



*This heifer has only had one owner and hence only has one brand. She might have to go through three more ownerships, thus three brands. This seriously restricts the component size of articles made from the final leather.*

# The Colombian leather sector: A renaissance banquet of feast and famine!

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**T**he basis of the Renaissance was the willingness of people to adopt technology and concepts from other cultures. The Colombian leather sector, while very traditional, nevertheless still has a positive Renaissance outlook. Since there has been a very deep relationship between cattle ranching and leather, these facts can help explain the character of the leather sector.

The leather industry in Colombia has always been deeply involved with cattle ranching, being the main source of raw material and the principal consumer of its products.

Historically, the Spanish leather-making industry had been heavily influenced by foreign technology due to the Moorish occupation of Andalucía for approximately 800 years. The Spanish term descriptive of small leather goods is still Marroquinería, and the classical terms Cordovan leather and the Berber-origin term Tafilite amply demonstrate the great influence of those occupations on the rest of the known world at that time, on the eve of the Conquista.

This is not to assert that the native people were unaware of basic tanning technology, but rather because they did not raise cattle. They were clearly aware of tannin sources such as encenillo, peralejo, and even mangle (mangrove) and divi-divi as sources of astringent vegetable extracts.

The decorative use of tanned nutria fur on the classical Antioqueño Carriel, a leather purse obviously evolved from half of a traditional Spanish saddlebag (Alforja, an Arab origin term) undoubtedly shows some indigenous tanning technology was being used. This was part of an early partnership with the Spanish cattle raising, bovine leather-working European culture that was so different from the indigenous people's way of life.

## Creation through innovation

The interesting thing to note about the leather sector is that, although so traditional a craft, it is and was always willing to take up innovations from other sources. This Renaissance creativity remains present in the traditional Colombian leather sector of today.

Simply processed rawhide products, such as the indispensable rope for ranching, were produced from the very beginning. The use of parchment in colonial furniture was important, and as such allowed the subjects of Cartagena to withstand several sieges by British Privateers, by turning the parchment into gelatine, and eating it! The same type of parchment, light and strong upon drying, is what still holds the wood-frame of a classical cowboy saddle together.

Tanning yielded the numerous components of the equipment required by cowboys. Very clever, though primitive, alum tanning produced the lacing of non-stretchable, and of great tensile strength, straps. These anchored brass rings for the cinch to be secured on both sides of the saddle, and are still used, as vegetable tanned leather could have never provided such properties. Thus the early colonial leather production was substantially linked to horse-powered cattle ranching, a typical Spaniard's economic activity at the start of the colonial era in the New World.

Leather shoe production did not come until much later, because the Indians made a very effective sisal fibre-based slipper. It was very light, wear and fungus resistant and washable, and is still in use in some places. It is a most revealing fact of Renaissance mentality that the non-Indian, Spanish word for this slipper is of Arab origin: alpargata. At any rate, fabric sneakers



have widely replaced these items today.

At the end of the 19th century, the Colombian agrarian economy started to turn massively towards coffee, creating a larger middle class, potentially capable of consuming more sophisticated and fashionable leather goods. The use of simply tanned leather was still important in the traditional horse and mule transport and a growing commercial sector spurred on even more the use of such leather. The military uses of leather probably became very important during that terrible period of civil war around the turn of that century. Times were so very violent during the infamous thousand-day civil war, which left the country so deeply mutilated and exhausted, that the next (and longest) peaceful period extended through the widespread turmoil of both World Wars up to 1948. This was a time of great economic development and peaceful living conditions that is today looked upon with great nostalgia by most Colombians.

Slowly the consumer became more discerning in the 20th century. The upper classes began to use leather shoes, at first imported and resoled by local cobblers. Leather goods manufacturing in traditional talabarterías, although they were largely oriented towards the “horse and carriage” trade, literally, began experimenting in manufacturing leather goods copied mainly from French imports. This included such impossibly elitist goods as ladies’ dress gloves. British pommel-less riding saddles—and horse racing—became a permanent part of the leather scene as well. In short, by the early ’70s Colombia had vigorous and fashionable shoe and leather goods manufacturing sectors capable of exporting, and did so for some time until the widespread economic disaster of the ’90s.

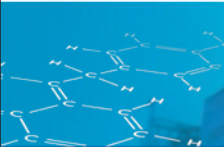
Small rural tanneries had developed very soft leather for a round, long bag for holding thin bedrolls. This was generally tied at the rear of the saddle, and called tula. It had a characteristic odour due to the ingenious use of spent automotive engine oil. Such mineral oil, because of the electric spark and air in the engine, becomes partially oxidized to aldehydes that cause a slight oil-tannage effect and a subtle feel— with just a hint of chamois leather! This tula leather was a great success in bag



*This Carriel is about 60 years old. The light yellow leather seen composing the bellows is Tula leather. There is fur on the outside cover imitating nutria fur in a really expensive item. The patent leather is linseed oil patent made up until the '60s.*



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exports, and an innovation coming from the “little guy” in leather. It is an example of how the Colombian leather goods sector was always willing to take a risk on a new, but authentic, leather product development.

#### Effects of population cycles in a cattle-based economy

The intimate link between cattle raising and leather has an unexpected effect on the psyche of the Colombian tanner. In many cattle-raising countries there are cycles in cattle population that reflect in slaughter cycles. In Colombia, Argentina (and in the USA up to about the First World War) such was the situation.

Cattle behave as a storehouse of wealth. They also have the added advantage of providing the investor with a biological interest rate, conformed by reproduction and growth of the net mass of meat represented. The annual slaughter rate is well known because of the traditional municipal government monopoly since Colonial times.

Prices of cattle in Colombia behave very much as gold does in a context of a bimetallic economy. The value of cattle in Colombia runs counter-cyclical to the consumer price index. By the monetary authorities attempting to apply monetarist policies to contain inflation, without taking into account the magnitude of the huge informal cattle-based economy, they have encouraged periodic scarcities of meat and rawhides as cattlemen invest and later divest third-party informal capital.

These investors, during times of high interest bank rates, spur an excessive slaughter which will invariably be followed later by

a great scarcity, as the herd is rebuilt. The periods are such that hide availability completely reverses every 3-4 years.

However, the size of the swing in the cyclical component of the annual slaughter rate has wildly increased after each cycle. At various times, the tanners cannot spend their money fast enough as hides are available and as a result agents for the suppliers of machinery and chemicals send exaggerated sales projections to their faraway headquarters.

#### Economic feast or famine

The reality is that the 6-7 year slaughter cycles need to be carefully considered. Although the macroeconomic effect of cattle on the total economy is a fascinating issue, the fact is that the total value of the Colombian cattle herd is of the same order of magnitude as all other monetary instruments combined. Cattle in Colombia are just like bearer promissory payment notes, endorsed to the buyer at his last branding. This means that the average raw hide will have about four or five large different iron brands at least.

The tanners that have managed to survive these economic cycles in their main raw material supply are, on a time-average basis, always disconnected from reality. Their operating logic is at best described as a schizophrenic mixture of feast or famine situations, when viewed by a normal, ordinary businessman! ☹

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