



LEATHER

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HOW TO MOVE CLOSER TOWARDS SUSTAINABLE LEATHER VALUE CHAINS¹

Defining sustainability in the leather sector

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There is no product that is “100 percent sustainable”. As the term sustainable development suggests, the concept arguably suits processes better than products, and as of today, there is no finish line to be seen in the sustainability journey. Each process can always become more sustainable in the future. What is considered sustainable also depends on the perceived alternatives. Those alternatives and perceptions change over time, with new learnings, best practices, visions. This text is meant to trigger debate and to assist actors in the leather industry in perceiving new alternatives. Designers can use this text as a source of information, as food for thought, and as basis for action.

As used by the United Nations (UN) for decades, the concept of sustainable development has included at least three overlapping dimensions: the social, the environmental, and the economic. The intersections between the spheres of business, society and the environment have especially been highlighted when all United Nations Member States agreed upon the Sustainable Development Goals (SDGs) in 2015, striving for a more holistic view on pressing issues of the time such as poverty, inequality, or access to clean water. The SDGs are also supposed to “further advance the realization

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of human rights for all people everywhere, without discrimination” (Office of the United Nations High Commissioner for Human Rights (OHCHR) n.d.). As one important principle expressed, business actors are supposed to be involved in the transformation as “partners”, whereas the “public sector (using regulation, tax and financing mechanisms) supports sustainable and inclusive business investment” and “civil society brings its technical expertise and ensures the achievement of societal benefit” (United Nations Department of Economic and Social Affairs (UN DESA)/ The Partnering Initiative (TPI) 2020: 15). The SDGs explicate that companies share responsibility for improvements, as has also been spelled out in the United Nations’ *Guidelines on Business and Human Rights* (2011).² Both international frameworks express two aspects clearly: first, that all businesses are expected to integrate sustainability and human rights concerns into their core business, and second, that action shall be systematically placed where the greatest need is. This implies to start with assessing and prioritizing, identifying “gaps, areas requiring urgent attention, risks and challenges” (UN DESA n.d.). Industries hence need to start sustainability processes with the pain of a ‘self-offense’.

We observe that compared to other industries such as fashion, the leather industry still shies away from this unpleasant task. The industry has partly accepted the responsibility for the environmental dimension of sustainability in their supply chains but tends to stay quiet and/or defensive on questions related to their human rights due diligence as well as on the interlinkage between the social and the economic dimension. Open and self-critical tones are rare in these regards, and truthful assessments hence obstructed. This gap is also reflected in academia. Scientific analyses of the leather sector and its potential to become more sustainable are predominantly concerned with techno-ecological issues relating to various tanning and water treatment methods, sometimes combined with health effect analyses (cf. e.g., Dixit et al. 2015; Sawalha et al. 2019); but not with business models, labor rights or global inequality dynamics among market players. Analyses of CSR reports of European companies cannot fill this gap (cf. Omoloso et al. 2020). The gap is surprising based on the indisputable fact that the leather industry is a high-risk sector for human rights violations (see e.g., Weiss et al. 2020) and characterized by large power imbalances between brands, suppliers, and workers.

As the understanding is gaining ground that sustainable value chains require transparent and open communication, even (or especially) on problem areas, the strategy of denial is outdated. However, the leather industry cannot afford to be seen as outdated, because alternative materials are capturing markets and new regulation worldwide either already addresses such issues as child or forced labor (such as in Australia, the Netherlands or the UK) or is going to require human rights due diligence in the near future (such as in France, Germany, Norway, and planned in many other countries, and in the EU), in accordance with the frameworks named above.

Industries need to start sustainability processes with the pain of a ‘self-offense’.

THE LEATHER INDUSTRY IN LIGHT OF SELECTED SDGS

For illustrative purposes, this section discusses three SDGs: SDG 12 (ensure sustainable consumption and production patterns), SDG 8 (decent work and economic growth), and SDG 1 (no poverty, esp. 1.5) - to show that the value chains of leather are often not sustainable, but deeply problematic, affecting the achievement of many of the 17 SDGs. Other SDGs which could have been chosen are, for instance, SDG 3 on healthy lives and well-being for all, SDG 5 on gender equality, SDG 6 on availability and sustainable management of water and sanitation, or SDG 15 on life on land (including deforestation).

