



**2ND WORLD LEATHER CONGRESS
MILAN, SEPTEMBER, 2015**



The UK Leather Industry



-  **23** Tanneries in the UK
-  Employing around **1200** employees
-  2014 Annual Turnover estimated at **£213 Million**

The UK Leather Industry



Production of Finished Leather - 2014



Heavy Leather
363.48 tonnes



Bovine Light Leather
7,446,003 SqM²



Sheep Leather
1,089,945 SqM²

Diversity of UK Leather Production

Bovine, ovine, caprine & equine	Vegetable, Organic & Chromium-tanned	Wet blue, crust & finished grain, suede & wool-on leather
Automotive	Industrial	Parchment / Vellum
Aviation	Marine	Bookbinding
Footwear	Sports	Orthopaedic
Leathergoods	Saddlery & Bridle leather	Interiors
Upholstery	Chamois	Military
Garment	Wool-on sheepskin	Bagpipes

The UK Leather Industry – UKLF Member Tanners



- J & JF Baker & Co Ltd - Colyton, Devon
- Barrhead Leather Company - Glasgow, Renfrewshire
- Bridge of Weir Leather Company - Bridge of Weir, Renfrewshire
- Joseph Claytons & Sons Ltd - Chesterfield, Derbyshire - **175 Years**
- The Clyde Leather Company - Glasgow, Renfrewshire
- J Hewit & Sons Ltd - Livingston, West Lothian
- Hutchings & Harding - Sawston, Cambridgeshire
- WJ & W Langs Ltd - Paisley, Renfrewshire
- Andrew Muirhead & Son Ltd - Glasgow, Renfrewshire - **175 Years**
- NCT Leather Ltd - Bridge of Weir, Renfrewshire
- Pittards PLC - Yeovil, Somerset
- J & E Sedgwick - Walsall, West Midlands
- Charles F Stead & Co Ltd - Leeds, West Yorkshire
- Thomas Ware & Sons Ltd - Bristol, Avon - **175 Years**
- Waltham Tannery Co Ltd - Louth, Lincolnshire
- Dickens Brothers - Northampton, Northamptonshire
- Devonian - Buckfast, Devon
- Holmes Halls Tanners - Hull
- Bradleys - Shrewsbury, Shropshire
- Organic Sheepskin Tannery - Lesser Netherton, Hereford
- Blenkinsop Leather Ltd - Higham Ferrers, Northamptonshire
- Skyeskyns - Isle of Skye
- William Cowley - Newport Pagnell, Buckinghamshire

Global Presence



- Germany
- China
- Japan
- USA
- Mexico
- Australia
- Italy
- United Arab Emirates
- Hong Kong
- Singapore
- Ethiopia
- Poland

Value of Exports & Key Trading Partners (2014)

WET BLUE & CRUST

FINISHED LEATHER

EXPORTS	VALUE £ MILLION	% OF TOTAL	EXPORTS	VALUE £ MILLION	% OF TOTAL
<i>Italy</i>	32.68	57.5	<i>USA</i>	15.68	14.1
<i>China</i>	14.95	26.4	<i>Hong Kong</i>	13.19	11.8
<i>Hong Kong</i>	4.06	7.1	<i>Poland</i>	12.86	11.5
<i>United Arab Emirates</i>	0.85	1.5	<i>Germany</i>	11.11	10.0
<i>Japan</i>	0.65	1.2	<i>Portugal</i>	10.41	9.4
Main 5 markets	53.2	93.7	Main 5 markets	63.29	56.8
All countries	56.7	100	All countries	111.48	100

Global Export

Bovine Wet Blue & Crust Exports - 2014



	US \$1000
1 - Brazil	1,299,496
2 - USA	1,170,142
3 - Argentina	744,643
4 - Italy	564,060
5 - Taiwan	347,269
UK - 19th	90,321
World	7,759,206
UK as % of total	1.2%

Bovine Finished Leather Exports - 2014



	US \$1000
1 - Italy	3,650,589
2 - China	1,649,856
3 - Brazil	1,620,416
4 - India	888,423
5 - South Korea	757,764
UK - 19th	161,508
World	14,350,456
UK as % of total	1.1%

