



Regional Commentary

Stability in the face of uncertainty

"Stable" is the word that springs immediately to the mind of Dr Kerry Senior, director of the United Kingdom Leather Federation (UKLF), when asked to describe the state of the industry there at the start of 2017. One small tannery, Dickens Brothers in Northampton, closed in 2016 and export revenues went down slightly, but 22 leather manufacturers of differing sizes remain and, collectively, they turned over £215 million last year. They exported 80% of their production, with half of those exports going to other parts of Europe and these companies employ a combined total of 1,400 people.

The two biggest groups, Pittards in south-west England and Scottish Leather Group in the west of Scotland, are both expanding at the moment. A third group, CF Stead & Co in Leeds, recently opened a new dyehouse. "Investment is taking place," Dr Senior says, "and the industry, having come through some tough times, is doing all right."

There is uncertainty at the moment because no one (including the government, critics say) is sure what the UK's economy and trading relationships will look like after the country leaves the European Union, in accordance with the result of a referendum in June 2016. Uncertainty is seldom welcome in business discussions, but so far the looming departure from the 28-state trade bloc that the United Nations ranked as the largest economy in the world in 2015, has not been all bad news, according to the UKLF director.

In the weeks and months following the vote, there was a fall in the value of the pound and this has helped UK tanners boost their exports and contributed to keeping order-books busy for the early part of 2017. It's a bit of a double-edged sword, though, because almost all the chemicals and machinery the tanners need are made overseas and have, therefore, become more expensive to UK buyers. Plus, as with finished leather, the 2.5 million high-quality bovine hides made available by packers in the UK each year are now cheaper for overseas tanners to buy and if the competition for this raw material continues to intensify, it is likely to push prices up for everyone.

Currency exchange rates aside, figures show that imports of finished leather into the UK last year outstripped exports. "What that tells us is that there appear to be more companies in the UK making finished products with leather than we thought," Dr Senior says, "and that means they could use UK-made leather." Scottish Leather Group director James Lang, who has been the chairman of UKLF since 2015, takes this point further. "There are a lot of designer-manufacturers," he explains. "They are small-scale, but we have a large number of them. It's probably hundreds and not thousands, but it's seems clear that there are more of them than we were aware of until recently."

For UK tanners to win some of the business of supplying these small players with finished leather, Mr Lang argues that a minor change in culture may be required. He feels UK tanners, while "very knowledgeable", have become reluctant to take on jobs that can involve small volumes but high levels of customisation and producing items that are probably not in their catalogues. Yet this is the type of product small designer-manufacturers are likely to want.

One of a series of challenges to the established world order in 2016 was the result of a referendum in the United Kingdom in June, which means the country will leave the European Union after almost 45 years. Six months on from the vote, the leather industry is trying to maintain a business-as-usual stance on the one hand while also attempting to achieve clarity on what the future will hold.

He knows of one company in Glasgow, Nu Blvck, that is focusing entirely on providing limited-edition, handcrafted bags, belts and purses for customers, with the products made by emerging designers. In this case, its accessories do contain leather from the UK, mostly traditional English bridle-style leathers sourced in Northampton, which a designer based in Leominster in Herefordshire, Sarah Williams, uses to make the Nu Blvck collection by hand. "Nu Blvck only wants to make what it can sell or has sold already; it wants no inventory," James Lang explains. Facilities such as the Cockpit Arts incubator designer-manufacturer hub in Deptford in London are helping these small companies gain a



A bag from start-up brand Nu Blvck, handmade by artisan Sarah Williams. Designer-manufacturers specialising in leather products abound in the UK today.

CREDIT: NU BLVCK



bigger profile and attract customers. A number of the artisans who have set up there have need of high-quality leather; examples include bespoke shoe manufacturers Maria Mclean and Mariano Palencia Crespo and accessory producers Johnette Taylor, Candice Lau and Asdrúbal Barreto-Abreu. He would like to see an idea like this replicated in Paisley, where one of Scottish Leather Group's three tanneries is located, and which is in the midst of a renewal programme. Ongoing relationships between UKLF member tanneries and companies like these will take UK leather manufacturers into new territory.

At the other end of the accessories business, the UK is also home to a number of extremely big brands, including Mulberry, Burberry, Radley and others. They, too, could make more use of the leather being produced on home soil, Kerry Senior believes, and he's not

sure what it is that holds them back. "Perhaps there are too few tanneries here and most are small," he suggests. "Perhaps they worry about tying their leather requirements to one or a very few tanneries and thus leave little or no room for negotiation." What will encourage change, he believes, is for end consumers to begin demanding that 'UK-made' on the label should include the use of UK leather in the finished product's material mix. "This would give conscious consumers a guarantee that, as well as being beautiful, the leather has a low environmental impact, came from an animal that was treated well and was made by companies that take social responsibility seriously and pay their workers fairly. We need to do what lots of countries do," he says. "We need to emphasise our heritage and all of these welfare and responsibility elements are part of our heritage." 🌐

A force for good

A part from having launched start-up businesses with links to leather under the same roof in south-east London, three of the five Cockpit Arts artisans mentioned above have something else in common. Maria Mclean, Candice Lau and Asdrúbal Barreto-Abreu were winners, in 2014 and in 2015 respectively, of the Cockpit Arts-Leathersellers' Awards, giving them a place at the design hub paid for the Worshipful Leathersellers' Company in return for a commitment to develop new work in which leather is a major constituent.

