



Salt recovered from wet-salted hides at a tanning cluster in India. The salt has to be stored on site. CREDIT: WTP

Salting hides needs to stop

Meat consumption will continue and hides will continue to move from abattoirs into leather production. In this article, based on an influential speech he made at the third World Leather Congress in Shanghai in 2017, World Leather's publisher and chief executive, Simon Yarwood, argues that what must not continue is the practice of salting those hides and shipping them across the oceans of the world so that the excess salt becomes someone else's environmental problem.

World Leather has achieved many things in its 30-year history, including important series of articles on leather production that have been published in the magazine and in book form under the titles *Back to Basics* and *A Framework for Leather Manufacture*. We are also the publishers of a book called *Machines In The Tannery*, and of a series of free-to-view, free-to-share online essays explaining the entire leather value chain under the title *Nothing To Hide*.

One of the achievements I'm most proud of is Tannery of the Year, a programme we launched almost ten years ago to celebrate the good things that leather manufacturers around the world do, day in day out, for their workers, for their neighbours and for the environment. It's based on boots-on-the-ground meetings between tanners and the *World Leather* team and I know I'm not the only person who believes that the reports these meetings have yielded represent an extremely valuable account of the recent history of the leather industry, with tanners on all continents talking frankly about their challenges and fears, as well as sharing (often for the first time – because no one had ever asked them) happier stories about their good works, ranging from environmental and

educational breakthroughs to, literally, saving people's lives.

Every two years or so, we've been able to bring the great and the good in the global leather industry together at our Gala Final events to share these stories and present the Tannery of the Year awards to people who do a great deal to make this an industry we can be proud of.

The industry leaders who take part in Tannery of the Year are generous and brave enough to open their doors and share their secrets and it is no coincidence that they also represent superb examples of companies that are committed to innovation, to partnership with chemical and machinery suppliers, and to the best possible levels of customer service. They are living proof that excellence exists in this industry.

Meat consumption

The first of the three areas I want to address in this article is raw material—always a source of tension between tanners and meat companies, and that's not going to change. Those of us who live in Europe or North America can see that restaurant menus and family shopping carts now include many meat-free meal options and it's tempting to conclude that meat consumption, globally, is going down. It isn't



Wet blue splitting at a tannery in China. CREDIT: XINGYE

though. The UN's Food and Agriculture Organization predicts that global per capita consumption of bovine meat will rise from 10.1 kilos in 2015 to an average of 10.6 kilos per person per year by 2030. Meanwhile, ICHSLTA, one of three global bodies with a hand in running the leather supply chain, estimates that global cattle slaughter is around 290 million head per year at the moment but will reach 430 million head in 2025.

We know, of course, that tanners will not be able to secure access to the hides of all these animals. At the moment, our best estimate is that around 250 million cattle hides a year are available to go from abattoirs into leather production. This figure may go up a little or down a little. Everyone knows that. What I really want to flag up is that the practice of salting and shipping those hides across oceans before tanners get to work on them needs to stop.

Let's stop shipping wet-salted hides thousands of kilometres around the world. They need to be processed into wet blue or wet white as close to source as possible. There are several reasons for this and they are all obvious: it's a far better way to prevent hide resources from going to waste, it's more environmentally responsible, it will improve the leather industry's relationships with shipping companies, it will save money and it will allow cattle-rearing countries to add more value to their own natural resources.

I know it's not a panacea and that purists have always believed that running your own beamhouse is the only way to keep complete control of the quality of your finished leather, although more and more people have begun to say this matters less than it used to if you have a good wet-end partner who will stick faithfully to the raw material, chemicals and machinery parameters you lay down.

Ship less waste

I also know that tanners have concerns about the changes that can occur in wet blue and in wet white with ageing. At the same time, I realise that shipping finished leather or cut parts would be even better because we'd be transporting even less waste and consignments would be even lighter (and cheaper), but the step I'm proposing is an obvious option that the industry could put into effect almost immediately. We are under severe pressure to improve our environmental footprint without delay and this would represent good progress. Doing nothing is not an option.

