Innovating heritage responsibly
Table of contents

05 Foreword

1: Fur Europe General Information
   08 Fur Europe represents the European Fur Sector’s Interests
   10 The people behind fur
   14 Regional updates

2: Animal Welfare and Society
   20 WelFur takes the animals as its starting point
   22 Morality is not a luxury

3: Traceability and Fur
   26 Pursuing continuous progress on traceability and certification
   28 First ever International Fur Dressers’ and Dyers’ Association’s sustainability report

4: Stakeholder Engagement
   32 ‘This is Fur’, a major success in EU policy outreach
   34 Overview of EU political engagement
   36 Building bridges of collaboration with education institutions
   38 Fur Creativity Summer School 2015, educating young generations on fur
   40 Dispelling customers and consumers’ concerns

5: Fur and Fashion
   44 ‘Fur Now’ campaign, showing the face of multi-generational modern family
   46 Fostering fur in fashion and design

6: Facts and Figures
   50 Facts and figures of the European fur sector: Farming
   52 Facts and figures of the European fur sector: Trade
   54 Acknowledgements & References
   56 Visit a fur farm or a manufacturing site
Foreword

2015 was a challenging year to the European fur sector. Geo-politics and decreasing oil prices dampened the purchase power of Russian consumers considerably, and this had direct effect on the many European fur manufacturers selling to the important Russian market. At the same time the global supply of raw fur skins has increased dramatically in recent years, leaving the global fur sector in a situation where the supply of both garments and raw materials have exceeded the demand.

The underlying global demand for fur products is however still strong, and while the European fur sector waits for the market to re-adjust, there are many reasons to be optimistic about the future.

- Fur remains in fashion. The fur material has unique creative opportunities, a feature that seems irresistible to designers, who are always looking to create new and innovative products. More than 2/3 of the runways at the international, trendsetting fashion weeks in London, New York, Milan and Paris feature fur. While fur traditionally has been women’s wear, 60% of the men’s collections feature fur today.

- New markets for fur products are being developed by European fur entrepreneurs in countries like Kazakhstan, Uzbekistan, Turkey and Iran. A spread in market activities will limit the dependency on a few markets like Russia and China.

- The economic restraints in the Eurozone will maintain a slow development of fur sales in Europe, but the exchange rate will boost the export of European manufactured fur goods to consumers in especially China and North America. A united European fur sector has given input to the ongoing Transatlantic Trade and Investment Partnership (TTIP) negotiations between the EU and the US, and we expect the result of the TTIP negotiations to benefit European fur manufacturers greatly in the years to come.

- The world supply of raw fur skins will drop significantly as a result of the oversupply in 2015. The drop will however primarily take place in China where reports suggest a mink production of 5 million in 2016 – dropping from a record-high 35 million in 2014. The decrease in the European production will be much smaller, but overall European fur farmers will gain a larger portion of the global market share. Rooted in agricultural tradition and quality production, European fur farmers are simply better equipped to survive the low prices resulting from the current oversupply of raw fur skins.

- The implementation of the European fur sector’s animal welfare project WelFur has begun with tests and calibration in 10 European countries. A farm level certification scheme developed by independent scientists from 7 European universities, WelFur is a tool for science-based animal welfare assessment, consumer transparency and improved welfare on European fur farms. All important parts of the sustainable development of the European fur sector.
Fur Europe represents the European fur sector’s interests

Fur Europe is the umbrella organisation representing the interests of the entire value chain of the European sector. Headquartered in Brussels, Belgium, Fur Europe has activities in 30 European countries, welcoming Bulgaria and the Czech Republic as new members in 2015. Fur is a European core competence in terms of production, design, manufacturing, marketing and sales. From the ground-breaking animal welfare assessment programme WelFur to the established use of fur in the collections of the world’s top designers, a high level of innovation and craftmanship in the various parts of the European fur sector’s value chain is the driving force behind Europe maintaining its world-leading position.

