



Strategies for securing the future of the European Leather Industry



Industry: TANNING / Leather



Gustavo Gonzalez-Quijano

Secretary General - COTANCE

Ljubljana, Slovenia, 18 November 2014



Confederation of National Associations of Tanners and Dressers of the European Community



- 13 Members → Representative National Leather Industry Association in:

BE		FI		NL		UK	
BU		FR		PT			
DE		IT		RO			
ES		LT		SE			

- Cotance Secretariat based in Belgium: where about 90% of the legislation affecting leather is produced by the EU institutions

<http://www.euroleather.com/index.php/cotance.html>



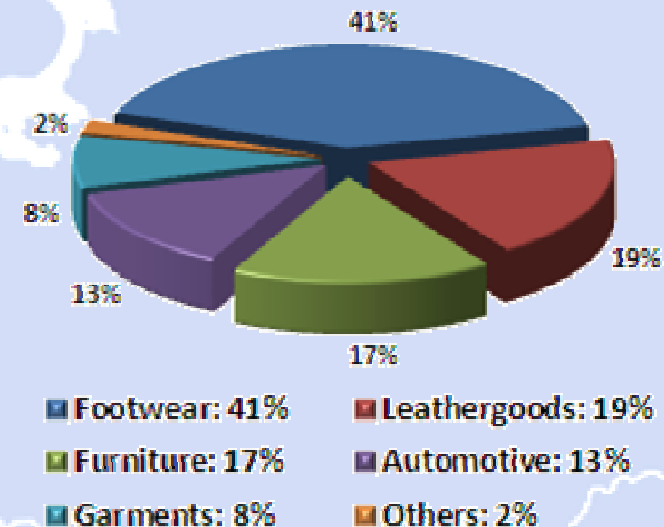
Euroleather
The official site of the European leather industry
created by COTANCE



