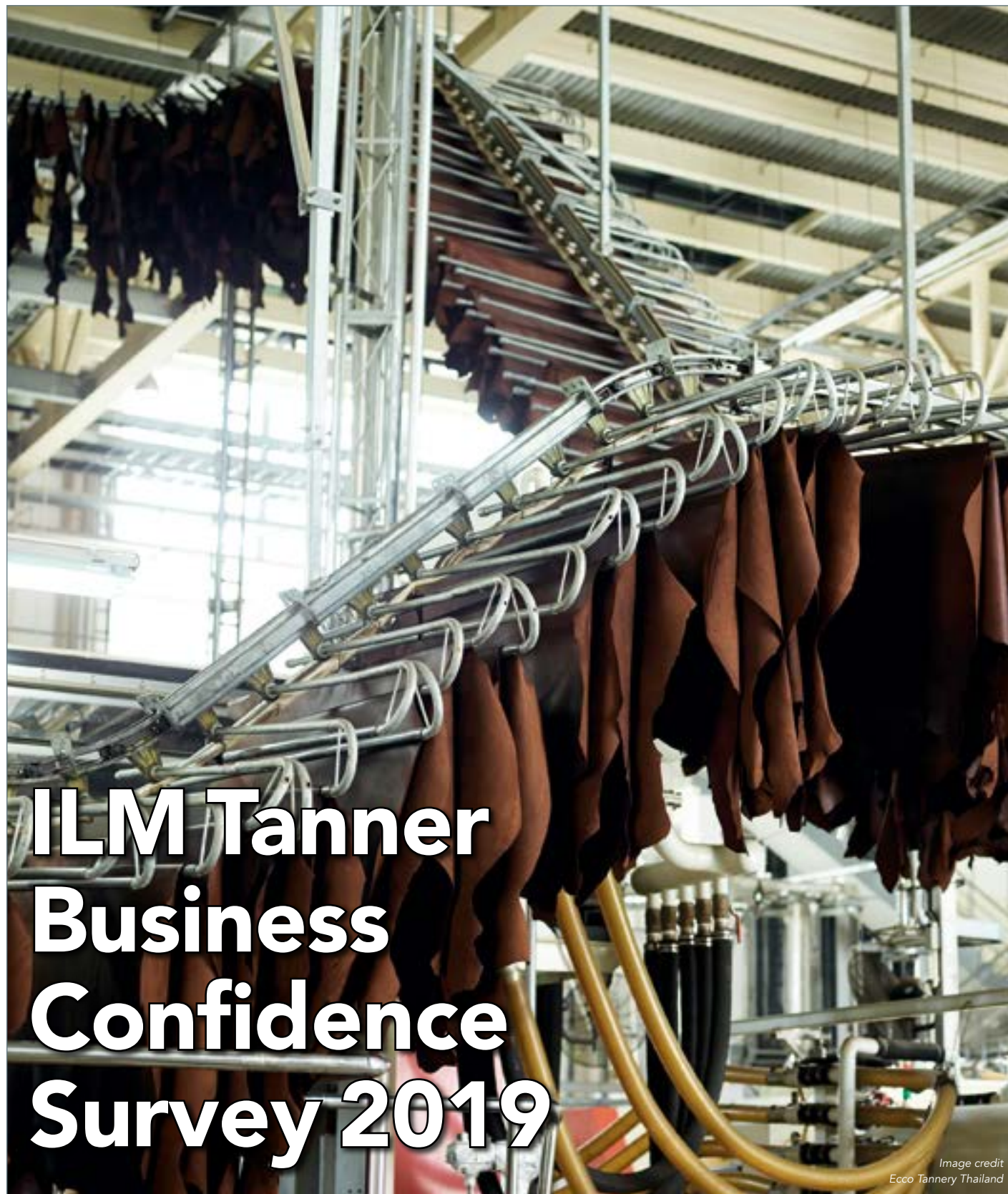




INTERNATIONAL LEATHER MAKER

september/october 2019
supplement

www.internationalleathermaker.com



ILM Tanner Business Confidence Survey 2019

*Image credit
Ecco Tannery Thailand*

2019 tanner survey reflects market concerns

The sixth and largest annual ILM Tanner Business Confidence Survey provides a valuable snapshot of the global tanning industry. Much has changed in the past year and the results highlight some worrying market trends and growing concerns that tanners are faced with.

Introduction

International Leather Maker (ILM) invited tanners from across the world to take part in its annual Business Confidence Survey to assess the current mood, business climate and the main issues facing operators in the sector, and reflect on the key trends and changes that have occurred over the past 12 months. Results are compared against 2017 and 2018. In 2019, ILM asked 11 new questions, and the responses reveal the true extent of the pressure the tanning industry is under. It also provides a unique insight into tanners' concerns and what needs to be done in the future to regain market share. The findings reflect the views of reputable international tanners who process millions of sq ft of leather for a multitude of end-uses. This year ILM received a record number of submissions, and thanks to the volume and high quality of responses we can say with confidence that the results give an accurate, meaningful and comprehensive representation of tanners' views worldwide in mid-2019. ILM would like to thank all the companies who took part in the survey.

Most of the tanners who responded to this year's survey operate within the footwear (67%) and leather goods segments (64%), followed by automotive upholstery (51%) and furniture upholstery / interior design at 37%. Other industry sectors covered include heavy leathers such as saddlery and harness producers (20%), garment (18%), gloving (16%) and sole leather (14%). There is an overlap between some segments, with a number of tanners involved in several product categories, particularly in the footwear and leather goods arena. Most respondents operate one to two plants (57% - a drop from 67% in 2018), followed by tanners who operate two to five units (30% - up from 25% in 2018). There has also been an increase in responses from larger groups who run more than ten units. The majority of tanners surveyed employ 100 and 500 people (30%), while a significant number (22%) employ over 1000 staff. In third place are companies with 50 to 100 employees (18%), with 14% of tanners representing family-owned SMEs with under 50 staff. The majority of respondents carry out the full tanning process from raw to finished (67% against 73% in 2018), followed by 24% who process from tanned materials such as wet-blue, wet-white or vegetable tanned.