Fur Europe was established in 2014 by the merger between the European Fur Breeders’ Association (EFBA) and the European members of the International Fur Federation (IFF), based on the values of openness, transparency and reliability. Its job is to facilitate the innovation, creativity and continued development of a historical and cultural European heritage in a responsible manner and to pursue the continued sustainable development of the European fur sector for future generations.

The organisation’s governance is led by its board, which consists of ten members coming via the European Fur Breeders Association (EFBA), the international Fur Federation (IFF) and the two large auction houses, Kopenhagen Fur and Saga Furs. In September 2015, the European members of IFF elected five Fur Europe board members for the next term: Johannes Manakas, Ivan Benjamin, Aron Liska, Steven Hurwitz, and Militiadis Karakoulakis. Those board members will take their seats in April 2016, with Manakas and Liska sitting on the Global IFF Board from 2015-2017 as well. Fur Europe’s staff consists of a dynamic core team of professionals coming from six European countries, who are committed to reaching the objectives of the organisation. After the departure of the CEO of Fur Europe, Martina Bianchini, the Board announced a new CEO, Mette Lykke Nielsen, former Head of Public Affairs of Fur Europe, in February 2016.

2015 saw the consolidation of Fur Europe, which undertook several activities for the implementation of the organisation’s roadmap towards sustainable development. The implementation of the pilot project of WelFur in ten European countries was a major milestone in animal welfare for the sector. Moreover, the Board set up a new certification group to develop a new approach to traceability and certification for the fur industry in Europe, engaging with other animal use sectors for learning and benchmarking.

Communication and stakeholder engagement were also important aspects of Fur Europe’s openness and transparency values. Fur Europe released new publications like its first ever annual report and a brochure presenting the fur value chain in Europe. It also publicly shared a revised version of the WelFur brochure and the WelFur protocols for mink and for foxes. Another important milestone was the launch of Fur Europe’s new website, www.fureurope.eu, conceived as a ‘library of reliable information’ on relevant issues related to fur, including traceability, socio-economics, ethics, legislation, sustainability and animal welfare.

From the stakeholder perspective, Fur Europe continues its role as a representative of the European fur sector towards the EU institutions, providing a platform for information and discussion at its major event, ‘This is Fur’ at the European Parliament in Brussels. The organisation also raised awareness of its creation amongst the members and fur professionals by participating as an exhibitor in several fur related events such as MIFUR (Milan), Athens Fur Excellence, Kastoria Fur Fair, Kopenhagen Fur International Show 2015 and the Fair Fur Convention in Poland. For its members, Fur Europe held its General Assembly in April and national workshops in several European countries, as continuation of this activity launched in 2014. Fur Europe also supported some members’ initiatives such as fashion shows, open farm days and workshops and facilitates members’ participation on EU funded projects like the EU WORTH project, which featured innovative fur creations.
MEMBERS OF THE BOARD

Kenneth Ingman
Chairman - Finland

Torben Nielsen
Vice-Chairman - Denmark

Johannes Manakas
Vice-Chairman - Germany

Pertti Fallenius
Finland

Jasper Jaspers
The Netherlands

Tage Pedersen
Denmark

Nathan Sprung
France

Carlo Teso
Italy

Aron Liska
Austria

Militiadis Karakoulakis
Greece
The people behind fur

Fur Europe represents the interests of the whole value chain formed by thousands of professionals whose dedication, know-how and motivation make the difference on the excellence of the end product offered to the consumers. Therefore, we want to share the personal testimonies of some of the people behind the scene.
**FARMERS**

**Arnis Veckaktins** - Mink Farmer, Latvia.

“I have always wanted to work in a field related to agriculture, as it is an opportunity to stay close to nature and at the same time use all ways of modern technologies. Fur farming is one of those sectors in Latvia which have accumulated a very long and valuable experience. While studying at the University of Agriculture, my dream was to use local traditions in order to create world-class competitive products, and that is exactly what we have managed to do.”

European fur farmers produce over 44 million farmed fur skins of the mink, fox, finnraccoon and chinchilla species annually. There are more than 5,000 fur farms in 22 European countries, mainly located solely in rural areas.