Brand Partners



MINISTRY OF DEFENCE



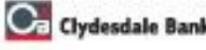
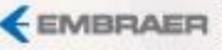
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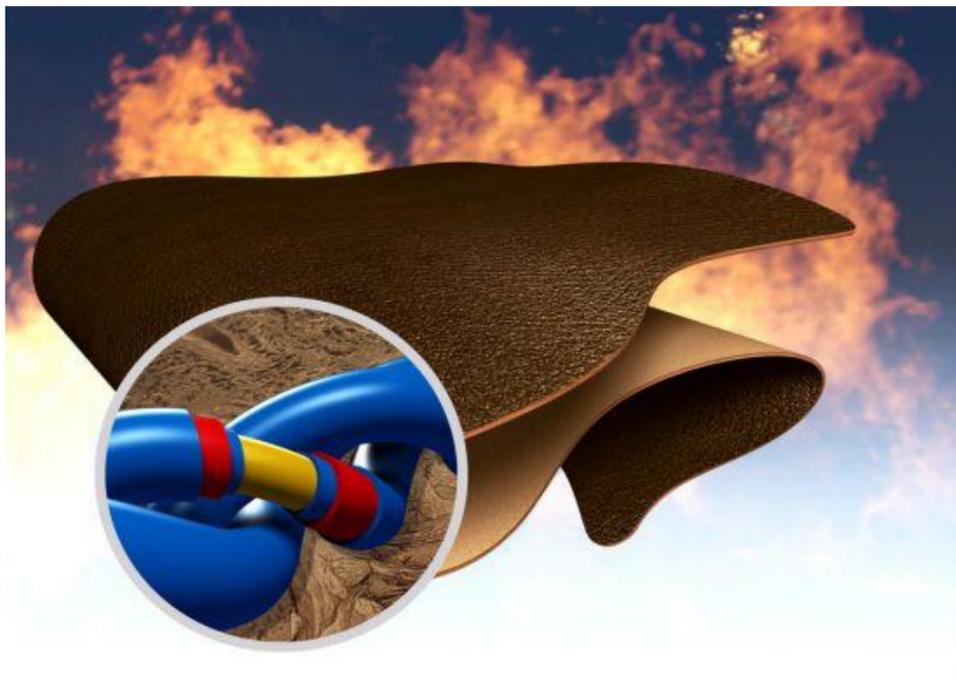
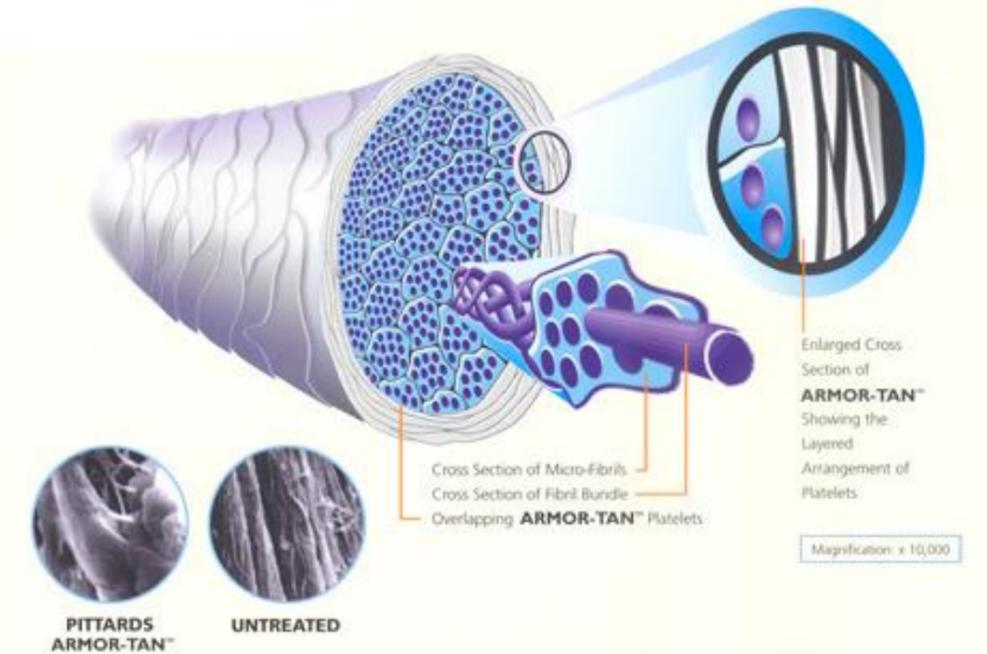


Brand Partners

 AIRBUS	 American Airlines <small>Something Special in the Air™</small>	 AMG	 ASTON MARTIN	 bmi	 BOEING	 BRITISH AIRWAYS	 Celebrity X Cruises	 Clydesdale Bank	 CUNARD <small>THE LAST GREAT BRITISH SHIP LINE</small>
 DELTA	 EMBRAER	 Emirates	 FISKER	 Ford	FIFTEEN	HARVEY NICHOLS	 Hilton	 Holiday Inn	HOUSES of PARLIAMENT
 JAGUAR	 LAND-ROVER	 LINCOLN AMERICAN LUXURY	 LOTUS	 Lufthansa	 QANTAS	 NatWest	 NOKIA Connecting People	 ROTHSCHILD	 RBS The Royal Bank of Scotland
 THE RITZ-CARLTON	 SAAB	 SINGAPORE AIRLINES	thistle	 Thomas Cook	 United Airlines	VERTU	 Virgin	 VW	 VOLVO

