

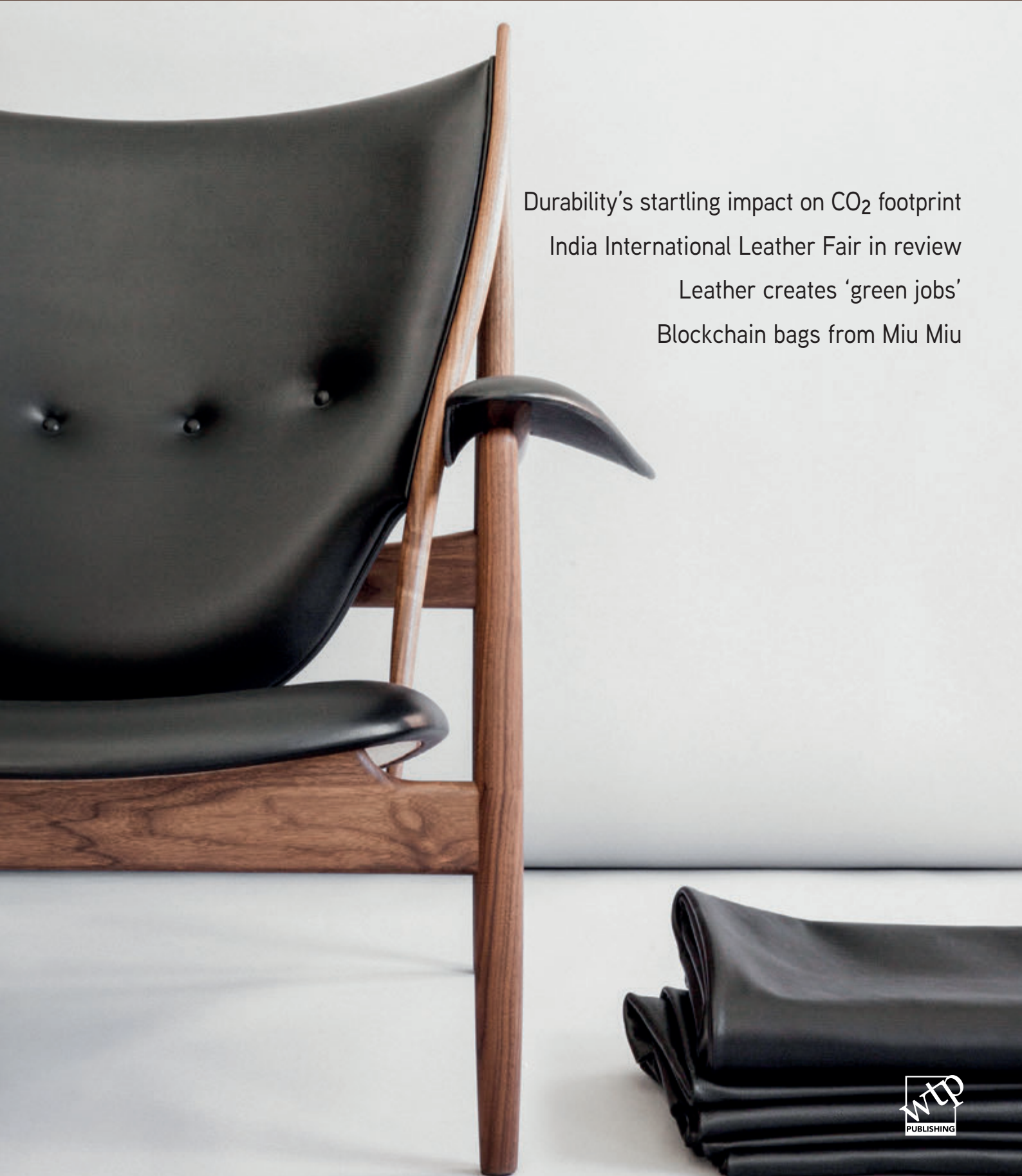
WORLD LEATHER

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

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Volume 37, Number 1



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Leather creates 'green jobs'

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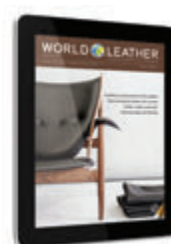


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Cover image: The Danish company Sørensen Leather has made an important breakthrough in showing, with facts and figures, what impact long life has on leather's carbon footprint. This is a Chieftain Chair, a classic style by twentieth-century Danish furniture designer Finn Juhl, covered in black leather from Sørensen's Elegance collection.

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UK Footwear brand Dr Martens has reported revenues of £662.9 million for the first nine months of its current fiscal year, the period ending December 31. This figure represents a fall of 12% year on year. Chief executive, Kenny Wilson, said weak results in the US had been an important factor. He said wholesale revenues in the US market were around half of what they had been a year earlier, with total sales there showing a fall of 31%. He added that "the weak consumer backdrop" there had made business in the US challenging for Dr Martens.

SPAIN Official figures from the Spanish government show a decline in the number of people working in footwear manufacturing there, but an increase in those working in leathergoods production. Figures from the government give a total of 40,307 people working in the leather and footwear sectors in Spain at the end of 2023, down by 2% year on year. There were falls of around 6% in the major footwear production areas but increases in towns and cities where leathergoods manufacture is an important source of employment.

FINLAND Textiles fibres maker Spinnova has teamed up with consultancy Reijlers Finland to produce a plan for scaling up production, including designing and sizing new factories. Technology developed by Spinnova can be used to produce textile fibres from waste streams, including leather, without the use of harmful chemicals in the spinning process. In 2021, Spinnova formed a joint venture with Ecco Leather and wet blue, crust and split supplier KT Trading called Respin. Respin involves taking fibre from leather waste to spin yarn that can then be woven or knitted.

AUSTRIA Leather-focused students from a technical college in Vienna recently visited one of Austria's biggest tanneries, the Wollsdorf Leather facility in the south of the country. The school, SZU Ungargasse, offers a three-and-a-half-year leather design course as one of the options in its programme for high-school students who want to pursue a technical education. On this occasion, 47 students and five members of the teaching staff travelled to Wollsdorf to see the leather manufacturing process close up.

TURKEY Commentators in Turkey have said an ongoing drop in demand for garments made from double-face sheepskin leather has caused the closure of tanneries there. Leather manufacturers specialising in double-face have closed their doors at a number of tanning clusters in Turkey, including those at Çorlu and Gonen. Climate change, high prices and competition from textiles have been suggested as reasons for the drop in demand.

COLOMBIA Leather and footwear materials exhibition IFLS took place in Bogotá from February 6-9. Organisers of the event have said they expected to build on the results of the most recent edition of IFLS, which took place at the end of June 2023. On that occasion, more than 7,000 visitors attended and were able to see materials from 483 exhibitor companies. This time, exhibitors were showing materials that they believe will be suitable for the autumn-winter 2024-2025 fashion season.

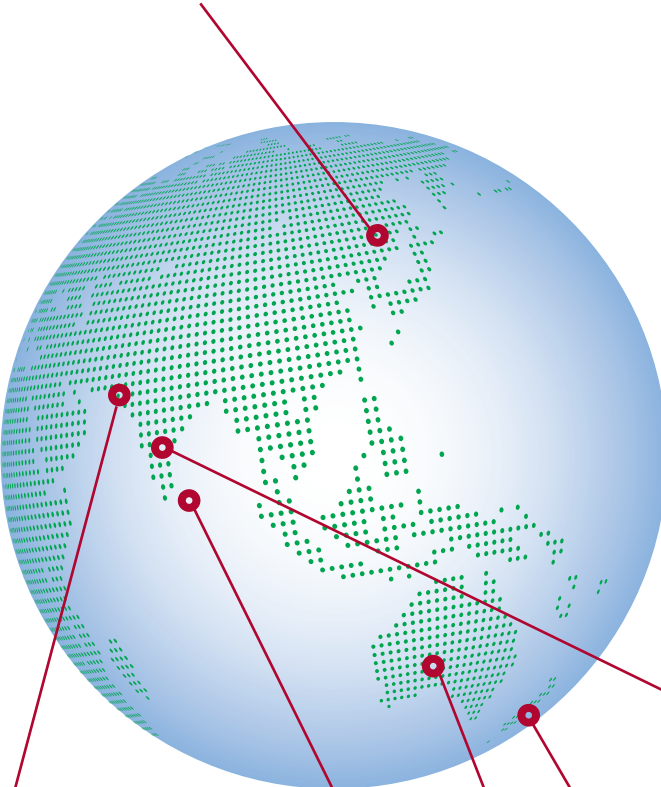
BRAZIL The leather sector earned a total of \$102.2 million in export revenues in the first month of this year, 3.1% higher than the amount for January 2023. The total area exported was 15.3 million square-metres, an increase of 5.5% from the previous year. This includes exports of wet-salted hides, semi-processed hides and finished leather. The three major importers of Brazilian exports were China, the US and Italy.

ETHIOPIA The leather industry in Ethiopia is "teetering on the brink of disaster", according to local press, as protectionism over the industrial salt market has led to rotting hides and skins. A fraction of the salt promised to tanneries was delivered in the first half of the financial year, reports have said. Terekegn Bululta, a state minister of industry, said Ethiopia has salt in abundance. But the authorities in Afar region have imposed restrictions on supply.

CHINA Year-on-year revenues for French leathergoods brand Longchamp rose by 44% over the 12 months ended December 31, the company has reported. Sales in China were up 84% after seven new stores opened during the year, taking its total number of in-country boutiques to 40. Back in 2022, chief executive Jean Cassegrain told press in Malaysia that the business' addition of categories such as footwear (in 2012) and ready-to-wear (2006) were only complementary to its leathergoods business, established in Paris in 1948.

CANADA Around 70% of Canada's western provinces are abnormally dry or in drought, according to reports, contributing to reduced cattle herds. Large swathes of each province have had 40% less rain than normal and the conditions are affecting multiple industries including farming, hydro-electricity and the ski industry. In Alberta, three years of drought have raised the cost of feeding cattle and drained dugouts that the cattle drink from. Canada's cattle inventory hit its lowest level on record last year, according to Statistics Canada.

US The Leather and Hide Council of America has published full-year figures for hide exports from the US in 2023. While the totals for the year confirm the falls that were in evidence throughout 2023, they show that tanners, packers and traders in the US still shipped 28.6 million hides to leather manufacturers overseas last year, bringing in export revenues of more than \$1.1 billion. These figures represent falls of 6.4% in volume and of 11.5% in value compared to 2022.



PAKISTAN Reports from Pakistan suggest the country's main representative body for leather manufacturers, the Pakistan Tanners' Association (PTA), has decided not to continue its co-leadership of the Pakistan Mega Leather Show. It shared organiser responsibilities for the ninth edition of the event in Lahore in January with the Pakistan Footwear Manufacturers' Association. After the event, there were unconfirmed comments from the PTA suggesting that this may have been its last time as co-organiser. Instead, it may seek to launch a new event in Karachi in 2025, the Pakistan Footwear Materials Show, with April 11-13 as the proposed dates.

SRI LANKA The ministry of industries in Sri Lanka has announced plans to establish a special zone in Valaichenai to relocate all tannery industries. The zone will cover an area of 50 acres of land that has already been allocated for this purpose. The authorities aim to make the zone operational before the end of the year. The zone will also accommodate other leather industry activities.

INDIA The 37th India International Leather Fair (IILF) closed on February 3. Event organisers India Trade Promotions Organisation (ITPO) and co-organisers, Council for Leather Exports (CLE) clarified that the 2025 event would be partly held in the new Chennai Trade Centre, which is due for completion in the next few weeks. With the new trade centre available, organisers said that the temporary 'hangars' that have made up some of the exhibition space for many years would no longer be needed. They said the older Convention Centre buildings and the new Trade Centre could accommodate more 600 exhibitors.

NEW ZEALAND The demand for sheepskin has increased due to people choosing natural products over plastic and vegan alternatives, according to *The New Zealand Herald*. One of the last remaining woolskin tanneries, Classic Sheepskins, located in Napier, which produces homewares, baby products, car seat covers, and woolly slippers said the company plans to increase production from 60,000 to 100,000 skins a year to keep up with the growing demand for its products. Kieran Callaghan, the general manager of the tannery, believes that people are starting to come back to natural products because of the growing desire for product longevity and concerns about the impact of plastic on the environment.

AUSTRALIA Figures for the first month of this year indicate a big increase in the volume of beef exports from Australia, with shipped weights of more than 75,000 tonnes. Promotions body Meat and Livestock Australia (MLA) said this was an increase of almost 50% compared to the same month last year and that this was the second-largest January figure on record, behind only January 2020. MLA said exports were up in all markets, but that shipments to North America had been particularly strong.



Silvateam-Olivenleder deal hailed as a turning point

Italy-based leather chemicals group Silvateam has acquired a majority stake in Wet-Green GmbH, developer of the patented Olivenleder technology. The Olivenleder process uses residues from the olive oil industry in leather production.

Silvateam said the new alliance would be “a new North Star” for sustainable innovation in the leather industry. It added: “This partnership sends a clear signal to the industry: the future lies in sustainable, plant-based solutions.”

It said its existing core capabilities in the production and supply of plant-based extracts for leather manufacture will make it possible to scale up the availability of the Olivenleder tanning agent. Production of wet-Green’s patented offering will now be streamlined as part of Silvateam’s wider operation.

The Italian company views Olivenleder 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.

It was very generous in its praise of Wet-Green’s work in bringing Olivenleder to market, saying: “It is a vegetable-based pre-tanning agent that, for the first time in the history of the leather industry, allows for the production of vegetable-tanned nappa-like, soft leather that is rapid to produce.”

The combined use of Ecotan and Olivenleder will enable brands to build what Silvateam called “strong green credentials”, with certification labels for both technologies, and set “new benchmarks for environmental responsibility and best practice” in the leather industry.

Director of Silvateam’s leather business unit, Antonio Battaglia, added: “This partnership is a turning point for the entire industry. We are setting new standards and demonstrating that sustainable tanning technologies are not only feasible but also the way forward. Olivenleder, added to Silvateam’s full range of wet-end products, will allow an unprecedented ability to innovate in sustainable leather technology.”

Thomas Lamparter, the head of sales at Olivenleder, shared his thoughts about the acquisition’s future in a social media video. In the video, he was seen sitting next to his son, expressing gratitude to all who contributed to the journey.

Mr Lamparter joined Olivenleder with the goal of helping the leather industry and the environment. The merger of Silvateam and Olivenleder is intended to provide complete



Stahl celebrates formal opening of China Technical Centre.

Leather chemicals group Stahl officially opened its new China Technical Centre at a ceremony at the end of January.

It said the new facility, in Foshan City in Guangdong province, would be one of its most advanced technological centres globally and said it would provide the company’s customers in China with “comprehensive technical support”.

Director of the leather business unit, Xavier Rafols, said the new centre would allow Stahl to offer more technical services to the market. He said he wanted to reaffirm the company’s commitment to the Chinese leather industry and to providing a high level of service to leather manufacturers there.

Chief executive, Maarten Heijbroek, said China was an essential part of Stahl’s growth strategy. He said the company would continue to invest in China and thanked the team that the company has in place for what he called “an outstanding performance during a period of intense transformation and diversification”.

solutions for tanneries, benefiting both the leather industry and the environment, as well as future generations.

Towards the end of the video, Mr Lamparter expressed his desire for his children to grow up in a world where sustainability is the norm.

DyTan makes exhibition debut

Leather chemicals group Trumpler chose the India International Leather Fair (IILF) as the first event to showcase leathers made using its new DyTan system.

Presenting leathers in a range of colours and utilising different base materials, the company showed leathers suitable for a wide range of applications including garment, footwear, upholstery and automotive.

The new system, launched in October 2023, is chrome-, metal- and aldehyde-free and is said to do away with traditional retanning stages as the dyeing and tanning afforded by the new system act as one.

Trumpler said the system facilitates the covalent cross-linking of collagen fibres in leather while colouring the leather at the same time.

With two systems available, for black and ‘colour-free’, the company claims that tanning and dyeing in the same stage is extendable to almost any shade.

Syn-Bios achieves ZDHC level 3

Italian leather chemicals manufacturer Syn-Bios has announced the achievement of ZDHC Level 3 - Progressive for its products, with over 490 MRSL v.3.1 Level 3 compliant formulations uploaded to ZDHC’s Gateway.

Eurofins Chem-MAP team certified Syn-Bios as a Level 3 company, following the successful completion of MRSL analysis on both finished products and raw materials against ZDHC MRSL V3.1, and an onsite chemical management audit.

Dr Giulia Fontana, technical director of Syn-Bios, said: “Being a Eurofins/Chem

Map partner, having more than 490 products certified at ZDHC level 3, emphasises our concrete commitment to being a conscious organisation in proposing tailor-made solutions to customers in order to exalt a circular and sustainable material such as leather.”

Tanning's impact is lower, Gruppo Dani confirms

Leather manufacturer Gruppo Dani has used figures from a lifecycle assessment (LCA) it has carried out to deconstruct false online claims that turning hides into leather creates more carbon emissions than letting the material go to waste.