**TRAPPERS**

**Leif Fontaine** - Fisherman & Seal Hunter, Greenland.

“I decided to become a fisherman and hunter when I was 28. I had studied at the university in Copenhagen, but wanted to be close to the nature, my culture and ancestors stem from. When I am on my boat and see the sun set on the ice in March, I know my choice was right. Where I live we cannot grow vegetables, but a good fisherman and hunter can support his family from using the animals that has been given to us by nature. In Greenland we have great respect for what surrounds us, and I am thankful every time I catch a seal or another animal.”

European hunters are not organised under the Fur Europe umbrella, but the European fur auction houses offer a wide selection of wild fur during their auctions. Therefore, the European fur sector supports, in close cooperation with the International Fur Federation (IFF), the development of humane trapping standards, the implementation of the AIHTS in Europe, and the trade in the European Union of goods made of seal from Greenland.

**AUCTION HOUSES**

**Julio Suarez Christiansen** - Business Director and Auctioneer at Saga Furs, Finland.

“Having worked more than 25 years in the fur trade, I find each day exciting. Working at Saga Furs has given me the opportunity to meet with people from different parts of the world and different cultures. The fur trade, from the farm to the catwalk, gives you the unique chance to interact with all steps of the value chain and meet professionals that take pride in what they do.”

Europe is home to the world’s two largest international fur auction houses: Saga Furs, located in Finland, and Kopenhagen Fur, located in Denmark. The auction houses are at the centre of the international fur trade as they collect and sell fur skins to the international fur trade for a total of nine annual auctions.
BROKERS & BUYERS

Tony Goldstein - Fur Broker, United Kingdom.

“I started in my father’s company when I was 20. I am at least a third generation fur trader and have been buying at fur auctions for nearly 50 years, purchasing for clients from around the world. I attend the approx 12 annual European sales, which takes place in Denmark, Finland and Russia, and use about 90 days a year total, which is a lot travelling. Nevertheless I enjoy it immensely and hope to continue for a while yet.”

The buying of fur at the international auctions happens most often through fur brokers who buy millions of fur skins on behalf of their customers due to their expertise on skin quality and skills within areas like logistics, taxation, insurance and financing.

DESIGN CENTRES & ACADEMIA

Django Steenbakker - Fashion Designer and Creative Manager at Furlab, (NL)

“I love working with fur. As a high-end fashion designer it is important to be able to provide what your clients wish. Fur is the king of materials and mega popular. Also, it is a material that really stimulates the creative mind with the many techniques available. Since 2012, I am the creative manager of Furlab. I think it is really important to inform and teach the next generation about fur since they are the future of fashion. Efficiency and innovation are my goals at Furlab.”

The Fur Design Centres in Europe are dedicated to developing new fur techniques and methods of working with fur as well as sharing this information with commercial partners from around the world. Saga Furs Design Centre, Kopenhagen Studio, FurLab, and Centro Studi AIP are the main design centres in Europe.

DRESSERS & DYERS

Athina Ditsios - Board Member of Ditsios Bros SA, Greece.

“I represent the third successful generation of a Kastorian-Greek family of fur dressers and dyers. I was raised up extremely close to fur, and everything in my life so far has been connected to fur: my parents, my job, my studies, my expertise, and my youth. I have decided to do my best in order to give a new face to the fur sector, the face it really deserves. In my opinion, fur is one of the few natural, organic and eco-friendly goods which can dress up both men and women in a modern, elegant and healthy way.”

The European dressers and dyers are subject to the European Union’s REACH regulation (Registration, Evaluation, Authorisation, and Restriction of Chemicals) that was adopted to protect human health and the environment from the hazards of chemicals. In connection with it, the International Fur Dressers’ and Dyers’ Association (IFDDA) has published its first ever sustainability report in 2015.
MANUFACTURERS

Tarmo Kattago - Fur manufacturer, Estonia.

