



A story worth telling

The value of an article can be defined as a function of its performance in use and perceptions of its uniqueness or desirability. Performance is determined as a combination of material properties and engineered design. Perceptions are subjective and malleable, shaped by information deemed reliable and by personal experience. Leather has a good reputation for durable performance and is widely perceived as being a luxurious material that wears well and ages gracefully.

LEATHER'S STRUCTURE

Leather's unique performance stems directly from an intriguing physical structure based on nano-strands of triple helical collagen twisted into very fine fibrils. These are then counter-twisted to form larger fibres which, in turn, are intertwined into fibre bundles that provide great physical strength.

Very fine fibres that give a smooth glossiness to the grain surface, along with the distinctively patterned hair follicles, impart a pleasing touch and a natural beauty to full-grain leather.

Once the pelt of an animal is cleaned and purified, the tanner uses his knowledge of the leather-making process to stabilise the structure and create additional desirable physical and aesthetic properties. The tanning process builds upon the existing properties to ensure the natural protein bio-material is made resistant to microbial attack and remains stable at higher temperatures.

Selection of different raw materials coupled with appropriate processing enables tanners to create a wide range of features as required for various end-uses. For example, its mouldability, durability and moisture management properties make it a premium material for shoemaking. Some people,

nevertheless, claim that modern synthetic materials are as good as leather. This is a myth; some synthetic materials may indeed imitate some of the properties or structure of leather, but none can emulate all its qualities.

When the physical properties of leather, combined with visual appearance and feel, are properly crafted into a well designed article, leather is truly deserving of its reputation as something special. It is an honest, natural product that readily deserves its place in the market as a premium material. It is, however, still a 'component material' and not a finished consumer article. There are a number of steps in the value chain separating the tanner who produces it and the consumer who ultimately buys the finished product in which has been used.

Although there are some good examples of vertical integration up and

down the value chain, there remains an opening for better understanding between the leather industry and the consumer. This would allow the tanner's knowledge of leather to be better communicated up the supply chain to the point of retail. The tanner understands the raw material and its intrinsic properties and has the ability to ensure that the most advantageous features are built into the leather depending on the final article and its intended use.

LEATHER'S IDENTITY

Leather is featured as a selected premium material by many of the world's leading manufacturers of consumer brands and is used to promote desirability for their products. This is largely based on what a typical consumer will know and expect from leather – their perception. We see this used as sales strategy at point of retail where the word leather is used to convey a sense of value.

However, not every consumer necessarily recognises leather immediately when they see it in the finished product, so the description by a salesperson of it being a 'leather shoe' is used to invoke a favourable emotional response in their mind. It is designed to elicit expectations of durability, luxury, performance and intrinsic value.

Indispensable for many articles in earlier times, leather has now become a choice. Synthetic material replacements exist for many leather end-uses and are becoming increasingly competitive. Their functional and aesthetic properties have improved significantly over the last few decades, surpassing those of leather for some applications. Polymeric shoe soles are waterproof and wear better. Many athletic shoes feature thinner, stronger materials that are also lighter in weight. Others, made to look and perform increasingly like leather, may also prove cheaper.

Some retailers use the confusion surrounding leather material identity for profit. Synthetics or materials that might contain some leather but are not natural leather (bonded leather, e-leather, etc.), are sold using the word 'leather'. At times this is deliberately designed to confuse or deceive the consumer. In addition, some countries have lax labelling laws and synthetic



Tanners can build a wide range of properties into leather in order to enhance the final product.

CREDIT: MESSE DÜSSELDORF

materials, made to look like leather, are intentionally mislabelled. Such practices blur leather's true identity in the eyes of many consumers.

Unfortunately, some leathers are poorly made or are notionally 'upgraded' with a plastic coating. While some enhancing techniques may be necessary and acceptable if well done, the appearance and touch of many lower-quality, heavily-finished leathers make them look and perform unsatisfactorily. Indeed, they are more like a cheap synthetic than leather. Sales people are often of little help in enlightening the customer about the differences between what is and what is not leather or about the true benefits of good quality genuine leather.