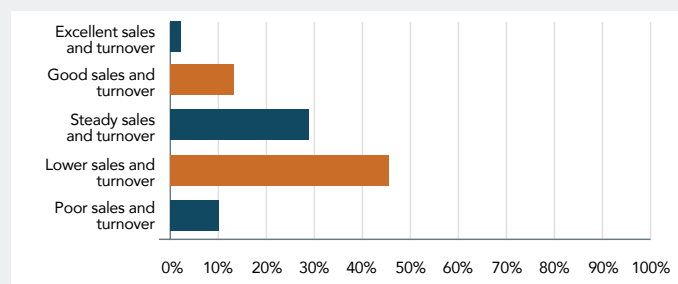
Tanners from Europe made up the majority of respondents in this

year's survey (51%), with strong representation also by tanners from North America (18%) in second place, followed by China (17%) and South East Asia (excluding China) at 15%. However, answers were also submitted by respondents from the Indian sub-continent, South and Central America, Africa, The Middle East, Australasia and the Russian Federation, providing a comprehensive overview of the global tanning industry.

Question 1

Since the beginning of 2019, which of the following can best describe your business compared with the year before?

The difficult trading climate of previous years continues to affect the industry negatively, with a significant drop in respondents reporting good sales and turnover (13% compared to 21% in 2018 and 27% in 2017 respectively) and a steep increase in tanners stating they saw lower sales and turnover in H1 2019 (46% compared to 28% in 2018 and 27% in 2017). Those reporting excellent sales and turnover remain relatively stable at 2% this year, compared to 3% in 2018 and 4% in 2017. This is also the case with regards to tanners who report poor sales and turnover, which at 10% has remained on a par with 2018, however, reflects an overall deterioration in sales (for reference, in 2017 this figure was 5%).



ANSWER CHOICES	2017	2018	2019
Excellent sales and turnover	4.11%	2.67%	2.22%
Good sales and turnover	20.55%	21.33%	13.33%
Steady sales and turnover	42.47%	37.33%	28.89%
Lower sales and turnover	27.40%	28.00%	45.56%
Poor sales and turnover	5.48%	10.67%	10.00%



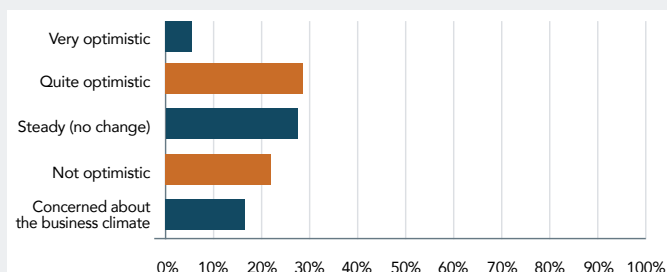
Tyche Leather Group in Taiwan

Ecco tannery Thailand

Question 2

Looking ahead, how optimistic are you about the future for the business in the next twelve months?

It is evident that this year tanners are feeling the pressure mounting on their sector, with generally a more pessimistic outlook for the future. The number of respondents who are concerned about the business climate has risen to 16% from 12% last year (this is in even more stark contrast to 2017 when this figure was just 4%), while 22% are not optimistic compared to 13% in 2018 and 12% in 2017. Just 27% of tanners feel the climate has not changed over the last 12 months, compared to 41% last year (29% in 2017). This tendency is also reflected in the declining figure for those who feel very optimistic, which stands at 5% this year compared to 9% last year. However, there is a slight increase in those who feel quite optimistic, up from 25% in 2018 to 29% in 2019, though this figure still remains well below the 2017 result, which was 48%.

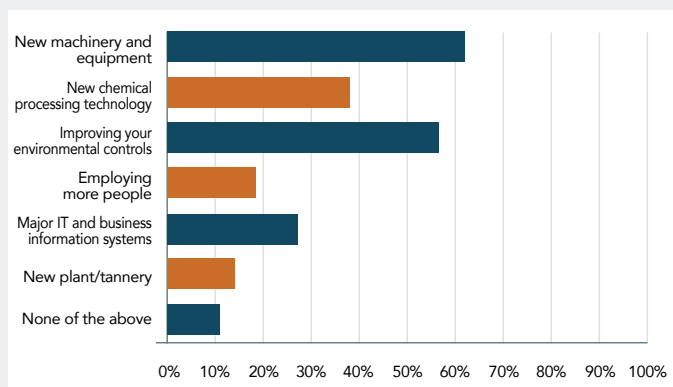


ANSWER CHOICES	2017	2018	2019
Very optimistic	6.85%	9.21%	5.49%
Quite optimistic	47.95%	25.00%	28.57%
Steady (no change)	28.77%	40.79%	27.47%
Not optimistic	12.33%	13.16%	21.98%
Concerned about the business climate	4.11%	11.84%	16.48%

Question 3

Are you looking to invest in any of the following in the next 6 to 12 months?

In line with the results of previous years, the investment focus of tanners seems to remain on technology, machinery and automation rather than people - over two thirds of respondents (62%) said they will invest in new machinery and equipment, which remains broadly comparable with 2018 and 2017, when this figure was at 60% and 66% respectively. Improving environmental controls remains high on tanners' agendas (57% of respondents, up from 52% last year). New chemical processing technology (38%) and major IT and business information systems (27%) also score highly in terms of investment commitments over the coming months, indicating that improved environmental performance and transparency are still areas of priority. Meanwhile, employing more people fell from 20% in 2018 (and 32% in 2017) to 18%, and just 14% of respondents planned to invest in a new plant or tannery, while 10% of tanners surveyed said they are not seeking to make any investment in the near future.



