, seems to have felt frustrated and disappointed that the campaign group used Kering’s annual general meeting to call into question the group’s (and, particularly, her) responsible sourcing efforts. Prominent animal rights organisations have, in the recent past, presented Kering with awards for ending its use of fur. This began at Gucci in 2017 and expanded to other Kering brands soon afterwards.

“We want to change the way things have worked traditionally,” Ms Daveu says. “This applies to animal welfare in the same way as it does to environmental and social considerations. Everyone has access to what we are trying to do because we have made it all open-source.”

Specific to exotic leather, she describes Kering’s approach as proactive and pragmatic at the same time. “We have different arrangements for the different exotic skins we source,” she continues. “They are all CITES-certified, meaning that no species that could be considered vulnerable is involved, and we have whole systems in place to make sure all the certification is up to date and genuine. And the audits we carry out include animal-welfare audits. We are not naïve about this.”

She says that, in the context of the requirement to have full traceability up to the farm level in place by 2025, Kering’s exotic leather supply chain was 97% compliant with this by the end of 2023. “I take this question of animal welfare seriously, at a personal level,” she says. “I have sat down with representatives of the campaign groups and explained all of this in person. And, yes, I know it is a long road. But no one can say that I do not believe in this or that I am anything other than deeply convinced of how important it is.” 🌱



The guidelines will help companies across the global leather industry respond to brands' and consumers' requests for transparency about leather's environmental impact.

Credit: WTP

"This will help the leather industry become more transparent."

IVAN KRÁL, UNIDO



Something for everyone



RENEWABLE



WASTE-FREE



LONG-LASTING



REPAIRABLE



SUSTAINABLE

The United Nations Industrial Development Organisation (UNIDO) is forging ahead with work on new guidelines for assessing the environmental footprint of leather. UNIDO's project manager for leather, Ivan Král, unveiled the idea at this year's first edition of Lineapelle in Milan in February. He will offer a formal presentation of the definitive guidelines at 2024's second edition of Lineapelle in September. "We want to create principles for carrying out environmental assessments," he says, "and we want the guidelines to be something that all companies can use in their calculations."

His argument is that there have already been too many false comparisons because studies such as lifecycle assessments (LCAs) have not covered the same aspects of production or of the upstream supply chain in the same way.

UNIDO is making use of, but reviewing, earlier work on this. The main sources it will look at include the final version of the product environmental footprint category rules (PEFCR) for leather that the European Commission approved in April 2018. A formal review of previous methodologies and recommendations for harmonisation that Federico Brugnoli published in 2012 will also be part of this, as will documentation on standards such as EN 16887.

UNIDO will publish guidelines on calculating the carbon footprint of leather that companies in all parts of the industry will be able to use.

Other dimensions

The guidelines that UNIDO will create from this and share in September will be science-based. Soon after Lineapelle, the report will go for peer review and publication. Mr Král says he does not want a carbon dioxide-equivalent per square-metre figure to be all that companies and consumers take away from this new initiative. He would like other dimensions, including the effect of durability on the carbon footprint of a long-lasting product to be an important component of the picture, too.

Other factors UNIDO wants to take into account include separate considerations for the methane and the CO₂ carbon cycles, and also the extra impact on the environment of failing



to put to good use the millions of available hides that go to waste every year. “We should use this natural material,” Mr Král says. “To use it would be much more responsible than throwing hides away and then have to produce other materials from synthetic fibres.”

The organisation is working closely with specialist consultancy Spin 360, of which Federico Brugnoli is the founder and chief executive, to create the guidelines, tapping into the Milan-based company’s expertise to make its analysis as comprehensive as possible. Through Spin 360, UNIDO has also been able to engage “a select group of global stakeholders” in discussions about the best ways to calculate the carbon footprint of leather. All of this insight is going into the guidelines and into what UNIDO hopes will become standardised methodologies that companies across the global leather industries will be able to use.

Friends and partners

To extend as widely as it can the network of friends and partners that will help it in this effort, UNIDO has also issued a call for expressions of interest in taking part in an official technical advisory group. Members of the technical advisory group can be people from academia and research institutions, public authorities, United Nations organisations, non-government organisations, the meat industry and trade associations. They can also be from producers and users of leather, and representatives of leather chemicals and leather technology companies.