According to the Gruppo Dani LCA, tanning a hide has an impact of around 16 kilos of CO₂-equivalent. It has said that one common method of getting rid of unwanted hides, incineration, would instead have a carbon footprint of around 18 kilos of CO₂-equivalent.

The lower-impact activity, leather manufacturing, also produces material that can be made into shoes, bags, car interiors and other objects that people need and use every day, the company said.

New set-up in Brazil for Zünd

Cutting technology provider Zünd Systemtechnik has established a new subsidiary company in Brazil, acquiring a long-standing partner company there, Porto Alegre-based BG Soluções Tecnológicas.

BG Soluções Tecnológicas was founded in 1981 by Sergio and Paulo Guerra and has been an official sales and service partner of Zünd's since 1990.

Now wholly owned by the Swiss group, the company will operate as Zünd Brasil and will move its offices to São Paulo. It will open a dedicated showroom there to allow customers to see at first-hand how Zünd's digital cutting technology works.

The new subsidiary company will have Cristiano Guerra as its chief executive and 10 employees in total. The group has said Zünd could expand further in Latin America, where it said it sees “significant market potential”.

Group chief executive, Oliver Zünd, said the new set-up would allow the technology provider to strengthen its business in Brazil and expand its customer base there.

Sfere technology in place at Mégisserie Richard

Mégisserie Richard, a company that specialises in producing leather for luxury bags, garments, and shoes, has

partnered with Qualus to use Sferes for production at its tannery in Millau, France.

The company successfully trialled Qualus' system to reduce water by 40% and chemicals by 15% in retanning at a small scale over the last year. Based on the success of the trial, the company has decided to move to production at scale. The tannery, rated as Leather Working Group (LWG) silver is targeting gold with the additional water savings.

Mégisserie Richard is the first tannery in France to adopt this technology, leading the way towards sustainability for the luxury leather sector.

Mégisserie Richard's CEO, Geoffrey Talpe, mentioned that the company is committed to achieving Net Zero and is constantly in search of innovations that will enable them to deliver this goal. He also added that Qualus' Sfere technology helps them to continue to further improve the environmental footprint of their tannery while maintaining the unique quality of their products.

Vikrant Pratap, Qualus' CEO, expressed his pride in working with such an iconic tannery and providing a technology that meets Mégisserie Richard's standards, supporting it in its drive to lead the luxury industry in not only the uniqueness of its products but also the sustainability of its operations.

Leather chemicals firms urged to embrace LCA

The National Union of Italian Tanning Auxiliary Producers (UNPAC) is working with specialist consultancy Spin360 to encourage producers of leather chemicals to carry out lifecycle assessment (LCA) studies tailored to wet-end products.

Italian leather chemical manufacturers have developed products that are part of a wider national programme called 'Made Green In Italy'. The aim of this programme is to boost the impression that qualifying products can make in the market.

Spin360 chief executive, Federico Brugnoli, attended two UNPAC workshops at the end of January to encourage member companies to engage with LCA to boost their sustainability claims further. A third workshop will take place in the near future.

Mr Brugnoli told the chemicals manufacturers that good LCA reports would help them stand out even more in the wider chemicals market, providing them with what he called “a global platform to showcase their know-how and expertise, propelling the industry towards

sustainability and innovation”.

To produce high-quality LCA studies, he impressed on them the need to use “primary data, for accurate insights”.

He provided examples of the detail that LCA exercises can yield from data that companies have already submitted as part of 'Made Green In Italy'. He also used data that leather chemicals group FGL International supplied following its own work in this area.

FGL said it was committed to dialogue and sharing, insisting this was the way to achieve growth and recognition for the whole leather chemicals supply chain.

Traceable hides

Brazilian tannery Durlicouros has delivered the first hides under its Certification of Origin and Traceability Implementation Initiative (COTI). In November, it joined three other tanners to launch the scheme, with the aim of using a QR code on each hide, proving it has not been sourced in an area at risk of deforestation.

At the time of the launch, Ivens Domingos, Durli Couros sustainability director, said: “Soon our European customers will be able to enter a code on a platform and have access to all information about the animal that generated this product.”

Science-based

Specialist consultancy Spin360 organised a series of science-based talks at Lineapelle in February, with speakers seeking to address a number of important current topics affecting the leather industry from a factual and scientific point of view. The talks were exceptionally well attended, with standing-room only at most.

Unanswered questions

With the European Commission's new rules on products with potential links to deforestation coming into force before the end of 2024, leather industry figures in Europe have said key questions remain unanswered.

At Lineapelle industry bodies UNIC and COTANCE revealed that they have formally asked the Commission for clarification on several points, but have still to receive answers.

One question focuses on whether the industry will need to provide traceability information for each individual hide, or if batch-level traceability will be enough.

Another is on the level of risk of deforestation that the Commission will apply to different countries in the leather value chain. ●



Michael Burke to lead LVMH Fashion Group

Former Louis Vuitton chairman and chief executive **Michael Burke** has succeeded **Sidney Toledano** at LVMH Fashion Group, home to high-end footwear and leathergoods brands including Loewe, Fendi, Givenchy, Celine, Kenzo, Marc Jacobs, Emilio Pucci and Patou.

Mr Burke took over on February 1, as Mr Toledano takes up the role of adviser to the luxury group's founder, chairman and chief executive, **Bernard Arnault**.

"I am a great believer in long-term vision, in craftsmanship, in creativity and in excellence," Mr Burke said. "These are all ingredients in the recipe I intend to apply with the teams at these Maisons to elevate their desirability and set new records even further."

Two measures of Micam's success

The Micam exhibition closed in Milan on February 21, with this, the ninety-seventh edition of the event hosting more than 1,000 footwear brands and welcoming more than 42,000 visitors. In the course of the show, there were also 20 free workshops for visitors to attend.

President of Italy's national footwear manufacturers' association Assocalzaturifici, **Giovanna Ceolini**, commented that high levels of innovation at an event like Micam were one of the measures of its success.

She added that the ability to attract footwear industry professionals from all parts of the world was something else that pleased her about Micam. At this edition of Micam, footwear brands were showing collections for the 2024-2025 autumn-winter season.

Leathergoods exhibition Mipel ran in parallel with Micam, with Lineapelle starting one day later (February 21) and sharing two days with the finished product events.

Assopellettieri president calls for more help

The president of Italy's national leathergoods manufacturers' association Assopellettieri, **Claudia Sequi**, has told Italy's minister for business and 'Made In Italy', Adolfo Urso, that government support for small- and medium-sized producers must increase.

Speaking at the 125th edition of the Mipel exhibition this February, Ms Sequi told the minister that Assopellettieri member companies need and deserve support to help them increase their levels of business in export markets.

She said two clear areas in which the government could give extra support were in helping companies attend exhibitions that attract good numbers of international buyers, and in supporting the exhibitions



Wolverine general manager to be acting LHCA president

The Leather and Hide Council of America (LHCA) has said **Kerry Brozyna** will become its acting president in June, taking over the role that **Stephen Sothmann** left at the end of 2023.

Mr Brozyna will join LHCA from his current role as vice-president and general manager of footwear group Wolverine Worldwide. LHCA said he would bring significant experience of brands, manufacturing and international supply chain management to the organisation. He is also currently the co-chair of the board of LHCA.

He will oversee the strategic direction of LHCA, which is the voice of 75 member companies in the US hide and leather industry. The US exports around 95% of its cattle hides. In 2023, it exported a total of 28.6 million wet-salted and wet blue hides to leather manufacturers all over the world. Total

export revenues from these shipments was more than \$1.1 billion.

LHCA also runs an industry sustainability programme that brings together partners from across the supply chain to promote best practice in manufacturing and championing the use of sustainable, high-quality leather in international markets.

It will release what it has called "the first comprehensive, independent lifecycle assessment of US cowhide production at *The Economist* Sustainability Summit in London in March. LHCA has said in advance of releasing the study that it is data-driven and will show a significantly smaller environmental footprint for leather than previous models have shown.

Kerry Brozyna commented: "A firm commitment is required to solutions that are as good for the planet as they are for business. We must protect and grow international markets and educate stakeholders and consumers as to why slow style is preferable to fast fashion."

He said he wanted to support the leather industry in its "rapid evolution" and to help it capitalise on the opportunity it has as "a unique industry that consumes, rather than creates, waste".

themselves. She added that events such as Mipel were an ideal stage on which to present the fruits of the Made In Italy strategy.

Ms Sequi said 200 brands had travelled to Milan to display bags, accessories, gloves, belts and other leather products, targeting the autumn-winter 2024-2025 fashion season. She pointed out that 65% of the exhibitors were Italian companies. She told the minister that these companies represent a real driving force for Made In Italy in the international business environment.

US leather manufacturer dies

The president and company owner of Milwaukee-based leather manufacturer Thiele Tanning, **Hal Thiele**, has died. US industry body the Leather and Hide Council of America (LHCA) shared the news on February 6. LHCA described Mr Thiele as "an entrepreneur, an innovator, a businessman and a passionate maker

of leather".

Mr Thiele's family has said his death was unexpected; he was 72 years old. Away from work, friends have said he was a passionate enthusiast of and instructor in the Argentine tango.

He was born in Milwaukee, where his parents, originally from Germany, had settled. They set up Thiele Tanning in 1934, with their son joining the business in the early 1970s, after university.

Thiele Tanning makes finished leather for customers around the world who produce footwear, accessories, apparel, furniture and saddlery. It sources all of its hides in the US and carries out the entire tanning process under its own roof.

Farfetch founder steps down amid layoffs

It has been reported that the CEO of Farfetch, **José Neves**, will step down from his position amidst a series of layoffs at the company.

The layoffs include the departure of the chief fashion and merchandising officer and the head of Farfetch Platform Solutions. This move comes after Farfetch was acquired by South Korean company, Coupang, for \$500 million. Mr Neves is expected to continue working with the company in a consultancy role, but his position will not be directly replaced. The interim management of the company will be led by Coupang founder, **Bom Kim**, and Farfetch's executive team.

Farfetch is planning to lay off between 25% and 30% of its workforce as Coupang works to "streamline the business".

UNIDO shares leather project success

The United Nations Industrial Development Organisation (UNIDO) has shared one of the success stories from its Leather Initiative for Sustainable Employment Creation (LISEC) project.

Funded by the European Union and China, and implemented by UNIDO, in collaboration with the Ethiopian government, the programme aims to generate job opportunities for youth in Modjo, addressing the core reasons for migration, through the development of the Ethiopian leather industry and the Modjo leather industrial park.

Abay Girma Kefene dreamt of being a skilled craftsman. However, his childhood dream was overshadowed due to family responsibilities and the financial pressures of the hustle of urban life. Hindered by the absence of university entrance results and the early commitments of starting a family, Mr Kefene persevered through numerous commission and construction roles to support his wife and six-year-old son.

Then, he discovered UNIDO's project and embraced training to become a skilled craftsman.

He said: "My city, Modjo, is known for tanneries and leather production. With ample leather availability, I want to make products for our local market. UNIDO LISEC trained me in footwear craftsmanship, providing me with the knowledge required for the whole process." Around \$5.6 million has been spent of an \$8.1 million budget. LISEC is due to end in June.

Tokyo exhibition highlights leather through photography

An exhibition showcasing the works of a photographer who was born and raised in Tatsu City, a hub for leather production, has commenced at the Fujifilm Square, a multipurpose showroom that Fujifilm opened in Tokyo Midtown in 2007 as part of its activities to promote the inherent values of photography.

The exhibition features photographs that

document the entire process of producing dairy products, from the dairy farmer to the tanner to the final product. Through these images, the exhibition aims to encourage viewers to ponder over the "importance of life" and the role of dairy products that generate profit from the skin of animals that are primarily raised for meat products.

The 'New Stories of Photographers' project is aimed at supporting young photographers and showcasing their work. As part of this project, there is a photo exhibition by **Yuichi Kamiyoshikawa**, who has been capturing the process of making cowhide products.

Mr Kamiyoshikawa became interested in the process of making cowhide wallets after photographing them, and he decided to document the process while communicating with the people involved, from livestock farmers who raise cattle to tanners in his hometown of Tatsuno City, Hyogo Prefecture.

Through careful interviews, Mr Kamiyoshikawa weaves together a story of how cowhide products are made. This photo exhibition is an opportunity to learn about the journey of these products from raw materials to finished goods.

The exhibition ran from January 19 until February 1. 





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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.

22 February 2024

'Sheep leather' shines at Zara

21 February 2024

Science-based talks prove popular at Lineapelle

Applications open for second Maestri d'Eccellenza

UK to review Chamois import duty

Lear makes 'Most Admired' list again

20 February 2024

Forvia to cut 10,000 jobs

Aston Martin recruits for growth

19 February 2024

Leather included in proposed stricter rules for waste in EU

16 February 2024

LWG and ZDHC announce chemical management collaboration

15 February 2024

Italian minister calls for immediate action to protect the leather sector

Leather Naturally to revamp APLF breakfast meeting

Loro Piana celebrates leather in Milan

14 February 2024

Ecco launches Digitalized Leathers

13 February 2024

Capri warns of slowing demand for luxury

12 February 2024

Challenging year for US beef exports
Another privatisation bid for Tod's

09 February 2024

Strong growth for Hermès in 2023

Zegna to open leathergoods and footwear factory in Italy

Leather Naturally seeks new communications lead

08 February 2024

A trying year for Kering

Belt embraces artisan craftsmanship at Vaincourt

Poor Q3 results for VF Corp

07 February 2024

New collaboration for leather and footwear traceability

Ecco pairs up with Minotaur for Japan-only golf shoe

06 February 2024

Leather's 'permanent priorities' are paramount at PV

Ugg launches Relimagined surplus collection

China's luxury spending forecast to jump by one-third in five years

05 February 2024

Beef business faces falls this year, Tyson says

Burberry shows new colours but warns of slowing demand

02 February 2024

Tour to search for LVMH talent kicks off in Paris

Tapestry highlights leather traceability with ISA

01 February 2024

Record revenues for red meat exports from Australia

Small but sophisticated bag from Loewe

Good attendance at IILF

31 January 2024

French leather sector pays tribute to farmers

CLE outlines ambitious vision for the future

JBS assistance program is helping 8,000 farms

30 January 2024

Confidence in Brazil that animal ID system can work for leather

Busy start to the year for Assomac

29 January 2024

Brazilian tanners hit the road

LHCA launches Only Natural

26 January 2024

Almost 75% of LVMH profit is from its leathergoods division

Leather carbon footprint study highlights "influencing sectors"

Adidas responds to kangaroo leather allegations

25 January 2024

Portfolio of ZDHC-certified products expands at Stahl

GSC in exhibition mode

24 January 2024

Fifth Avenue real-estate acquisition for Kering

DeMontfort University opens Legacy of Leather exhibition

23 January 2024

Au-Delà du Cuir announces 2024 intake

Lloyd Shoes eyes international growth with new ownership

22 January 2024

In praise of older leather furniture

Bentley sales drop

19 January 2024

TFL prepares for Chennai

Students enjoy sustainable tanning workshop

Syn-Bios announces partnership with Pidilite Industries



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The new chairman of Indias Council for Leather Exports, Rajendra Kumar Jalan, says the government's views of the leather industry has changed and that all parties are now pushing forward together for leather production in the country.

India: perceptions have changed

Congratulations on your reappointment as chairman of CLE. What will your priorities be for India's leather industry in the next few years?

We want to take this industry forward, and for it to be fully inclusive and transparent. I am lucky to have a good team in the CLE executive committee, but we want to have all members involved in decision-making, rather than having just 50 people make decisions about policy.

You have said India's leather and footwear industry can achieve revenues of \$47 billion by 2030, up from the current levels of around \$17.3 billion. Is this an aspirational target?

