



There are still lots of sneakers made from leather on the market, although many of them, like these adidas Stan Smith shoes, are in 'retro' styles. Newer silhouettes are being pushed all too easily towards synthetic uppers.

CREDIT: ADIDAS

Live and let live

Even if market demand went through the roof, there are too few hides in the world for leather to be the only material of choice for all the footwear, seats, clothes, bags and belts that people buy and use. Other materials are a must, and always have been. A consensus may be starting to build in the leather industry that it is fair enough to try to live side by side with alternative materials, but only if they treat leather with the respect it deserves.

The 2018 American Leather Chemists Association's annual convention got under way at the Eaglewood Resort in Illinois on June 20. In keeping with tradition, the event opened with the John Arthur Wilson memorial lecture, delivered this year by the chief executive of tanning group PrimeAsia, Jon Clark. Mr Clark chose as the title of his talk 'Leather: An Honest Material in a Confusing and Changing Environment'. "Leather is an honest material because there is not a person in the world who does not know where leather comes from," he told the audience.

However, he went on to explain in detail that, in the face of intense and often unfair criticism from campaign groups and competitors, there is a need for improvement in how those in the industry talk about leather to the outside world. But he also said no one in the leather sector should fear new materials that a wide range of companies, including prominent footwear brands, are developing and bringing to market. "We should embrace new technologies," he said, "but in doing so we should insist on straight talking, on honest representation."

Less honest than leather

It is because some suppliers of alternative materials are less honest than tanners that clear communication from the leather industry is required, and if it can find a way to speak with one voice, so much the better. "There is a desperate need for collaboration in this industry, for unity and like-minded thinking," Jon Clark said.

Lack of unity has made it easier for misuse of the term 'leather' to take root in the minds of many consumers. There seems to be no way to convince online retailer Amazon, for example, to stamp this out. On its UK site it continues to allow sellers to get away with the gross abuse of leather's good name, prefixing it with the word 'faux' in its official list of materials under which shoppers can search for women's handbags. It also has 'leather' as a category, naturally, but if you search there, it only takes a few seconds to see more abuse of 'leather' come up, this time preceding the word with 'PU', polyurethane. As if the material in a handbag or anything else could be polyurethane and leather at the same time. Other abuses that Amazon permits include the use of



the term 'vegan' alongside leather, an especially baffling one because many vegans go to great lengths to dissociate themselves from any animal products, whereas leather is synonymous with by-products from animal-rearing for milk and meat. Manufacturers of these vegan products are, of course, attempting to appeal to the sensibilities of vegan consumers and, in the same breath, steal leather's prestige to present their merchandise as classy and high-value. Psychologists call this cognitive dissonance.

Vegan people must go along with it, though. It would soon stop if consumers said they were so serious about distancing themselves from leather that they would turn their backs on any purse, shoe or handbag that used the term 'leather', with whatever fancy prefix or creative adjustment to the spelling, to describe itself. By way of illustration, no marketing consultant would allow a company to launch a new range of sparkling wine from northern Italy, insisting it was different from what is already on the market with all sorts of extra attractions and benefits, and then unveil the new product's name as 'Prosthecco'. The marketing people would tell their clients: "Sorry, but this just makes your product sound like a cheap imitation of the genuine article." They would be correct.

A more fundamental threat

For Jon Clark, tanners have, in living memory, faced more serious threats than this. Some of them at least, began embracing the need to "clean up our own act" as long ago as the 1990s, he says. This was as a result of a push on the part of customers, often footwear brands that were in the throes of becoming genuine global brands, rather than an initiative that grew out of the leather industry itself. Nevertheless, it drove change. The users of leather began to make it clear that they wanted no shareholder reaction and no negative publicity to result from the behaviour of any of their suppliers, including leather manufacturers.

Mr Clark continues: "A good number of tanners across the world really understood that change was necessary and they embraced environmental standards. There were a couple of reasons for this. It wasn't that we were all tree-huggers; it was more to do with a desire to create a level playing-field, so it was a selfish motivation to a certain extent. But in the 1990s, some of the bigger tanners in the world found themselves doing the right thing in the places where they were manufacturing only to find themselves competing around the world with people were doing the wrong thing, including turning rivers yellow and dumping solids."

It's true that the tanners who took part in what the PrimeAsia chief executive calls "this race to be better" gained market-share among some right-thinking customers. And at the same time there were real efficiency-gains from using less energy, less water, fewer chemicals and treating human resources "properly". More fundamentally, though, Jon Clark says these pioneering tanners soon came to the conclusion that "without change, we faced elimination".