“I’m proud to be a part of the fur trade – a very ancient and very modern trade at the same time. I can easily imagine many generations of furriers who have been making fur garments, either from wild or farmed fur, before us, as the skills required for working with fur, and a lot of tools are still the same. The way the furs are used today is however very much characterised by innovation. Fashion changes every year.”

Fur as a material requires delicate craftsmanship which is a traditional European core competence with the major centres of fur manufacturing in Europe being located in Italy, Greece and Germany.

RETAILERS

Myriam Buenaventura - Furrier and Retailer, Spain.

“I represent the third generation of a well-known and successful saga of Spanish furriers, and since I was a child, furs have captivated me. It is part of my roots. When I was 19 years old, I realised what the fur sector represented when I attended a training at Oslo Fur Centre. I discovered the fascinating and exciting aspects of the international fur business. I am convinced there will always exist a niche market for specialization, for tailor-made ‘savoir-faire’, with an eye for the details. Real luxury consists of exclusive haute-couture products made by craftsmen with passion, full dedication and time.”

The fur retail goods sales in Europe today follow the trend of other products and are distributed through a variety of sales channels, still playing an important role in the historical European family-owned furrier businesses, mainly in repairing and remodelling fur garments.
Sweden:
The Swedish fur farming sector is rapidly developing, and increased its production from 1 million to 1.2 million mink skins in the period 2014-2015 – an increase of 20%.

Norway:
A political and public discussion on the future of fur farming is currently taking place in Norway. As a part of a proactive strategy, the Norwegian fur sector opened more than 100 fur farms to the public in the spring of 2015. Throughout the year numerous politicians and other important stakeholders have visited Norwegian fur farms in order to see the conditions with their own eyes. An important part of the ongoing debate in Norway is the work done by a government appointed commission, which will be discussed by the government in autumn 2016. In a report issued in December 2014, the commission recommended the sustainable development of the Norwegian fur farming sector.

Denmark:
The Copenhagen University started a new Centre for Research in Mink Production, Health and Welfare, called CPH Mink, which counts with Kopenhagen Fur’s collaboration, the Danish fur auction house. Kopenhagen Fur also launched a mobile phone application, available in English and Chinese, which allows customers to follow the auctions live and receive the latest news. In addition, the Natural Museum of Denmark held until February 2015 a major exhibition about fur clothing, called ‘Fur - An Issue of Life and Death’, which offered a forum to debate some of the ethical issues surrounding the fur industry.

The Netherlands:
Whether or not fur farming is banned in The Netherlands remains an open question. Two lower Dutch court of laws have reached entirely contradictory results, and the case is now about to be tried at the highest court in The Netherlands. Nothing is definite yet, and the Dutch fur farmers are hopeful for a just outcome in the supreme court. The matter is highly principal as it concerns whether or not the State can ban an entire industry without paying compensations to the people behind the industry.

United Kingdom:
The British Fur Trade Association’s (BFTA) annual design contest continues to grow in popularity amongst fashion students. BFTA launched a University outreach programme in 2014 to strengthen the cooperation with the UK’s universities and fashion colleges. Since then, there has been a 33% increase in students. BFTA also succeeded in increasing its membership in 2015 by 25% with 11 new companies joining the British fur community.

France:
A fashion centre throughout world history, France remains a strong fur manufacturing country. In the beginning of 2015, French fur manufacturers could take note that the export of fur garments had increased by 27%, now constituting well over 100 million euro annually. On the organisational level, members from across the fur sector value chain agreed to work even closer together and join forces under the common umbrella organisation Federation Française des Métiers de la Fourrure.
Switzerland:
Successful liaison with politicians by national fur association SwissFur resulted in the dismissal of a motion to ban the import of “products produced with cruelty to animals” to Switzerland. The motion included both animal and consumer protection conditions with the aim to change farming and agricultural legislations in order to ban all animal products produced outside Switzerland from being imported. Ultimately, the motion was dismissed before reaching the Swiss Federal Council, amongst other arguments, due to a lack of validation to the premise of cruelty to animals. A result of the debate, however, was the introduction of a declaration ordinance on labelling.