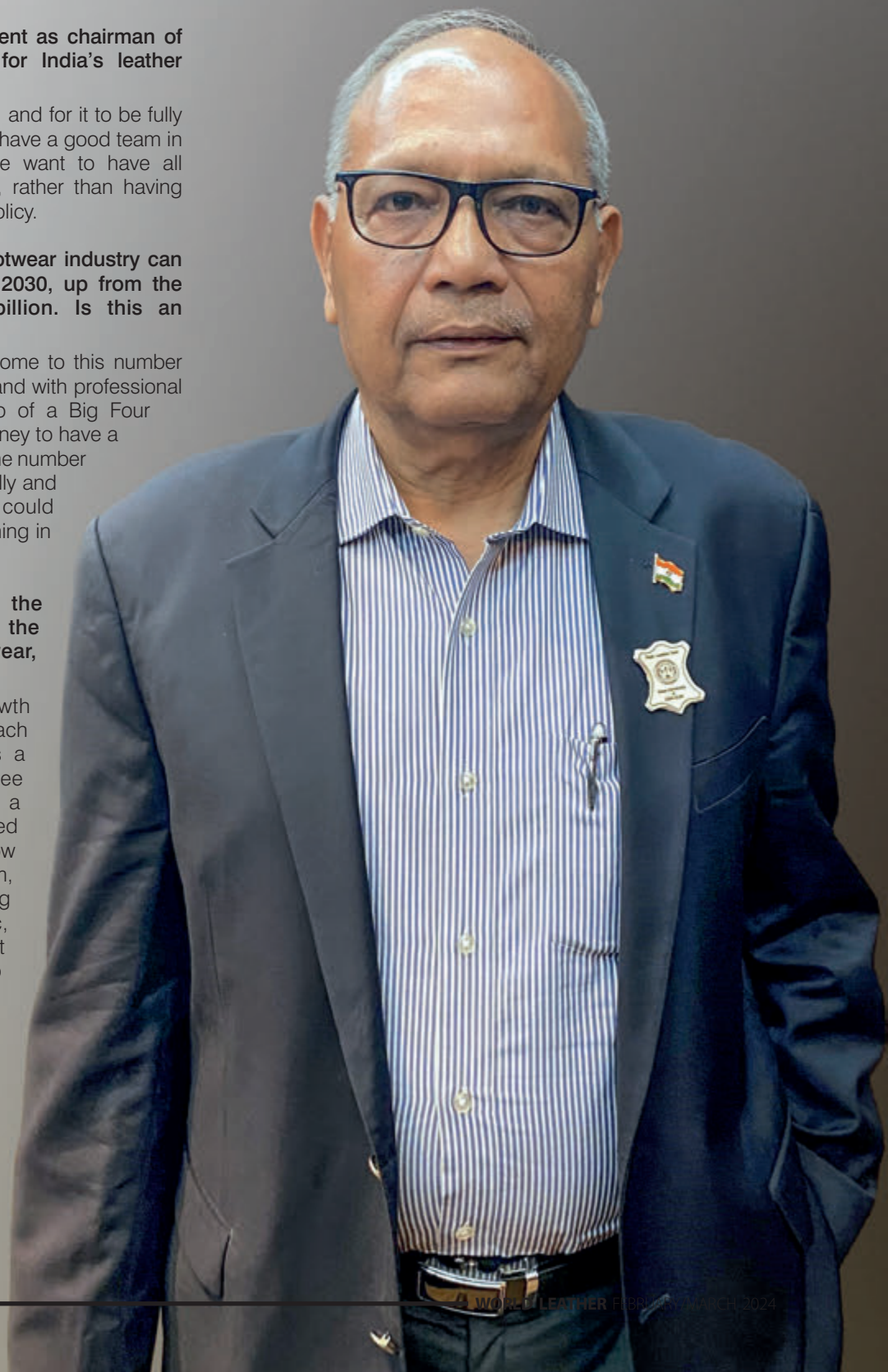
No, it is not aspirational. We have come to this number after a lot of deliberation all over India and with professional help. We got this done with the help of a Big Four consultancy company, paying good money to have a report prepared. We have not plucked the number from thin air. We came to it systematically and methodically. It is dynamic and it could change, but we wanted to have something in place, something to go by.

What is the picture in 2024 of the performance and importance of the different market segments: footwear, accessories, apparel and others?

All of these segments have growth potential. India is marching ahead. Each state has its own data and there is a competition among the states to see which is best for business. There was a time when this might have been based on reports submitted on paper, but now everything goes through the system, through the portal. Before, everything was physical. Now it's electronic, automatic. When we export we file it online and it is clear online. There is no human interface. This clarity has helped us; policies are emerging that are directly aimed at helping the leather industry.

Rajendra Kumar Jalan, re-elected as chairman of the Council for Leather Exports at the start of 2024.

ALL CREDITS: WTP



“Seeing everyone still working hard so late in the evening surprised them; it reminded them of China in the 1990s.”

How many tanneries are in operation in India now, how many people do they employ, and how does this compare with ten years ago?

We have 894 members who are registered as exporters of finished leather. That does not mean that they are the only ones who run tanneries. According to the CLRI, the number of tanneries in India is 2,000-plus, but my estimate is that around 10% of them have shut up shop following covid-19. This means we probably have 9% or 10% fewer tanneries than we did ten years ago. But we have a lot of untapped potential business. For example, we have calculated that sales of Indian finished leather in Vietnam, Indonesia and Mexico could bring in \$27 million per year. Our leather footwear has untapped business worth \$375 million per year in the US and our harness and saddlery products could achieve more than \$100 million of untapped business as far as the US is concerned. We need to identify all of these untapped markets and work on them. With the US, I have been doing very big business there for the last 50 years, but we are still looking for the best way to penetrate that market. We are still looking for the answers. Lots of businesses in India don't seem to want to cross the Atlantic.

Which are the main countries from which you are importing raw material?

For raw hides and skins, the most recent figures show an annual spend of \$3.1 million on material from Saudi Arabia, mostly sheep, and more than \$2.3 million on, mostly, cow hides from Argentina. We also spent \$1.4 million on material from New Zealand, mostly wool-on sheepskins, but some cow hides too. The figures also show a spend of \$840,000 on material from Myanmar, which surprised me. In terms of finished leather, we have values of \$37.25 million for material from Italy, \$32.5 million from Thailand, \$23.9 million from Turkey, \$21.5 million from Vietnam, \$19.9 million from Argentina, \$18.5 million from China, \$9.8 million from Egypt, \$9.6 million from Nigeria, \$8.9 million from Bangladesh and \$8.7 million from Saudi Arabia. Part of this last set of figures could refer to wet blue as well; it's not always clear from codes on the documents.

What are the main lessons about being a good CLE chairman that you learned last time around?

Experience makes you a little bit introspective and allows you to see where you have gone wrong in the past. With experience, I have learned that it is important to try to take everyone together and to involve everyone. But at the same time it is clear to me that we should not deviate from the main goal, which is to be at par with the rest of the world and to keep working to become more and more sustainable.



The Council for Leather Exports is committed to making inroads in important untapped markets for the country's leather footwear, accessories and apparel.

What recent examples of environmental progress would you point to?

Sustainable processes and sustainable use of components are key. Our Central Leather Research Institute (CLRI) has developed several new ideas and intends to commercialise them very quickly. These include making recycled chrome from wet blue shaving dust. We have been talking with contacts in Switzerland about how to use this shaving dust. They have developed a technology for this but they are not ready to part with it. What they want to do is set up a factory for us here in India.

Personally, in my factory in northern India, we hardly use any electricity. The design means we have natural draughts for cooling and natural light. The little electricity we need for use on the shop floor all comes from solar power. We are also using olive-tanned leather for some customers in Australia.

We have to move towards sustainability and do it fast. We want sustainability across the entire supply chain; not just in the end product. The entire eco-system has to be right.

Is it a concern for you that this often adds cost?

If consumers want a sustainable product they will definitely pay. In the project in which we have used olive-tanned leather, the shoes would probably have cost \$18 per pair, but with the olive-tanned leather, the price is \$22. Even



The new CLE chairman wants member companies across the whole of India to become involved in policy-making.



packaging can add cost. I have introduced FSC packaging, certified by the Forest Stewardship Council. Depending on the type of shoe and the size, this has added between 18 cents and 22 cents to the cost and we have passed that on to customers, with the customers gladly accepting it. But there is help available too. Some states in India, Uttar Pradesh for example, will subsidise environmental, social and governance (ESG) audits. This amounts to financial help to make your factory more sustainable.

What importance do you and CLE give to research and education in general, and to the work of India's Central Leather Research Institute (CSIR-CLRI) in particular?

The institutions are doing a lot of research on sustainable production, for example on how to add value to waste material. The entire team at CLE is motivated to take all these messages about new processes, new chemicals, new leathers to our member companies. We feed information from the institutions to them and feed back to the institutes what our members are asking for and this is working. If we want to become global leaders we have to spend money on research. We have hope that CLRI will receive increased funding from the government of India. All of our state governments, as well as the central government, are looking at our sector because of the fact that we are people who can create a lot of employment. You can't get that from, say, the IT industry. This is very significant for the government.

Are you satisfied with the role and status of India's leather sector within the global leather industry? If not, what would need to change for India to offer a higher level of global leadership?

No, we are not satisfied. How could we be? We want to grow. We don't mind being second, but we don't want to be a distant second. If Bangladesh and Vietnam can grow, India can definitely grow and grow at a much faster pace. In India there are no kick-backs, but the kick-backs in other countries are reducing, with big impacts on industries such as clothing and footwear. Their governments have said their industries have to be compliant with World Trade Organization rules.

Bangladesh, for example, has benefited from having 'Least Developed Country' status, giving it favourable access to key markets, but that will end in 2026. [Note: The United Nations Committee for Development Policy recommended Bangladesh's 'graduation' from Least Developed Country status in 2021, but it has allowed a preparatory period of five years rather than the expected three, due to the covid-19 pandemic]. Bangladesh has maybe had an edge on us, but that edge is going to go away.

How would you describe the relationship between the government of India and the country's leather industry at the moment?

It's also true that we have had certain issues with the government in the past but now we want to move forward with the government, move forward to the next level of production while reducing production costs. I must thank former chairman Sanjay Leeka for working very hard to win government support for including leather among the industries that can take part in a programme it introduced in 2020, the Production Linked Incentive (PLI) Scheme. It means that whatever money you invest in domestic manufacturing you can get back within five years. Leather could win PLI approval any day now and if that happens it could help us to double the entire eco-system for our industry. That's important because the biggest problem in this country is supply chain management. That's why we are a little bit behind China. The whole perception of the government has changed. For example, we used to have to approach export promotion body Invest India for help. Now they are coming to us to talk about the possibilities. Three months ago, Mr Leeka hosted a visit from partners from Taiwan and a meeting with state government officials was part of the programme. They were delayed and it was eight o'clock in the evening before they reached the government building for the meeting. The Taiwanese visitors were surprised that the lights were on and that there were around 200 cars in the car-park. Seeing everyone still working hard so late in the evening surprised them. They said it reminded them of China in the 1990s. 🌐



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Black Line milling drums: quality and uniformity

At the last Simac exhibition, Erretre presented the latest version of the Paca model from its Black Line range; it was exhibited in Milan as a concept for the innovations that the company has recently introduced in its top-of-the-range milling drums.

One of the main challenges facing tanners is combining standardisation with high quality in mass production. Many will argue that what happens in the milling drum is key to meeting those challenges despite the variability of the batches of leather to be processed. Guaranteeing a homogenous result to ensure uniformity and consistency in quality is what is required in the modern tannery and Italian manufacturer Erretre, based in Arzignano, believes it has the answer.

Its Black Line Paca concept drum was on show at the last edition of Simac in Milan. The R&D department had sharpened further its focus on the mechanics, sensors

and HMI, human machine interface, to add innovations to make leather production increasingly automated, efficient, sustainable, and traceable. The drums in the Black Line range are designed for precise and accurate control of the main variables that determine the result of the milling process: the moisture content of the leather, the relative humidity of the air, the temperature, and the mechanical movement of the hides inside the drum in relation to the load. Regardless of the starting point, advanced sensor technology provides real and reliable data that the operator can easily manage through an intuitive and user-friendly interface.



CREDIT: ERRETRE

The Black Line models: Paca and High

Drums in the range consist of two main models: Paca and High. Paca differs from the High model in its automatic unloading system. This distinction allows tanneries to choose the model best suited to their production needs while maintaining a high standard of finished product quality. In particular, the automated unloading of the Paca model allows large loads of hides to be handled, reducing the time required for milling and preventing the hides from being damaged by being stopped for too long. During unloading, the drum rotates, and the hides are gathered in a rear collector and then placed on the conveyor belt that brings them to the front of the machine. An exclusive new curved conveyor follows the shape of the drum, allowing a wide and constant space to be maintained. This avoids areas of constriction, risk of squashing and possible damage to the hide, allowing the hides to be unloaded quickly and safely and allowing the operator to transfer the hides from the conveyor belt without risking damage to the appearance of the hide.

Both models are available with Cold Milling technology, which allows delicate leathers to be treated at lower temperatures, while maintaining the correct humidity and avoiding thermal shocks that could affect their quality.

The Black Line Paca version (left) is equipped with an automatic loading and unloading system that comes with automated doors and belts. This system ensures quick handling of large volumes of leather and hides. The maximum load capacity varies according to size: 500 kg for the 2500mm size, 900 kg for the 3000mm size, and 2000kg for the 3500mm size.

The High version has a manual loading and unloading system and has watertight doors that are easy to open and close. The maximum load capacity for this system also varies according to size: 400kg / 2500mm slim size, 500kg / 2500mm full size, 700kg / 3000mm slim size, and 900kg / 3000mm full size.

CREDIT: ERRETRE

Mechanical and sensor innovations

The mechanical and design features of the sensors supplied with the drums are a key aspect of the machine design: these new sensors, correctly selected and positioned, guarantee precise and reliable readings, which are cited as a distinguishing feature of the Black Line drums, where consistent and reliable data is essential to ensure a quality finished product every time. The acquisition of humidity data has always been the most sensitive and delicate parameter in the process. For this reason, a validation system has been implemented in the drums that automatically checks the moisture reading. Keeping this value under control is essential to ensuring a product with the desired characteristics, even in the most demanding applications. Furthermore, the innovative dust collector helps to ensure the accuracy of the sensor readings by separating dust and chemical residues, resulting from the finishing process, in a safe and fully automatic way, without modifying the processing parameters such as humidity and temperature.

Greater performance, efficiency and adaptability

With claims that the Black Line outperforms conventional models in terms of performance, offering a significant reduction in milling time, this advantage is not only a question of speed, but also of energy efficiency and reduced environmental impact. The approach focuses on achieving maximum results with minimum waste, an increasingly important principle in the modern industry. The technology used automates the leather finishing process, optimising temperature and humidity and consequently energy consumption.

The leather making process is complex and consists of several stages. The ability to adapt parameters makes it possible to correct any discrepancies created in previous stages. This flexibility ensures that the final result matches initial expectations, despite variations that may have occurred in earlier stages of processing.

The ability to adjust the drum settings makes it possible to correct errors in earlier stages. In particular, if the hides exhibit non-conforming characteristics prior to milling, the drums can be adjusted to bring them back to the desired specifications. This ability to 'correct the shot' is a unique feature that increases the flexibility of the production process and ensures a high quality end product.



Ease of use and accuracy with bespoke software

The in-house developed software is said to be the real heart of Erretre's machines: increasingly precise tools that give the customer total control of the process, while simplifying its management as a result of the interfaces used. LCAS (leather crafting automation software) allows real-time graphic visualisation of the process and creation of customised recipes. With an interchangeable database, the software can communicate with the customer's management system or its manufacturing execution system (MES) to guarantee production synchronisation.

M.O.Re (milling organisational resources) was created in 2003 to improve the management of the milling department. This scheduling system optimises production planning and monitors the smooth running of the plant, providing a detailed productivity report and analysing process data.

The construction of Black Line drums is an important aspect that is often overlooked. Research on the distribution of mechanical forces has led to a design that not only ensures efficiency and precision but also greater machine durability and longevity. Erretre says this makes investing in these drums not only beneficial for immediate quality improvement but also for long-term sustainability of the equipment in the tannery. Erretre claims that the Black Line drums are a benchmark in the tanning industry due to their ability to combine advanced technology, operational precision, and sustainability. These machines are not just processing tools but also contribute significantly to the production of high-quality leathers. The latest version's unveiling at Simac underscored Erretre's commitment to being at the forefront of technological innovation and providing solutions that meet current and future needs of the tanning market. 🌐

The automated unloading system has a retractable conveyor belt that transports the hides from the drum to the operative, ensuring that leather is not damaged or compressed by stopping the drum.

CREDIT: ERRETRE

Milling – an interplay between relative humidity, temperature and moisture

Leather, being a natural material, is highly sensitive to changes in environmental conditions. Fluctuations in temperature and humidity can directly affect the moisture content of the leather, impacting its physical properties such as flexibility, softness, and strength.

In leather production, repeatability is crucial. By maintaining consistent environmental conditions inside the drum, the quality of the milling process is guaranteed. This ensures uniform results between batches, avoiding variations in softness, grain, finish, and overall quality.

Keeping the right balance of moisture is essential. Over-drying can lead to stiff and brittle leather, while over-hydration may result in a soggy and weak material. Understanding the correlations between humidity, temperature, and moisture content allows for precise control, preventing these undesirable outcomes.

Efficient control of temperature and humidity not only ensures quality but also contributes to energy efficiency in the milling process. Optimising these factors reduces the likelihood of rework due to inconsistent results and minimises waste.

Proper treatment, with the right control of relative humidity and temperature, enhances the softness and aesthetic characteristics that were developed in the previous process steps, such as tanning and retanning.

