

Boots by El Dantés. A thriving design and fashion industry in Spain is good news for the country's tanning industry.

A sign of the times

The tanning industry in Spain is working hard to meet the needs of extensive domestic footwear, upholstery and fashion industries, but at the same time, it is striving to develop new business in new markets.

Spain's tanning sector is proud of its transition from centuries of craftsmanship and artisan production into a twenty-first century industry with high levels of technical excellence.

However—with the exception of a handful of pockets of activity, principally in Catalonia (63 tanneries), Valencia (36) and Murcia (15)—most of Spain is tannery-free these days. There are 132 companies active in the sector across the country, employing just over 4,000 people.

Together, in 2007, they produced 32.7 million square-metres of leather, worth €884 million. Bovine leather accounted for 57% of this output, sheep leather for 19%, with the rest being made up of a mix of goat and pignskin, snakeskin and rabbit.

Internal focus

More than 60% of the leather produced in Spain's tanneries last year went to Spanish manufacturing companies. The country's footwear sector has had mixed fortunes recently. There are reports of factory closures and more than 1,000 jobs

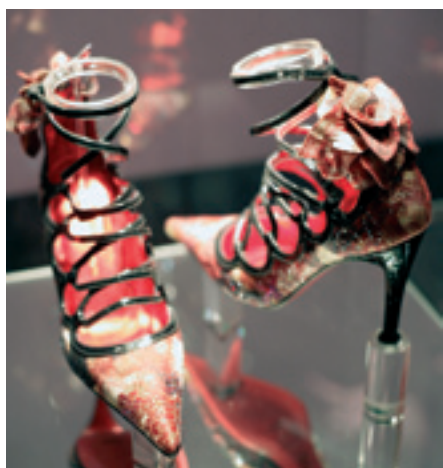
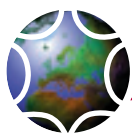
lost in the shoe stronghold that is the province of Alicante since the start of the autumn. Nevertheless, some of the companies at the higher end of the global footwear sector have 'Made in Spain' on the soles of their shoes and they are flying.

The same applies to world of fashion. The Spanish Tanners' Confederation (CEC-FECUR) has done a good job in convincing some of the country's top talent—Modesto Lomba, Miriam Ocariz to name just two—to make leather a critical part of their collections. And in the important world of leathersgoods, there are exuberant young brands such as ERVA that have made Spain's leather tradition a crucial part of their strategy. ERVA is the creation of two young designers, Eva García and Rosa Rial, who come from the north-west of Spain, near Santiago de Compostela. They met in London, but when they decided to launch their own brand around five years ago, they headed back to Spain, although to Catalonia rather than Galicia, specifically to have easier access to leather and leather



Spanish footwear brands that focus on the domestic market are having a difficult time, but designers at the higher end, such as Paco Gil (seen here with former Miss World Rosanna Davison), are doing better.

CREDIT: RENE TILLMANN/MESSE DÜSSELDORF



The international reputation of brands such as Sacha London (from Elda, Alicante) is growing all the time.

CREDIT: RENE TILLMANN/MESSE DÜSSELDORF

craftsmanship.

Market breakdown

The breakdown of the €883,694 worth of leather that Spain's tanneries produced in 2007 is as follows: bovine leather accounted for more than €500,000, and tanned sheepskin for €165,000. So between them these two types of leather represented more than three-quarters of total output. Double-face earned the industry €81,154 and tanned goatskins were worth €54,000. Sole leather was next at €27,237 and other types combined to bring in €42,291.

Exports of Spanish finished leather last year were worth €339.4 million, with imports of leather from outside Spain reaching a value of EUR 320.3 million. These figures include trade with other European Union countries; more than 60% of exports went to other EU countries. In descending order, the most important markets for Spanish leather were Italy, Hong Kong, France, Portugal, China, the United Kingdom, Turkey, Morocco, Germany, the US, Korea, Japan and Canada, with the 2007 values ranging from €59.6 million at the top of the list to €1.1 million at the bottom.

Wider world

For some analysis of this situation, we turned to the current president of CEC-FECUR, Josep Ballbè.

He explains: "I would say that our situation here in Spain is in keeping with that of other countries in Europe. This was clear at the most recent Cotance meeting in London at the start of October. There are always small differences, but I think, basically, our situation here reflects that of

our industry all over the world at the moment."

There has been a long period now, the CEC-FECUR president says, in which few aspects of life have been easy for tanners. He dates it back to 2001 or 2002.

A SORE LOSS

The Spanish tanning sector—and, indeed, the global industry—suffered an important loss in 2008 with the death in the summer of Andreu Colomer.

An iconic figure in the town of Vic, Mr Colomer was 95 when he died. The town, which is 65 kilometres north of Barcelona, is still the home of the tanning group, Colomer i Munmany, that his great-great-grandfather, Jaume Munmany, founded in 1792.