ANSWER CHOICES	2017	2018	2019
New machinery and equipment	65.75%	60.00%	61.96%
New chemical processing technology	39.73%	37.33%	38.04%
Improving your environmental controls	60.27%	52.00%	56.52%
Employing more people	31.51%	20.00%	18.48%
Major IT and business information systems	21.92%	28.00%	27.17%
New plant/tannery	17.81%	13.33%	14.13%
None of the above	12.33%	16.00%	10.87%

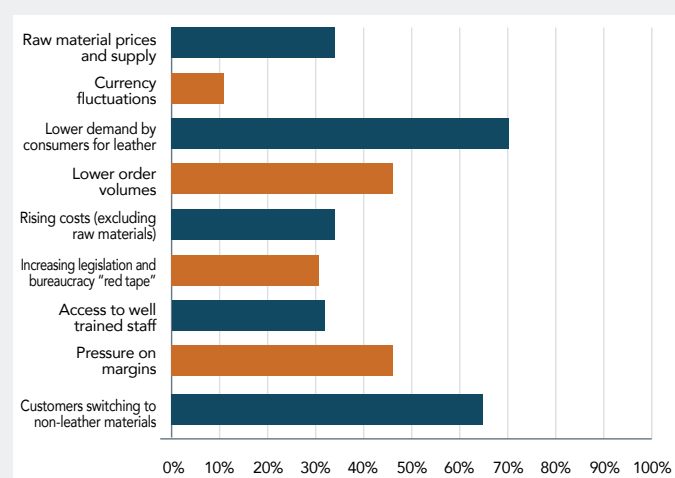
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Question 4

Looking ahead, what are the main concerns for your business?

Lower demand by consumers for leather and customers switching to non-leather materials came out on top this year as the main concerns for tanners, with both categories seeing a significant increase (to 70% and 65% respectively) from this time last year. This reflects the general mood and trend in the market, with the rise of alternative materials and a widespread, negative image of leather clearly having an impact on the business confidence of tanners. Lower order volumes and pressures on margins are also key issues tanners are worrying about and have overtaken concerns about raw material prices and supply, which decreased significantly from 58% last year and 60% in 2017 to just over a third of respondents. It is clear, also from subsequent, more detailed questions, that a perceived general move away from leather remains the biggest challenge for the industry ahead.



ANSWER CHOICES	2017	2018	2019
Raw material prices and supply	60.27%	58.11%	34.07%
Currency fluctuations	24.66%	24.32%	10.99%
Lower demand by consumers for leather	53.42%	56.76%	70.33%
Lower order volumes	41.10%	43.24%	46.15%
Rising costs (excluding raw materials)	38.36%	40.54%	34.07%
Increasing legislation and bureaucracy "red tape"	35.62%	29.73%	30.77%
Access to well trained staff	28.77%	31.08%	31.87%
Pressure on margins	46.58%	39.19%	46.15%
Customers switching to non-leather materials	-	-	64.84%

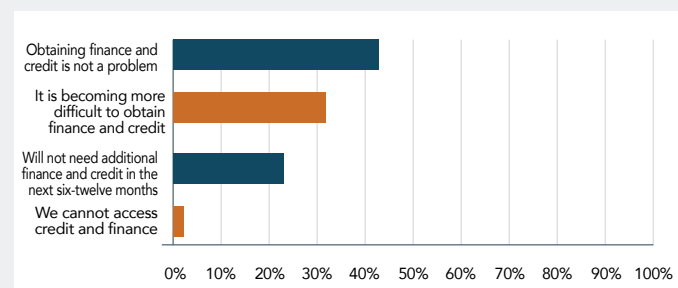


Fubang

Question 5

How easy is it for you to obtain finance?

There have been no significant changes in the access to finance and credit reported by tanners, with the majority of tanners experiencing no major problems. Slightly more tanners than last year (23% compared to 18% in 2018) state that they will not need additional finance and credit in the next six to twelve months, while there has been a slight decline from 3% to 2% in businesses not being able to access credit and finance at all – encouragingly, a very low figure.

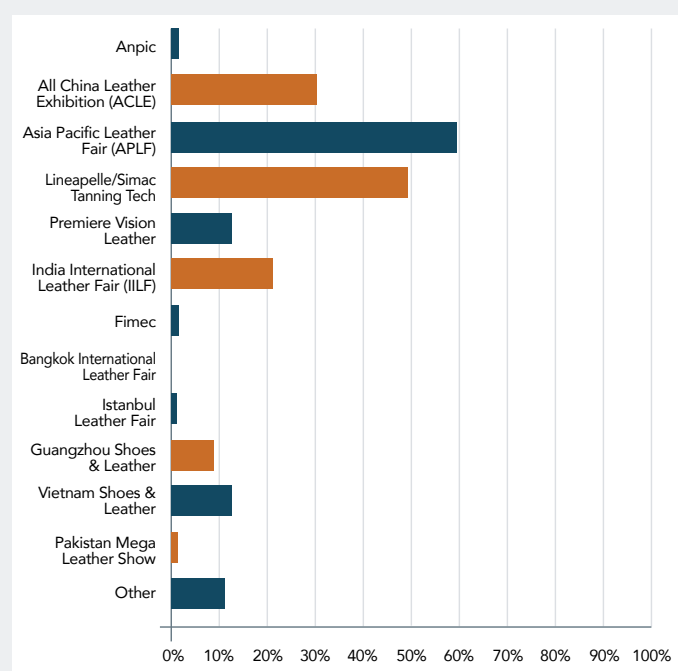


ANSWER CHOICES	2017	2018	2019
Obtaining finance and credit is not a problem	62.50%	46.48%	42.86%
It is becoming more difficult to obtain finance and credit	18.06%	32.39%	31.87%
Will not need additional finance and credit in the next six-twelve months	18.06%	18.31%	23.08%
We cannot access credit and finance	1.39%	2.82%	2.20%

Question 6

Which of the following industry trade shows do you exhibit at?

