

Sustainability in the leather supply chain

Not too long ago, a tannery taking care of all activities on its own premises and having good control over everything leaving their premises, would be considered to be doing an excellent job. Times have changed and this is no longer sufficient. To achieve improvements, whether they be social, environmental or indeed anything else in the leather supply chain, the tanneries need a far broader understanding of every stage in the chain—from basic raw materials to recycling opportunities at the end of the chain. Why have things changed, what new factors do tanners need to consider, and what opportunities does this provide to tanners who embrace the necessary changes?

Why the changes?

The changes we see now have been evolving for over 50 years. There is no doubt that the Industrial Revolution has on balance led to a huge improvement in life across the countries that fully embraced it but it took time to recognise the negative side of some of these improvements. Awareness has grown over the last fifty years, leading to cleaner air, reduction and elimination of some harmful chemicals and less pollution of rivers and seas to name but a few. The difference over the last decade has been a far broader acceptance that we collectively have the potential to damage the prospects of future generations to reach the living standards we have today. There are still some in denial, even at the highest levels, but they are more and more isolated. This increased awareness impacts on the leather supply chain because of far greater consumer awareness and concern, the activities of a number of NGOs (non governmental organisations), and the vast amount of new information available through social media. The majority of the brands supplied by the tanneries are fully aware of the need to be seen to be actively working all along the supply chain on social and environmental improvement. Those tanners who are able to support them are seeing improved business prospects. There are of course concerns on increased costs but the reality is that many of the necessary changes can actually save money and also that properly informed consumers are becoming more and more likely to be prepared to pay for improved products. Anyone who doubts this just needs to look how much so called “organic” food is sold across the developed world at the expense of cheaper alternatives.

Areas for improvement in the leather supply chain

One area of serious concern to many of the brands is raw material sourcing. They want to know that hides and skins have been sourced from farms that have met standards on animal welfare but also are not in areas of deforestation. There has been considerable progress on this with more information available to the tanners and systems being put in place for leathers produced in any particular tannery to be able to carry this information on to the brand and eventually the consumer as well. In some areas, the information available only goes back as far as the slaughterhouse but increasingly it can go back as far as the original farm.



The raw material concerns do not only relate to hides and skins. Chemicals, water and energy also need to be considered. One issue for chemicals is that understandably chemical manufacturers do not want to reveal every component and process used to produce their products; they consider this to be proprietary information. The answer to this may be for independent bodies to be used to certify that a particular chemical firm is meeting the required standards. For water and energy, it should be relatively straightforward for tanners in the developed world to show where they are sourcing. In the developing world it might be more problematical at this stage. For example, the impact of an individual tannery or tannery cluster on the local water table is not information that is readily available.

A major topic in sustainable sourcing has been to look at local rather than global availability. The leather industry has become increasingly global and, although there will be definitely be some opportunities for brands to return to some local sourcing, it will not be possible on a wider scale in the foreseeable future. This means work needs to be done to reduce the impact of transportation and to ensure that the supplying countries meet the required social and environmental standards of the receiving brand or country.

The intention of this paper is not to look too closely at current tannery operations, but rather to look at the factors outside of the direct tannery control that they now need to consider. However there is one factor within the tannery operation that needs to be covered. We have gone from a period where there was little or no consideration to the final fate of the leather at the end of its life, to considering a cradle-to-grave life cycle and now going further to the current search for cradle-to-cradle. In other words, the end of life of the leather product means that all the components in the shoe, seat or garment should be used as raw materials for some other product rather than being sent to landfill. Whilst this will to a great extent remain outside the influence of the supplying tannery, it will mean that tanners carefully choose the chemicals used in the production of their leather to ensure that

residual chemicals in the leather do not negatively impact on potential opportunities for recycling of the final product. Many tanners have already worked closely with the brands to make leathers suitable for construction of new products, and this cooperation now needs to be extended to cover the deconstruction of the same products.

One other factor worth considering within the tannery operation is the technology available to make lighter weight leathers. There is a very obvious advantage in using this type of leather for aircraft seating. Perhaps less obvious in other applications but worth considering that every car manufacturer is taking every opportunity to reduce the weight of their vehicles. For them every gram saved counts. In other applications, the leather and final products still need to be transported so there can be a fuel saving resulting from this reduction of weight.

In the search for sustainable solutions, brands are looking again at alternatives to leather. The industry as a whole needs to be aware of this and respond by showing genuine measurable improvements in their performance and also to recognise that it will often be the weakest link in the chain that gets the most publicity – bad news always seem to get a wider audience – a combination of education and legislation needs to be put in place to raise standards across the world.

Sustainable opportunities

There are a number of consumers who will willingly embrace more sustainable products and technologies almost regardless of cost. There are others who never will. The vast majority of people sit somewhere in the middle, they need to be persuaded of any benefits before deciding to buy new products. It is no longer sufficient for tanners and others in the supply chain to quietly do the right thing: they have to be seen to be doing it and to let potential buyers know of the benefits. The move to a more sustainable future certainly creates plenty of opportunities but it is always worth bearing in mind that if few know about it, the benefits will be much more limited.

The debate continues on whether hides and skins are considered as by-products of the meat and dairy industry but, regardless of any final conclusion on this discussion, the use of a natural as opposed to synthetic raw material fits well in a sustainable world. In promoting leather, it is important to get this message across. Many of the leading brands want to continue and even increase their leather usage; by assisting them to build a strong story, there is an obvious benefit to the leather industry as a whole and particularly to those tanners playing a leading role in meeting the new requirements.

In order to address the concerns of the brands, more controls are being implemented along the supply chain. For the tanneries this often means having to meet the contrasting and even sometimes conflicting standards set by a number of different sources. This can definitely be seen as a threat to their business. The opportunity lies in working together with other tanners and the brands to make sure the required standards are sensible and achievable and also that there is not such a proliferation of different standards.

The last few decades have seen a huge relocation of leather production, mainly from the developed to the developing world. The new standards on sustainability will inevitably lead to a move towards a much more level playing field where all leather suppliers have to ensure improving social and environmental standards. Again, a threat to some but surely a huge opportunity to those prepared to meet the challenges presented in this changing market situation. 🌱



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