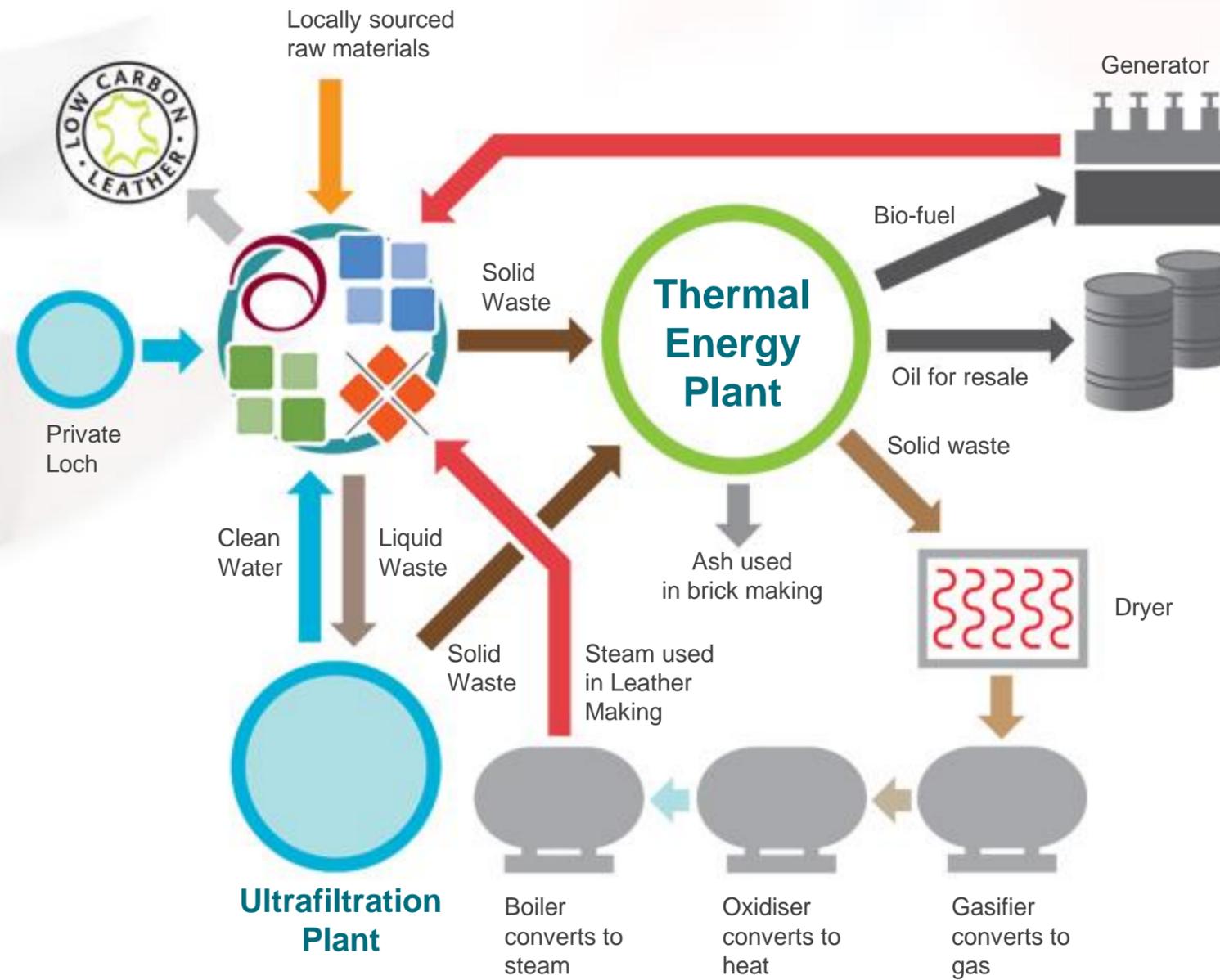
Innovation & leather

Pittards' 'Armor-tan' - encases leather fibril bundles with microscopic ceramic "armor plates" which are more resistant to abrasion, thus increasing the durability of the leather up to 25%



Pittards' 'Firebloc II' - improves the fire retardant properties, without any impact on the essential characteristics, so that leathers remain soft, supple and breathable

Innovation & the Environment



Training the next generation of tanners

- The Institute for Creative Leather Technology at University of Northampton
- The only centre in Europe providing training and higher education in leather manufacture
- Courses at Diploma, BSc, MSc and PhD level, research and engagement in schools
- Scottish Leather Group Apprenticeship Academy - rolling programme of Engineering and Manufacturing Apprentices
- Pittards Plc's Apprenticeships in Leather & Leathergoods manufacture
- UK Leather Federation activity in raising profile of industry



Information, Engagement and Inspiration

- International Centre for Leather
- Collaborative partnership of The International Museum of Leathercraft, the Leather Conservation Centre and the Institute for Creative Leather Technology
- Bold vision of linking academia with industry, the environment, fashion and cultural heritage
- A global Centre of Excellence bringing together education, research, development and innovation, conservation and heritage, creative fashion and design
- ‘There will be nothing like this anywhere else in the world’



The UK Leather Industry:

- Successful
- Innovative
- Preparing for the future

Thank you