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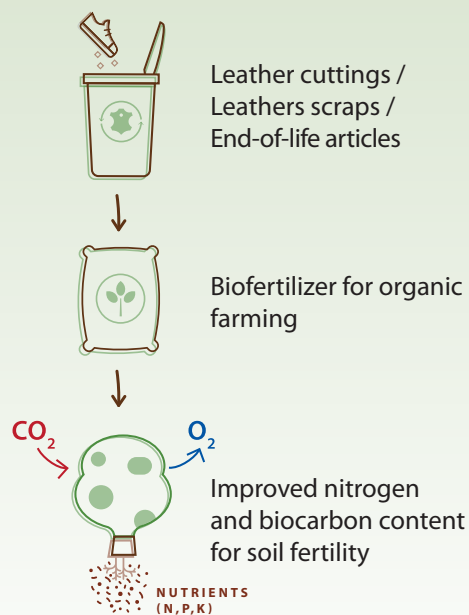
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Benefits of Mediterranean diet extend to leather

GSC Group has launched a new line of biobased tanning products based on olive mill wastewater (OMW) technology, which leverages the tanning power of olive oil vegetation water, a waste by-product from the pressing of olives. The product combines science from both the tanning and olive oil food industries and integrates two important national industrial sectors in Italy.

The Mediterranean diet has been lauded for its health benefits for many years. This diet is rich in various nutrients and minerals, and at its core, emphasises the consumption of healthy fats. Olive oil is known for its heart-healthy, unsaturated fats and its antioxidant properties. The European Union is responsible for producing approximately 67% of the world's olive oil, with Italy being the second-largest producer, yielding over 300,000 tons annually. However, not all aspects of olive oil, or more specifically its production, are healthy, particularly the waste products generated during the extraction process.

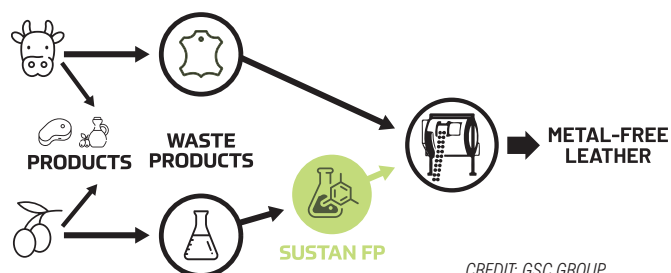
Olive oil production can involve several extraction processes, with press extraction and three-phase extraction being the most common. This results in an annual global olive mill wastewater (OMW) production of 10 to over 30 million cubic metres, depending on harvest conditions. High concentrations of organic compounds, such as organic acids, sugars, tannins, pectin, and phenolic substances, characterise OMWs. This composition makes them phytotoxic and inhibits bacterial activity. Polyphenols, including benzoic acid and hydroxycinnamic acid derivatives, are abundant in OMWs, along with considerable amounts of tyrosol and hydroxytyrosol — all aspects that make treatment challenging and costly.

Circularity personified

The OMW technology is a sustainable solution that combines natural and reusable wastewater from the olive oil

industry with specially designed polymers to produce two commercial GSC products: Sustan FP and Sustan PRE. The technology is designed to deliver consistent, efficient, and high-performance results towards the production of leather, making it suitable for various applications such as automotive, footwear, and garments. Furthermore, following independent analysis, the absolute biodegradability of leather tanned with the sustan products has been measured at 87.14%, where bovine tendon collagen (type I) measures 93.3% and glutaraldehyde tanned leather was 79.03%. These test results were in accordance with EN ISO 20136:2020 – Leather: Determination of degradability by microorganisms.

OMW raw material arrives at the company's facilities and must meet specific criteria before it can be utilised. It is essential to characterise the OMW's solids content,



CREDIT: GSC GROUP



viscosity, acidity, and tanning properties, with the polyphenolic content being particularly critical for the proper utilisation of this raw material.

Polyphenols play a crucial role in the leather tanning process by interacting with the hides via micro-interactions, and their concentration must fall within a specific range defined by GSC research and development and technicians to ensure consistent performance. After initial control, the mill wastewater undergoes concentration and stabilisation through physical and chemical processes. Finally, it is retested for polyphenolic content via titration to ensure a consistent and reproducible raw material.

The OMW technology relies on the synergy between natural polyphenolic species from the olive industry and synthetic tannins. The raw material is complex and variable, rich in polyphenolic species, such as hydroxytyrosol, tyrosol, and catechol, as well as organic acids such as gallic and caffeic acids, which contribute to the tanning effect.

The patented technology has applications in both the tanning and retanning processes. It is compatible with industry standard processes and can be used for the retanning of mineral-tanned hides such as chromium-tanned wet blue and as a retanning to wet white. It is also compatible with vegetable-tanned leather as both rely on natural components as the tanning agents. This positive synergy enables the exploitation of the technology in tanning applications that provide a higher bio-based content to the leather than standard products, primarily focusing on retanning.

Serving the future

The OMW product range is largely based on natural raw materials and has a valued contribution of bio-based carbon, when used in conjunction with designed fatliquors, resins, and synthetic tannins. The manufacturer maintains that the combination of Sustan PRE and Sustan FP is unique and brings a tannin effect to leather where Sustan FP acts like a polymer with phenolic tanning properties, while Sustan PRE is based on synthetic di-hydroxy-diphenyl-sulphone (DDS) tannin and imparts the crosslinking effect.

Waste generation results in both solid and liquid waste, including leather shavings, scraps, tanning liquor, retanning liquors, and sludge. The OMW technology provides a fully organic solution that ensures no heavy metals or harmful substances are present in the solid waste, making it possible to recover it completely via thermal treatment. While the liquid wastewater is free from heavy metals, its organic load is higher than in chromium technology, and it needs to be treated following standardised wastewater protocols.

The OMW product portfolio relies on non-hazardous chemicals, including Sustan FP and Sustan PRE, which are free from harmful chemicals. OMW chemicals are formaldehyde-free, and their residue concentration is also far below safety concerns. The technology belongs to metal-free tanning processes, making it another alternative technology that can serve the future of the leather industry. 🌱

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The new Chennai Trade Centre, due for completion soon, will double the current showground capacity and include a 4,000 seat auditorium and multi-storey car park for 1,000 cars. Event organisers ITPO and co-organisers CLE clarified that the 2025 event would be partly held in the new building.

CREDIT: WTP

Ambitious India – aiming at \$47 billion

Ahead of the 37th India International Leather Fair in Chennai, leaders of the Indian leather industry published some ambitious targets for 2030. To some, these may seem aspirational but to others, the figures could be conservative.

The Indian leather, leather products, and footwear industry is an essential component of the Indian economy, known for its consistently high export earnings and employment generation. Citing the latest information from the Council for Leather Exports (CLE), the industry had a turnover of approximately \$17.26 billion during 2022-23, with a domestic industry turnover of \$12 billion and an export turnover of \$5.26 billion.

India has a rich abundance of raw materials, including 20% of the world's cattle and buffalo and 11% of the world's goat and sheep population. The country accounts for around 13% of global leather production. The industry benefits from skilled manpower, innovative technology, increasing compliance with international environmental standards, and the dedicated support of allied industries. Added to this, the leather industry is a significant source of employment, providing jobs to approximately 4.42 million people, mostly from weaker sections of society. Women comprise the majority of the workforce in the leather products sector, accounting for about 40% of the total workforce.

It is fascinating to note that India is the second-largest exporter of leather garments, the second-largest exporter of saddlery and harness, and the fourth-largest exporter of leather goods worldwide. The industry has significantly increased its exports from \$4.87 billion in 2021-22 to \$5.26 billion in 2022-23.

According to the CLE, India's leather and footwear industry is expected to experience significant growth, with a target of reaching \$47 billion by 2030; exports are projected to double to \$13.7 billion in the next six years, according to its recently published vision document. The document outlines the industry's global outlook, infrastructure landscape, and best practices, as well as recommendations for the short, medium, and long term.

Whilst the \$47 billion claim seems aspirational, the figures are said to be backed up by major global audit advisory companies and during the international journalists' press conference held by the CLE, newly installed chairman Mr Rajendra Kumar Jalan told *World Leather* that these figures could be considered conservative, particularly when

**CLE Export Projections 2030**

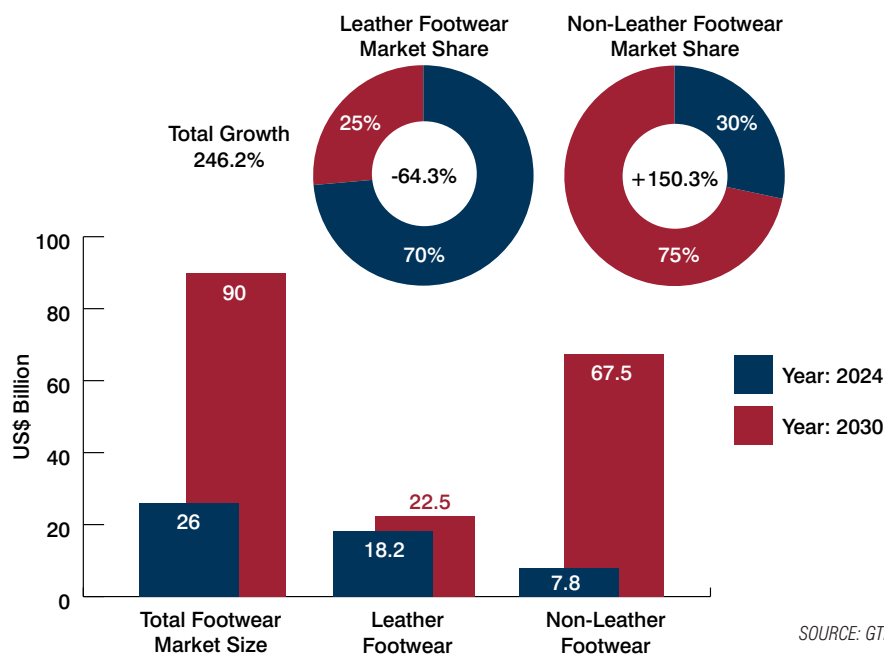
Year	Finished Leather	Leather Footwear	Footwear Components	Leather Garments	Leather Goods	Saddlery & Harness	Non-leather Footwear	Total Million USD
2022-23	430.93	2377.2	289.81	353.07	1301.34	222.17	284.98	5259.53
2023-24	444.00	2021.00	272.00	361.00	1171.00	193.00	219.00	4681.00
2024-25	555.00	2404.99	312.80	397.10	1346.65	208.44	273.75	5498.73
2025-26	693.75	2861.94	359.72	436.81	1548.65	225.12	342.19	6468.18
2026-27	867.19	3405.71	413.68	480.49	1780.94	243.12	427.73	7618.86
2027-28	1083.98	4052.79	475.73	528.54	2048.09	262.57	534.67	8986.37
2028-29	1354.98	4822.82	547.09	581.39	2355.3	283.58	668.33	10613.49
2029-30	1693.73	5739.16	629.15	639.53	2708.59	306.27	835.42	12551.85

considering a recent report published by the Global Trade Research Initiative (GTRI) suggested that the Indian footwear market, currently valued at \$26 billion is expected to grow to \$90 billion by 2030.

However, the crux of the matter and slightly concerning for the leather sector, this growth will be driven by an increase in demand for non-leather footwear alongside a possible shift from small-scale, cottage industries to large corporates in the production of leather shoes. Current ratios for footwear stand at 75:25 with leather taking the lead, but for the future forecast, these numbers are expected to switch with non-leather taking the largest market share.

It was understood from the press conference at the 2023 IILF that the pandemic had allowed India to position itself as a possible player in the footwear market, to take up the “slack” from the prolonged shutdown in China but volume production capabilities were not in place. One year on and it sounds like discussions, and more, have been going on at pace with major brands and their manufacturing partners to bring those capabilities closer to reality.

Mr Jalan expressed optimism about the business landscape. He mentioned that as of 2023, there were no joint ventures established, particularly in the Chennai region of the country. However, within the last year, there has been significant investment in the region of \$800 million. Mr Jalan also stated that China's influence in this industry has declined, though he did not completely disregard their potential involvement in the future.

Indian Footwear Market Size Projections**IILF by numbers**

According to preliminary figures released by the CLE and the India Trade Promotions Organisation (ITPO), this year's show was slightly larger, covering an area of 10,500 square metres. The event featured around 400 domestic exhibitors, along with approximately 60 from overseas showcasing a variety of products, machinery, and equipment. Although the overall floor space was increased from 2023 (10,000 sq.m), the number of exhibitors was slightly down for the 2024 fair, mainly due to a decrease in foreign participation.

Event organisers have always claimed that floor space for the show sells out

quickly. Next year, this claim will be put to the test when the newly built Chennai Trade Centre becomes available to house part of the show. With the new trade centre available, the organisers said that the temporary “hangars” that have been used as exhibition space for many years would no longer be needed. They added that the older Convention Centre buildings and the new Trade Centre combined could accommodate over 600 exhibitors.

Around the halls

Once again, this year saw the aisles filled with visitors. Quite whether they were all serious buyers is very hard to

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Navigating the aisles at the IILF creates challenges rarely experienced at other shows.

CREDIT: WTP

evaluate but the consensus was that the quality of visitors making it out of the aisles and onto the stands was good. *World Leather* has reported before about the justification of visitors to trade shows — it is after all a tactile industry that warrants physical interaction with almost all the senses.

Chemical suppliers have changed their approach over the years by showcasing leather produced with their products rather than just presenting trend books with recipe formulas. This trend was also evident in the latest show. Most suppliers available to discuss the business landscape were cautiously optimistic about the current year, with many stating that things were in a better position compared to the same time last year. However, suppliers are still being cautious, and the "foot is still hovering over the brake" is a well-worded explanation of the current scenario.

While availability and price were the primary concerns in 2023, this year matters have improved slightly in terms of availability, but prices remain unpredictable, with very little long-term price security or guarantee given to quotes. However, logistics now creates its own issues. Where an issue with container availability hampered logistics twelve months ago, the current situation is focused on issues in the Red Sea.

Many European suppliers have good business in Asia, but with transport routes forced to take the Red Sea out of the equation, it now adds many weeks to transport times, and this is out of the control of the suppliers. This compounds the "reactive" ordering that some chemical companies reported, where customers had good orders coming but did not want to hold much stock themselves until "the deal was done," after which the requirement for shipping was

“World Leather has reported before about the justification of visitors to trade shows — it is after all a tactile industry that warrants physical interaction with almost all the senses.”

requested. By all accounts, though, first quarter business looks healthy but forecasts further ahead than that are very difficult to access. Machinery manufacturers faced more difficult situations compared to others. Although they had conversations about future projects, this event mainly provided an opportunity to meet customers and arrange visits to tanneries after the three-day event. On the other hand, consumables much like chemical suppliers reported relatively good business.

It was noted that business in India was satisfactory, although the industry might not be universally busy and growing. However, many positively noted Indonesia, often quoted as the fourth largest footwear manufacturer after China, India, and Vietnam. Countries now looking to reduce their reliance on China due in some part to covid-related restrictions, and Vietnam being saturated, so Indonesia is becoming a focused growth area. Indonesian GDP from leather and footwear manufacturing has been rising progressively for the past decade as a result of lower labour costs and its central location.

It is worth mentioning that the IILF stands out from many other similar events in that it operates successfully without the participation of China. Despite being an international show that attracts attendees and exhibitors from various countries, some other events heavily rely on China's presence to thrive. However, the IILF manages to maintain its reputation without such dependence, which is a testament to the fair's ability to offer value and appeal to the global leather goods industry.

Designers Fair

The designers fair, this year in its seventh iteration, was for the first time held at the showground alongside the main exhibition. Previously, this event was held in a function room at a nearby hotel and, whilst the opulent setting was possibly more in keeping with what international designers would be used to, it always felt that to be separate from the larger event would be detrimental to their experience, and the experience of the captive audience visiting the trade show. Having spoken to some of the designers, the reality was found to be that expectations didn't match up, where some of the designers felt that a dedicated event separated from the IILF ensured that interested parties made an attempt to visit "their show". Instead, most "industrial" visitors had little in common or much to offer the emerging global talent, so reports were received that it was somewhat flat. It was also commented on that with the global representation provided by the designers, there were 40 designers from 13 different countries, and more could possibly have been done to foster their talents with inclusion in the Leather Fashion Show on the evening of the first day, with collaboration pieces. 🌐



Control of the PCR-e8 is enabled through a touchscreen interface and manual hydraulic controls. With four independent bridges, the eight pressure points can be adjusted to give the best dewatering and stretching effects to a wide variety of leathers.

The big samming squeeze

The Escomar PCR-e8 is a powerful and efficient samming machine designed to meet the needs of modern tanneries. The manufacturer claims that its many new features make it stand out in the market. These include a high-pressure drying system, increased working speed, low electric consumption, low noise emissions, an excellent stretching system, and easy-to-use application programs.

Escomar Italia is a well-known company that specialises in producing through-feed samming machines for wet blue leather production, and has recently launched a new electro-hydraulic model, PCR-e8, an advanced machine designed to provide high performance and production yields in the leather sector. The PCR-e8 has various innovative functionalities that make it a valuable acquisition for those looking to improve their leather manufacturing process.

One of the key highlights of the PCR-e8 is its advanced drying system which has been significantly upgraded. The hydraulic unit controls the distribution of the drying system, enabling the pressing system to generate up to 280 tons, the highest power pressure currently available in the company's range. Moreover, the pressure is distributed by four independent bridges with eight pressure points which further enhances the machine's efficiency and effectiveness. This unique feature empowers the PCR-e8 to handle even the most difficult materials, making it an ideal choice for businesses looking for high performance and reliability.