Once again, APLF maintains its status as the most important international trade fair for the tanners that responded, followed by Lineapelle, which takes the second top spot. ACLE, though less relevant, also remains a key destination for respondents. In addition, tanners also attend a number of national and more regional shows, most notably the India International Leather Fair (IILF).

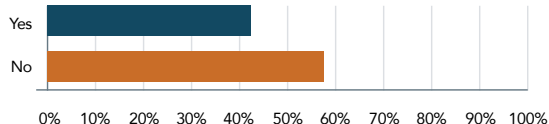


ANSWER CHOICES	2017	2018	2019
Anpic	2.94%	1.59%	2.53%
All China Leather Exhibition (ACLE)	38.24%	31.75%	30.38%
Asia Pacific Leather Fair (APLF)	63.24%	57.14%	59.49%
Lineapelle/Simac Tanning Tech	50.00%	50.79%	49.37%
Premiere Vision Leather	16.18%	17.46%	12.66%
India International Leather Fair (IILF)	16.18%	26.98%	21.52%
Fimec	2.94%	1.59%	1.27%
Bangkok International Leather Fair	1.47%	0.00%	0.00%
Istanbul Leather Fair	4.41%	1.59%	5.06%
Guangzhou Shoes & Leather	5.88%	3.17%	8.86%
Vietnam Shoes & Leather	-	-	12.66%
Pakistan Mega Leather Show	-	-	1.27%
Other (please specify)	32.35%	22.22%	12.66%

Question 7

Will you be looking to employ more staff in the next six months?

The number of tanners expecting to take on additional staff in the next half year has regained its 2017 level of 42% after it dropped to 35% last year. Equally, the number of respondents stating that they will not be bolstering their workforce has dropped from 2018 – perhaps an encouraging sign that, despite the pressures on the sector, it is not all doom and gloom for tanners, and businesses are still expanding.

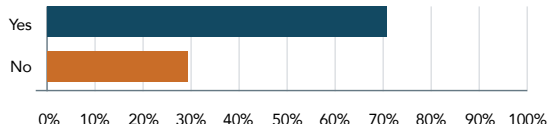


ANSWER CHOICES	2017	2018	2019
Yes	42.47%	34.72%	42.39%
No	57.53%	65.28%	57.61%

Question 8

Are you concerned about declining raw material quality?

There does not appear to be a big change in the concern over declining raw material quality, which has been evident over the last couple of years, with more than two thirds of respondents stating that this is still a worry, with just a relatively small percentage drop on last year's figures. There has been little development in terms of a joined-up industry effort to change and improve the situation, and until something is put in place, the sentiment is likely to remain the same going forward.

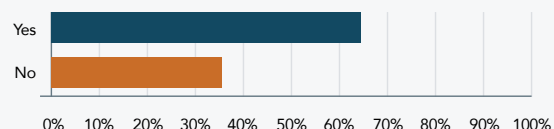


ANSWER CHOICES	2017	2018	2019
Yes	75.34%	77.03%	70.65%
No	24.66%	22.97%	29.35%

Question 9

Would you be prepared to pay more for higher quality raw materials if they were guaranteed?

The quality of raw materials is evidently still a big issue for tanners, with 64% stating they would be willing to pay more, which is consistent with findings from previous years.



ANSWER CHOICES	2017	2018	2019
Yes	58.90%	67.57%	64.44%
No	41.10%	32.43%	35.56%

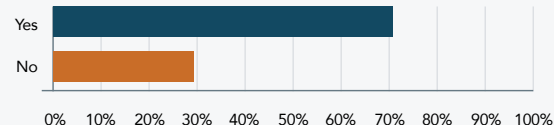


Maydiang tannery China

Question 10

Do you think that raw material restrictions should be lifted to create a free-market of raw material supply

The overwhelming majority of respondents (71%) want raw materials restrictions to be lifted. This is a steep rise from the 56% in 2018 and 59% in 2017. Clearly, the issue continues to be a big problem for tanners in the current economic climate, who strongly disagree with the existence of raw material trade restrictions and see it as having a big negative impact on their business.



ANSWER CHOICES	2017	2018	2019
Yes	58.90%	56.16%	70.79%
No	41.10%	43.84%	29.21%

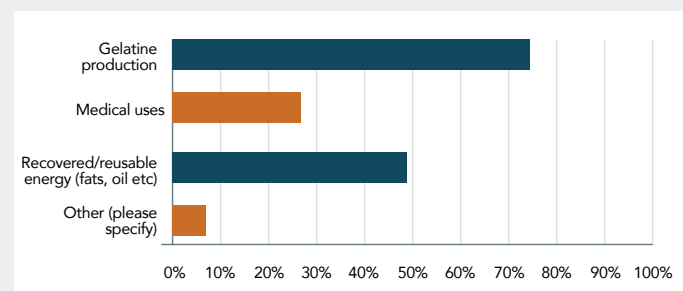
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Question 11

What alternatives to leather making are there for lower grade hides & skins that are not currently being utilised in the tanning industry to avoid landfill or waste?

A new question for this year's survey, 74% of respondents believe that gelatine production is the best alternative to leather making, with recovered / reusable energy coming in at 49% and therefore in second place. Medical uses received 27% of votes, while other uses (such as pet supplements) made up 7%.