Things have changed, largely because most global brands now source their leather only from tanneries that undergo regular third-party audits, he believes, but companies in the leather supply chain will still need to think carefully about survival if they fail to adapt to change in the marketplace. Part of the change is that materials manufacturers will keep coming up with new options to meet the needs of consumers that are, Jon Clark says, constantly evolving and driving



The chief executive of PrimeAsia, Jon Clark..

CREDIT: WTP

ongoing change in the way we look at fashion and style. He highlights the impact of the move away from bricks-and-mortar shopping to online purchasing, with next-day delivery and free returns. "To a certain degree, this has put the whole supply chain on pause," he says. "The big athletic brands are having to move their inventory differently, from what was Foot Locker, with its massive bricks-and-mortar footprint to much smaller inventory boxes that are ready to ship directly to consumers. It's a big struggle. There is no patience in the world any more and the 21-year-old in China knows exactly what the 21-year-old in New York City or London or Paris is doing and, generally, wants the same products."

He says that, while this presents a challenge to the leather industry, it also presents an opportunity.

Fight them on the e-commerce platforms

He is not alone, although there are people who argue that the move to e-commerce removes leather's important advantage of looking, feeling and smelling much nicer than the alternative materials against which it has to compete. The chief executive of leather chemicals producer TFL, Dr Peter Amann, dismisses this and says that the real threat to leather from synthetics is that synthetics are becoming better and better, technically. "There's no point sticking your head in the sand," he says. "You have to fight the manufacturers of alternative materials on their own territory and that means online. Tanners can still fight them on quality. A lot of us have objects made from leather that have lasted decades. I certainly do. I have things that I have kept for 35 years and the leather in them has outlasted all the other components."

His point is that leather has a great story to tell, and in spite of the difficulty in convincing companies like Amazon to make the playing-field level, it must now learn to tell it to online consumers, too, using high-quality images, videos and well written explanations of how articles are made, including a



Modern Meadow's progress in developing biofabricated materials from collagen-producing yeast cells has earned it inclusion in the latest group of World Economic Forum technology pioneers.

CREDIT: MODERN MEADOW



A close-up image of Modern Meadow's Zoa material. Some commentators insist that, whatever language the biofabricated materials developer uses to describes Zoa, the leather industry should take an interest because the material will need to be tanned.

back-story that celebrates respect for animal welfare, environmental and social responsibility, commitment to partnership and innovation, transparency and a little bit of pride. "It's not enough to send an email," Peter Amann says. "That won't do it any more. You have to offer more than that, and the way e-commerce works now, you can offer consumers a lot of information quickly and it's not expensive. Making samples of leather articles, now that's expensive. The problem is that too many tanners still seem to believe that leather will speak for itself, that the advantages and benefits and qualities it offers don't need explaining to the consumer. That may or may not have been true once. It's definitely not true now."

Biofabrication pioneer receives 'summer Davos' invitation

Dr Amann does not mention Modern Meadow by name and it could be that it is still too early in the biofabricated material developer's history to know for sure if it will be able to compete, technically, with leather. But Modern Meadow is certainly becoming well known. It announced on June 21 that it has been selected as one of the World Economic Forum's latest cohort of technology pioneers, a group of early-stage companies from around the world that are involved in developing innovations that could have a significant impact on business and society.

Modern Meadow has been selected because its collagen-based materials can, it says, enable "new design and performance possibilities". It says it is already partnering with "some of the world's most cherished and innovative consumer brands to bring new life to the material world".

Chief executive, Andras Forgacs, will participate in the World Economic Forum annual meeting of 'new champions', also dubbed the 'summer Davos', which will be held in Tianjin, China, from September 18-20. "We welcome Modern Meadow to this diverse group of technology pioneers," said

Fulvia Montresor, head of technology pioneers at the World Economic Forum. "Modern Meadow and its fellow pioneers are front and centre in shaping the ongoing fourth industrial revolution and we believe they will transform society and industry in a positive way in the years to come."

For his part, Andras Forgacs says: "This is confirmation that our technology is at the forefront of innovation that will transform the future of materials production. Our biofabricated materials brand, Zoa, is just the start of a new material era, the age of biofabrication, where we will no longer have to compromise between quality and sustainability in our products."

Modern Meadow deserves congratulations for winning this recognition from the World Economic Forum but there is no denying that the specialist in biofabricated materials has divided opinion in the leather industry. On the one hand, it has attracted criticism for using, frequently if not always, the term 'leather' to help it describe Zoa, which it makes using DNA editing tools to engineer specialised collagen-producing yeast cells. These cells are optimised to manufacture the type and quantity of collagen required. Once purified, the collagen can be formulated and assembled into Zoa, a material that the New Jersey-based company insists brands will be able to use to make finished consumer products.