Members of the technical advisory group will need to have some knowledge of the leather industry and leather-related environmental matters, as well as knowledge and

experience of LCA methodologies and good technical knowledge of the relevant standards. They will also need to be able to work in English.

“We at UNIDO are acting as an honest broker in this,” Ivan Král says, “trying to co-ordinate the work, to prepare the scientific paper we will publish and have it peer-reviewed. There is a lot to the process and it is not easy.” No remuneration is available for taking part in the technical advisory group and most of the work will take place during the summer, but UNIDO has said members will benefit from being part of the peer review process, participating in meetings, networking with like-minded professionals and keeping up to date with the latest trends and innovations.

Double benefit

Harmonisation, Ivan Král insists, will benefit the leather sector in two important ways. “It will help the leather industry become more transparent,” he says, “and we all know this is important because we know how concerned consumers are about the environment. But it is also good to do this because it will help the leather industry improve.”

He confirms that the new guidelines will help companies in all parts of the world and will show them what aspects of their work they can focus on to bring their carbon footprint down. He is confident this will help convince consumers that leather is a good choice and encourage them to demand and support the use of the renewable materials so that the volume of these materials that is going to waste at the moment declines. “I have heard that 35% of the hides that are available worldwide to be made into leather is going to waste,” he points out. “And I know that is a conservative estimate.”

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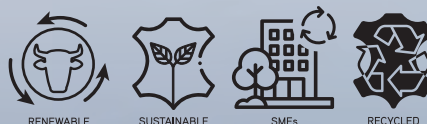
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Specialist tannery waste processor SICIT is to build a new factory in the heart of Mexico's main tanning industry area, León, Guanajuato. It will seek to replicate in Mexico its operations in Italy. Its facility in Chiampo takes delivery of trimmings and shavings from nearby tanneries and uses them to produce biostimulants for use in agriculture.

SICIT has said it will aim to process 20,000 tonnes of tannery waste per year at the new plant in León. Chief executive, Massimo Neresini, has said the new factory will be very similar to the one the group runs in northern Italy with, perhaps, a few modifications. The aim is to have the new Mexican facility operating in the final months of 2024 or in the first few months of 2025.

Agricultural yields

Mr Neresini is quick to make a clear distinction between the biostimulants that SICIT produces and fertilisers. It uses animal-derived collagen, sourced from tannery waste, to produce the hydrolysed proteins that function as biostimulants that help farmers increase agricultural yields. “Our products are food supplements,” the chief executive continues. “I think it’s important to underline how important this is.”

He argues that what the group produces meets an important demand in the market, and that this should be obvious to anyone who has stepped into a pharmacy recently. “Twenty years ago, when you went into a

A company that specialises in producing biostimulants from tannery waste is setting up an operation in Mexico to replicate what it has done for years in Italy.

pharmacy, what you saw was pharmaceutical products,” he explains, “with perhaps one or two bottles of vitamin C tablets. Now when you go in, practically the only things on show are food supplements.”

For several years now, some of the biostimulants the group makes derive from plant sources and its expansion projects in Latin America also include a new plant in Chilean Patagonia that uses seaweed as the raw material. Its proprietary technology can transform these residues, too, into high added-value, environmentally safe products. Other product streams include biofuel and retardant materials for the construction industry. However, Mr Neresini takes particular pride in describing SICIT as the world’s largest producer of animal-derived biostimulants. It is in this that the company has its roots.





Syngenta is one of a number of large crop science companies that are using biostimulants from SICIT in their products.

Credit: Syngenta

Added value

From its launch in 1960, SICIT's intention was always to extract value from waste from the tanneries in and around Arzignano and Chiampo. Its initial focus was on recovering chrome from discarded trimmings and shavings to sell back to leather manufacturers for reuse. This proved less successful than Dr Giuliano Guardini, the company's founder, hoped and he soon turned his attention to extracting protein by means of hydrolysis from the same waste material instead.