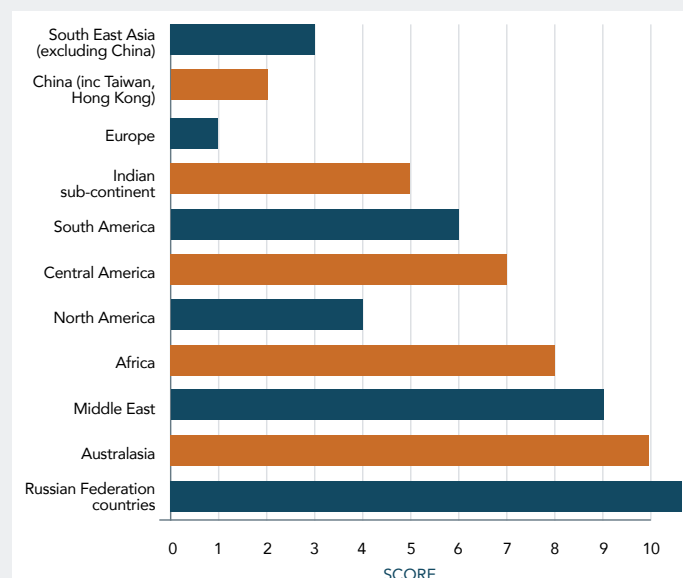


ANSWER CHOICES	2017	2018	2019
Gelatine production	-	-	74.42%
Medical uses	-	-	26.74%
Recovered/reusable energy (fats, oil etc)	-	-	48.84%
Other (please specify):	-	-	6.98%

Question 12

Which are your strongest markets for sales? Rank 1 (strongest) to 11 (weakest).

Europe once again came out on top as the strongest market for tanners, with Greater China (including Taiwan and Hong Kong) regaining its second place from 2017, after falling to third place last year. South East Asia (excluding China) takes third spot this year, with North America and the Indian sub-continent also remaining important markets in 4th and 5th place respectively (unchanged from 2018).



ANSWER CHOICES	2017	2018	2019
South East Asia (excluding China)	3rd	2nd	3rd
China (inc Taiwan, Hong Kong)	2nd	3rd	2nd
Europe	1st	1st	1st
Indian sub-continent	5th	5th	5th
South America	6th	6th	6th
Central America	7th	7th	7th
North America	4th	4th	4th
Africa	8th	9th	8th
Middle East	9th	8th	9th
Australasia	10th	10th	10th
Russian Federation countries	11th	11th	11th

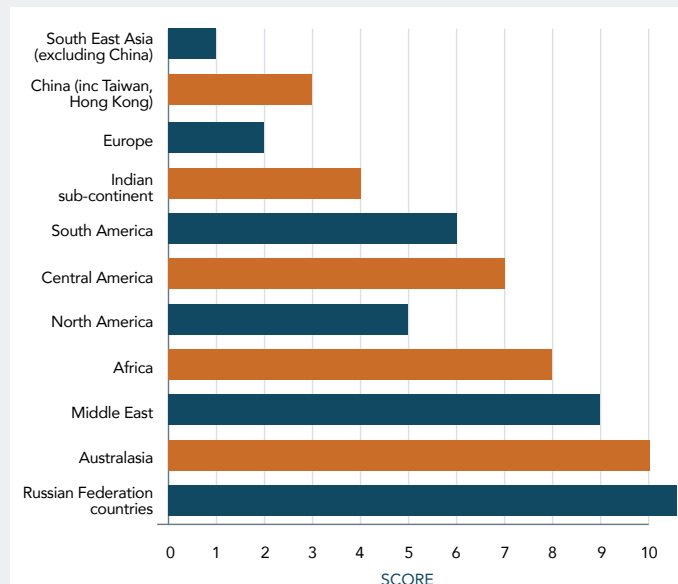


Thomas Ware

Question 13

What are your fastest growing markets for new business? Rank 1 (strongest) to 11 (weakest).

Interestingly, South East Asia (excluding China) has climbed three places and reclaimed its number 1 position from 2017, having fallen to fourth place last year. Europe is still up there as highly important market in second spot (number one in 2018), followed by Greater China (including Taiwan and Hong Kong) in third place, the Indian subcontinent in 4th and North America in 5th place, which are also seen as key areas for new business growth.

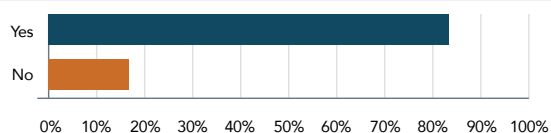


ANSWER CHOICES	2017	2018	2019
South East Asia (excluding China)	1st	4th	1st
China (inc Taiwan, Hong Kong)	3rd	2nd	3rd
Europe	1st	1st	2nd
Indian sub-continent	5th	3rd	4th
South America	6th	7th	6th
Central America	7th	=8th	7th
North America	4th	5th	5th
Africa	8th	11th	8th
Middle East	10th	=8th	9th
Australasia	9th	=8th	10th
Russian Federation countries	11th	6th	11th

Question 14

Are you concerned about your customers sourcing other non-leather materials and textiles instead of genuine leather?

The shift towards non-leather materials and textiles continues to be a huge worry for tanners, with a steep increase in respondents year-on-year stating that this is a key concern - a whopping 83% compared to 75% last year and 68% in 2016. The growing demand for leather alternatives, particularly in the footwear upper segment, but increasingly also in the automotive sector, is putting added pressure on the leather industry, and a recovery is unfortunately not in sight.

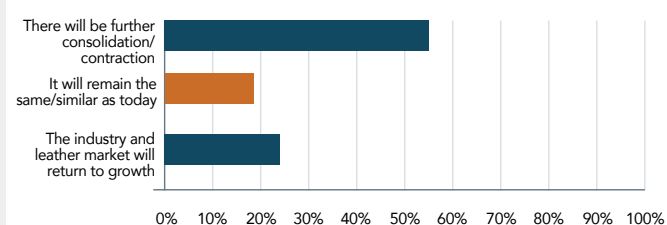


ANSWER CHOICES	2017	2018	2019
Yes	68.49%	75.00%	83.33%
No	31.51%	25.00%	16.67%

Question 15

Where do you see the global leather manufacturing industry heading over the next five years?

The majority of respondents share a pessimistic outlook, with 57% believing there will be further consolidation or contraction of the market. 24% remain optimistic and feel that the industry and leather market will return to growth, while 19% believe it will stay the same as today. There is no comparable data, as this is the first year this question was introduced, but it is evident that a very cautious climate and sentiment within the industry can be gauged.

