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Published 11/05/2018

40% of millennials now admit to making a conscious effort to reduce the amount of meat which they consumeⁱ. Environmentally destructive impacts of intensive agriculture and meat production, alongside the realities of factory farming, are among key drivers cited.

However, the production and use of another animal product – leather – has so far been largely exempt from a similar shift-change in attitudes and behaviour. Moreover, it is apparent that in the public consciousness, wearing leather is not regarded as morally dubious, nor socially contentious. In fact, demand for leather has undergone a significant upsurge.

Fashion houses use it in their designs for its luxurious status, durability and versatility, with high street brands following suit. Leather garments, shoes, bags and other accessories are coveted, increasingly the world over, as an expanding global middle-class drive consumption. Presently, it is estimated that nearly 300 million cows are killed every year, with projections forecasting the industry needs to slaughter closer to 500 million annually by 2025 to meet demandⁱⁱ,

The complex and substantive **sustainability challenges**, which underwrite the production of leather, only stand to worsen as demand increases. As an ever-increasing demographic pursue leather goods it becomes increasingly important for luxury houses and fast-fashion brands alike to elevate sustainable practices, solutions and alternatives.

Animal welfare

A central criticism of leather products is the cruelty some animals are subjected to. Each year, more than 1 billion animals are killed worldwide for the leather trade, from cows to horses, lambs, goats and pigs, even dogs and catsⁱⁱⁱ.

In certain geographies, leather is the most economically important by-product of the meat industry. PETA argues that purchasing the skins of cows raised in the US legitimises factory farming, and by

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extension, its abusive practices. Such practices include confinement, castration, branding, tail docking, and dehorning without pain killers, as well as inhumane transportation.

India is one of the world's top five producers of leather, and a keystone in the global leather trade. The great irony however, is that in most Indian states, cattle slaughter is illegal for cultural and religious reasons. This has led to many cows being deliberately maimed or poisoned, so that they can be 'lawfully' killed. It also means that some slaughterhouses in India operate informally and as such, are largely unregulated. Investigations by organisations such as PETA into these facilities have found appalling conditions; with animals crushed into tight spaces, and killed in front of one another, often inhumanely. It is also common for cattle to be transported out of India, with an estimated two million cattle driven into Bangladesh for slaughter each year. During this journey, hundreds of kilometres in length, cattle are often tortured. To force the animals to continue walking, substances like tobacco and chili can be rubbed into their eyes, or their tails broken.

Most of the world's leather though, comes from China. In addition to more conventional leather sources such as cows, an estimated 2 million cats and dogs are killed there each year for their skins. Despite evidence of widespread abuse and the efforts of animal rights organisations, no penalties currently exist in China for abuse in animal skin industries^{iv}. PETA investigators in Asia have uncovered evidence of slaughterhouses skinning live, or partially conscious, dogs, and further up the supply chain, the processing of dog skin to make accessories which are then exported all over the world.

With growing concerns from consumers around the practices associated with animal leather, several 'cruelty free' alternatives have emerged. In the UK, a number of vegan leather brands, such as Beyond Skin and Bourgeois Boheme for shoes, and Matt and Nat for bags, are becoming more established. At the designer level, Stella McCartney has acted as an important figure-head in promoting leather alternatives.

High-quality animal-free leather is made from many different materials, including non-animal microfibres, recycled nylon, PVC, polyurethane, and even plants. Faux-leather materials should not be accepted uncritically however. The sustainability credentials of alternative products can themselves be dubious; with synthetic materials tending to be petroleum by-products, and less able to biodegrade.

In Silicon Valley, a number of start-ups are exploring the concept of 'bio-fabrication', in essence, lab leather. This product eschews the environmental challenges of existing alternative leathers. One such company, Modern

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Meadow, is looking to grow a strain of yeast engineered to produce collagen. Once purified, pressed into sheets, and tanned, Modern Meadow's vat-grown collagen effectively becomes leather.

Environmentally deleterious impacts

As a by-product of meat production, leather is indirectly associated with the industry's excessive consumption of water, land conversion, destruction of pristine rainforests, depletion of fossil fuels, and climate change.