Over time, the leather manufacturing community in this part of Italy has increased its appreciation of the value that SICIT brings to the conversation around leather and the circular economy. So much so that, in the early 1990s, prominent tanning industry figure Rino Mastrotto took ownership of SICIT through a company he had already set up, Intesa. SICIT has undergone further restructuring since then and went public in 2021; Rino Mastrotto is still its president.

He remembers starting to pay close attention to what the group was doing in the mid-to-late 1980s. "We had this problem with trimmings and fleshings," he explains, "and we had not been able to resolve it. Tanneries were full of it. It was clearly something we needed to work on."

As the need to find a way of managing this waste grew, Mr Mastrotto says it dawned on him that better links between SICIT and the local tanneries could be the key to resolving the issue. Because he already had Intesa in place, he decided to use it as an instrument for taking ownership of the problem

and of the solution. This was at a time when SICIT was not enjoying much success as a business, in spite of the enthusiasm of the management team it had in place. "I'm not sure I thought about it all in too much detail," Mr Mastrotto says now, "but I have always been a bit of an adventurer." He adds right away that a whole group of tanning industry leaders in and around Arzignano supported the idea. Together they found a way to take it forward, he says.

People at the core

"There were fears at the time that SICIT would not be able to stay open," he continues, "but we bought it and the adventure began. And we found right away that there was a real strength within SICIT thanks to the people who worked there. There were people who knew how to move forward and they advised us what to do. That gave us confidence and I must say I become emotional when I look now and see what SICIT has become."

The group is achieving commercial success and expanding. It now counts among its customers some of the biggest crop science businesses in the world, including Syngenta, BASF, Bayer and others. "These are enormous companies," Massimo Neresini says, "and the quality of product that they demand from us is huge." These global players would not be working with SICIT if its strategy were just to collect tanning waste, mix it up a bit and throw it on the ground, the chief executive insists. They are on board because they view this supplier as a serious player, one that is committed to research and development and uses its knowledge to extract collagen and refine it, to produce free amino acids and products that remove pollutants and micropollutants.

A source of learning

The group president, Rino Mastrotto, says it makes him happy to see SICIT continue to move forward and record success. In late 2022, it was one of the winners of a sustainable enterprise award set up by the Vatican.

Mr Mastrotto, one of the most experienced leather manufacturers in the global industry, says SICIT and its core activity of taking fleshings, trimmings and shavings that tanneries cannot use and turning them into in-demand, value-added products that are helping to feed the world have been great sources of learning for him. "SICIT has taught me so much," he says. "It has taught me to think about just how natural a product leather is. It has helped me realise that leather is the most natural product on earth." 🌱



Left: SICIT chief executive, Massimo Neresini.

Credit: SICIT



Right: Leather manufacturer Rino Mastrotto says he has learned a lot from his involvement as president of SICIT.

Credit: Rino Mastrotto Group

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The finer details



“Born from an intuition to recover waste” is how the daughter of Luciano Vivolo, founder of leather trims and patches company Vivolo, describes the Bologna-based company. In the 1970s, Mr Vivolo and his wife Marianna saw an opportunity to transform leftover leather from local bag and shoemakers into elbow patches, considered a fashion item at the time. The company supplied to local companies but a shrewd decision to send samples to newspaper *Corriere della Sera* in 1980 proved a turning point for the family run firm: a week later, an order was placed for 2 million patches. Leather elbow patches became jeans patches, and the business grew, adding leather trims and accessories for the fashion market. In 2000, the couple's children joined them in the management team, allowing them to focus on export markets, and by 2010, the company was selling in 42 countries and counted some of the biggest fashion brands among its clients.

The opening of a newly built headquarters in San Lazzaro di Savena last year marked another turning point for the company. The sustainability strategy is built into the fabric of the 10,000 square-metre facility, with floor-to-ceiling windows surrounded by beech trees, giving a feeling of being at one with the environment. High-performance thermal systems minimise energy loss and large green courtyard areas absorb carbon dioxide. Underground cisterns collect rainwater for reuse in production and last year the

Leather trims manufacturer Vivolo produces 8 million articles per year from a state-of-the-art facility in Bologna. It has recently invested €1 million in its leathersgoods and footwear department to enable it to expand its offering.

photovoltaic panels on the roof contributed 110,000 kWh towards the company's energy needs.

