Leather & Beef:  
Adding Skin to the Game 
Anne Gillespie, Director of Industry Integrity,  
Textile Exchange 

Global Conference on Sustainable Beef / Global Forum on Responsible Leather 
October 9-12 | Kilkenny, Ireland
Thank you GRSB!
1. Embed sustainability into evolving business and supply chain strategies.

2. Make it easier for companies to adapt to changing opportunities and requirements in textile sustainability.

3. Ensure that actions taken toward sustainability result in real and meaningful change.

We envision a global textile industry that protects and restores the environment and enhances lives.

Textile Exchange inspires and equips people to accelerate sustainable practices in the textile value chain. We focus on minimizing the harmful impacts of the global textile industry and maximizing its positive effects.
Our 20 team members and ambassadors are spread across 11 countries around the globe.
## MEMBERSHIP NETWORK

### Farm/Fiber
- Imperial Stock Ranch
- Chargeurs Wool
- UNIFI
- Haili
- Lenzing
- Shanghai Different Chemical Fiber Co., Ltd.

### Suppliers/Manufacturers
- Esquel Group
- Pratibha
- Sateri
- Armstrong
- Asahi Kasei
- Arvind
- Hohenstein
- Applied DNAsciences
- Re:Newcell

### Brands/Retailers
- Nike
- Patagonia
- Lululemon
- Inditex
- Timberland
- Prana
- VF
- H&M
- Gap
- Eileen Fisher
- Prada
- LVMH
- Kering
- Adidas
- C&A
- Otto Group
- Williams-Sonoma
- Burberry

### Friends of Textile Exchange
- Organic
- BCI
- Soil Association
- GOTS
- Outdoor Industry Association
- New York Fair Fashion Center
- ISM
- OrganiMark
- Bluesign
- Sustainable Apparel Coalition
UNITED BY ACTION:
ACCELERATING SUSTAINABILITY IN TEXTILES AND FASHION

October 22-24 | Milan, Italy

https://www.travelandleisure.com/articles/hidden-treasures-in-milan
Responsible Leather is a Textile Exchange initiative aimed at addressing the many issues found within the global leather supply chain.
Responsible Leather Round Table (RLRT)

**VISION**
We envision a world in which all aspects of the leather value chain are environmentally and socially responsible, promote animal welfare, and is economically viable.

**MISSION**
Advance responsibility and continuous improvement in the global leather value chain through leadership, inclusive multi-stakeholder engagement and collaboration.

**GOALS**
1. A platform for stakeholders in the leather industry to engage with each other, share information, and identify common challenges and opportunities.
2. A structure for interacting with other organizations and government bodies.
3. **A forum to agree on priority issues and take action to advance our mission and vision.**
Sector Membership

1. Brands and Retailers
   Companies and associations who bring leather products to consumers.

2. Supply Chain
   Companies and associations who convert and supply materials for further processing or sale of leather goods.

3. Producers
   Farmers, organizations and associations who are actively engaged in the ownership and management of live cattle.

4. Civil Society
   Academic institutions, non-governmental organizations, non-commercial institutions, foundations, and associations with a stake in the cattle and leather value chains.

5. Professional Services (Consulting Members)
   Individuals or organizations such as regulatory authorities, governmental agencies, consulting/auditing firms and donor organizations; do not belong to one of the voting constituencies, but may request membership as Consulting Members.

⭐ = voting member
Responsible Leather Assessment Tool (RLA) Goals

1. Develop a tool that recognizes and drives best practices in the leather industry, leading to positive social, environmental and animal welfare impacts.

2. Establish a clear benchmark for best practices.

3. Provide companies with a means to link their sourcing to more responsible practices and make accurate claims about how they source.

4. Leverage and add value to the existing tools and programs that are driving better practices in the leather industry.

5. Reward and influence the leather industry to incentivize practices that respect animals, people and the environment.
A diagram shows a process starting from the cow-calf farm through to the brand/retail stage. The stages are labeled as follows: Cow-calf farm, Raising farm, Finishing farm, Slaughter, Tannery 1, Tannery 2, Tannery 3, Production, and Brand/retail.

At each stage, there are specific organizations and standards associated with it:

- **Cow-calf farm**
  - GRSB
  - CFA
  - SAN
  - Global Animal Partnership, etc.
  - etc.

- **Raising farm**
  - ZDHC
  - WWF
  - Tannery of the Future
  - ICEC
  - SA8000, WRAP, etc.

- **Finishing farm**
  - Optional LWG animal welfare risk assessment model

- **Slaughter**
  - LWG

- **Tannery 1, Tannery 2, Tannery 3**
  - Textile Exchange

- **Production**

- **Brand/retail**

*These are examples only.*

The diagram is labeled with "Optional LWG animal welfare risk assessment model."
Theory of Change

- Responsible Leather Round Table
- BRANDS
- “Safe” supply → Demand
- Responsible Leather Assessment Tool
- INDUSTRY
- Best Practices
<table>
<thead>
<tr>
<th>Animal Welfare</th>
<th>RLA v1</th>
<th>RLA v2</th>
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<td>Farm</td>
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<td><img src="image2.png" alt="Image" /></td>
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<td>Transport</td>
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TBD
Why leather?
Leather has Global Impacts

Leather tanning uses large amounts of water in combination with sometimes harmful chemicals. If not addressed properly, tanning operations can have significant impacts on water quality.