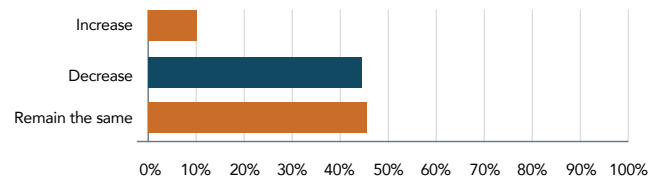


ANSWER CHOICES	2017	2018	2019
There will be further consolidation/contraction	-	-	56.67%
It will remain the same/similar as today	-	-	18.89%
The industry and leather market will return to growth	-	-	24.44%

Question 16

What do you think will happen to finished leather prices over the next six months?

Interestingly, the sector is almost evenly split between those who believe that finished leather prices will decrease over the next six months (44%) and those who feel they will remain the same (46%). Just ten percent of tanners, however, believe that they will increase, staying in line with last year's results (12%). For comparison, last year 49% of respondents believed finished leather prices would remain the same, while 39% thought they would decrease.

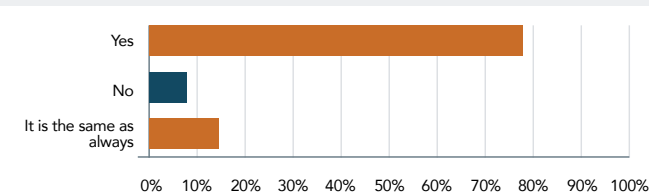


ANSWER CHOICES	2017	2018	2019
Increase	-	12.50%	10.00%
Decrease	-	38.89%	44.44%
Remain the same	-	48.61%	45.56%

Question 17

Do you think that leather is increasingly coming under attack by NGOs and campaign groups (anti-leather, vegan groups) in the media and social media?

At 78%, a large majority of tanners believe that leather is still under attack from activist groups, no significant change to the previous years' responses and an indication that operators in the industry are feeling the impact of negative reporting and image campaigns.



ANSWER CHOICES	2017	2018	2019
Yes	-	79.17%	77.78%
No	-	11.11%	7.78%
It is the same as always	-	9.72%	14.44%

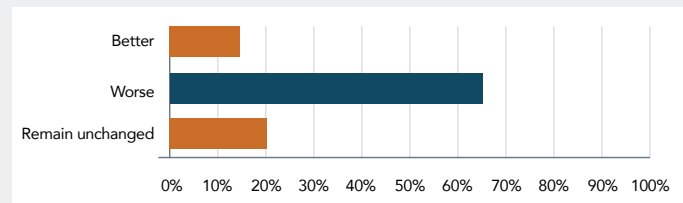
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Question 18

Compared with 2018, has the global leather business environment changed?

A large proportion of participants (65%) feel that the leather business environment has deteriorated compared with 2018, supporting the pessimistic sentiment of previous answers. 20% of tanners think the trading climate is unchanged, while a relatively small number of respondents (15%) feel the business environment has improved.



ANSWER CHOICES	2017	2018	2019
Better	-	-	14.61%
Worse	-	-	65.17%
Remain unchanged	-	-	20.22%

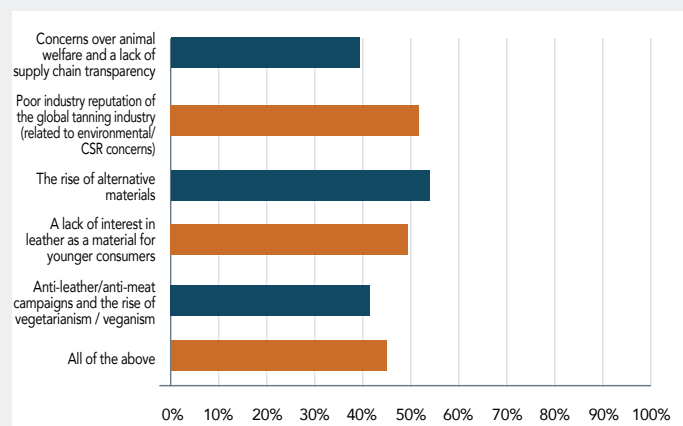


Wollsdorf Leather

Question 19

What are the greatest threats to the long-term viability of the leathemaking industry? (You can choose more than one option).

This question, another first this year, highlights how complex and multi-faceted the threats to the future of the leathemaking industry are, as it is impossible to isolate a single issue, with all receiving relatively equal amounts of votes. The rise of alternative materials nudges ahead with 54%, closely followed by poor reputation of the global tanning industry at 52%, and lack of interest in leather as a material for younger consumers (49%). But, anti-leather campaigns (42%) and concerns over animal welfare and lack of supply chain transparency (39%) also score high.

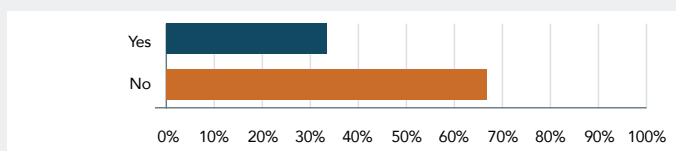


ANSWER CHOICES	2017	2018	2019
Concerns over animal welfare and a lack of supply chain transparency	-	-	39.33%
Poor industry reputation of the global tanning industry (related to environmental/CSR concerns)	-	-	51.69%
The rise of alternative materials	-	-	53.93%
A lack of interest in leather as a material for younger consumers	-	-	49.44%
Anti-leather/anti-meat campaigns and the rise of vegetarianism / veganism	-	-	41.57%
All of the above	-	-	44.94%

Question 20

Have geopolitical issues such as global trade tensions / Brexit had a negative impact on your business over the past 12 months?

Encouragingly, 67% of respondents do not feel that geopolitical issues have negatively impacted their business over the past year.