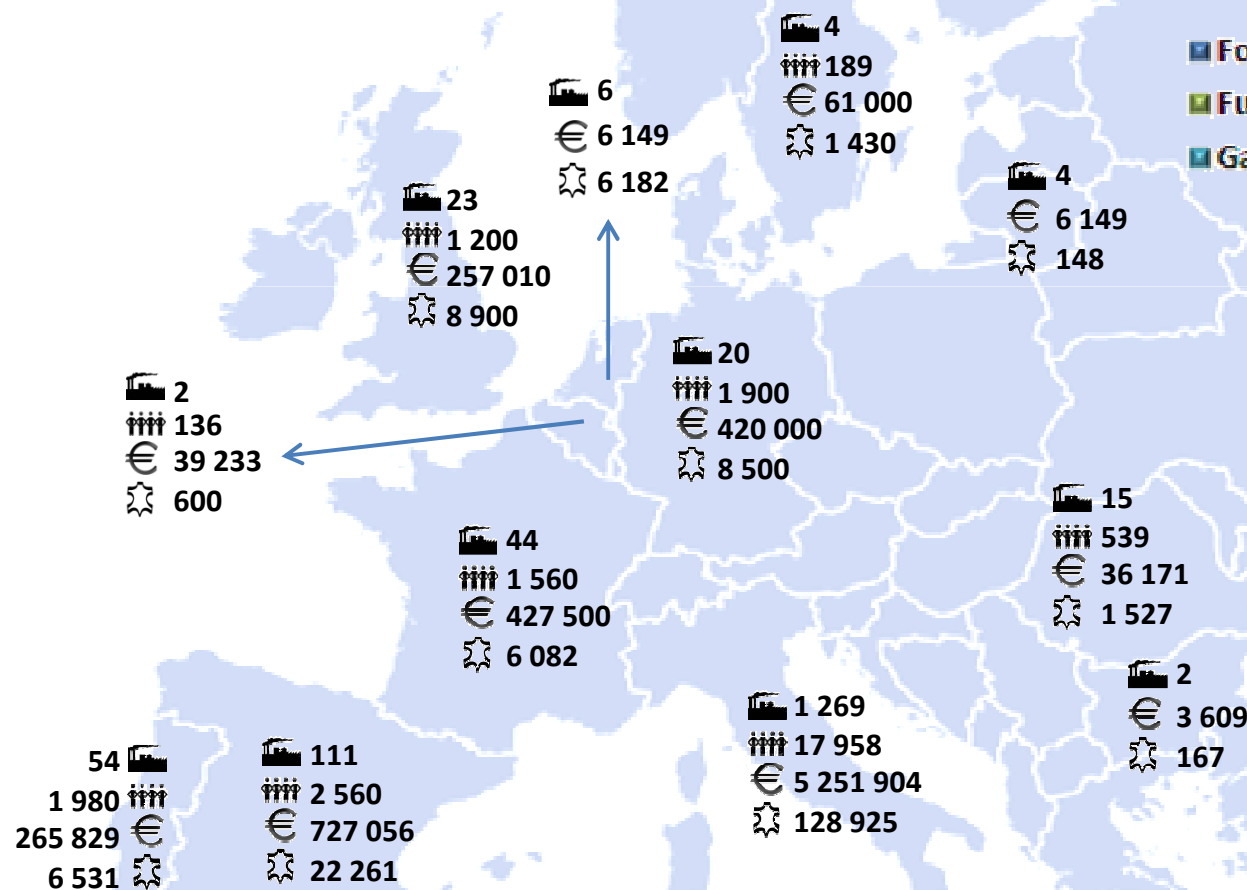
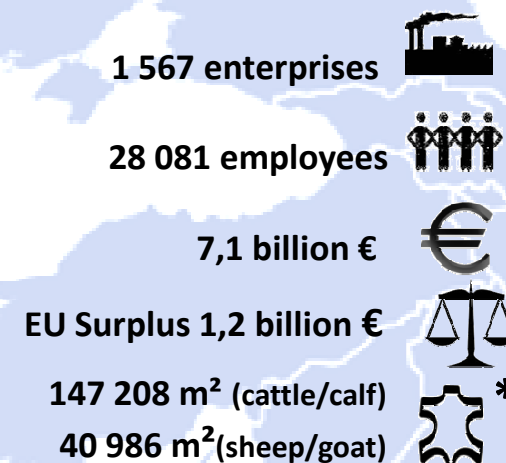
THE EUROPEAN LEATHER INDUSTRY

This map shows where leather is produced in COTANCE member countries. Talented people are needed to maintain Europe as the world's top leather producer, excelling in quality, environmental performance and social responsibility

Main destinations of EU Leather



Structure of the EU leather industry



Data from COTANCE Member associations (2012-2013). Non-COTANCE member tanneries in the EU also exist in AT, DK, FI, GR, PL, HU, CZ, SK, CR, SL

€ Turnover data in 1000€

*Data in 000m²

Strategies for securing the future of the EU Leather Industry

- Invest in Skills
- Make the sector more attractive
- Save energy and money
- Think green



EU Leather Product
Environmental Footprint Pilot



By improving your workforce's **skills** you can help your business to increase productivity and profits.

- More qualified and skilled workers
- Improve the level of education and skills
- Networking and best practices

***EU Council:** Ministers emphasised that the EU education and training systems should play a fundamental role in ensuring that young people and low-skilled adults acquire skills and competences that match the needs of today's labour market.*

“Investment in skills leads to more productivity, better business performance & greater profitability”



“Benefits from training your staff include improved morale, job satisfaction, increased turnover & confidence in the workplace”

<http://europeanskillscouncil.t-c-l.eu/eng/>

EU TCL SKILLS COUNCIL

- The EU TCL Skills Council aims at **improving the level of education, skills and employment** in the Textile, Clothing, Leather and recently added Footwear (TCLF) industries in Europe.
- Currently, the ISP Network counts with 5 members: UK, BE, FR, IT, ES. In addition, the Board is working to enlarge this number.