INDUSTRY'S IMAGE

To add to concerns about leather identity, influential voices in the fashion and animal rights sectors advocate

against its use, arguing that it is no longer necessary and should be avoided. High utilisation of resources (water, energy, chemicals), controversy over carbon footprint and the way some in the industry handle waste also invite criticism from a world increasingly focused on transparency in sourcing and demanding more sustainable manufacturing and stewardship of resources.

This is unfortunate, as leather can—and is—being made sustainably and without undue damage to the environment. However, the practice of some can impact the view of many. Confusion in the mind of the consumer about leather as a product and the industry that makes it, can detract from the desirability or demand for leather and so negatively affect its value. Certain sections of the press seek to promote this view by publishing misleading articles on the practices of the leather industry. It is frightening how little research as well as how many prejudices are shown by so-called journalists have when seeking to influence public opinion.

At the same time it must be said that the leather industry itself has not worked hard enough on the image of the product and the transparency of the production chain. It is touting traceability and it seems that everybody wants to believe this will solve these problems; it may well fail to do so. It is not traceability that will influence consumers' opinions, it is more the campaign against beef in general. Since leather is the most valuable by-product and is used in so many branded consumer products, it has been dragged into focus as being a major driver rather than result of the beef industry.

People illustrate the story with pictures from slaughter operations and unacceptable working conditions, which are far from standard and not at all representative of the production of the majority of leather around the world. Quite the reverse. If we compare what the leather industry has achieved in the past 25 years, many people would be more than surprised. However, yet again, the leather pipeline is used as a tool for a totally different purpose.

What they ignore is the huge number of people in the world who consider lamb, goat or beef a serious part of their culture and diet. One can of course



In countries such as Somalia, up to 80% of the population rely on animal husbandry for both income and food.

CREDIT: FREE WIND 2014 / SHUTTERSTOCK

debate how much of something should be consumed, whether it be sugar, alcohol, drugs, salt and fat, or meat in general. To ignore the fact that many people will continue to eat meat regardless, is simple arrogance and as long as meat—especially beef—is produced, leather will continue to be one of the most sustainable by-products available.

LEATHER AS A BRAND

Using price as proxy, ultimately, the value of leather is established at point of retail by what the consumer is willing to pay. Depending upon the article and design, leather may be a major or lesser component part. For example, it can represent over 80% of the material content of a pair of shoes. It thus becomes a central feature of the product and one that can be actively promoted as a selling point. Leather in that sense fits all the definitions of a brand.

Ingredient or component branding is a rapidly growing segment of marketing today, especially with global brands. The desired result of such a strategy is a win-win partnership between component manufacturer and brand. Each brings their expertise and knowledge to help

enhance the value of the final article. This demands clear communication and a close working relationship with agreed and defined responsibilities and goals. When done correctly, the effort is synergistic and benefits everyone involved in the supply chain.

The goal of marketing is to enhance value. In a world of alternatives and substitutes, it is important to clearly differentiate leather as the component product of choice. This can be done by good labelling—a simple tag is not enough. Brand marketing is about creating and sustaining a positive mental image or feeling, including all that is known and experienced about the product.

CREATING THE STORY

A compelling story is often used to engage consumers and stimulate their interest and loyalty. Modern consumers are interested not only in the story of what the material can do for them, but increasingly about what it means, and where and how the material was made. The story that should be told of leather is one of a natural product, each piece unique; a durable material with many desirable performance properties—both

inherent and crafted—and an aesthetic appeal, highly engaging to the senses.

The story should include the fact that leather is sourced in an ethical way, that it has been made in a tannery that takes responsibility for the environment, cares for workers and community, and that the material has progressed through a traceable and verifiable supply chain. Such a story—if properly told—can work to the benefit of both shoemaker and tanner, enhancing the image of their products and their value in the market place.

Shoemaking is a global industry that has developed over centuries on the back of a totally sustainable natural by-product that is now under attack through deliberate misinformation. If the leather industry is damaged, so is the footwear industry; we are inseparable. The true story is therefore surely one we should all be telling. 📌

This article is based on one by leading leather industry chemist Elton Hurlow that first appeared in sister publication World Leather in its series 'Nothing to Hide'. Details of this important series of articles by key industry figures can be found at www.nothing-to-hide.org