The building houses more than 100 machines, enabling the 150 workers to produce eight million items per year, and the facility includes a laundry department that can create vintage looks through various washes and dye techniques. As well as its core business of jeans labels and patches, it manufactures straps, covered buttons, zip pulls for shoes, key rings, purses, wallets and handles for customers including Hermès, Versace, Valentino, Loewe and Armani. The company has recently invested almost €1 million to expand its leathersgoods and footwear workspace by 200

The headquarters have been designed to include features that help reduce energy consumption, and include an outside space filled with trees and plants.

All credits: Vivolo





The Vivolo family – first and second generations now run the company.

“Working with tanneries on an exclusive basis allows us to propose unique solutions to our customers.”

LUCIANA VIVOLO

square-metres, with extra machinery and more staff to offer semi-finished shoes and bags.

“At the core of our business is environmental ethics, it is a vision that encompasses all stages of processing,” Luciana Vivolo, chief product officer at Vivolo, tells *World Leather*. “Customers really appreciate that. There is an expression that best defines us and which we recently chose for our new logo: Beyond the Product.”

Material gains

These environmental ethics are reinforced by its choice of leather. Vivolo works with an exclusive network of Italian tanneries. “This allows us to source raw materials that are guaranteed and excellent, as well as enabling us to study new and exclusive processing techniques, which allow us to propose unique solutions to our customers,” explains Ms Vivolo. “The market has always recognised our quality and our ability to be very flexible.”

Articles are available in full grain, suede and exotic leathers, as well as fabric options such as banana and pineapple-derived materials. For its denim clients, which include 7 For All Mankind and Citizens of Humanity, the priority is to create labels and details that enhance brand identity, says Ms Vivolo. She noted this year’s most popular materials include nubuck and crust leather, as well as leathers with different textures that allow for embroidery, metal adornments and customisation. “We expect an increasingly customised direction in this sector, with the consumer at the centre of a shopping experience and where choosing a denim garment, from the fabric to the details, is an expression of identity.”

The latest collection, for spring-summer 2025, includes variations on its hot-printed or digitally printed leather labels for denim and trousers, lace finials and 3D printing, recycled and natural materials. Recycled leather is another option, however, this is aimed at smaller collections, says Ms Vivolo. “We create projects with very small production runs, limited editions that tell a story and have specific purposes in terms of both target and message. They are not productions aimed at the mass market, where the quantities and quality standards do not allow us to work with waste materials,

which have a very high intrinsic value, but cannot ensure a consistent output,” she explains.

The company is keen to promote leather’s circular qualities and that tanneries use a waste product from the food industry. The message is reinforced through a project with local schools, where the children learn about giving new life to waste materials, “raising awareness of reuse and recycling among the new generations”. The family also sponsors a competition at art school Accademia di Belle Arti di Bologna, the Luciano Vivolo Prize, which is now in its second season. Students are invited into the company to learn about the business and then challenged to design patches, labels, buckles and pullers. “We believe in the next generation of designers.”

Brand customers are also invited to the facility to find inspiration in its showroom and archives, which contain 20,000 samples and 200,000 square-metres of leather. “When customers visit our company, we try to give them an experience that is out of the ordinary,” says Ms Vivolo. “We are a company with a strong ecological identity, combining know-how with technological innovations, always remembering that we are born from Luciano’s magical intuition to recover waste materials.”



Vivolo’s tannery network allows for close collaboration on processing techniques and colours.



The US Federal Trade Commission has moved to block Tapestry's acquisition of Capri, saying it would stifle competition and harm American consumers. Both luxury groups contest the FTC's "unrealistic view" of the market, but it does raise questions about how suppliers will be affected if they become a 'stronghold'.