An additional benefit of the high-pressure system enables the machine to work at high speeds, leading to significant production benefits. The increased working speed, up to 28 metres per minute, ensures that the machine can handle a

large volume of material in a short period, making it a highly efficient and effective tool for any leather manufacturing facility. Overall, the PCR-e8 is a significant improvement on the previous model and a valuable addition to the company's line of through-feed samming machines.

An eco-friendly machine that consumes less electricity, Escomar claims it makes it an excellent option for companies looking to reduce their energy bills. The machine's transport speed is controlled by an electric motor variator, managed by an inverter, ensuring a steady and precise speed that is essential for leather manufacturers looking to produce high-quality products.

In addition to its energy-saving capabilities, the PCR-e8 has new application programs that allow for easy and intuitive management. Users can easily control and monitor the various functions of the machine, even from a remote device, using specific manufacturer-developed software. This feature ensures that the machine is easy to use, even for those who are unfamiliar with its operation.

By all accounts, Escomar's new samming machine is an advanced design that offers a range of innovative features to make the manufacturing process faster, easier, and more cost-effective as well as enhancing the quality of leather produced. ☺

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Real Leather. Stay Different. (RLSD) is the Leather & Hide Council of America's global campaign that has reached some 750 million people. The competition challenges design students and recent graduates to create a bespoke item from leather in one of three categories—apparel, accessories and footwear.

All category winners will be invited to compete at a final judging event in October for the title of Overall Winner, where their designs will form part of a capsule collection.

Last year's event saw thousands of entries from more than 100 higher-education institutions in 27 different countries. This year will see even more young designers inspired to work with leather, helping to reinforce its place in the future of manufacturing.

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ATC's focus on finishes gives quality improvements, natural looks and feel modification.

CREDIT: ATC



Industry round-up

World Leather reached out to several companies to gather their latest information and what to expect for upcoming 2024 shows. Based on the feedback, one can anticipate a diverse range of new products, innovations, and trends that will shape the leather industry. They are likely to include the adoption of more sustainable and eco-friendly materials, as well as the integration of advanced technologies into the production process.

Rotacoat

The Rotacoat J1 3400 model has been designed to function in reverse and synchro mode and uses a patented rubber belt that eliminates the need for detaching devices. The manufacturer claims this results in higher quality leather that is free from flesh contamination, which in turn leads to reduced maintenance costs. The machine is equipped with a soft rubberised pressure roller and a thin rubber conveyor to compensate for any uneven structure of the leather. It features a working mode selection for base coating and stucco and is equipped with surface treated "Extended Range" coating rollers that provide superior durability and smoothness. These rollers have a plasma coating of tungsten carbide that increases their lifespan and are impregnated with a unique chemical

product to protect them from atmospheric agents, chlorine, acids, and bases. A programmable doctor blade positioning system that is digitally controlled on both ends measures the added paint with precision across the entire working width, reducing the wear and tear of both doctor blade and coating rollers. Additionally, it has a patented "Safe Blade" doctor blade made of a plastic material, which cleans the surface of the coating roller. This blade does not sharpen and allows for a more consistent and flawless coating process.

Barnini

Ecological Spray is an advanced leather spraying system that was developed following extensive research and development involving universities and companies



The redesigned Rotacoat J1 now has a patented "Safe Blade", a doctor blade made of plastic that cleans the surface of the coating roller without becoming sharpened.

CREDIT: ROTACOAT



from various sectors. According to Barnini, the system offers several benefits such as improved finishing quality, reduced paint passes, savings in chemical products and water, timesaving for spray booth cleaning, and a decrease in both water and air contamination. The ecological spray package comprises a B54 HVLP automatic spraying gun, a spray-station panel PC with a 15" touch screen, and a Smartscan leather reading bar with a 5mm pitch. The B54 gun is equipped with a new patented accessory called 4FLIX, which performs multiple functions such as automatic adjustment of clicks, swift paint flush using the "quick flush" drain valve, easy gun release from the arm, and concealed tubes to prevent contamination during the spraying process. Additionally, the spray gun can be customised with an automatic pneumatic paint flow regulator and a

quick flushing valve, which can be installed independently or together.

Schill + Seilacher

Schill + Seilacher has recently launched a new Triose-based wet white tanning system called Succuir. This tanning technology is claimed to be eco-friendly, biogenic, and made exclusively from bio-waste streams. It is designed to create high-performance leathers with low environmental impact. Succuir is free from heavy metals and glutaraldehyde, making it easy to shave and process the leather using any main tanning and retanning systems.

Neosustol LT is a fatliquor made using decades of knowledge in lecithin production and modern chemical engineering practices that prioritise the environment. The softeners used in Neosustol LT are vegetable-based and replace traditional petrochemical-

based softeners, contributing to a biogenic content while maintaining crucial performance factors such as fogging and lightfastness. It is specifically formulated to produce soft furniture and low-fogging automotive leathers with consistent softness, fine smooth grain, and a silky texture. Leathers pre-tanned with Succuir and fatliquored with Neosustol LT meet the biogenic requirement's benchmark.

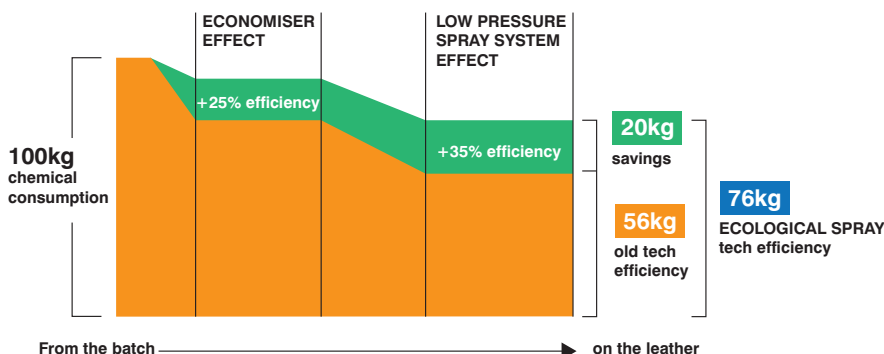
Neosustol RS is an automotive fatliquor that is designed to create eco-friendly upholstery leathers. It is made from renewable, biogenic, and recycled resources and has replaced synthetic softeners with those of recycled origin, reducing carbon emissions during production. The concentration of Neosustol RS is higher, which allows for lower fatliquor offer and a lower COD of the effluent. The leather fatliquored with it has a soft, fluffy texture and an even milling pattern.

Flacavon SBF is a flame-retardant agent that is designed to be innovative, antimony-free, and eco-friendly, while maintaining high performance. Its patented technology aims to minimise inhalation risks for tannery workers and reduce the ecological footprint. It is also considered easy to apply and handle.

Todesco

The company's Purple technology is an innovative finishing process that allows for low-temperature drying by using UV rays to speed up the process. This patented process claims to reduce the temperature needed for drying topcoats and fixatives to below 40°C, leading to significant reductions in

Table 1: Chemical consumption comparison of the Ecological Spray system from Barnini





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energy costs and emissions. The estimated reduction in energy costs is 73%, accompanied by a similar reduction in the carbon footprint of the entire process, claimed to be around 75%. The process also solves some issues such as the stickiness of the leather and the sintering effect during spraying. Todesco developed the technology in partnership with GSC group, with low VOC finishes designed to ensure excellent performance, especially for automotive leathers that require high rub resistance and elastic properties.

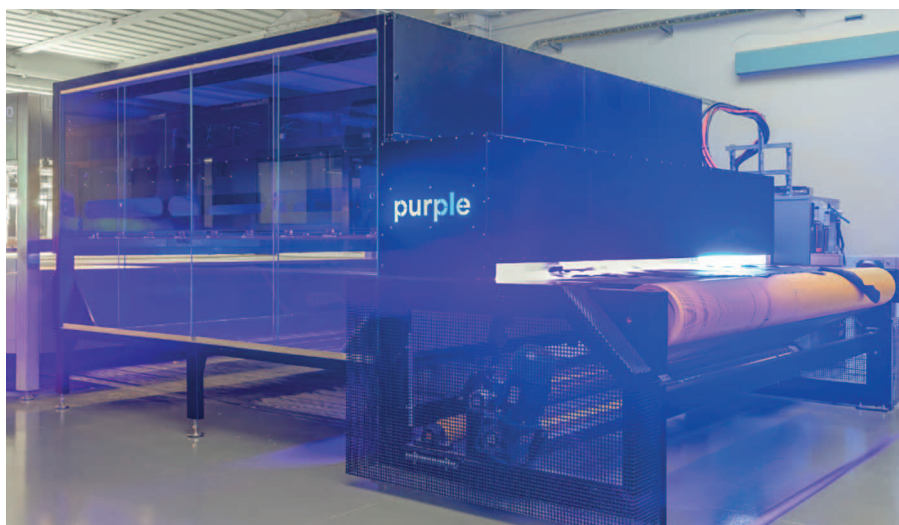
Pajusco

Pajusco's Filter & Press technology is a patented solution developed exclusively for liming processes. The advanced filter system has unique features that make it more efficient and effective compared to traditional filters. A key benefit is its versatility, as the filters can be easily connected to different types of processes, allowing for greater customisation and precision. Additionally, the technology combines filtration and pressing capabilities into a single device, providing superior performance while requiring less space and energy. Important in today's world, reducing consumption and minimising environmental impact are seen as critical priorities.



Offering a "two machines in one" the patented filter press from Pajusco gives users the advantage of reduced space and reduced energy consumption.

CREDIT: PAJUSCO



The Purple finishing system by Todesco uses UV light to dry specially prepared low VOC finishes at reduced temperatures.

CREDIT: TODESCO

Colorantes Industriales

Colorantes Industriales introduces the Biograde range of wet white products, suitable for use on various types of leathers, including cow, sheepskin and goat. This range is said to be particularly well-suited for producing luxury leather goods, garments, and shoe uppers. The range aims to prioritise ecological integrity, supreme quality, and certified compostability in their leather crafting process. The leathers produced will be luxurious and responsible, exceeding industry standards and promoting a greener planet. The company adheres to rigorous standards and certifications; its biodegradable and compostable products conform to internal and external tests. These include ISO technical standards such as OECD 302 B/301 F for biodegradability of a chemical compound, ISO 20200 for the disintegration of leather, ISO 20136 for the biodegradability of leather in a liquid medium, and UNE-EN 13432 for materials biodegradability and compostability. Customers can also apply for the prestigious TUV "OK Compost" label for their leathers. It offers leather production processes that are entirely biodegradable and sustainable, from the beamhouse to finishing, reduces water consumption, and wastewater is compliant with regulations covering biodegradability, absence of heavy metals, and correct conductivity.

Cromogenia Units

Cromogenia Units offers a range of probiotic-based products, including

Celesal DG, Celesal SK, Celesal AD, and Celesal PB, designed to provide an eco-friendly alternative for leather production. These probiotics are created using a proprietary fermentation technology that offers degreasing, dispersing, and wetting properties suitable for various stages of the tanning process. Additionally, these products are 100% natural, biodegradable, and non-toxic, which helps to promote sustainability and reduce operational costs. Celesal DG is a deep degreaser, while Celesal AD is a highly effective cleaning and dispersing agent. Celesal SK is a strong wetting agent, and Celesal PB combines wetting, dispersing, and degreasing properties.

Developments in high-performance products

Cromogenia Units has also recently introduced new products in its finishing department. These products include matte polyurethanes without silica, highly glossy polyurethane, and a BIO-based water repellent that is free of CFC. The company offers Regel U 217 PG, a medium-soft matte polyurethane that is highly resistant to xenon and high temperatures, making it ideal for base coats. Regel U 219 PG is suitable for topcoats and has a soft texture with excellent feel, also resistant to xenon and high temperatures. Regel U 183 PRG is a high-gloss polycarbonate polyurethane that is very soft and scratch-resistant, with excellent performance during both roller and spray application. The company offers



Regel FFW B, a 51% fluorine-free water repellent that is sustainable and does not affect the feel, with a high degree of permanence.

Lanxess

Lanxess now offers Product Carbon Footprint (PCF) data for the majority of its leather preservatives, showcasing its dedication to transparency and sustainability across its product range.

It has strategically expanded its portfolio by acquiring the Microbial Control Business Segment of International Flavors & Fragrances (IFF). This acquisition has enriched the Preventol brand portfolio in leather preservation with the renowned brand Bioban and glutaraldehyde as a tanning agent. This move solidifies Lanxess' position in the market, reflecting its proactive stance in responding to evolving consumer needs.

Notable additions are Bioban O 45 and Bioban 890. Bioban O 45 serves as a tailored supplementary preservative for leather intermediates in tannery environments, enhancing leather protection during processing. Bioban 890 caters specifically to the Chinese market as an effective tanning preservative. The company's glutaraldehyde is offered in concentrations of 24% and 50%.

Şişecam

Şişecam, a prominent manufacturer of basic chromium sulphate products, has been granted the ECO Passport certification by OEKO-TEX that verifies that its products adhere to the standards for human-ecological optimised leathers and textiles, ensuring that they are free from harmful substances and safe for both human and environmental health.

Şişecam say its products provide various advantages to leather tanners, such as optimisation of human-ecological factors, ensuring end-user well-being, taking environmental responsibility, differentiation in the market, and gaining global recognition through OEKO-TEX's certification and ECO Passport.

ATC Tannery Chemicals

French manufacturer ATC has recently launched a new range of low bisphenol syntans for the pretanning and retanning processes of high-quality leather. The range includes Actan WTG-LB (<0.02%), Actan WT-LB (<0.03%), Actan SBA-LB (<0.01%), Actan HFP-LB (<0.02%) and Actan SLQ-LB (<0.02%). These syntans, available in both powder and liquid forms, are designed to meet regulations and enhance leather sustainability without compromising technical performance. The range is suitable for producing a wide variety of leather items, from pure white leather to colour-dyed leather.

ATC has also introduced three new products in the finishing range. Actycompact GS is a compact resin binder made of flexible polymers, specially designed for sheepskin clothing to improve the quality of poor skins. Actycompact BU Soft is a softer version of Actycompact BU, suitable for making full-grain soft shoe leathers or lightly sanded grain. It provides polishing properties to the finish, giving a natural appearance. Actywax AT NI is a new non-ionic product that prevents sticking following embossing and stacking of skins. It can be used in both cationic and anionic environments in layers applied by gun. 🌱

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Anticipating the future

Reducing the environmental footprint is a combination of vision for the future, technical skills and tools, and legal knowledge of the new rules that are on the way. According to SPIN360, anticipation is the strategic key for the fashion, luxury and leather industry to be future-proof and ready to face all the upcoming environmental and production changes.

Working to reduce the environmental footprint is a combination of vision for the future, technical skills and tools, and legal knowledge of the new rules that are coming. The European Commission has set precise targets for energy, climate change and the environment for 2030, 2040 and 2050 and is working on the creation of new regulations, some of which have quite long approval processes.

For example, after almost two years of complex negotiations between the European institutions and the Member States the European Parliament approved the so-called “Greenwashing Directive”, last January which aims to protect consumers from misleading communication practices and help them make better purchasing decisions. This is one of the latest directives to be adopted by the EU Commission that will affect the fashion market and supply chains. Taking a closer look at the European Commission ESG objectives, there are many other directives in the process of approval such as the EU Strategy for Sustainable and Circular Textiles, the ESPR Ecodesign for Sustainable Products Regulation to name a few. But there’s more to come such as the Digital Passport, the CSDR Corporate Sustainability Reporting, the Ecolabel etc. The fashion and the leather industry (like all other industries) must be prepared to face and apply all these new rules: but meeting all these new requirements is not something that can be done overnight.

Aware of this, SPIN360, a global player specialized in innovative science-based solutions that contribute to reducing the environmental impact of the supply chains ecosystem in various product sectors, has always worked to anticipate what will happen: having visibility of what is going, ESG-wise, SPIN360 is aware that preparing the ground to work into the new paradigm is crucial for companies that want to be successful and compliant in their business.

Getting around legislation is always very complicated, especially when it comes to the requirements to fight climate change. So, once all stakeholders know in advance that a new directive is coming, the next step is to ensure it is understood clearly and without a shadow of a doubt. Only professional experts can explain what the new directive will

mean for the business of manufacturers in the supply chain. This is why SPIN360 signed a very important partnership last February with Bird & Bird, an international law firm that supports companies operating in high level tech sectors and provides strategic, innovative and business-focused legal advice, and OXYGY, the consulting arm of Bird & Bird, an international management consulting firm focused on data and digital transformation, regulatory compliance, business expansion and innovation, and business model transformation, has also joined the partnership.