Andreu Colomer embraced the changes imposed on his company, and on the whole of the leather industry, with enthusiasm and he presided over its adoption of modern technology and materials innovations, turning it into the international business it is today. In the course of pushing these developments forward, Mr Colomer became an influential figure on the global stage. He served as a member of the United Nations Industrial Development Organisation, and as president of the European leather industry association, Cotance.

He spoke of his own career fondly, but recalled that there were difficult times along the way. Born in 1913, he became an apprentice in the family firm at the age of 15. "You had to spend three years as an apprentice," he told local media shortly before his death, "living with the master tanner to make sure you learned how to tan leather well. At the end of that time, Vic's association of tanners and glovemakers—because in those days Vic made gloves too—would meet up and confer the certificate on you. This was the accreditation you needed to become professionally active."

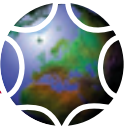
He went on to recall a hair-raising start to the Spanish Civil War in 1936. Vic was under the control of a revolutionary committee and Andreu Colomer found himself on its wrong side. "One day they came to the house and called to me to come down," he said. "As I walked down the stairs, I was sure that I was going to die."

But he was spared and was able to flee to Brussels, arriving in the Belgian capital with four-and-a-half francs in his pocket. He knew someone in the city, someone who owed the tanner money, but couldn't pay and offered instead to give him "a plate at his table and an attic to sleep in". But even here Andreu Colomer was able to develop himself professionally. He took a position in a local factory as an ordinary worker but, three years later, ended up with his own office there and seven people in his charge. He left just as World War II was starting, and made his way home.

In his later travels, he began to buy examples of artwork and craftsmanship in which leather featured prominently. Over the years, he put together a collection of more than 1,000 artifacts (trunks, screens, altar decorations, writing desks, chairs, saddles, masks, and so on) from all parts of the world and covering many centuries in the history of the production and use of leather. At the end of the 1990s, he bequeathed the collection to the town of Vic. The authorities installed it in a former Carmelite convent and it became the Museu de l'Art de la Pell (the museum of leather art).

The museum is open to all visitors six days a week and contains a specialised library, guided visits, archives, facilities for school visits, meeting rooms and a restoration workshop. It is a fitting legacy to a life devoted to the industry.

There may have been a little respite over the last couple of years, but lately, the spread of what is now confirmed as a global economic crisis and the strength of the euro have made things even more difficult. He knows that the question of



One of ERVA's stylish bags. The Barcelona-based brand set up in Spain specifically because of its tradition in leather craftsmanship.

CREDIT: ERVA.

currency works both ways: the members of his organisation that deal in dollars are receiving an important boost from this ("it's important always to look at the positive side too").

Another factor is the market-sector that tanners produce for. Those that serve the manufacturers who focus on the domestic, Spanish footwear market are the ones that are suffering most, but, as mentioned above, tanners supplying top-quality leather to high-end footwear brands that have a share of the middle and high tiers of the global footwear market are doing better. Even if footwear consumption in Spain (or throughout Europe) is falling, developing markets in other parts of the world are becoming more lucrative all the time. There is, therefore, "some stability" in the markets for bovine leather for the leathergoods and export footwear spaces. "These markets are neither going up nor down," he says, "whereas if your focus is on domestic footwear, you'll be having a more complicated time of it at the moment. Meanwhile, tanners that produce finished leather from smaller skins are certainly suffering, and double-face is an area that has been low for quite some time. So there are tanneries that are having to adapt to these difficult circumstances. No one knows how long it's going to take for the global economy to turn around. It's impossible to know; all we can do is hope."

Special areas

Mr Ballbè adds that he was able to identify no real change in mood after the Lineapelle exhibition in Bologna at the end of October and says the fair simply reflected the mood of the industry. He feels that where we are today represents a degree of proof that businesses, including tanneries, can ride out the storm successfully if they specialise in the right



Demand for top-quality leather among some of Spain's top fashion designers, including Miriam Ocariz, is also high.

CREDIT: IFEMA

areas. Spain's finest tanneries are doing that now, adding value in terms of quality, design and their ability to meet the demands of fashion trends, he insists, even though, for some, that means looking beyond their own borders more than ever before.

"Look," he continues, "if your natural market vanishes you have to start thinking about other markets, even if that's something you never had to think about before. If the European market has been falling away has been diminishing for a few years now, we have to look elsewhere, to markets that are growing."

The example of China is, perhaps, the best one. Secure even a tiny fraction of that market and it will represent an extremely positive result for any company. Everyone knows that, so there is intense competition for the Chinese market, not least from Chinese tanners, but Mr Ballbè believes it will be some time in the future before local leather producers are able to compete at the high levels with his member companies. "At that level, manufacturers in China still prefer to use European leather. We have to make the most of that and make sure we are there at the right moment."

For two years now his organisation has been leading tours for Spanish tanners to Asia, starting in Tokyo (a delegation travelled there again in November), and later to Hong Kong, to Shanghai and to Guangzhou. It is leaving nothing to chance. 🌐