SDG 12: SUSTAINABLE CONSUMPTION AND PRODUCTION

SDG 12 is rooted in the belief that “[c]hanges in consumption and production patterns can help promote decoupling of economic growth and human well-being from resource use and environmental impacts” (UN DESA 2021a). Indicators cover for

² Those guidelines apply “to all business enterprises, both transnational and others, regardless of their size, sector, location, ownership and structure” (2011: 1).

example “the environmentally sound management of chemicals and all wastes throughout their life cycle, in accordance with agreed international frameworks, and significantly reduce their release to air, water and soil in order to minimize their adverse impacts on human health and the environment” (ibid., Goal 12.4).

There is plenty of scientific evidence that this is relevant for the leather industry, with the challenges related to the management of fluid and solid waste being common knowledge (cf. e.g., Gomes et al. 2017; Kumar/Joshiba 2020; Sawalha et al. 2019). In many tanning regions, discussions and conflicts over clean water and grounds have been on-going for decades (e.g., Nunes et al. 2019 for conflicts in the Sinos River Valley, Brazil, since the 1970s; Armiero 2021: 37 and Notarnicola 2011 for Italy and Spain). Regulation such as the European REACH and many other laws (such as the Closed Substance Cycle Waste Management Act in Germany) has forced the industry ever more to search for better solutions. In production countries such as India, civil society activism, as well as occasional governmental and judicial interventions have pushed the leather industry to address the issue of pollution caused by effluents (Ojha 2013). Increasing awareness on those matters is observable. Companies and governments have been investing in respective R&D activities and have joined business initiatives and/or have acquired environmental labels.

“Out of the two broad categories of technical methods, the first group involves the introduction of processing technologies by decreasing the effluent pollution load, avoiding the use of harmful chemicals and producing solid wastes that can be used as by-products. The other category is related to the treatment of wastewater, handling and processing of solid waste in an environment-friendly manner.” (Dixit et al. 2015: 39)

Old vegetable tanning methods which do not require potentially toxic substances such as chromium have enjoyed renewed attention (cf. e.g., China et al. 2020 for an overview). Companies have also started to assess and report on their CO₂-emissions and have invested in more comprehensive life-cycle assessments. However, bad practice still prevails in many areas worldwide and the burden of poisoned flowing waters, groundwater and soil still greatly reduces the people’s quality of life and the biodiversity in many communities (cf. e.g., Oruko et al. 2020 and other sources listed in the bibliography).

Mostly missing in the sector in this regard, however, are transparency, traceability, and the critical dissemination of good practices to the majority of tanneries, including small and medium-sized enterprises, worldwide. Parts of those shortcomings are addressed in a project on *Traceability for Sustainable Garment and Footwear* by United Nations Economic Commission for Europe (UNECE) and United Nations Centre for Trade Facilitation and Electronic Business (UN/CEFACT). Several other private and multi-stakeholder initiatives have started working on more transparency in the sector. However, unless business models change, and responsibilities, technologies and cost-burdens of necessary investments are shared globally, the unequal distribution of environmental harm caused by the leather industry will prevail. The weakest actors will pay the largest price, with the pollution of waters and grounds persisting and worsening.

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SDG 8: DECENT WORK AND ECONOMIC GROWTH

SDG 8 on decent work and economic growth includes target 8.8 aimed at “protect[ing] labour rights and promot[ing] safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment” (UN DESA 2021b). Target 8.3 includes “decent job creation and [...] the encourage[ment] [of] the formalization and growth of micro, small, and medium-sized enterprises” (ibid.); informal employment shall be reduced.

