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European Project - Transparency of the origin of hides & skins

VS/2011/0145 -

National Report from FRANCE

We ran the consultation from September 2011 to March 2012. We received 12 replies corresponding to 25% of the sector's companies, 60% of the sector's turnover, and 70% of the sector's employment in France.

0. IDENTIFICATION OF THE RESPONDENTS (IN PERCENTAGE)

The tanneries that replied to the consultation supply the following downstream sectors:

Footwear	14%	Furniture	2%
Leathergoods	54%	Automotive/aero/other transport	1%
Clothing/Gloves	20%	Wet Blue	
Other	9%		

1. PERCEPTION OF THE ISSUE

1.1. What type of news regarding the conditions of sourcing of hides and skins has what level of shocking potential for consumers?

Social	**Total**	**%**
-Child labour in connection with hides and skins	55	5
-Unhealthy working conditions in slaughterhouses	45	4
-Forced or Compulsory work in Farms	46	4
-Other:…………………………………….	3	-
Environmental	**Total**	
-Rainforest deforestation for getting grazing land for herds in connection to hides and skins	38	3
-Chemical Risks, including preservation Salt use	33	3
-Other:……………………………………..	4	-
Animal Welfare	**Total**	
-Animal mistreatment at the farm	42	4
-Animal mistreatment during transport to slaughter	46	4
-Non "humane" slaughter methods	47	4
-Other:…………………………………….	3	-

1.2-4. Perception of how consumers care when the Media bring shocking stories about irresponsible behaviour of economic operators in terms of Social or Environmental aspects in supply chains

According to the tanneries consulted, consumers in France care (83%) when shocking stories on Social or Environmental aspects of their supply chain are portrayed in the media.

Our tanners believe that the negative impression left in the mind of consumers tends to remain (50%).

The consultation reveals that tanners in France understand that concerned consumers do not tend to react by boycotting leather in consumer goods (only 8% believe they do) but try to get assurances from the supply chain (25%) regarding the conditions of environmental performance and social accountability under which the purchased products have been sourced.

1.5-6. Interpretation of customers of such societal concerns and consequent reactions

Percentage of customers who “are concerned”		
	Total	%
Customers don’t translate such concerns into action	448	37
Customers contact suppliers and try to sensitise them on their values	276	23
Customers translate Societal concerns sooner rather than later into specific requests to suppliers	476	40
Other:……………………..		

According to our sector’s operators, the manufacturers of leather articles, the customers of our tanners, perceive the negative publicity brought by the media as concerning (83%).

1.7. When the media unveils a scandal in the leather sector who gets hurt?

	TOTAL	**%**
the image of the leather industry in general?	43	4
the image of the entire leather sector in the concerned country?	45	4
the image of the leather sub-sector concerned independent of location, eg footwear leather/clothing leather?	41	3
the image of the leather sub-sector in the country concerned?	34	3
the image of the company/ies concerned?	39	3

1.8. Consequences mostly feared for business and personnel

	TOTAL	**%**
less orders	31	3
cancellation of orders	27	2
reduction of volume in orders	40	3
less candidates for taking a job in the company	26	2
not getting top people for the company	23	2
staff getting stressed or depressed from the pressure of public opinion	22	2
losing staff for ethical considerations	18	2
loss in the value of the company brand name	27	2
loss of consideration in society as a tanner	31	3
official controls	33	3
pressure/attacks from NGOs	35	3
other:……………………		

Main concerns of our tanners:
Reduction in volume in orders
Pressure from NGOs
Official controls
Loss of consideration in society as a tanner
Less orders

2. IDENTIFICATION OF THE ORIGIN OF HIDES & SKINS

2.1**.** The respondents to our consultation use the following raw materials :

Cattle 4 Calf 4 Sheep 3 Goat 1 Other/Reptile: 1

Compared with the entire national tanning sector, this is consistent.

2.2. **Origin** (percentage on an annual basis):

Domestic	42	EU	30	Other European		Extra-EU	28

These data reflect the supply situation in France.

2.3**. State** (% on an annual basis):

Fresh	3	Salted	69	Wet-Blue	10
Dried		Limed/Pickled	8	Crust	10

These data reflect the supply situation in France.

2.4. **Nº of suppliers reported on average by our national tanners:**

1-5 = 33%
5-10 = 25%
10-20 = 33%
20-50 = 9%
more than 50 = 0

These data reflect the supply situation in France.

2.5. **Nº of orders (per year) reported on average by our national tanners:**

1-5 / 5-10 / 10-20 = 0%
20-50 = 42%
more than 50 = 58%

These data reflect the supply situation in France.

2.6. **Relationship with suppliers as reported by our national tanners:** (% per category)

Stable	90	Occasional	10

These data reflect the supply situation in France.

2.7. S**uppliers are reported to be in general** (% per category)

Bigger than tanners	54	Smaller than tanners	46

These data reflect the supply situation in France.

Capacity of European tanners to identify the precise provenance of the hides or skins

2.8. France's tanners can identify the source of the following percentage of raw materials supplies:
(circle or underline answer)

0% / 10-20% / 20-40% = 0%
40-60% = 9%
60-80% = 33%
80-100% = 58%

2.9. Our national tanners claim to be able to identify: (circle or underline answer)

-the precise country of the hides and skins bought	100%	Yes
-the precise slaughterhouse of the hides and skins bought	58%	Yes
-the precise farm/herd of the hides and skins bought	17%	Yes
-the precise cohort of the hides and skins bought	8 %	Yes

Capacity of European tanners to communicate with the originators of hides and skins e.g. husbandry, abattoir, type of communication personal/paper-based/electronic

2.10. Tanners claim to be able to set up communication channels with:

-slaughterhouses 83% Yes
-animal transport companies 33% Yes
-farmers 42% Yes

2.11. The preferred route for communications upstream of the tanning sector is:

-Electronic communication (e-mail, blogs, chats…) 75%Yes
-Paper based communications (letters, circulars, Newsletters) 42%Yes
-Personal contacts (meetings, telephone calls, fairs, auctions) 83% Yes

3. HOW TO ORGANISE A RELIABLE ASSURANCE MECHANISM?

Tanners were requested to rate from 1 to 5 (best option) the various options proposed. The table shows the average values obtained regarding the preferred assurance mechanism.

a standard for a self-declaration of suppliers	3
a contractual clause in the supply contract	3
a company-based public societal commitment	2
a Multi-Stakeholder Code of Conduct	3
Other:………………………..	-

4. HOW TO PROVIDE A CREDIBLE ASSURANCE TO THE GENERAL PUBLIC?

4.1. How to provide a credible assurance to the general public?

Tanners were requested to rate the various options proposed from 1 to 5 (best option) . The table shows the average values obtained regarding the most appropriate assurance mechanism.

an identifying tag for identifying the origin of each hide or skin	4
a paper-based documentation for lots	3
a self-declaration of herds	2
Slaughterhouses	2
Suppliers	2
a certification of herds	2
Slaughterhouses	2
Suppliers	2
a “black list” of suppliers	3
a list of “good” suppliers	2

4**.2. How should compliance be audited**?

Tanners were requested to rate the various options proposed from 1 to 5 (best option) . The table shows the average values obtained regarding the most appropriate audit mechanism.

by buyers	4
by an independent party: Veterinary/sanitary services	3
NGOs	2
Technical centres	3
Others:…………….	
by the Sector institutions and Stakeholders jointly	3