The main objective of the partnership is to create a hub of experienced professionals able to monitor regulations related to sustainability issues, legislative trends to anticipate their impact in the future, and preparing companies for change management: Bird & Bird will provide concrete support in analyzing the legal implications of the applicable regulations; SPIN360 is committed to helping clients and supply chains anticipating the challenges of truly sustainable operations; and OXYGY will guide clients through the transformation processes required to adapt to the global scenarios that call for a new approach to sustainable transition.

This agreement is a valuable addition to the range of services offered by SPIN360 reinforcing its unique value proposition based on “innovative sustainability”, which revolves around LCA Life Cycle Assessment, traceability solutions (currently used by more than 180 tanneries), data-driven plans and strategies for continuous improvement of product environmental performance, design and implementation of upskilling and ongoing training projects. This year SPIN360 is celebrating 15 years of Sustainability, Progress, Innovation and Network which are not only the words behind the acronym of its name, but also the values that Federico Brugnoli, its founder, and the team believe in. 🌱





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

Green job creators

This year, close to half of the adults in the world will have the right to vote for a new president or a new government. Among the 70 or so elections that will take place, there will be general or presidential elections in eight of the ten most populous countries in the world, including the US, Mexico, India, Indonesia, Russia and Pakistan. There will also be elections for the European Parliament. The vote-count will be tighter in some of these contests than in others, but campaigns are in full swing across the world from east to west.

Geopolitics and global security constitute the top topic, although candidates have different views of what the security priorities should be. Economic concerns take second place, encompassing inflation, debt, energy and food supply, infrastructure projects, trade and, of course, jobs.

Campaign messages

President Joe Biden began this election year by claiming that 2023 had been a great year for workers in the US because the economy there created 2.7 million new jobs. Part of his re-election campaign is that 2021 and 2022 were two of the strongest job-growth years in US history and that the unemployment rate there is now at its lowest level in 50 years. Another of his messages is that entrepreneurs in the US have applied to create 16 million new businesses since he took office at the start of 2021.

Late last year, India's prime minister, Narendra Modi, had already begun to promise millions of new jobs if voters deliver

The leather industry can win much-needed political support by telling its 'green jobs' story more effectively.

a third straight election win for him in April and May. In speeches at rallies he said there would be 10 million new jobs for young people. This was a headline-grabbing message in a country with a population of more than 1.4 billion people, 65% of whom are under the age of 35.

Millennial and Gen Z voters also made up a large proportion of the electorate in Indonesia's general election in February. In the campaign, former army lieutenant general and defence minister Prabowo Subianto, a clear leader in the polls, made the promise to create jobs a central part of his message. He said he would make 19 million new jobs available.

In Mexico, the incumbent president, Andrés Manuel López Obrador (AMLO), who has been in office since 2018, cannot run for office in the new election that will be taking place in June. No one who has been president of Mexico can take up the role again. However, the party he founded, MORENA, is favourite to win in 2024, with its candidate, Claudia Sheinbaum, ahead in most polls. In February, she made her own a series of AMLO promises, including a pledge to



The French government has said it is determined to preserve the “unique savoir-faire” of the leather industry in the country.

Credit: Première Vision/Alex Gallosi

guarantee young people a job when they leave education. This will mean that, for one year, millions of young people leaving school or college will receive a salary from the government while training in factories, workshops, company offices or shops.

(Lack of) friends in high places

All of these examples show that jobs matter to politicians and that promises of job creation matter to voters. The point is that an industry that creates and sustains jobs deserves to have friends in high places. In this, the leather industry, especially in some (not all) of the world's largest and most developed economies is being short-changed. Without question, the industry could tell this part of its story better and make it clear to those with political clout that this is a sector that employs millions of people and that the jobs it creates qualify as ‘green jobs’.

The World Bank defines a ‘green job’ simply: it is a job that has “environmental objectives”. Many sectors have the right to claim to be part of this. Among those the World Bank presents as good examples is the circular economy. Green jobs are important because in many parts of the world, especially those that have young populations, “there is a need for employment and careers to have a positive impact when it comes to the climate”, it continues. It estimates that, every month, 3.7 million people around the world reach working age and argues that a global transition to a green economy “needs to provide opportunities for those young people without harming our warming world”.

Leather’s ‘green jobs’ message

It follows that if leather is part of the circular economy, the jobs that the leather sector creates are circular-economy jobs and, therefore, green jobs. The logic of this was clearly lost on a majority of the elected politicians in the European Parliament when they voted, in 2022, to include leather among the industries that must now manage new restrictions on importing products potentially linked to deforestation. A proposal went before the parliament asking for an exemption

for hides, skins and leather. In the vote, 277 of the politicians voted to approve the leather industry’s request, but 338 voted to reject it. Leather’s ‘green jobs’ message had not reached the 338 parliamentarians, or the message was drowned out by other voices in their ears. But the story must be worth telling again and again, and it must be framed in the context of the circular economy.

The leather industry in India deserves praise for the success it has had in putting this across. The newly re-elected chairman of India’s Council for Leather Exports, Rajendra Kumar Jalan, tells us in the Leather Leaders interview in this issue of *World Leather* that the industry’s relationship with those in power in India is changing. There have been areas of contention in the past, but he says perceptions have changed and that now leather and leather products manufacturers in India are in a position “to move forward with the government”. He explains that the leather industry’s appeal is its ability to create jobs. “All of our state governments, as well as the central government, are looking at our sector because of the fact that we are people who can create a lot of employment,” he says. “You can’t get that from, say, the IT industry. This is very significant for the government.”

The most recent figures we have from Italy’s national tanning industry body UNIC are that leather manufacturers alone employ almost 18,000 workers in different parts of Italy, across a total of more than 1,100 companies. This group of people was able to generate revenues of €4.2 billion in 2022, which UNIC calculated to be 23% of total revenues worldwide from leather production that year and 66% of the total for Europe.

Downstream from the tanneries, an estimated 5,000 companies make up the community of finished leathergoods manufacturing companies in Italy, although the average number of employees across the sector is below 10. There are some very big operations, such as the new workshop that luxury brand Saint Laurent opened in Scandicci, near Florence, at the end of last year, which will employ 500 skilled leathergoods artisans. For the average still to be fewer than 10 employees, it means many leathergoods production



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companies are tiny.

Representative body Assopellettieri is taking steps to help the sector as a whole recruit new generations of skilled workers. It is aiming to set up a new training school in Tuscany using a model that it will be able to take to other parts of Italy too. Assopellettieri president, Claudia Sequi, has told *World Leather* that she is determined to take the message into schools that there is an interesting and rewarding career in the leathersgoods industry. “We need to tell young people what it means to be able to create something so beautiful with your own hands, using your own creativity,” she says. Assopellettieri has said the sector can create around 2,500 new jobs in Tuscany alone.



France's minister for industry, Roland Lescure.

Credit: European Union

Ministers' views

Two years ago, while on a visit to Tuscany, Italy's then-prime minister, Mario Draghi, paid tribute to the region's tanners and leathersgoods manufacturers. Dr Draghi, a globally renowned economist long before he became a politician, said the production environment the leather industry has in Tuscany was a good example of the benefits that manufacturing activities can bring if they are rooted in local cultures. “This isn't only about links to external markets,” he said, “but also about important links that these activities can have with the local area. They are an expression of companies' willingness to invest in technology and in social capital, to take a long-term view.”

He went on to say that the way Tuscan leathersgoods companies work showed this well. “The quality of the materials this sector uses helps to set it apart,” he said, “and this is a benefit of being close to the Santa Croce tanning district. It also benefits from the high levels of skill and artisan craftsmanship that come from centuries of tradition, enriched further by creativity and by the research that the sector's academies and institutions carry out.”

Cry for help

As recently as February 14 this year, the president of Italy's national tanning industry body UNIC, Fabrizio Nuti, held a meeting in Rome with Massimo Bitonci, one of the ministers in the national government's department for business and ‘Made In Italy’.

UNIC described the encounter as an important opportunity for its president to talk to the politician and discuss “the numerous issues and concerns affecting the Italian tanning sector in a complicated economic environment”. Naturally, this includes jobs.

After the meeting, the minister said: “Processing hides and skins into leather is an area of excellence in our country and is renowned internationally. But it is at risk of being undermined by new regulations in the European Union on deforestation.”

Following the 2022 parliamentary vote mentioned above, the European Commission has published regulations that, as



things stand, will enforce full traceability of a number of products, including hides, by 2025. Arguments that this will give buyers of leather and finished leather products in Europe a guarantee that what they bring to market has no link to deforestation have failed to convince Massimo Bitonci.

"This requirement imposes an unnecessary increase in bureaucracy on a sector [the Italian leather industry] that not only causes no harm to forests, but actually recovers waste from the meat industry and turns it into a noble material," the minister said at the meeting with UNIC.

He went on to describe the proposed regulations as "the latest in a long line of examples of the supposedly green ideology that has taken hold in Brussels". Mr Bitonci said the new rules would serve only to help supply chains outside the European Union. He argued that this would also put the business of leather manufacturers in Italy at risk, posing a threat to employment levels and to the supply of what he called "a fundamental resource for luxury Made In Italy brands".

He said there needs to be "immediate action" to protect the entire leather value chain.

Cross-border ties

The Saint Laurent example shows that part of the demand for skilled leather-sector workers in Italy comes from the major, Paris-based international luxury brands. This is not a new phenomenon. For the most part, these groups talk openly about the number of employees they have outside France. What they also do, though, is provide blow-by-blow accounts of the progress they are making in creating jobs on home soil. This is a source of pride for them and has, naturally, captured the attention of politicians.

France's minister for industry, Roland Lescure, gave an address at the 2023 Sustainable Leather Forum, saying that he is fully aware of the value of the country's leather sector. He said the French leather industry's success was built on "a unique savoir-faire" and said this was something the government was determined to preserve. "Leather is part of an eco-system that employs more than 130,000 people in France, in almost 13,000 businesses," the minister said. He then paid tribute to the large luxury groups and big-name brands that are part of the leather sector in France for the role that they play in driving the industry forward.

Recruitment drive

Saint Laurent's parent group, Kering, had 48,964 employees across the world at the end of 2023, an increase of 4% compared with the previous year. Rival group LVMH employs 213,000 people in total, almost 40,000 of them in France. It has said it aims to recruit another 3,500 new-generation craftspeople this year, although not all of them will work with leather. A key component of LVMH's recruitment effort is a programme it calls *Métiers d'Excellence* (ME), which means 'professions of excellence'. This programme celebrates its tenth anniversary 2024 and, as it has done for three years now, it is taking on tour a series of live demonstrations of the skills young people can learn and the jobs they can do in the group.

This year's tour, which the group calls 'You and ME', kicked off in Paris at the end of January, attracting 3,000 job-seekers to the Carreau du Temple, a former covered market, in Le Marais. After Paris, the tour goes to Orléans and Clichy-sous-Bois in February, and then to Reims and Lyon in March. Cementing the importance of Italian workers in the leather sector, the tour will then continue with visits to three Italian

"Hermès will continue recruiting at 2023 levels, when it added 2,400 new employees; we have no intention of slowing down."

AXEL DUMAS, HERMÈS

cities in April and May. LVMH has not yet confirmed the Italian legs of the 2024 You and ME tour, but last year it held events in Florence, Novara and Padua.

LVMH now runs 118 production facilities in France and 26 in Italy. It also produces leathersgoods in Spain, for its Louis Vuitton brand at a factory in Barberà del Vallès, near Barcelona, and for its Loewe brand in Getafe, near Madrid. After carrying out a survey of companies in France, asking them about their job-creation plans for 2024, weekly business magazine *L'Usine Nouvelle* proclaimed LVMH as France's largest private-sector recruiter.

Production capacity

The third of the big French luxury leathersgoods groups, Hermès, talks about employment and skills development with admirable frequency and great enthusiasm. It created 2,400 new jobs in 2023, taking its total number of employees to 22,040, of which 13,700 work in France. It has created a total of 5,400 jobs in the last three years, 3,300 of them in France, and doubled its overall workforce in the last ten years. Across the company, 60% of Hermès employees are women. The group runs eight training schools.

It made 55% of its products in its own workshops last year and, in total, 74% of all products were made in France (it is proud of the relationships it has with key external suppliers, with the average length of time it has worked with its top 50 suppliers working out at 19 years). It plans to open four new leather workshops over the next four years and to carry on recruiting at 2023 levels. "We are going to continue along those lines," says executive chairman, Axel Dumas. "We have no intention of slowing down."

Beyond that, Mr Dumas says it is in his nature to be optimistic and that he is confident about the future of the company, but that he does not have fixed plans for the next ten years. He points out that Hermès is in the business of creating desire. "We exist to give our customers opportunities to bring pleasure into their lives," he explains. "This is something that is impossible to turn into a bureaucratic exercise and we do not take for granted our ability to keep creating that desire among our customers. I suppose one of the ways to keep success going is to worry that, one day, you may not have the same success."

For its leathersgoods division to continue to have success, the main constraints Hermès has to overcome are limits to production capacity and to the availability of raw material of the quality the group requires. Its intention to keep opening new leathersgoods factories shows that it is planning ahead and that its plans are ambitious. This is because, the group reveals, each of the new factories adds 7% to its leathersgoods production capacity. Four new factories in the next four years will, therefore, increase current production capacity by 28%. This means its creation of green jobs will continue apace. 🌱



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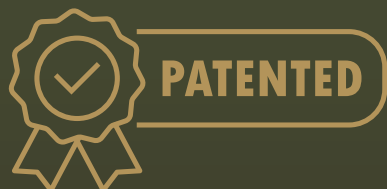
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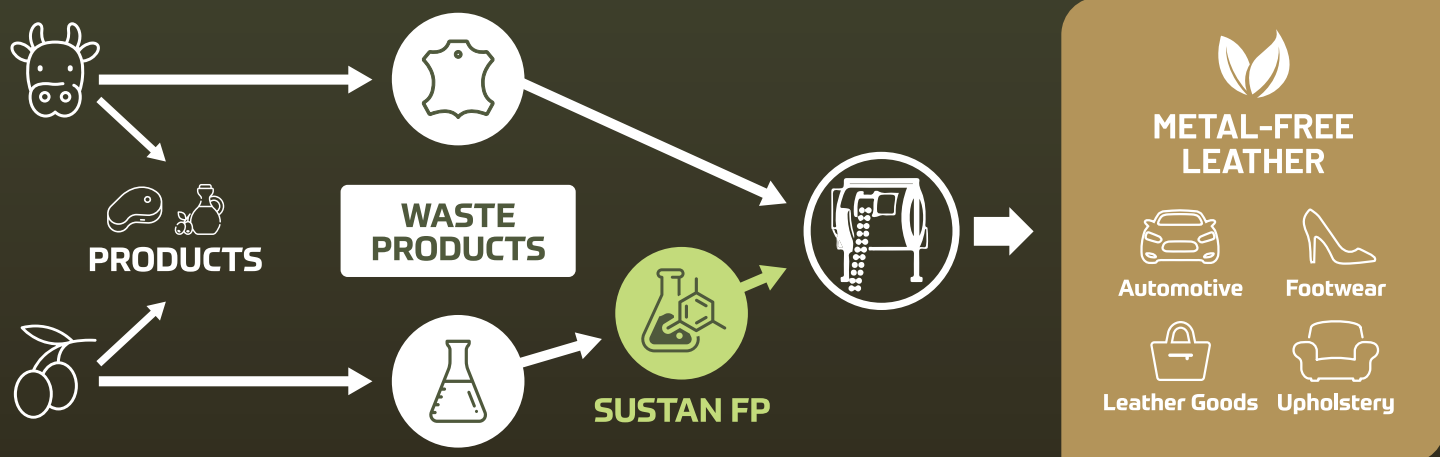
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GREEN JOBS

Years of effort to turn the hard work of establishing product environmental footprint category rules (PEFCR) for leather into a tool that tanners can use in their day-to-day work are about to bear fruit.

In addition to its successful introduction of standard EN 16887 on the carbon footprint of leather, which was approved in 2016, the industry's representative body in the European Union, COTANCE, began years of work on PEFCR in 2013. Helped and informed by national industry associations and other partners, it succeeded in producing a baseline model for calculating the environmental footprint of leather, establishing rules that will allow individual companies to work out product-specific results in 16 different impact categories (of which carbon footprint is the best known) for the different types of leather they manufacture. In 2018, this work received official approval from the European Union.

As part of this process, COTANCE then went to work on preparing all the PEFCR documentation for a technology partner to develop into an easy-to-use tool. In September 2019, it announced that this preparation was complete. A number of other industries that had successfully walked the long, hard PEFCR road submitted their data too; it all went to an external technology partner that the European Commission had appointed and funded to produce calculation tools for leather and the other sectors. But the technology partner failed to deliver and in 2020 it abandoned the project, leaving tanners high and dry.

Valuable work

Far too much effort had gone into PEFCR to let all the work go to waste. In 2023, when COTANCE secured support from the EU for a new project, Green Deal Leather, it quickly saw the possibility of making the carbon footprint of leather part of the discussion again. This new project (full name: Towards Zero Adverse Impact of the European Leather Industry – Green Deal Leather) launched in Milan in September with a particular focus on workplace safety and on carbon footprint.