In its pivotal report 'Slaughtering the Amazon' (2009), Greenpeace drew a direct link between leather and environmental destruction. Its research showed how the Brazilian cattle industry was the single largest driver of global deforestation, responsible for more than 15% of the world's annual total. At the same time, Brazil was positioned as a leading global exporter of tanned leather, with leather representing more than a quarter of the total value of Brazil's cattle trade in 2008^v. Greenpeace also exposed the presence of Brazilian leather in the supply chain of major global brands, with many accepting leather from cattle raised on land which had been illegally cleared.

It is the processing of leather though, which is most commonly linked with environmental pollution. Many of the chemicals used during tanning are toxic, with substances like mineral salts, formaldehyde, chromium, coal-tar derivative and cyanide-based dyes routinely used. Environmental protection standards tend to be insufficient in primary leather producing regions, with waste water and solid waste from the tanning process dumped directly into rivers, devastating nearby flora and fauna. The Buriganga river, which runs through the leather-production zone of Hazaribagh, Bangladesh, has been declared "ecologically dead", with the wider geographic region ranked among the world's most toxic places, alongside Chernobyl^{vi}.

Burberry is a good example of a company which proactively seeks to mitigate the environmental impacts of leather across its value chain via brand-drive initiatives^{vii}. Burberry has calculated that its leather accessories account for more than 10% of its total greenhouse gas emissions, and has set a specific public target around reducing the environmental impact of leather. A central tenet of Burberry's approach to responsible leather production is tannery certification, with 77% of Burberry accessories sourced from tanneries holding one or more certifications from the Leather Working Group (LWG), the Italian Istituto di Certificazione della Qualità per l'Industria Conciaria (ICEC) and/or the International Organization for Standardization (ISO). These certifications set a minimum performance threshold around environmental criteria such as energy use, water

use, and waste management procedures. Burberry also seeks to work in partnership with key tanneries to promote best practice in these areas via its tannery improvement programme^{viii}.

Burberry has further sought to mitigate environmental risks which exist beyond the tannery, promoting accountability throughout the supply chain. The fashion house has taken the stand that it will not source any leather derived from cattle in the Amazon biome. To this end, the brand has sought to improve its levels of visibility and traceability.

Traceability and provenance

For brands selling leather items, and consumers purchasing them, knowing where these products originated, and the conditions in which they were made, poses a significant challenge.

Whilst for consumers stamps of ‘Italian leather’ may go some way to allay concerns, in reality it is only the finishing touches of an item which need to be applied to a product for it to be labelled European. Equally for brands, supply chain transparency is immensely complex. Leather from cattle raised on illegal ranches, or slaughtered inhumanely, is often mixed up with other pieces such that it is impossible to trace a single piece’s origin. Worse, there have been cases where dog skin and leather originating from other types of animal have been laundered through the supply chain – unwittingly sold on by companies^{ixx}.

A number of luxury brands are leading the way when it comes to traceability. Kering has committed that 100% of leather from domestic livestock within its brands’ products will be from responsible and verified sources. At the end of 2015, Kering had achieved this for 67% of its luxury brands’ leather. As part of its new 2025 sustainability strategy, Kering committed to trace 95% of its raw materials (cotton, leather, precious skins, wool) by the end of 2018, rendering its commitment to a transparent supply chain public and time-bound. It has already achieved 100% traceability for its iconic Bottega Veneta Cabat bag, and for some of its Gucci items it is able to detail the precise history of the product’s supply chain.

Following an Environmental Profit and Loss accounting exercise which found that 23% of Kering’s impact was due to cattle ranching, the group undertook a supply chain mapping exercise to evaluate the impact of its leather sourcing practices. Kering worked with a third-party expert organisation to produce a comprehensive study of global cattle production systems. This supply chain knowledge has equipped Kering with insight regarding where to source leather most sustainably.

Workers' health, well-being and labour rights

Tanning does not just have an environmental cost, a number of the chemicals used to tan leather are carcinogenic; endangering the health of those who labour in tanneries. The processing of leather has been increasingly outsourced to the developing world, which accounts for more than half of the global leather trade^{xi}. Workers tend to be of low socio-economic status, and the industry is exposed to serious and systemic social risks including labour rights violations such as forced and child labour, and wage theft.