Who hides the hides?

Andras Forgacs' reference to ending "a compromise between quality and sustainability" could also be interpreted as suggesting that using biofabricated materials to replace leather in consumer products would make sense from an environmental point of view. But this ignores the fact that the best tanners in the world are operating at close to zero waste now and have an immense contribution to make to the circular economy. It also does nothing to



answer questions about what the world would do with the hundreds of millions of hides and skins that tanners turn into leather every year.

Where would that raw material go? Who would pay to dispose of it? If the tanning industry disappeared, how long would it take for us to become conscious of the need to 'reinvent' it, and how long would it be before companies in the 'reinvented' tanning industry could justifiably argue that they deserved inclusion in future cohorts of the World Economic Forum's technology pioneers?

On the other hand, commentators, including Nicoline van Enter, founder of footwear innovation and education platform The Footwearists, have pointed out that, whatever language Modern Meadow uses to describe Zoa, it is a material that requires tanning and, therefore, one in which the tanning industry should be taking a keen interest.

Questions to answer

Leather is not the right material for every application, Jon Clark says. There has been what he calls a huge impact on the leather supply chain from alternative materials in general and he describes the pace of innovation in non-leather materials as unrelenting. "Forget the emotion," he says, "the choices a designer now has when picking a material are mind-boggling. We welcome innovation, as citizens and as consumers, but we want the whole story behind the innovation, not just pieces of it."

There is a general lack of transparency from the manufacturers of many synthetic materials, he says again, and, in contrasting them with leather, a reluctance on the part of rivals to open up about the raw materials and chemicals they are using and about and what their carbon footprint is. He says the greatest strength of some of these materials is the false labelling already mentioned; the leather industry, in contrast, is not running away from issues such as carbon footprint, but is working to find the fairest way to calculate it. The manufacturers of alternative materials ought to be asked to do the same, he insists.

He rails against the trend among younger consumers especially to tire of products quickly and dispose of things they no longer want, describing this approach as "purchase, use, next", but not everything about their attitude towards the products they buy strikes him as wrong. "They understand what they're getting because the information is available to them and they can figure out where the value is."

There are still lots of leather sneakers around, Mr Clark points out, but many we still see today are what brands like to call 'retro' styles. With a lot of the newer developments in this footwear segment, he feels it has been easy to push design teams towards non-leather. "The new silhouettes fit in with demands for versatility, comfort and value," he explains. "The shoes are lightweight and you can wear them with jeans, shorts, khakis or whatever. Older generations understood leather; they knew what leather was. They went to work in leather shoes and at the weekend they were in penny loafers. This new generation is less informed through this big push of athletics now into the casual marketplace, and the general lack of understanding doesn't just affect consumers. The lack of knowledge about materials in general among developers and designers is astonishing and the brands themselves are not teaching materials management. This is something with which we as an industry can help."



TFL chief executive, Dr Peter Amann, says the quality of non-leather materials is improving all the time.

CREDIT: TFL

Business decisions

There are other factors. One of the biggest drivers in the shift towards synthetics was, Jon Clark insists, when the hide market went "absolutely historically crazy" four years ago. It was something that he says forced users of leather to make changes and he insists that no one can blame them for that; it was a business decision, based on cost. At the time, leather shoes still constituted an important part of the portfolios of those companies, but those products simply became unaffordable for their customers. "That was the switch that started this trend," he says. "Now we are trying to reel it back in and that's not an easy thing to do." The leather supply chain is making it even less easy, he says. PrimeAsia, like its peers, is purchasing raw material almost six months in advance of receiving orders for the leather it will go into. "We've got an ocean in the way," he points out. "And then we still batch-manufacture. It's just not in tune with the 'one-at-a-time' mentality."

He says the current climate demands innovation and creativity and warns that there is not enough investment in innovation or creativity in the leather industry, that budgets are just not large enough. And he is adamant that the innovation needs to be in product and in process. Smaller batch sizes are a reality. A customer that had an average batch-size of a six-figure number of square-feet of finished PrimeAsia leather has now reduced this to below 1,000 square-feet. A customer that offered one of its most popular shoes in 10 colours a decade ago is now asking for the same leather to be available in 76 colours. "The future is one-at-a-time," Mr Clark says. "We will be finishing, if not tanning, one side at a time in our lifetimes, and supplying cut shoe parts to our footwear customers, not just the finished leather. We have to adapt. We have to make leather that is lighter, stronger and more interactive and we have to find technology that will bring us there." 🌐