Representatives of the industry from Spain, Portugal, France, Austria, Hungary, Italy and Germany are involved in the discussions, along with COTANCE and trade union organisation IndustriAllEurope. It was an earlier “social dialogue” project involving these participants in 2022 that gave rise to Green Deal Leather. This is all part of an unbroken

It has taken years of trying, but a tool that will help tanners calculate the carbon footprint of their leather is on the way at last.

thread of initiatives through which the industry has sought to present leather manufacturing as being safe for workers and safe for the environment, while producing a high-quality, versatile, valuable material and sustaining millions of direct and indirect jobs across the world.

Workplace safety was the centrepiece of the inaugural gathering in Milan. The second of three project meetings took place in Frankfurt at the end of January and the focus this time was firmly on the carbon footprint of bovine leather. The highlight, COTANCE said afterwards, was the presentation, at last, of a tool for measuring carbon footprint. The new tool builds on the previous EN 16887 and PEFCR work, but also on ECO2L, a parallel initiative that one of the project partners, the German Leather Federation (VDL), has been running successfully for the last 12 years.

A global solution

In 2012, ECO2L launched as a label that would present finished leather as being “energy controlled”, hence the name. From the outset, VDL says, this label had behind it accurate calculations of the energy efficiency and carbon emissions of leather manufacturing facilities, a world first, the organisation insists. Tanneries in Germany and elsewhere (companies in other parts of Europe, as well as in China, Indonesia and Uruguay, have engaged with the programme) continue to undergo regular audits to be able to present ECO2L certification to their customers. Now, COTANCE has confirmed that a new version of the label that VDL announced in 2022, an upgrade on the previous version, will be at the core of the new carbon footprint tool. It particularly likes that the tool will, therefore, be made by tanners for tanners.

This is a positive development,” COTANCE says. “We are taking the upgrade of ECO2L data collection protocol and

*Boots from outdoor brand
Lundhags that use ECO2L-
certified leather from Lederfabrik
Josef Heinen in Germany.*

Credit: Lundhags



The scene at the second Green Deal Leather project meeting in Frankfurt in January 2024.

Credits: COTANCE

making it into an official tool for the global leather industry. The new tool is an instrument developed from scratch by the leather industry.” Its hope is that the tool can “empower tanners to benchmark their carbon footprint against an EU average, aiding them in their journey towards more sustainable practices”. The initiative is rooted in Europe, but it is clear that the partners believe it can empower tanners in all parts of the world to improve sustainability.

The discussion in Frankfurt, involved the project partners, as well as representatives of the industry in Turkey and the UK. It covered details of the work involved in calculating the average against which users of the new tool will benchmark their products’ carbon footprint.

Original aims

VDL managing director, Andreas Meyer, has told *World Leather* that the main aim of ECO2L was always to improve energy efficiency. Version 2.0, he explains, is still about making tanneries more energy-efficient, which he insists means more than simply reducing the total amount of energy they consume. After the upgrade to ECO2L 2.0, this now includes scope-three data. Scope three brings the impact from external suppliers into the calculation, including data from the chemicals that tanners use to make leather. “As a result,” Mr Meyer says, “you get the figures for energy consumption, but you get the carbon footprint for the product-mix of the tannery as well.”

He adds that, carrying out regular audits over the years has enabled VDL to see that tanneries have become steadily more efficient. In parallel, the leather manufacturers themselves have been able to see their own results and benchmark them against industry averages. This, Mr Meyer insists, has opened their eyes to the opportunities that can arise from investing in greater energy efficiency.

He explains: “Our VDL members, the people who run the tanneries, wanted to compare themselves with others in a fair and reliable way in terms of energy consumption. They wanted to save energy where it made sense, and save money in the process. Customers then began asking what carbon footprint the production of leather had and we saw that ECO2L could provide a reliable basis for this calculation too.”

Make it manageable

Secretary general of COTANCE, Gustavo González- Quijano, says the project team is putting “the utmost care” into the task of bringing ECO2L into the workings of the Green Deal Leather project. The new ECO2L data collection protocol generates a large amount of information and, for the tool to work well, it is important to provide “all the necessary explanations”. Distilling this down “to the essentials” is important, he points out, because understanding carbon footprint details and all the environmental implications that arise from them is complex. “Simply comparing one number here with another there without the corresponding context often leads to wrong conclusions,” he warns. The final Green Deal Leather project conference will take place in Brussels on May 16.

Current COTANCE president, Manuel Ríos Navarro, who runs Spanish leather manufacturing group Inpelsa, expresses hope on behalf of his peers that the new tool will produce results that help customers and end-consumers understand leather’s carbon footprint better. However, he too makes the argument that this is about more than a single calculation or a rounded-up number. “The carbon footprint of leather also reflects the technology we use to produce it,” he explains, “and the work we do to ensure long use of the material. The true environmental impact of leather depends, after all, on the length of time the material stays in use. In this, leather is a true champion.”

It has also taken a long time to arrive at the point that Green Deal Leather is close to reaching now. The combination of these two strands of the industry’s work over more than a decade is going to culminate in the creation of a new carbon footprint tool that will benefit tanners everywhere. The project partners are in no doubt that it will be worth the wait. “ECO2L was created on a voluntary basis by tanners who, the whole time, still had to continue their normal work,” Andreas Meyer concludes. “They did this with the support of a non-profit organisation. All of this meant the costs for the users had to remain low. Sometimes, to develop things like this successfully, it has to be at the expense of speed.” 🌱



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PrimeAsia looks towards a bright future



From its vantage point, PrimeAsia's leather manufacturing shows no sign of slowing, according to tannery group PrimeAsia, which is undergoing an expansion at its Vietnamese plant to boost capacity there from six million to eight million square-feet per month. The leather manufacturer, which also has operations in China and is headquartered in the US and Taiwan, has unveiled plans for a wide-ranging sustainability strategy called 'Sustaining Excellence, Preserving Tomorrow', which will help reduce its footprint and provide data that its clients can use in their own product or company calculations.

The strategy is created and guided by the group's chief sustainability officer, Camille Mori, who joined at the start of 2023. The initiative will be based around four pillars: added to the current Operational Excellence will be Circularity, Climate Action and Social Impact. "Under Operational Excellence we are looking to continuously improve our management systems for compliance management, traceability, chemical management and resource management," Ms Mori tells *World Leather*. "With Social Impact, we are continuing to give back to communities where we operate, will be tracking progress toward worker wellbeing programmes throughout our value chain, and will be disclosing wage data and tracking wages against the Global Living Wage Benchmark."

The leather manufacturer has set out an ambitious new strategy to give its clients access to verified data to weave into their own carbon reduction and sustainability targets.

Measurable impact

One of the key themes that underpins the strategy is that of producing and providing quantified data that can be used as benchmarks within the group and by its customers. PrimeAsia is partnering Spin360, a consultancy led by Federico Brugnoli that specialises in mapping carbon footprints in the leather supply chain. Their joint work includes collecting and analysing data for an expanded Lifecycle Assessment which includes more products and an increase of primary data, and conducting a carbon footprint analysis to develop carbon reduction targets to submit to the Science Based Targets Initiative (SBTi), an organisation that developed industry standards for companies to meet greenhouse gas reduction targets.

“Our customers are asking for data and evidence to show our progress, and we intend to offer this transparency.”

CAMILLE MORI, PRIMEASIA



Hides dry as they move around the facility in China.

The aim is to have near-and longer-term targets approved by SBTi during 2025, plus align with Science Based Targets for Nature to set strategies for water, land use and biodiversity. “It is vital for us to follow industry standards for calculating and reporting on climate action so we are following the same protocols as our brand customers and supply chain partners who have also set SBTi targets,” explains Ms Mori. “This will help with disclosing carbon accounting data to our suppliers who are counting on us to reduce our emissions as part of their scope 3 [manufacturers’] targets.”

PrimeAsia specialises in footwear leathers, supplying to global shoe brands such as Nike and adidas. For these types of companies, offering transparency in their supply chains will become more important, potentially driven by incoming legislation in Europe that requires Digital Product Passports, with information on components and ingredients. These brands will lean on their suppliers to help them meet their own targets. “Our customers are asking for data and evidence to show our progress, and we intend to offer this transparency,” adds Ms Mori, who has experience of what the brands will need, having joined PrimeAsia from PVH Corp.

Circular advances

Circularity is a central tenet of the strategy, building on the truism that hides are a byproduct of the food industry. The group is also researching avenues for its leather waste and packaging within the tanneries and partner footwear factories. It has been increasing the volume of recycled water the tanneries use, hitting the 60% mark on average last year. The target is to use only recycled water for leather production in the tanneries by 2040 or earlier.

All of these sustainability improvements require time, investment and commitment. To make sure these commitments stay on track, PrimeAsia is recruiting more people to its sustainability team, to add to its rollcall of over 3,000 employees based across its manufacturing sites as

well sales and marketing teams in India, Indonesia, Taiwan, Thailand, the UK and US.

Collaborating with supply chain partners and the wider sector will also be key to creating an industry-wide impact on the big issues, Ms Mori believes. “There is also a lot of momentum in groups like the Leather Working Group to drive industry approaches and solutions to big challenges like traceability, carbon reduction and biodiversity.”

Expansion plans

As part of the expansion of the facility in Ba Ria-Vung Tau province in southern Vietnam, new technology is being added to improve its energy, waste and water management, as well as a new retanning and colouring mezzanine and will also include eight new fully automated production drums. The current sample retanning and colouring area will be relocated to a newly constructed dedicated building. It is also updating the pigment finishing lines to support growing demand for athletic leathers, new drying and conditioning equipment, new equipment for splitting, shaving and buffing, and a significant upgrade to the wastewater treatment plant and solid waste handling technologies. To help meet its renewable energy targets, solar panels are being added to the roof. “While the stated focus is building capacity, the underlying mission is to make positive adjustments within the tannery, and leather making process, that will allow PrimeAsia to produce leather more efficiently and faster while maintaining high quality standards,” says PrimeAsia CEO Jonathan Clark.

An increase in demand for retro-looking athletic shoes has seen a multitude of leather and suede designs from footwear brands over recent years, and shows no sign of slowing. Leather’s credentials only feed into the growing desire to move away from plastic, too, adds Ms Mori. “From a sustainability perspective, I see a lot of opportunities for the future of leather,” she says. “As there is more focus on durable, long-lasting products and moving away from fossil fuel derived materials, we see a bright future for leather.” 

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A chair by designer Poul Kjærholm uses walnut-coloured leather from Sørensen in this reproduction for Fritz Hansen.

Credit: Jonas Bjerre-Poulsen



Longevity makes a big difference



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GREEN TAX

Like many companies producing and supplying leather now, Sørensen Leather has been on the receiving end of loud encouragement from its customers to provide information about the carbon footprint of its materials.

The Denmark-based company, which sources finished leather from trusted partners but runs no tanneries of its own, accepted that it would be of benefit to everyone in its supply chain to put the necessary information together for a comprehensive lifecycle assessment (LCA) of its products. This has taken 18 months of painstaking work, but the results are in and they are deserving of very close attention by everyone in the leather industry.

The industry has argued for years that leather's durability is one of its greatest attributes, that its longevity is something to love and be proud of, especially because leather often only becomes more beautiful with age. Leather products are eminently repairable. The length of time a mended product

A new lifecycle assessment report from Sørensen Leather shows that the environmental impact of leather is extremely small if the calculations take into account the material's durability.

can remain in use makes the cost and effort of carrying out repairs worthwhile. Each of these are pivotal qualities for materials, products, companies and entire industries to be able rightfully to claim a place at the circular-economy table.

Now, thanks to Sørensen Leather's new LCA, the industry has figures that show how big a role product longevity can play in lowering carbon footprint calculations.



Long view

Eighteen months' work may seem a lot, but Sørensen Leather takes the long view of things. Last year, the company celebrated its fiftieth anniversary, marking the half century since founder, Arne Sørensen, set it up (in the garage at his family home in Egå, near Aarhus). "He was 25 years old when he started out," explains current chief executive, Louise Vesterskov Sørensen, the founder's daughter. She joined the company in 2006, as her brother, Mads, had done five years earlier; she and her brother now run it together.

"My father was in the furniture business, selling wheels for chairs. He spent a lot of time in furniture factories listening to his customers talk about leather," Ms Vesterskov Sørensen explains. "When he decided to start out on his own, he became a representative for two tanneries." The company built up its business from there and soon moved to bigger premises so that it could add to the leather collections it was sourcing and offer an increasingly flexible service to customers. Its headquarters are now in Lystrup; the facility there stores around 20,000 hides in more than 450 colours. Furniture and interior design still make up its biggest, but not its only market segment.

Easy stories

This flexibility and a commitment to high-quality leather have coincided with several important changes in the market. When a large percentage of leather production in the Nordic countries moved away, some buyers began to base their purchasing decisions on Excel spreadsheet data, or were often won over by what Louise Sørensen refers to as "easy stories". The Sørensens began to think deeply about how they could best present their collections in this environment. Efforts to visualise the good work of the company's partner tanneries, of



Left to right: Mads, Arne and Louise Sørensen.

Credit: Sørensen Leather

which there are around ten, and the high quality of the leather they produce have led to new ways of presenting the leather, including new ways of photographing it.

"Something else that has happened is that we have also begun to work much more closely with architects and designers," she continues. "We want to inspire them and work with them at a strategic level. Now we develop collections with them as well as with the tanners." The Danish company has known these leather manufacturers for many years and is aware of the strengths of each. From this, it knows which supplier to work with if a project requires, aniline leather, for example, and which to choose if veg-tanned leather will work better in another job.

Customers working on these projects often have limited familiarity with how different types of leather work, with what is feasible and what is not. They are, benefitting from the expertise of their specialist leather supplier and its connections to the tanners. And this same set of relationships has also been of help in the more recent quest of gathering accurate information about carbon footprint. "More and more questions about this began to come up three or four years ago," Ms Sørensen says. "Our customers were used to new buildings needing to have CO₂ emissions documentation, but this was happening for building interiors as well; demand was coming there too. Architects wanted to have information and documentation about the materials in use in the interior, especially in publicly funded buildings."

Calculation tools

She explains that there are popular tools for calculating CO₂ emissions from wood, foam and other materials already. However it seemed clear to the Sørensen Leather team that some of these tools were calculating leather's contribution to emissions inaccurately. "We simply couldn't understand how a piece of leather could add so much to the emissions figure," the chief executive recalls, "but our customers were finding it



It is difficult to over-state the influence of Danish designers on high-end furniture. Ideas such as this Egg chair conceived by Arne Jacobsen are still being produced, in this case by furniture brand Fritz Hansen, with long-lasting leather from Sørensen the upholstery material of choice.

Credit: Sørensen Leather

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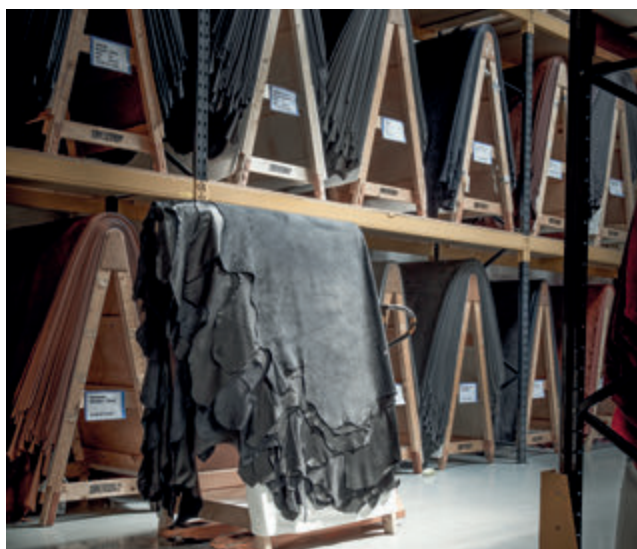


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Leather in the Sørensen Leather warehouse. The company's LCA offers an initial figure of 8.7 kilos of CO₂-equivalent (CO₂e) for each square-metre of finished leather that it brings to market. However, if the leather goes into furniture that stays in use for 25 years, the figure will be 0.35 kilos of CO₂e per square-metre.
Credits: Sørensen Leather

difficult to refute claims that leather was increasing the overall carbon footprint by too much and that it would be better to use fabric instead."

In preparing to respond to this, she says she and her brother realised quickly that embarking on their own LCA would be worthwhile. "Facts and data are stronger arguments than thoughts and feelings," she points out. She admits it was hard work and that it took longer than the leadership team at the company expected, but the partner it worked with, specialist consultancy EnergySolution, offered lots of help and encouragement.

EnergySolution insisted on working with as much primary data as possible. In this case, the tannery partners are in various countries and collect data in different ways. Gathering consistent data that the consultancy could input accurately and fairly into the LCA report it was compiling proved impossible. "There were meetings, conversations with different people about this and a lot of back-and-forth," Louise Sørensen confirms. The solution was to estimate this component using the most recent Product Environmental Footprint Category Rules (PEFCR) for finished leather and leathergoods. She describes working with the team at EnergySolution, which is also based in Denmark, as a good match, explaining: "We needed experts around us who knew how to conduct an LCA; EnergySolution knows." It conducted the analysis for the leather company in accordance with ISO standard 14067:2018 and submitted the results for verification by an independent third-party specialist.