Core activities

- The establishment and execution of an **Education, Training and Jobs Work Programme** setting out priorities, activities and deliverables to coordinate the work of the members and of the network;
- The production of **periodic reports on the TCLF labour market** addressing perspectives and outlook, innovation, skills needs, qualification issues, mobility and other education- and training-related matters.

Make the sector more attractive



Unemployment in the EU has reached unprecedented levels while work opportunities in industry remain uncovered. The leather sector in the EU risks not being capable of satisfying its recruitment needs:

- Ageing workforce coupled with a vanishing of vocations in younger generations
- Erosion of the sector's education & training structures coupled to language barriers for optimising remaining qualifying pathways
- Risk of losing the sector's capacity to transmitting top level know-how crucial to high-end industries

Europe's tanneries offer excellent opportunities, where young people can realise their potential in an industry that knows no borders and that is as necessary as it has always been.



<http://www.euroleather.com/index.php/leather-is-my-job>



Make the sector more attractive



Leather is my Job!

- Raising further awareness in the sector and among stakeholders of the value and benefits of the Social Dialogue at sector level in the area of **Image & Jobs**
- Producing attractive information and **dissemination material** for illustrating what the leather sector has to offer in terms of societal values and employment opportunities
- Exploiting the potential of the Social Dialogue for harnessing the challenge of the sector's **Appeal & Attractiveness**

Main Activities

- 2 regional “Leather is my Job! Events” in April (UK + Romania)
 - Focus on: the outlook of the sector, Skills and HR Management, experiences and labour market policies
- Final European “Leather is my Job! Event” (RO) → October 2014 at ICAMS
- Digital toolbox
- Paper Brochure: 5650 copies



<http://www.euroleather.com/index.php/leather-is-my-job>



Make the sector more attractive



Key recommendations - Draft ideas

1. Leather education & training: Support Schools, VET, dual learning and Promotion at all levels (Public-Private; Local-National-European,...)
2. Leather skills & competences: Linking R&D and Training
3. Leather “associationism” & “activism”: Networking and Social Media
4. Leather communication & labelling: Image building and Brand consolidating
5. Leather “solidarity”: cooperating and helping the poorer



<http://www.euroleather.com/index.php/leather-is-my-job>



Make the sector more attractive



Some key data

- More than 75 workers & employers involved in the project across 7 countries (Uk, Ro, Fr, Pt, De, Bu, Es)
- Working on 10 different departments: Production and Manufacturing, Environment, Technical, Sales, Finance, HR, Management, trainees, Logistics and R&D...



<http://www.euroleather.com/index.php/leather-is-my-job>



Save energy and money



- Learn ways to **save energy** and use clean technologies, renewable resources.
- Saving energy is a smart way for businesses large and small to cut operating expenses and improve bottom lines
- **Saving energy** is good for the environment and good for the business
- Build **your** brand as a socially conscious company
- In order to **reduce** costs in **your business** when it comes to **energy**, there are a variety of different factors you need to consider.
- Whether or not you're into environmentalism, **saving energy** is a smart **business** strategy



<http://www.ind-ecoefficiency.eu/>



Save energy and money



The project aims at developing the best framework conditions for supporting tanners and footwear manufacturers to invest in energy efficiency

Four primary objectives:

- Identifying the main areas where **energy efficiency can be implemented** in tanneries and in the leather value chain;
- Identifying the best technical and **technological solutions available** in the domestic and European context to reach higher levels of energy efficiency;
- Reaching agreements with economic and financial operators at a European, national and local level, to facilitate corporate **access to finance** needed to invest in energy efficiency;
- Tutoring the companies in the development of energy efficiency **investment plans**.



<http://www.ind-ecoefficiency.eu/>



Save energy and money



INDECO - What companies will get from INDECO:

- Free **advice from experts and specialists in energy efficiency** who will perform a comprehensive technical and technological investigation aimed at identifying the main possible actions to be adopted so as to improve energy efficiency and estimate the resulting energy savings;
- Access to a special **database of energy-efficient technologies** (system and process solutions), with the support of agreements reached with suppliers in the framework of the project;
- Benefit from the links reached with energy specialists, European banks and national and local credit institutions, aimed at facilitating **access to loans for energy efficiency investments**.