Leathersellers is one of the 110 guilds and trade associations, ancient and modern, that make up the Livery Companies of the City of London, the three square-kilometre area that houses a huge proportion of London's financial services and its history. The Clerk of the Company, which is to say the person with overall responsibility for the day to day running, David Santa Olalla, explains that this is just one of an array of ways in which the organisation helps the UK leather industry today and says this engagement with and support of the leather industry is part of its mission statement, even if a majority of its members, or liverymen, are now from other business backgrounds.

The Company's Master for 2016-2017, Ian Russell, says 10% of Leathersellers liverymen have an active interest in the industry today and that another 15% have what he calls "a meaningful connection" to it. He does not count himself in this group even though he is from a tanning family. His father sold the business and Mr Russell never worked in it. "That means I've never had a commercial interest," he explains, "but so many of us are retailers and entrepreneurs. We understand job creation and economic challenges. What we aim to do is learn about leather today and use our knowledge to add some value."

Leathersellers also provides important funding to the University of Northampton's Institute for Creative Leather Technologies (ICLT), as well as to other UK academic institutions, including De Montfort University and the London College of Fashion, through bursaries and graduate prizes. As well as sponsoring one-off projects, such as a recent move on the part of the UK's Society of Leather Technologists and Scientists (SLTC) to digitise data it held in paper form only, it is providing support for initiatives that stand a strong chance of having important implications for the entire global leather



St Helen's Place, London, showing the livery hall of the Worshipful Company of Leathersellers with the St Mary Axe commercial skyscraper, colloquially known as The Gherkin, in the background.

CREDIT: BIKEWORLDTRAVEL / SHUTTERSTOCK, INC.

industry. Thanks to funding from Leathersellers, ICLT has now recruited a PhD student, Tom Garwood, to work on a programme of in-depth study to define the problems surrounding chrome VI, produce evidence using advanced analysis and come up with a definitive answer to key chrome VI questions.

Many cities had or have guilds or guild-like business associations, but it's hard to think of any that remain as prominent, prosperous and important as London's. "This has much to do with the scale and reach of London's Livery Companies," Leathersellers' Master, Ian Russell, says. "Generations of liverymen have invested time and resource in their trade bodies and, over time, bodies such as ours have gained good momentum. We have conducted the stewardship of our assets well and prudently and now we have the momentum to be a force for good."

He says Leathersellers is "acutely aware" of the need for it to remain relevant to the industry that founded it in the fourteenth century to promote education and social wellbeing among people connected to the leather industry; it is determined to remain faithful to its original mission. 🌐



The European Synchrotron Radiation Facility (ESRF) in Grenoble; its technology could help PhD student Tom Garwood decode the secrets of chrome-tanned leather.

CREDIT: ESRF

New ideas to benefit the global industry

Work going on at the University of Northampton's Institute for Creative Leather Technologies (ICLT) has the potential to change and help the way the global leather industry works. That's the conviction of Professor Tony Covington, who has the title of emeritus professor of leather science, but who is still very much involved with the institute's work and still part of a team that includes director Rachel Garwood, senior lecturers Dr Will Wise and Dr Anne Lama, tannery manager David Sherwood and, the newest recruit, Tom Garwood (no relation), who began a PhD programme in the autumn of 2016. Professor Covington sees little point in false modesty and asserts that the academic work going on in Northampton is important and has, and will continue to have, a high "level of influence".

Ironically, many people in the leather industry knew some of the details about Tom Garwood's PhD programme before he did because Professor Covington mentioned it at an industry seminar at the end of 2015. He said questions remain over the possibility of consumers coming into unsafe levels of hexavalent chromium (chrome VI) through leather. He added: "I'm sick of this subject constantly being brought up and of the uncertainty." For this reason, he explained, the university had decided to seek support to run a doctoral programme to find the answers "once and for all" and communicate the information widely. ICLT spent the first half of 2016 securing support (which came from the Worshipful Company

of Leathersellers and the UK Leather Federation) and recruiting Tom Garwood; he began his work in the early part of the 2016-2017 academic year. His background is in chemistry and forensic science and, following the completion of his undergraduate degree, he spent two years working in process development. His PhD work will include time using the equipment at the European Synchrotron Radiation Facility (ESRF) in Grenoble, whose self-stated aim is to help humanity "decode the secrets of matter" by producing X-rays that are 100 billion times brighter than the X-rays in use in hospitals. Employing equipment like this and working at ICLT, tapping into the expertise there and making use of the institute's own tannery, Mr Garwood hopes (to use the ESRF's own phrase) to decode the secrets of chrome-tanned leather and, in three years' time, be ready to share a definitive study on the subject.