For a diverse group of production countries, evidence shows that this goal is relevant for the leather industry (cf. e.g., on workers' health problems and selected major health risks: Biswas/Rahman 2013, Hasan et al. 2019, and Rabbani et al. 2021 on Bangladesh; Qi et al. 2017 on China; Junaid et al. 2017 on Pakistan; Myagmartseren/Geater/Sriplung 2017 on Mongolia). Whereas a study in France was inconclusive (Radoi et al. 2019), most analyses find negative health effects that workers in the leather industry must cope with. Pandu (2018) has inquired into the perceived quality of life of leather workers in India, identifying occupational health and safety and the atmosphere at the workplace to be crucial. Sarker/Akter (2018) focusing on Bangladesh and Grumiller (2021), Grumiller/Werner (2019), and Hardy/Hauge (2019), all focusing on Ethiopia, are among the few academic outputs shedding light on the workers' situation beyond health concerns, discussing problems such as very low wages, missing bargaining power and short-term employment in the sector.

Given the academic gap, diverse field studies and publications of civil society organizations have revealed the problems which need to be addressed to transform jobs in the leather industry to be "decent". Problems identified include severe labor rights violations such as restrictions on the freedom of association and the right to form trade unions and to bargain collectively, forced over-time, further harassment, discrimination and violence in the workplace as well as legal uncertainties due to missing or insufficient working contracts (cf. e.g. Clean Clothes Campaign Germany n.d.; Williams/Brill/Ravi 2019; Public Eye 2017; also on problems in footwear production and intersectionality of discrimination). Especially in poor countries, the leather and leather goods sectors are a source of livelihood for millions of people. Many of those belong to vulnerable groups which are socially and economically marginalized due to their gender, caste, citizenship, or cultural identity (cf. e.g., Hoefe 2017).

The US Bureau of International Labor Affairs (ILAB)'s *2020 List of Goods Produced by Child Labor or Forced Labor* identifies the risk of child labor in leather and leather goods production in Bangladesh, India, Mexico, Pakistan, and Vietnam. For the related footwear sector, the risk of child labor is also identified for Brazil, Indonesia, and Turkey; while forced labor is documented for China. However, exploitative practices are not limited to those countries, as has become increasingly known also among industry actors and auditors (cf. e.g., Sebastio 2021). However, to date, there is no open and transformative discourse on those concerns in the industry. On the contrary, it is very likely that the COVID-19 pandemic has worsened the situation for workers in the countries mentioned and many others.

What is needed in the leather industry to improve the situation for workers? Central is the realization that the exploitation of the workforce is harmful to the industry itself and, indeed, unsustainable. Market actors need to engage in an honest discourse about the drivers of this exploitation, and they need to agree that - just like with climate change mitigation - changing the situation will not come for free. Research on global value chains has recently given answers on underlying causes which complicate the creation of decent work. It has become a common understanding that economic power imbalances between buying brands and suppliers and the consequent bad purchasing practices and business relations often leave suppliers little choice but to agree to excessive price and time pressures which are partly handed over to the workforce, and/or prior tiers (cf. e.g., Anner 2022).

The exploitation of the workforce is harmful to the industry itself.

SDG 1: NO POVERTY

SDG 1 aims at the end of poverty in all its forms. Following target 1.1, by "2030, [...] extreme poverty for all people everywhere [shall be eradicated], currently measured as people living on less than \$1.25 a day" (UN DESA 2021c). Target 1.5 states:

By 2030, build the resilience of the poor and those in vulnerable situations and reduce their exposure and vulnerability to climate-related extreme events and other economic, social and environmental shocks and disasters.

The COVID-19 pandemic with its multi-dimensional consequences in most countries of the world has surely been such a shock. We will use this shock to exemplify how SDG 1 relates to business activities in the leather industry. In the summer of 2020 when COVID-19 hampered business globally, we conducted a survey with shoe and leather workers in India, as one important production area for the world market. That survey clearly showed their vulnerability.

