



SUSTAINABLE DEVELOPMENT GOALS

ACTION
CAMPAIGN

LEATHER 2035 QUANTITY BEATS QUALITY



Under the given global conditions, i.e. a growing demand for affordable leather, which under the real existing cost pressure allows only standardized cost-optimized and mass-produced goods, the leather industry in 2035 is dominated by homogeneous „cheap“ mass products, which at the same time are linked to low requirements on functionality of the leather as well as on quality.

WHAT MADE SUCH A DEVELOPMENT POSSIBLE?

This is only possible because until 2035 relentless use of the **natural resources** continues, in particular water, that are needed for this purpose. Brazil continues to convert rainforest into arable land to provide the **raw material** for leather production through large-scale livestock farming. The availability of chemicals for the mass market is also assured. The consequence of these global, transport-intensive production methods is also that **greenhouse gas emissions** have risen compared to 2019 and that there are still problems with climate protection. Water pollution at various locations where work is carried out under low standards (environmental, worker protection) also remains a concern in 2035. While in some places the social, political and cultural **local factors** have developed in a way that favours the production of „more sustainable leather“, producers are redirecting their supply chains in line with mass demand to other locations where production can be carried out under low conditions and **production costs**.



Production under these conditions is still possible, since the societies in the purchasing countries do not question mass consumption. The decisive factor in 2035 is a more or less uncritical **consumer** who continues to focus primarily on price, trends and design. One aspect here is that the **critical public** has become quieter, possibly because there are many other issues that claim their resources. Since there is no great pressure from the public to change conditions, production essentially continues as it was in 2019.

WHAT ARE THE FRAMEWORK CONDITIONS OF LEATHER CHEMISTRY IN 2035?

The bulk leather goods are generally based on standard chemicals, which are available globally at reasonable prices. Therefore there is no pressure to develop **process innovations** for a more efficient and less problematic chemistry. Innovative manufacturers of leather chemicals are not particularly in demand.

An important prerequisite for the state of the leather industry in 2035 is the lack of a **regulatory framework** that provides effective impetus towards ‚sustainable development‘ - despite parallel developments in this direction, which have created some political pressure in various countries, with an impact on **local factors**.



Minor improvements have also been helped by increased **transparency and knowledge** in the various steps of the supply chain regarding the use and effects of chemicals in the processes and the end product. Similarly, supply chains are more transparent due to **organisational innovation**, i.e. in particular increasing cooperation vertically, but also horizontally in supply chains. However, by 2035, the necessary degree of transparency has not yet been reached to allow for **traceability** of substances in products and processes. This notably due to the lack of critical **consumers** who demand information on which chemicals are present in leather products such as clothing and shoes.