From smallholder farmers to slaughterhouse workers to sewers, people contribute to and are impacted by the production of leather. There are many opportunities to improve working conditions and livelihoods of the people involved.

Through its connection to the beef industry, leather is strongly linked to the climate impacts of land use. Requiring leather to originate from farms that are not deforesting will have a positive impact on greenhouse gas emissions.

Cattle farming gives the opportunity to “take urgent and significant action to reduce the degradation of natural habitats, halt the loss of biodiversity and, by 2020, protect and prevent the extinction of threatened species.”
According to LCA calculations, 95% of the economic value is allocated to food. (lcafood2014.org)
Therefore,

**Leather is < 5% of the economic value of a cow**

The leather industry is about $40 billion
The value of the RLI stakeholders is > $1.2 trillion
The apparel industry is $1.7 trillion
“Europe’s animal farming sector has exceeded safe bounds for greenhouse gas emissions, nutrient flows and biodiversity loss, and urgently needs to be scaled back, according to a major report.”

“The study calls for the European commission to urgently set up a formal inquiry mandated to propose measures – including taxes and subsidies – that “discourage livestock products harmful to health, climate or the environment”. Livestock has the world’s largest land footprint and is growing fast, with close to 80% of the planet’s agricultural land now used for grazing and animal feed production, even though meat delivers just 18% of our calories.”
“ETC Group and Fibershed ... cautions that any commercial-scale expansion of biosynthetic fabrics, such as those derived from genetically engineered (GE) microorganisms, could exert undue pressures on ecosystems while creating potentially dangerous sources of biotech waste. Worse, by diverting support from so-called “truly sustainable” natural fiber economies, such technologies could also undermine farmers worldwide.”

“The global synthetic leather market is expected to reach USD 85.05 billion by 2025, according to a new report by Grand View Research, Inc. Globally increasing applications in footwears has been a major factor driving market growth. In addition, increasing focus towards animal rights led by several organizations and rising stringency in laws governing real leather are propelling demand for synthetic leather.”
Why Beef?
"We envision a world in which all aspects of the beef value chain are environmentally sound, socially responsible and economically viable."

"We envision a global textile industry that protects and restores the environment and enhances lives."

"The GRSB mission is to advance continuous improvement in sustainability of the global beef value chain through leadership, science and multi-stakeholder engagement and collaboration."

"Textile Exchange inspires and equips people to accelerate sustainable practices in the textile value chain. We focus on minimizing the harmful impacts of the global textile industry and maximizing its positive effects."
Environmental impact
Social impact
Animal welfare
Traceability and quality
Continuous improvement and education
GRSB

Regional Roundtables

Sub-regional Roundtables

Partner Organizations

Connecting Groups

Millions of Producers
Opportunities
Working together to tell credible and consistent stories

- **Leather Naturally**: Global marketing and PR campaign to promote leather, aimed at Gen Z and millennials.
- **Responsible Leather**: B2B, ensuring a strong foundation of best practices to deliver authenticity.
- **Beef/leather supply network**: Producers and companies meeting best practices, and sharing their stories.
Working together to provide full supply chain traceability.
Traceability to slaughterhouse and Direct Farm theoretically possible
Traceability to birthing farm theoretically possible
Certificates are registered onto the trading platform by farms and slaughterhouses. Brands and retailers can purchase the certificates and make claims.
Be open.

Listen.

Learn.

Share your reality.

UBUNTU: “I am because we are”
Friday, October 12th

7:00 a.m. – 8:30 a.m.  A Sustainability Sunrise Session: Leather & Beef
8:30 a.m. – 9:00 a.m.  Break
9:00 a.m. – 9:30 a.m.  Opening & Welcome to the Global Meeting of the RLRT
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11:00 a.m. – 11:45 a.m.  Animal Welfare Working Session
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3:00 p.m. – 3:30 p.m.  Break
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4:15 p.m. – 4:50 p.m.  Language and Claims Working Session
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- C&A
- THE NORTH FACE
- WILLIAMS-SONOMA
- BURBERRY
- Otto Group

Friends of Textile Exchange
- Better Cotton Initiative
- THE FAIR FASHION CENTER
- OUTDOOR INDUSTRY ASSOCIATION
- Organic Trade Association
- Soil Association
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GRSB
ZDHC
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Responsible Leather Assessment Tool

Global Forum on Responsible Leather
Theory of Change

Responsible Leather Round Table -> Best Practices

BRANDS

“Safe” supply -> Demand

Responsible Leather Assessment Tool

INDUSTRY
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<tr>
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SILK?
I'D RATHER GO NAKED.

DOWN?
I'D RATHER GO NAKED.

FUR?
I'D RATHER GO NAKED.

LEATHER?
I'D RATHER GO NAKED.

WOOL?
I'D RATHER GO NAKED.
Why Beef?
Overlapping Goals

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Millions of Producers
Opportunities Together
Working together to tell credible and consistent stories

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