Tapestry's takeover turmoil

Between them, luxury groups Capri and Tapestry make up a substantial part of the 'accessible luxury' sector and the announcement last summer that they would be merging in an \$8.5 billion deal was not a big surprise to the market. Coach bought footwear brand Stuart Weitzman in 2015 and accessories maker Kate Spade in 2017, rebranding to Tapestry to demarcate it as a group. A similar story at Michael Kors, which bought Jimmy Choo in 2017, then rebranded as Capri in 2019 after buying Versace. Tapestry chief executive Joanne Crevoiserat said of the deal: "The combination creates a new, powerful, global luxury house, unlocking a unique opportunity to drive enhanced value for our consumers, employees, communities and shareholders around the world."

The combined group would represent \$12 billion in annual sales, employing 33,000 worldwide. Their brands offer some similar products, from clothing to sunglasses, but it is in the mid-range handbag sector where there is the most crossover. And it is exactly this crossover that the US Federal Trade Commission (FTC) has an issue with.

This April, the FTC filed a lawsuit in a US federal court to block the proposed acquisition. If allowed, it said, the deal would give Tapestry a dominant share of the "accessible luxury" handbag market and eliminate the brands' competition on price, innovation, design and marketing, affecting American consumers. "With the goal to become a serial acquirer, Tapestry seeks to acquire Capri to further entrench its stronghold in the fashion industry," said Henry Liu, director of the FTC's Bureau of Competition. "This deal threatens to deprive consumers of the competition for affordable handbags, while hourly workers stand to lose the benefits of higher wages and more favourable workplace conditions."

Unsurprisingly, Tapestry and Capri do not agree. Far from stifling competition, the pairing will expand their reach and diversification, they said. More significantly, they accuse the FTC of having "an unrealistic view of the marketplace" and "ignoring the commercial realities of the industry". "Even a quick department-store visit or online search shatters the image of such a narrow and artificial market," said the groups' lawyers, naming longstanding competitors such as Burberry, Gucci, Louis Vuitton and Tory Burch alongside multiple new brands, making up at least 150 competing in the same space. "A

handbag purchase is far more emotional, multifaceted and discretionary than the FTC's theory can tolerate. There is no definable captive consumer of fashion handbags who cannot readily switch from brand to brand, across price ranges. The FTC's worldview comes from its experience litigating business tie-ups involving critical healthcare infrastructure, essential manufacturing inputs, or ubiquitous digital platforms, but those industries are far from this world of fashion."

Sector specific

The groups also argued that it is wrong to class "accessible luxury" as a specific sector, as it was a term coined by Tapestry's marketing teams several years to denote well-made products that were less expensive than ultra-high-end brands, but was never meant to define a sector in its own right. This was a key sticking point, with multiple pages addressing this in a filing. "The FTC failed to articulate how the subjective marketing term 'accessible luxury' could possibly describe a 'distinct' product market for antitrust purposes...are materials the determinate or is price? Or is it the location of manufacturing? Perhaps it is all three, but in what measure? The complaint is unclear." Despite this assertion, the federal judge overseeing the case, Judge Jennifer Rochon in Manhattan, in May rejected the groups' point, saying the FTC had provided enough information about the market in which they compete.

The groups also point out antitrust enforcers in China, Japan and Korea reviewed the merger and found no problem. The European Commission investigated competitors and customers and concluded the handbag industry is "constantly evolving and characterised by low barriers to entry and frequent entry of new players".

The FTC's assertion that the merger could affect workers was also denied, saying, "The FTC makes no effort to identify a relevant market of labourers that will be adversely affected by the merger, let alone show that Tapestry and Capri combined will have an undue concentration of any such market". The groups do, however, admit the deal "will unlock opportunity for significant cost synergies of over \$200 million within three years of closing" and it is commonplace for some job losses when companies combine similar roles. What else could these cost synergies mean? *Fortune* magazine quoted Coach CEO Todd



Last year, Tapestry launched Coachtopia, a sub brand that uses waste materials and leather scraps for shoes and small leathersgoods. Josh Silverstein, head of Coachtopia, called the brand “an agile start-up” and “discovery lab” that offers a “more open-source approach to creativity”.

CREDIT: COACHTOPIA / KYRRE KRISTOFFERSEN





The Jimmy Choo brand was launched in 1996 by the eponymous designer and his niece, Sandra Choi, who remains the company's creative director.