The truth is we are going in the opposite direction. In case you missed it, the total number of wet-salted hides exported by the US last year was 24.8 million, which represents an increase year on year of 15.3%. Over the same timeframe, its exports of wet blue went down by 10.6% to 5.9 million. If the US needs encouragement to resist the quick cash on offer for wet-salted material, it need only look at Italy. Italian tanners became the biggest buyers of US wet blue in 2017, taking 40% of the total and spending \$216 million, pushing China into second place.

Curiously, this has come at a time when Italian imports of wet blue from other origins, notably Brazil, are declining. Plus, this doesn't look to us as though it is only about price because in the early part of last year, one tonne of wet blue from Brazil cost Italian tanners, on average, €2,100, while the same volume of material from the US was setting them back €3,633.

If the wet end were to rest with specialist operators with facilities close to high-volume cattle slaughter, they could concentrate on producing products that are really commodities. What happens next is a completely separate set of activities because processing from wet blue or wet white to finished leather requires creativity, flexibility, small batches, broad product ranges and great responsiveness. And this is what I'd like to expand on in the next section of this article.

Commodity or bespoke?

The traditional set-up often seems to ask tanners to be high-volume producers of a commodity one minute and, the next, turn into bespoke suppliers that can meet the specific needs of demanding customers. It's asking them to meet two totally different sets of objectives at the same time. But we take this dichotomy away if we leave the wet end in the hands of specialists close to the source of the raw material.

There could also be an argument for setting up larger, centralised plants in each region for retanning, dyeing and drying, but the main point is that we would free up the specialist finishers to work their magic as and when required. Finishing facilities should be smaller and located close to where the demand is, which is to say on the



doorstep of the shoe and accessory factories or of the automotive cutting plants.

And of course all operations inside tanneries must become more environmentally efficient. Of course the leather chemicals we source in the years ahead must become easier to exhaust fully or salvage for reuse so as not to generate waste. We have to learn to waste nothing, and to reduce, reuse and recycle until tanneries become closed-loop, zero-emission operations.

At the same time, our facilities are going to have to end their high dependence on manual labour and become much smarter in their use of automation and robotics. These are not synonyms, incidentally. Automation is the completion of pre-determined processes at the push of a button. Robotics are even smarter: in our context, robotics can give us systems that can 'see' that the pre-set conditions in a throughfeed drying system, for example, need adjusting because a particular hide, or batch of hides, needs a lower temperature or an increased airflow.

New momentum

And what about the future of leather itself? I am on the side of those who believe finished leather should be an exclusive, high-value, luxury material and that we should set aside all our differences and work together too on a global marketing campaign to promote leather to the end consumers, to the public.

This ought to provide new momentum for the push to have more natural-looking leathers, leathers with less finishing, accepted, natural defects and all, by consumers and by designers and brands. Perhaps the time has come for us to accept that if some finished-product companies want a material that looks like plastic, has the bland uniformity of plastic and the cheapness of plastic the solution is staring everyone in the face: they should use plastic. In choosing to do so, these companies would also need to lend their weight to efforts to manage the environmental problems that plastic waste causes, on land and at sea.

Our customers have a right to expect high performance from leather: they most certainly do have that right. Our educational institutions, research and development facilities,



Simon Yarwood speaking at the 2018 Tannery of the Year Awards. CREDIT: WTP

leather chemicals innovators and tanners must work together to endow leather with the properties the market requires: stain resistance, flame retardancy, weight reduction, conductivity, haptic responsiveness and so on. And all without compromising on leather's timeless qualities: its durability, naturalness, breathability and, of course, beauty.

We used to think those qualities spoke for themselves: maybe they did in the past, and maybe they didn't. In 2018 they certainly do not and it's up to us to explain leather's naturalness, renewability, ancient history and sensuality, and all from a bulky waste product that we manage to prevent from going into landfill.

We know better now than to expect any thanks for turning that waste into something uniquely valuable, beautiful and versatile. But it would be nice if our opponents could at least stop telling lies about us and pretending that plastic is a better option, environmentally or aesthetically. They do so with impunity partly because of our lack of leadership and our reluctance to speak with one voice. In other words, it's our own fault. But that, too, can become a thing of the past and we can put our collective support behind efforts to improve and unify our standards and tell our story to the world. 🌍

Sitting comfortably—it's up to the industry to explain leather's naturalness, renewability, long history and sensuality.

CREDIT: IMM COLOGNE