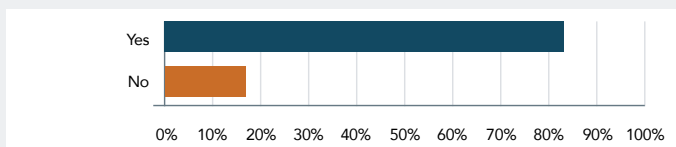


ANSWER CHOICES	2017	2018	2019
Yes	-	-	33.33%
No	-	-	66.67%

Question 21

Are your clients asking more questions about where you source your raw materials (hides / skins / tanned leather etc.)?

Confirming the rising trend in the industry and growing demand for greater transparency and traceability, this year's results remain on a par with the previous year (83% vs 84% in 2018). More so than ever, tanners will have to implement more stringent traceability and transparency policies if they want to remain competitive in the market in the future and supply global brands and OEMs, who themselves are upgrading their transparency and sustainability efforts.

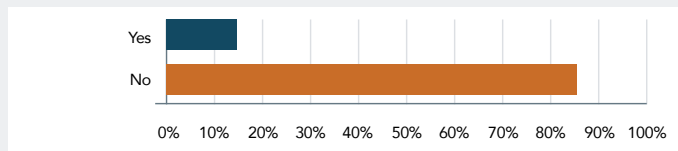


ANSWER CHOICES	2017	2018	2019
Yes	-	84.29%	83.15%
No	-	15.71%	16.85%

Question 22

Do you think that the leather industry is doing a good enough job at marketing leather to the consumer?

There appears to be a rising sentiment that the industry is inadequately equipped or failing to market leather to the consumer, with a whopping 85% expressing their discontent with the status quo (an increase of 10% compared with last year). The results give a clear indication that those respondents also feel that there is a definite need to implement a positive image campaign and promote leather, particularly to the consumer and especially younger generations.

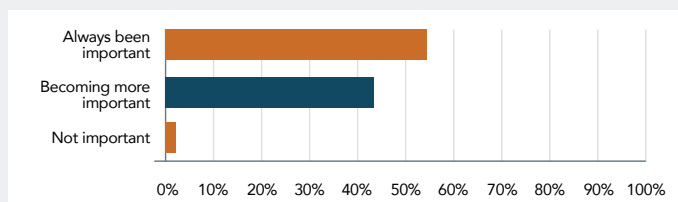


ANSWER CHOICES	2017	2018	2019
Yes	-	25.00%	14.61%
No	-	75.00%	85.39%

Question 23

How important are transparent and open Corporate Social Responsibility (CSR) policies for your business and your customers?

Only a very small minority of businesses (2%) state that CSR is not important factor for their business or their customers, which is in stark contrast to the overwhelming majority of respondents who do. 54% say that this has always been an important consideration for their companies, while 43% indicate a growing emphasis on CSR policies. This is in line with previous responses above and confirms that few companies today can successfully operate outside of regulated and international CSR policies and standards.

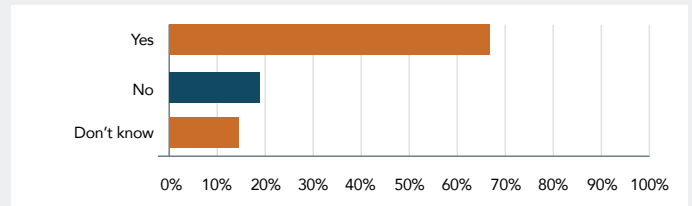


ANSWER CHOICES	2017	2018	2019
Always been important	-	-	54.44%
Becoming more important	-	-	43.33%
Not important	-	-	2.22%

Question 24

Following on from the previous question, does your business have a clearly verifiable framework or international accreditation to prove that it has implemented a CSR policy?

Further confirming the above results, 67% of tanners state they have a verifiable CSR framework in place, however, combining those who say they have not and those who do not know (which amounts to 33%) indicates that there is still a lot of room for improvement and that verifiable policies and frameworks still are a grey area for many tanners.

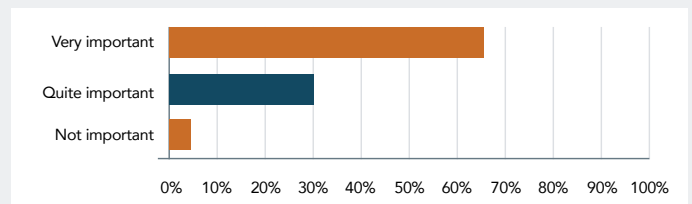


ANSWER CHOICES	2017	2018	2019
Yes	-	-	66.67%
No	-	-	18.89%
Don't know	-	-	14.44%

Question 25

How important and relevant are recent industry promotional initiatives such as Leather Naturally and One 4 Leather to the modern tanning industry?

As already indicated in Q22, there is a clear desire in the industry for effective marketing and promotion of leather, which is confirmed by 66% of respondents answering this question with "very important", and 30% with "quite important". Only a negligible 4% feel that this is not a priority for the industry.



ANSWER CHOICES	2017	2018	2019
Very important	-	-	65.56%
Quite important	-	-	30.00%
Not important	-	-	4.44%



Interhides Thailand

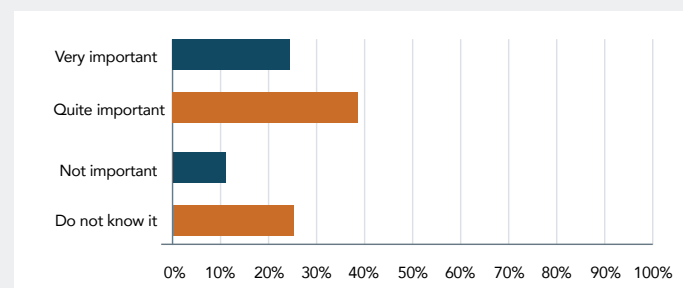
BUSINESS INFORMATION

Tanner survey results

Question 26

How important and relevant are industry accreditations such as the Brazilian Leather Sustainability Certification – CSCB (Brazil) for the modern tanning industry?