CREDIT: JIMMY CHOO

Kahn as saying, "We want to have the power of a \$12 billion enterprise when we're procuring everything from toilet paper for our stores to negotiating leather supplies." Could this be bad news for its tanners? Possibly moving to fewer suppliers, or pushing down the prices the combined group pays?

Flat sales

For the 12 months ending March 30, 2024, Capri reported full-year revenues of just under \$5.2 billion, around 8% lower than the previous financial year. Michael Kors contributed the majority – \$3.5 billion – towards the total, falling by 9.2% year on year. Its revival has been cited as one of the main reasons for the deal – its "star has fallen", Capri admits. Handbag sales have been in decline for a decade, with annual revenues down 38% since 2015. It is hoped Tapestry's digital capabilities and international footprint will help reinvigorate consumer perception and drive sales. Revenues at Versace reached just over \$1 billion, falling by 6.9%. At Jimmy Choo, total revenues for the year reached \$618 million, down by 2.4%. Capri CEO John Idol said the results were disappointing, but that the performance was impacted by softening demand globally for fashion luxury goods.

Tapestry's full year 2024 revenues have not yet been published, but third quarter sales of \$1.48 billion were down on the \$1.51 billion in the prior year period. Despite the dip, it said

highlights in the three-month period included adding 1.2 million customers in North America and achieving international revenue growth of 3%.

In Europe it is commonplace for groups to own multiple luxury brands – Kering has more than 10 fashion companies while LVMH owns 75. Despite the rebuttals, it is unclear how more "powerful global houses" will affect suppliers. If the brands grow, orders might grow; but fewer negotiators might mean lower prices paid overall, as Mr Kahn suggested. All eyes will be on the evidentiary hearing on September 25, when the leathergoods sector will be picked apart and its contents sifted through to see whether bigger groups could profit from a "stronghold" at the expense of consumers. 🌐

Tapestry highlights leather traceability with ISA

Tapestry has made special mention of its leather traceability efforts, in particular with long-time tannery partner ISA TanTec, in its recent Corporate Responsibility report.

ISA partnered with Applied DNA Sciences (ADNAS) to complete a traceability pilot that aimed to establish a verifiable way to confirm the origin of leather used in footwear. ISA sourced traceable hides through its Greener Pastures programme and applied a tracer provided by ADNAS to achieve fully traceable leather from farm to finished goods.

Tapestry tested leather for tracers to confirm their presence and used the tagged leather in two Coach shoe styles, which were re-tested and verified. The results of the pilot are being reviewed for implementation in other supply chains.

Leather makes up more than 50% of its raw materials by weight and was a key focus area in the group's strategy to reduce environmental impact. In 2023, 97% of its leather was from Leather Working Group gold and silver-rated tanneries.

Capri commits to regenerative practices

Last summer, Capri Holdings signed a "first of its kind", three year partnership with the US-based National Fish and Wildlife Foundation (NFWF) to accelerated adoption of regenerative management and conservation practices in the US.

Expected to generate a \$3 million "on-the-ground" conservation impact, Capri will fund the project with matching contributions through NFWF with the aim of improving 150,000 acres of US grasslands to drive a more sustainable future for the leather industry through advanced regenerative agriculture practices, restoring the health of critical grazing lands in the Northern Great Plains, Southern Great Plains and Rocky Mountain Rangelands.

Capri CEO John Idol, said: "We are proud to partner with NFWF to accelerate regenerative agriculture practices, improve biodiversity and drive positive environmental and social impacts in the leather supply chain."

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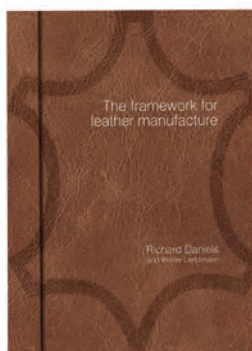
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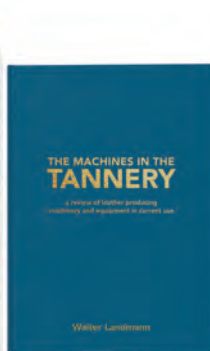
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