The results are in

A headline finding from the report itself is that Sørensen can attribute emissions of 8.7 kilos of CO₂-equivalent (CO₂e) to each square-metre of finished leather that it brings to market. What happens in the upstream raw material supply chain counts for 1.6% of the total and EnergySolution included data for water, energy, chemicals and packaging

when working the total out. In fact, its figures are for 1.1 square-metres of leather, calculating that 0.1 square-metres would go to waste.

"That was what the consultants insisted on," Louise Sørensen explains, "but it shows that the 8.7 figure could easily have been less." The point is that the specialists permitted no short-cuts. Acknowledging what it calls "the constraints of direct comparisons arising from differences in calculation methodologies", the LCA report says this figure, an average across all of the company's leather collections, is in line with the emissions from 790 grammes of chocolate, 1.1 kilos of coffee beans, or a 61-kilometre drive in a new diesel car.

A particularly interesting focus of the Sørensen LCA is that it also examines what the long lifespan of leather means for its carbon footprint, leading to the conclusion that its durability means the emissions calculation for leather reduces significantly over time. With the 8.7 kilos of CO₂e per square-metre of finished leather as a starting point, the study went on to calculate that using leather in a chair or sofa or as part of the interior design of a building for five years will bring the emissions calculation for the leather down to 1.7 kilos of CO₂e per square-metre. After 10 years of use, this figure will come down further to 0.87 kilos and if the leather in the product stays in use for 25 years, its carbon footprint will be 0.35 kilos of CO₂e per square-metre.

Smell the coffee

This means that any customer using leather from Sørensen in a sofa, for instance, will be able to calculate the carbon footprint of that leather as 8.7 kilos of CO₂e if it uses the sofa for one day. But if the sofa stays in use for 25 years, the figure will be 0.35 kilos of CO₂e per square-metre. This is a reduction of more than 95%. Continuing with the coffee comparison, emissions from this leather would then equate to the emissions figure for 55 grammes, or enough coffee beans for a party of four people to have one double espresso each

after a lunch.

Carefully constructed pieces of furniture with leather upholstery can easily stay in use for considerably more than 25 years. A *Financial Times* feature in early 2024 compiled comments on furniture from previous interviews with influential people across the world of business, fashion, design and architecture sharing details of their favourite sofas and chairs.

Those declaring a love for leather upholstery included Mandy Madden Kelley, founder of Pagerie, a high-end accessories brand for pets, who chose a 1960s Erik Jørgensen Ox Chair by Danish designer Hans J Wegner (whose furniture ideas, like those of a number of influential twentieth-century designers from Denmark, are still in production and frequently use Sørensen Leather). Architect Frida Escobedo said she had long coveted, and recently acquired, a Knoll Brigadier leather sofa also created in the 1960s by Italian designer Cini Boeri.

Japanese clothing and footwear designer Hiroki Nakamura also declared his love of leather furniture, especially for two club chairs, probably from the 1930s, that he found at a flea market at Clignancourt in Paris and had them shipped all the way to his home in Tokyo. He told the FT that he loved the chairs because they still had their original cognac-coloured leather upholstery, albeit with many scuffs and cracks. “They are kind of worn out,” he told the newspaper, “but I like how they look.”

For generations

Sørensen Leather has pledged to continue working on its LCA and to keep its numbers up to date. The chief executive has also said she will seek to meet with other specialist consultancies and ask them to take these new numbers for leather on board and apply them to their carbon footprint calculations. She explains: “Our thought was to make this a part of our competition with other materials. Longevity proves that leather’s environmental impact, if it is higher in the beginning, is much lower than that of other materials over 10 years or 25 years. Buyers should choose something that will last for generations.”

She says early reactions from customers show that they are happy with the findings of this LCA. She adds that many of them “knew instinctively that leather is a great material”. She is glad to have been able to share with them “the facts that prove it”. The message that must spread is that, just as leather is beautiful and only grows more beautiful over time, its carbon footprint is low and becomes lower with every year it stays in use.

A final point emerges from Louise Vesterskov Sørensen’s comment about architects being especially keen on accurate information regarding materials’ carbon footprint if the building they are working on is publicly funded. The European Commission has said that it wants to integrate circular-economy principles into public procurement in the European Union. Communications about this consistently point to a time in the near future when it will only be permissible to spend public money on materials that are in keeping with the circular economy. We have argued in this section of *World Leather* since 2020 that leather is the circular-economy material par excellence. Leather deserves to be among the top options when public buildings are being fitted out or refurbished. Longevity’s huge influence on achieving low carbon footprint over time can surely help convince the doubters. 



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A conservation project in Western South Dakota has brought life back to the grasslands with the reintroduction of buffalo. As part of Wild Idea's philosophy of respecting the animals and the ecosystem, nothing goes to waste.

No herd mentality



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SMEs

It is estimated that as little as 200 years ago, millions of bison, also known as the American buffalo, roamed freely over the vast grasslands of the US. It took less than a quarter of that time to slash that to mere hundreds, according to the US Department of the Interior. The keystone species in that environment was decimated by settlers, hungry for the food and leather, and with little regard for or knowledge of how the ecosystem would be affected. Had it not been for a few private individuals working with tribes and the Department of the Interior, the bison would be extinct.

For Dan O'Brien, reintroducing bison to the prairies in South Dakota was an afterthought. An author and conservationist, his priority was tracking the peregrine falcon and working to increase their population and reinvigorate their breeding and feeding grounds. But all natural ecosystems are delicately linked and he realised the ground had adapted to the roaming buffalo, with their hooves gently disturbing and aerating the

soil, allowing the grasses to flourish and habitats to form.

Wild Idea Buffalo range was established in 1997, with an initial aim of revitalising 1,000 acres with a small herd of buffalo. This has now grown to over 300,000 acres, and the changes to the landscape are astonishing, says ranch manager Colton Jones. "What we are trying to do by reintroducing the bison to the grasslands is to put the missing piece back. We see a change in biodiversity in the grass and bird species. We have seen a change in the wildlife. The flora and fauna have altered dramatically in less than 30 years."

At one with nature

Part of the philosophy of the company is to produce grass-fed and field-harvested meat, which means the animals are shot on the range in their natural habitat and are skinned in mobile abattoirs. The Wild Idea team believes this is the most humane way to harvest the animals: they are not subjected to



The American bison was named the national mammal of the US in 2016. They are the largest mammal in North America. Male bison (bulls) stand 6 feet tall, while females (cows) reach a height of 4-5 feet. They weigh on average between 700 - 2,200lbs. Credit: Unsplash



“Putting the boots back in contact with the grass where they started, that’s very powerful.”

DAN O'BRIEN, WILD IDEA BUFFALO

the stress of transport or the feedlot or abattoir. This in turn produces better meat, they say: free from the cortisone or stress hormones that can flood the animal if they are in distress. “We try to treat them as close to nature’s intentions as possible, give them respect in life and dignity in death,” says rancher Jilian Jones.

Outdoor clothing company Patagonia had been buying bison jerky from the company for several years when the two companies teamed up to look for a solution for the hides. “Not wasting any part of the animal is a key part of Wild Idea’s philosophy,” adds Ms Jones. “We started thinking about the idea of a boot.”

Natural ruggedness

Patagonia contacted one of its footwear suppliers in Portugal – Hugal, a family run company that specialises in Goodyear welted construction and supplies the military and rural sectors, to see if they could work with the buffalo leather.

US-based tannery Horween specialises in the thicker leathers, including horsehide and bovine, and tanned the hides for Patagonia using wet-green technology, a vegetable tanning method that uses tannins from waste olive tree leaves. “Bison would seem to behave like a cow or steerhide, but it’s quite different,” comments Nick Horween on the tannery’s website. “The bison hides are much greasier and tend to have pockets of lightweight areas, especially over the natural hump of the animal’s back. The hides also have more natural wrinkles and striations due to the ruggedness of the animal. The bison is raised and lives differently.”

The Boita family in Portugal relished the challenge. “I like this product a lot, because we can feel the naturalness of the leather. It does not have any chemicals or plastics. It is very natural,” says company founder Jose Boita, who has been making shoes since he was 14.

The boots have uppers built from the hardworking, long-lasting buffalo leather, which conforms to the foot without losing shape. Brass five-eye lace-ups and three speed hooks provide a secure fit with ankle support. The Goodyear welt is a specialist method of attaching the outsole to the upper, making it easy to replace outsoles and extend the life of the boot. In fact, the soles could be replaced many times over,

The Wild Idea Boot is Patagonia’s first work boot. The outsoles are 30% recycled Vibram EcoStep and there are removable recycled cork insoles. Credit: Patagonia

the leather is so durable, say the makers. “This is a high-quality material that respects the environment,” says Jose’s son, Andre, managing director at Hugal. “We think that’s the future. That’s the big opportunity to start a new age.”

Grassland grazing

Dan O’Brien isn’t just a supplier to Patagonia – he is a friend of founder Yvon Chouinard, after crossing paths through business many years ago. “You need to read this book,” Mr Chouinard said to him on a recent Zoom call. The Ministry of the Future by best-selling author Kim Stanley Robinson is a fictional look at a government department battling to reverse climate change: although a somewhat depressing vision of a planet ravaged by global warming, there is hope. And in it, the author namechecks some visionary companies. Including Wild Idea Buffalo.

“The upshot is this: Global climate change is very real,” says Mr O’Brien. “It is happening and it’s going to continue to happen. It’s an existential threat and we are all going to suffer. But it is also an opportunity to hit the reset button on our relationship with Earth. We must never forget the provocative and transformative words of another man worth listening to: ‘It is not the strongest of the species that survives, nor the most intelligent, it is the one most adaptable to change’: Charles Darwin.”

Only around 1,000 pairs of Patagonia’s bison leather boots will be available each season, coinciding with the number of hides available as a result of Wild Idea’s food production and conservation practices. These sturdy work boots provide protection and comfort for farmers, which deepens the connection to the ground they are sourced from, says Mr O’Brien. “The loss of the grasslands is a huge tragedy, but the work we’re doing here is going to help. Symbolically, metaphorically, the boots are the foundation. That’s how we get around. Putting the boots back in contact with the grass where they started, that’s very powerful.” 🌱



Miu Miu brings archival leathers into the fold as it releases its first-ever line of Upcycled bags.

Not a Patch on leather

Prada-owned Milanese fashion and leathersgoods business Miu Miu, led creatively by namesake designer Miuccia Prada since 1993, weaved leather handbags into its Upcycled collection for the first time earlier this year. The resulting Patch bags, including a stitched-logo version of the label's new Arcadie model, have each been assembled from pieces of remnant leather, repurposed from some of the luxury company's earlier designs. "A respect for tradition enriches the here and now," Miu Miu said of the circularity minded line-up. "The existent is reimagined to create something imbued with heritage."

Accordingly, all the bags exhibit a deliberately aged patina in key areas, suggestive of a 'vintage' look. The denim-heavy capsule likewise features nappa Wander bags rendered in the brand's signature matelassé or quilted surface texture. Miu Miu only introduced its top-handle Arcadie bag, somewhat reminiscent of 'big sister' Prada's autumn-winter 2000 Bowling style, in June. This followed the Wander's autumn-winter 2022 debut, which coincided with the presentation of an Upcycled line of leather jackets during fashion week in Paris. For the denim, jeanswear dating from the last millennium exclusively was sourced from specialists across the globe for its various fades, finishes, colours and fabric weights, before undergoing a remaking process in Italy. Trucker jackets, wide-legged jeans, shorts, bra tops, baseball caps, clips and hair bands all ensued. Hand-sewn floral embellishments, inspired by haute couture, pitter-patter over otherwise more workwear-tinged choices, dressing up the denims with black silk chiffon petals, crystal and faceted beads set in "antique" metal. Logoed interior labels are leather, with canvas selected for the inside tags.

Already in its fourth edition, Upcycled by Miu Miu's availability is inherently limited, given the nature of its materials supply. Perhaps auspiciously, this year's collection was released in January, well-timed for Chinese New Year on February 10. Upcycled first launched as a concept in 2020.

Territories known and unknown

With the Patch bags' debut, Miu Miu has shown itself very much in tune with luxury peers like Loewe, Bottega Veneta, Patou, Saint Laurent, Chloé, MCM, Salvatore Ferragamo, Coach,

A keen appreciation for the patina developed by used and archival materials over time, not to mention design heritage and traditional techniques, is a coherent thread running throughout.

ALL CREDITS: MIU MIU





“With the Patch bags’ debut, Miu Miu has shown itself very much in tune with luxury peers like Loewe, Bottega Veneta, Patou, Saint Laurent, Chloé, MCM, Salvatore Ferragamo, Coach, Mansur Gavriel and Mulberry.”

Mansur Gavriel and Mulberry. Each has integrated surplus hides and skins recovered from past seasons in recent years and all say they are mindful of keeping internal stocks and off-cuts in circulation, cognisant of their value. More footwear and leathergoods brands working in a similar manner include Ugg, Reco, Sieme, Roccamore, Clarks Originals and Annagiulia Giannetti. Petit H, Hermès’ own upcycling atelier which works exclusively with the maison’s unused leathers, silks, fabrics and other materials, launched in late 2010. Last year, its limited edition collections toured Osaka and Beijing. Similarly, high-end British carmaker Bentley released an Emmanuel Lawal-designed driving glove crafted from leftover leather in October, inspired by its popular Continental GT model.

What sets Miu Miu’s latest Upcycled range apart, however, is its blockchain verification. Every item is registered on Aura blockchain, which Prada Group, LVMH, Richemont-owned Cartier, OTB and Mercedes-Benz opened to the luxury sector in April 2021. The customer-centric traceability and transparency technology feeds product history, proof of authenticity and handbag lifecycle data to buyers from ideation through distribution via a scannable near-field communications tag inserted under the leather, close to its hand-stitched logo. Clients “will be able to access detailed information about the bag and the material it is made from”, Miu Miu says. Other users of Aura blockchain include Dior, Bulgari, Tod’s, Martin Margiela and Prada itself.

Quantity and quality

With figures from Aspri, the Association of Recycled Leather in Italy (Associazione Pelle Recuperata Italiana), indicating that the Italian tanning industry produces almost 758 million kilograms of finished-leather waste annually, roughly 232 million kilograms of which is created in Tuscany alone, there is more than enough material available for upcycled leathergoods. LVMH-owned Nona Source, which also launched in April 2021, was introduced to help whittle down this supply with luxury brand sourcing teams in mind. Its curation of deadstock hides and skins of the highest quality are offered to both its own houses and external designers alike, at its showrooms, trade shows and online. Nona Source sold approximately 2,000 surplus skins to its “mindful creatives community” in its first year of operations. Meanwhile, Scandicci-based Zerolab opened in spring 2022 as more of a hands-on creative education and leathergoods incubator waste collection



The careful deliberation over materials for this fourth Upcycled by Miu Miu chapter shows a level of understanding that goes far beyond the superficial and the temporary.

centre and sorting effort, working with co-founder Zerow’s leather stocks. Zerolab is the fruit of local upcycling e-commerce platform Zerow’s partnership with Aspri. Last year, Polimoda-trained Italian designer Annagiulia Giannetti, who graduated in 2021 and recently collaborated with Colville and Diadora on a limited line of recycled leather-trimmed sneakers, told *World Leather* that she now only purchases her materials from Zerow.

As traceability and transparency tools mature, and sustainability-driven demand for upcycling continues to reach into higher price-points, the breadth and depth of scope for luxury leathergoods companies to invest in such technologies is likely to only advance as things move on. Surely, these can only strengthen brand-led storytelling around material authenticity and provenance. The contemporary, more conscious consumer, especially those in the market for a \$4,200 or \$2,750 leather Upcycled bag from Miu Miu, will increasingly request this over time, too. But one thing remains the same in the materials marketplace: cut up, deadstock or scrap, the properties and value of so-called alternatives are not a Patch on leather. 🌱

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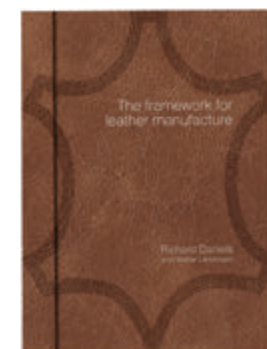
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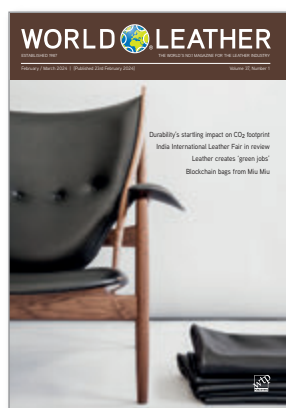
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A photograph of three lion cubs climbing a large, weathered tree trunk in a savanna environment. One cub is at the top, another in the middle, and a third at the bottom. The background is a blurred green landscape.

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