<http://www.ind-ecoefficiency.eu/>

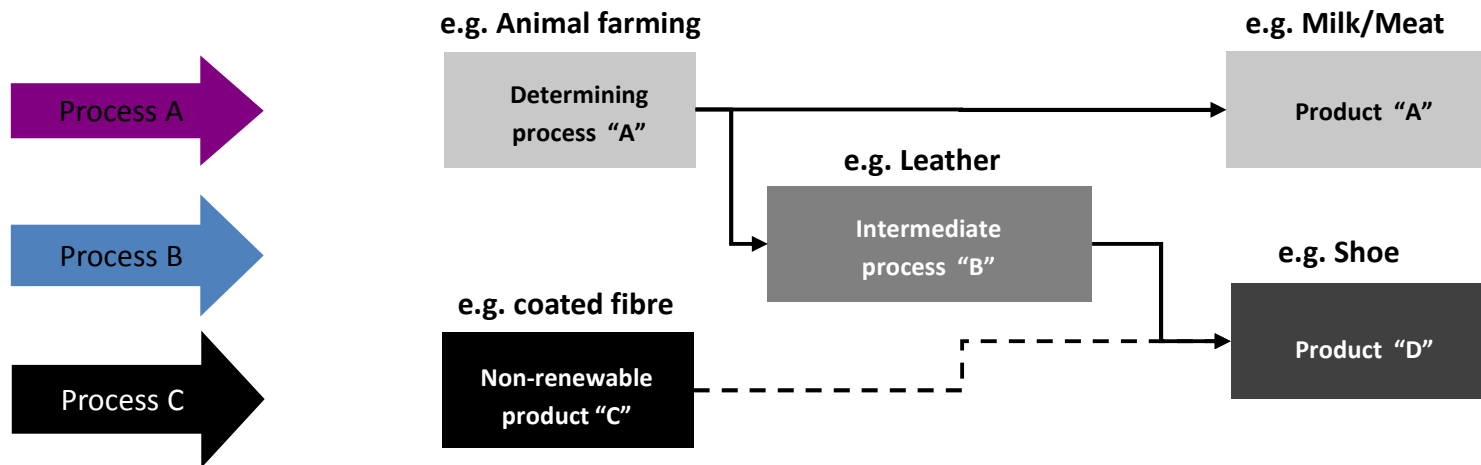




EU Leather Product Environmental Footprint Pilot

- Product Environmental Footprint Category Rules (PEFCRs) provide specific guidance for calculating and reporting products' life cycle environmental impacts.
- Existing life cycle-based standards do not provide sufficient specificity to ensure that the same assumptions, measurements and calculations are made to support comparable environmental claims across products delivering the same function.
- The primary objective of a PEFCR is to fix a consistent set of rules to calculate and communicate the relevant environmental information of products within the same category. An equally important objective is to enable comparisons and comparative assertions in all cases when this is considered feasible, relevant and appropriate.

Think Green: 0% allocation for by-products



- “A” is a co-producing process based on a renewable origin ✓
 - The production volume of “A” is not affected by demand of “B” ✓
 - In the application “B” a non renewable product “C” gets displaced ✓
-
- Process “A” is excluded in the footprint calculation of “B”
 - Process “A” gets a credit for the by-product to produce “B”

** source: 7th LCA Case Studies Symposium SETAC Europe, B Weidema,
UNIDO technical report: “Carbon Footprint in Leather Processing”, Federico Brugnoli,*





The conference is organised in the frame of project »Strong TCL: Strong partnership for an enhanced Social Dialogue in the Textile, Clothing and Leather sector in Slovenia, Croatia, Macedonia, Montenegro and Serbia« is co-funded by the European Union. The responsibility for the contents and opinions expressed rests solely with the authors. The European Commission is not responsible for any use that may be made of information contained.

Thank you

Gustavo Gonzalez-Quijano

cotance@euroleather.com