Inadequate worker protections mean individuals are exposed to all sorts of hazards including the handling of toxic chemicals, injury from heavy machinery and sharp knives, and risk of dangerous falls. Children as young as 10 have been found working in tanneries in locations like Bangladesh and India^{xii}. In the leather producing district of Hazaribagh, Bangladesh, 90% of the region's approximately 15,000 workers die before the age of 50. This high death rate is largely attributed to respiratory diseases though residents of the Hazaribagh slums also complain of illnesses such as fevers, skin diseases, and diarrhoea, caused by the extreme tannery pollution of air, water, and soil.^{xiii} The Bangladeshi government has been accused of failing to protect the right to health of workers and residents and consistently failing to enforce labour and/or environmental laws.

Even in Europe where tannery workers are afforded better protection and modernised facilities tend to be carefully managed, incidence of disease is disproportionately high. Studies of leather-tannery workers in Sweden and Italy have found cancer risks between 20% and 50% above those expected^{xiv}.

Human Rights Watch has called upon companies buying leather in high risk areas to fulfil their responsibility to respect human rights, as stipulated under the United Nations Global Principles^{xv}. A number of high street brands are taking steps towards this. ECCO's approach to due diligence is based on international frameworks, such as the UN and ILO. ECCO is currently working to assess its actual and potential human rights risk. Due diligence undertaken by the brand includes conducting pre-screening on all of its new suppliers to assess compliance with ECCO's Code of Conduct. Once approved, audits of suppliers are conducted by ECCO's internal Code of Conduct audit team, and findings are supplemented with audits from external auditors. Those suppliers at highest risk of adverse human rights impacts are prioritised during this process, for example, suppliers that use subcontractors or those with work-intensive production. ECCO's audit programme is reviewed annually to strengthen its effectiveness over time. ECCO further acknowledges the importance of complementing audits with other measures and processes, particularly in the area of modern slavery. In addition to a robust audit

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programme therefore, ECCO has environment, safety, and health committees at its own factories to empower workers in voicing their concerns related to working conditions and other topics of concern without fear of reprisal.

Whilst the sustainability challenges facing leather are significant, momentum towards more sustainable solutions is evident, be this in efforts to improve existing sourcing or production practices, or else to develop environmentally advantageous alternatives. To support such endeavours, three factors will be essential:

- Collaboration among different actors along the value chain
- Embracing the benefits of technological advancements
- Sharing information on best farming practices and sustainable leather initiatives

ⁱ <http://www.onegreenplanet.org/news/millennials-cut-out-meat-because-of-environmental-concerns/>

ⁱⁱ <https://www.theguardian.com/fashion/2016/mar/13/is-it-time-to-give-up-leather-animal-welfare-ethical-lucy-siegle>

ⁱⁱⁱ <https://www.peta.org.uk/issues/animals-not-wear/leather/>

^{iv} <https://www.peta.org.uk/issues/animals-not-wear/leather/>

^v <https://www.greenpeace.org/archive-international/Global/international/planet-2/binaries/2009/7/slaughtering-the-amazon-part1.pdf>

^{vi} <https://www.theguardian.com/environment/2015/feb/15/is-wearing-leather-less-moral-than-wearing-fur>

^{vii} <https://www.burberryplc.com/en/responsibility/areas-of-work/heritage-raw-materials.html>

^{viii} <https://www.burberryplc.com/content/dam/burberry/corporate/Responsibility/Performance/Docs/Burberry%20Responsibility%20Report%202012-17.pdf>

^{ix} <http://www.dailymail.co.uk/news/article-2878962/The-skin-dogs-slaughtered-food-China-GLOVES-horrific-conditions.html>

^x <https://www.refinery29.uk/2016/03/106232/china-dog-leather-imports-animal-rights-peta-asia>

^{xi} <https://www.theguardian.com/fashion/2016/mar/13/is-it-time-to-give-up-leather-animal-welfare-ethical-lucy-siegle>

^{xii} https://www.dol.gov/ilab/reports/pdf/tvpra_report2014.pdf

^{xiii} <https://www.hrw.org/news/2015/05/17/dispatches-bangladeshs-toxic-tanneries-glimmer-hope-outlook-bleak>

^{xiv} <https://www.peta.org.uk/issues/animals-not-wear/leather/>

^{xiv} <https://www.peta.org.uk/issues/animals-not-wear/leather/>

^{xv} <https://www.hrw.org/sites/default/files/reports/bangladesh1012webwcover.pdf>