Other projects include examining the possibility of using deep eutectic ionic liquids to deliver reagents to hides and endow finished leather with high levels of performance properties in what Professor Covington calls "a new and safe way". He thinks it's possible that chemical treatments that tanners cannot apply today, or at least cannot do so easily, could become much easier to achieve. "Of course, tanners can make leather water-resistant at the moment," he continues, "but what impact does that have on the leather? And what other ways are there to achieve the same effect? That's what we're looking at. We think this may be a way to achieve



extreme water resistance without affecting aspects such as the handle of the leather. Ionic liquids open up possibilities."

Dr Will Wise believes using deep eutectics, if it becomes mainstream, will represent "a complete shift away from conventional thinking". He limits himself to saying it "looks promising", and points out that commercial partners are likely to work on turning ICLT research and academic work into marketable industry solutions. "We're not talking about improving the products that are already on offer to tanners," he continues. "We're not trying to compete with leather chemical companies. These are completely new ideas."

The ICLT director, Rachel Garwood, also describes these ideas as "completely fresh". She says that most people who have been in the leather industry for any length of time will have seen projects to replace salt in hide preservation or to improve the colour-fastness of suede come round time after time. "These ideas are genuinely new," she adds, "and they look very promising." She is of the view that having a working tannery at ICLT is "worth its weight in gold" for developing initiatives like these. It also makes the institute a good place for the leather industry professionals of the future to study and its graduates are in demand. Year after year, leather manufacturing companies around the world snap up every graduate who completes the course at Northampton. She is also grateful to the tanning companies who realise that it's important for them to "put something into ICLT as well as taking something out", for example by sending employees to gain formal university qualifications in leather technology. "We've had six consecutive years of 100% employment for our students at the end of their courses and we are now attracting students from a creative background as well as from a science background and the calibre of our undergraduate and research students is high. We may be niche, but there is a global shortage of the skills our students learn here and because our courses are closely integrated with the industry, students can start networking from day one and are finishing their time here at ICLT as



Industry ties. Students and staff from the Institute for Creative Leather Technologies at the University of Northampton with representatives of leather chemicals manufacturer Trumpler.

CREDIT: TRUMPLER

rounded, industry-ready graduates."

The university is moving from its Park Campus, which currently houses ICLT. Plans for moving the institute to a dedicated leather centre in Northampton's new Cultural Quarter are at an advanced stage. This development will take place in the Vulcan Works building in the centre of the city. Northampton's leather conservation centre will also be part of the move and the National Leather Collection (formerly the International Museum of Leathercraft) will be a few minutes' walk away. Rachel Garwood says these changes will be complete by September 2018. "We're bringing leather back to the centre of Northampton," she says. "It's where it belongs." 🌐

A platform for the whole world

The United Kingdom may now produce a lot less leather than it did a generation ago, but as the ongoing work of the University of Northampton's Institute for Creative Leather Technologies shows, it's now able to make contributions to the development of the global leather industry in other ways.

Another example is that the UK is now an important centre of publishing for the industry, with *World Leather* and its partner online projects *leatherbiz.com* and electronic newsletter *Leatherbiz Weekly* (with its exclusive fortnightly market intelligence report, the Leather Pipeline) at the forefront in providing a platform for news about developments across the industry and for innovative technology ideas from chemicals and machinery manufacturers. Naturally this has something to do with English being the lingua franca of business in our times, but that cannot be the only explanation because the United Kingdom is far from the only place where English is the first language.

"We at *World Leather* don't just report on the leather industry. We have always believed in giving something back to it," says publisher and chief executive, Simon Yarwood. "The magazine has

always been a pioneer and will continue to be; from our work on comparative international wastewater standards being adopted by the relevant United Nations agency, to the work our previous technical editor, Richard Daniels, carried out to develop the concept of reed-bed technology for treating tannery waste, our range of multilingual guides to the workings of this industry that we have published and which are still popular in all parts of the world. A newer book, *The Framework for Leather Manufacture*, our *Nothing to Hide* website of essays dedicated to the defence of leather and our Beast to Beauty conference are all part of this. We have shared our knowledge."

The Tannery of the Year initiative is another demonstration of this approach. Since 2009, it has provided some of the best tanners in the world with an opportunity to share positive stories about the way they work, the way they look after the environment and their workers, their commitment to innovation, to authenticity and to transparency, and their determination to work hand in hand with the communities with which they share resources. This work continues. 🌐