In our research together with colleagues from Society for Labour and Development India (SLD) and INKOTA, we interrogated 115 workers, encompassing 37 different shoe production sites and 18 tanneries, in the areas of Vellore (Tamil Nadu), Kanpur and Unnao (Uttar Pradesh) in India. We brought to light how the COVID-19 induced crises caused huge income and job losses, financial insecurity, and acute shortage of basic supplies for workers. The survey showed how even workers who had been working in the industry for decades experienced a high risk of long-term impoverishment.

The pandemic had of course challenged the leather sector worldwide. The Indian shoe and leather industry, for instance, experienced supply bottlenecks, factory closures during a hard lockdown ordered by the government (March to June 2020), lack of cash-flow, and the crash of national and international demand. However, our research shows that the actors with the weakest financial, political, and legal position in the value chain - the workers - took on a disproportionately high burden in this situation, while other actors used their options to refuse shared responsibilities.

During the hard lockdown, more than a third of the sample of workers was confronted with total wage loss. More than half was forced to take on debt. Nearly 40% of the sample was not able to take up work when the production sites re-opened in June 2020; while 22% of the sample found work but earned less than before. Those workers who earned comparably decent wages before the pandemic (though still not at the level of living wages as calculated by the Asia Floor Wage Alliance, AFWA) accounted for the income group facing the greatest wage losses. The worker group getting the same wage before and after the hard lockdown were mainly those with extremely low wages, with many of them being women. We also learned that many workers could not access social security systems during the crisis, an important reason for this being their informal or insecure employment statuses. Furthermore, in many workplaces, workers councils or trade unions did not exist or were not consulted by their respective factory or tannery management to negotiate each actor groups' needs and to find solutions (Gojowczyk 2021; Ravi 2020; Wazed 2021). Media coverage, personal accounts of workers, industry statements in 2020 and 2021, and reports by international organizations on manufacturing industries (such as International Labour Organization 2020) give reason to assume that India's situation is no exception among other leather production countries.

With their low wages before the crisis, workers could hardly build up reserves; and in the crisis, they did not have the necessary political, social, and economic means to defend their interests in international value chains. In this respect, they are the victims of merciless international competition for the cheapest production. This competition is the direct result of the demands formulated by the strongest players in the market financially and the fact that **governments, until today, do not use regulation, tax, and financing mechanisms well enough** to support sustainable and inclusive business investment in the industry.

During the crisis, some voices in the leather industry highlighted the interdependence of different tiers and actors of the value chain. However, words must be followed by deeds which will be described in the conclusions.

CONCLUSIONS FOR THE DESIGN OF LEATHER PRODUCTS

Whoever cannot accept the fact that leather value chains are often highly problematic environmentally *and economically, and socially*, will not be able to define what a sustainable value chain shall look like. Scaring away from the most difficult aspects will not make the leather supply chains more sustainable. Corporate actions must address the biggest problems. One may say that it is the processes identifying, addressing, and eliminating the serious sustainability problems which make leather value chains sustainable at a certain point in time.

See section 1

Which processes do we believe to be helpful at this point in time? Based on international debates on sustainability in globalized value chains, on sustainable development and on the role that business actors are supposed to fulfill to achieve the goals internationally agreed upon, we draw the following conclusions.

On a general level, we are convinced that all the complicated steps in the value chains of leather can still be improved environmentally, socially, and economically. CSR literature has shown that next to regulation, it is particularly the mindset of the company leadership which influences whether a sustainability initiative is implemented (cf. e.g., Petrini/Back/Santos 2018). We argue that in the leather industry, this mindset has yet to widen to take all dimensions of sustainability into account equally, and that initiatives need to become much stronger in the social and economic dimension.

More specifically, we suggest to company managements to foster the following processes. Companies need to apply risk-based human rights due diligence for their whole supply chain, as described by the *Organization for Economic Co-operation and Development (OECD) Guidelines for Multinational Enterprises*, as “the process through which enterprises can identify, prevent, mitigate and account for how they address their actual and potential adverse impacts as an integral part of business decision-making and risk management systems” (2011, p. 23). The guidelines are also a good orientation for the establishment of grievance mechanisms for workers along the supply chains. The consequences of the power distribution in business relationships, of purchasing practices, and of price expectations need to be put to a critical test.