Industry accreditations seem to have a lot of credibility, with 24% stating that the CSCB is “very important”, and 39% considering it “quite important”, while 25% of those that responded stating that they do not know it.

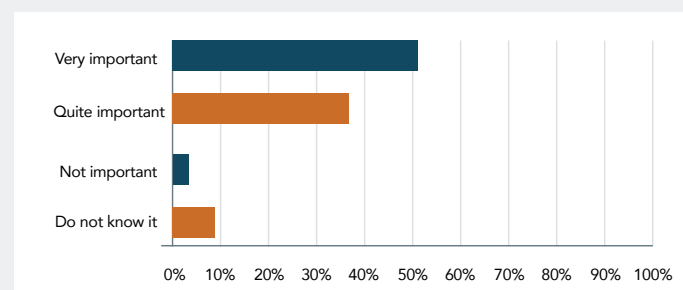


ANSWER CHOICES	2017	2018	2019
Very important	-	-	24.14%
Quite important	-	-	39.08%
Not important	-	-	11.49%
Do not know it	-	-	25.29%

Question 27

How important and relevant is the Leather Working Group for the modern tanning industry?

The Leather Working Group is undeniably one of the most important initiatives for the tanning industry, with 51% of respondents considering it as “very important” for the modern tanning industry and 37% as “quite important”, indicating strong industry support for the work that the LWG carries out and its importance to the wider sector. Only 3% of tanners said they did not consider it important, while 9% do not know about it.



ANSWER CHOICES	2017	2018	2019
Very important	-	-	51.11%
Quite important	-	-	36.67%
Not important	-	-	3.33%
Do not know it	-	-	8.89%

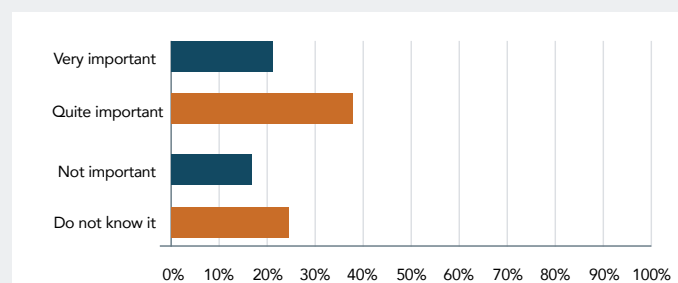


Atik Saudi Arabia

Question 28

How important and relevant are industry accreditations such as I.C.E.C – Institute of Quality Certification for the Leather Sector (Italy) for the modern tanning industry?

This paints a similar picture as Q's 26 & 27, with the majority of tanners approving industry accreditations such as I.C.E.C. 24% do not know this accreditation, which may indicate more regional relevance, while 17% are stating that it is not important.



ANSWER CHOICES	2017	2018	2019
Very important	-	-	21.11%
Quite important	-	-	37.78%
Not important	-	-	16.67%
Do not know it	-	-	24.44%



Wollsdorf Leather

Question 30

Do you have any written comments to make?

■ “Environmental costs are not mentioned and every year they become higher and higher; our customers cannot afford to pay for so many laws and new legislation that is absolutely nonsense and the same leather sector approves all of these ideas from the international bureaucracy. All of these groups (industry accreditation bodies) really seem to be of no use, customers only ask about price and everybody has the idea that synthetic materials are excellent and leather is the worse, nobody tells the truth; by making manmade material, the impact on the environment is a lot worse than chrome and sodium sulphide, but all of us and all of these organizations do not stand up for the truth. If you see the bank balances of our large customers, their profits are every year higher because they can sell synthetic material shoes for much more than real leather shoes. We just sit around to see how they make huge profits and talk bad things about the leather industry, meanwhile they become richer every day.”

■ “Branding leather is important because of other materials using the word leather. The industry needs to protect its greatest asset.”

■ “The leather market is going down each and every year, thus the importance of leather and related products needs to be well advertised. Also, leather products in the market are very expensive, thus making consumers opt for other alternatives.”

■ “Our Industry has to be more serious. The transparency, especially in raw material supply should be reconsidered. We have to think about how we can give the emotions which we have in the leather business to the customers, especially to the designers. Leather is a material which was always on the runway for fashion. Tanners can reinvent their articles compared with plastic very fast. We should have more innovative inventions for leather, like the hot shop from Ecco Leather.”

■ “Marketing for the leather business is lousy. Leather Naturally is the worst spent money.”

■ “An aggressive campaign targeting young consumers about the advantages of leather as compared to other materials (is needed).”

■ “One of the possibilities is concern for plastic in oceans, but the leather industry must also reduce its own use of PU coatings to be able to give leather as option for not using plastic.”

Acknowledgement

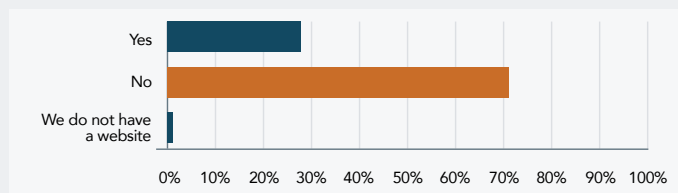
ILM is most grateful to those tanners who took part and thanks them for their participation. Confidentiality concerning individual responses is guaranteed.

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Question 29

Is your company set up to sell leather online or via e-commerce platforms?

E-commerce appears to be still an area that tanners are slow to embrace, with 71% of respondents stating they are not geared towards selling online – this is even higher than last year’s figure of 61%. Just 27% of tanners are trading via e-commerce websites, though it is unclear whether this is through their own sites or via third party platforms, and whether this is b2b or b2c. However, only 1% (compared to 3% last year) do not have an online presence in the form of a website at all.



ANSWER CHOICES	2017	2018	2019
Yes	-	35.62%	27.78%
No	-	61.64%	71.11%
We do not have a website	-	2.74%	1.11%