In most cases, cut-and-run strategies are no appropriate reaction to risks which will become visible through those processes. However, regional production, the concentration of the tiers in the value chain(s) and the reduction of the number of suppliers can be helpful for the mitigation and reaction to many of the sustainability risks and harms. Long-term and stable commercial relationships enhance open communication and a productive ‘culture of error’ both in a company and between business partners. It may also avoid the race to bottom phenomenon among suppliers and regulators in production countries which have led to the dilution of their respective environmental regulations and labor laws, leading to ever poorer environmental and working conditions, among other negative consequences. More secure business relations also make it easier to create job security and formal employment in production countries.

All business partners need to find ways to assure that all workers are protected by social security schemes sufficiently, respect their right to freedom of association, and engage in social dialogue with them. This social dialogue should be aimed not least at achieving living wages for all workers (cf. Asia Floor Wage Alliance (AFWA) n.d.), and at creating a decent work environment. To build respective structures and capacities can be challenging, but there are many networks, trade unions and civil society actors throughout the world who are happy to assist in serious transformation processes. Engagement with civil society actors and trade unions in production countries makes a company’s due diligence processes more robust and inclusive.

Management teams of companies in wealthy economies can also consider organizing tiers differently, assuring more value addition in production regions usually characterized by “cheap labor” and low value addition, e.g., by cooperating with designers, marketing, IT or other experts from those regions.

Designers in a company play a vital role in creating sustainability opportunities and cultures with respect to the problems discussed above. It should be part of designers’ job ethos to understand the entire supply chain and the situation of all the actors involved, and to design products and product lines that can be produced without harm to workers, the environment, and communities in the production areas. They can support the way forward, *inter alia*, through:

- ▶ Taking a leadership role in their companies in communicating about the different dimensions of sustainability in value chains and the great importance of addressing them (not exclusively, but also as part of the aesthetic consciousness in the 21st century).

The processes identifying, addressing, and eliminating the serious sustainability problems make leather value chains sustainable.

- ▶ Designing products and product lines that allow long term relationships with suppliers.
- ▶ Cultivating an understanding of the challenges in production, and fostering, together with colleagues from other departments of the company, early communication with potential suppliers about timetables, expectations, and possibilities.
- ▶ Avoiding frequent changes to styles and models of the products and integrating time-management that leaves reasonable time for production; allowing anti-cyclical production to avoid peaks and to enable maximum capacity utilization in supply facilities. This would have positive impact on the workers in the supply chain by reducing an important basis of pressure and harassment as well as of periodic employment.
- ▶ Together with colleagues from other departments, calculating prices for material and production realistically, striving for living wages and for the internalization of all costs along the whole value chain.

Last but not least, sustainability leaders should have an intrinsic interest to support legislation that aims for a regulatory regime in which the costs of sustainable production are a prerequisite to participate in a market rather than an economic burden.

With this list, we have mainly addressed the social and economic dimension. Others will be better equipped to give advice on the environmental dimension and as discussed, there are much more sources to be found to inform management and R&D in these related areas (cf. e.g., Envol Vert 2020; Karuppiah et al. 2021; Moktadir et al. 2020 in addition to sources cited).

We have given our answer to the question on how to move closer towards sustainable leather value chains. We strongly believe that the processes described above will help the industry to achieve more than fig leaf projects, to truly evolve and secure the industry sustainably for the future. This can only happen based on meaningful and decent work, no matter where a production area is located.

SÜDWIND has been committed to economic, social and ecological justice worldwide, for more than 30 years. Using concrete examples of grievances, we uncover unjust structures. We combine our research with development education and public relations work and we carry demands into campaigns, society, companies and politics. SÜDWIND is a non-profit and independent organization financed by grants, income from commissioned activities as well as membership fees and donations.

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DISCUSSION PAPER

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