Germany:
In 2015 the German Chinchilla Breeders Association held the 3rd European Championship, International Chinchilla Show with the support of Fur Europe. The event offered a unique platform to contribute to the continuous improvement of fur quality and farming conditions in Europe as well as the promotion of the chinchilla fur and the fur sector at large.

Lithuania:
Ranking among the best producers of quality mink skins in the world, Lithuanian fur farmers increased their production from 1.5 million to 2 million mink skins in 2015. It also developed a website with Fur Europe’s support.

Latvia:
The Latvian Parliament rejected a motion to ban fur farming in February 2015, and the Latvian Fur Breeders’ Association organised the largest ever fur fashion show in Latvia with the support of Fur Europe to promote the fur sector. The event showcased 26 garments and accessories by the fashion designer Alexander Pavlov.

Estonia:
Following a Citizens Initiative in Estonia, a political debate over fur farming has been ongoing since 2015. The Estonian fur sector reacted pro-actively, and throughout the year politicians, media and citizens have visited fur farms and responded positively. Likewise the Estonian fur community aired a new information website, raised awareness about the fur sector through the media and built up alliances with other animal use sectors.

Finland:
The 2015 parliamentary elections in Finland brought about a new government that immediately indicated its support to the Finnish fur sector. Confident that the Finnish fur sector will develop sustainably on its own initiative, the government found no reason to tighten requirements on fur farming. In spite of difficult financial times for Finnish universities and research institutions, the Finnish fur sector managed to increase its share of external funding for research projects, stressing the major importance of the fur sector in Finland. Always popular on the fashion scene, the trademark of Finland – the production of high quality fox skins – saw an increase of 38%, from 1.8 million skins in 2014, to 2.5 million skins in 2015. The world sales of fox skins almost exclusively takes place at the Finnish auction house Saga Furs.

Austria:
Austrian furriers remain very active in engaging young designers to work with fur materials. The proactive work includes cooperation with Austria’s best fashion schools and the organisation of famous design award Austrian Creative Fur and the Red Fox Award Competition (read more on pages 46 and 47).
Poland:
With a strongly increasing mink production, Poland has become a new power house in the global fur production market. A 2015 production of 9 million mink skins makes Poland the third-largest fur producing country in the world. Different actors from the fur sector have worked closely for more sectoral integration. This was shown in the Polish Fur Breeders Association’s (PZHŻF) annual meeting, renamed as Fair Fur Convention, where all the fur farmers in Poland were invited regardless of their membership status in the association. In addition, the four Polish fur associations participated in the establishment of the Rada Konsultacyjna (Consultation Council).

Czech Republic:
The fur farming community in the Czech Republic applied for and became a member of Fur Europe through the European Fur Breeders’ Association. The appreciation of the value of being part of a larger community was also reflected internally in the Czech Republic as the fur farmers continue to build relations with other parts of the animal agriculture industry and receive the support of the Ministry of Agriculture and the Committee of Agriculture in the Parliament. Furthermore, the Czech fur sector aims to include the entire value chain in one association.

Italy:
A country forever in love with fashion, fur was featured on no less than 83% of the runways at the internationally trendsetting fashion week in Milan (autumn/winter). The Italian Fur Association also launched the fashion website ‘Wonderfurs’ in 2015. The association also became a member of the Italian government’s newly created Italian Fashion System that is formed to develop national fashion strategies and work on issues like sustainability, communication, trade fairs, education, etc. Moreover, the fur breeders and trade associations committed to work closer to streamline the fur sector all in all. On the political arena, the Italian fur sector managed to block several attempts to ban fur farming in the Parliament and won a court case against the Ministry of Health on vaccine imports.

Spain
In order to meet the challenges with a better organisational setup, the creation of a new national fur association, under the new name Spanish Fur Association, was announced in 2015 to gather individual representatives of the whole value chain. A strong member of the European fur community, Spain excels as both a strong fashion and fur farming country with a 20% increase in the fur garments exported in 2014 versus the previous year.
Greece:
The Hellenic Fur Federation and Fur Europe organised a political outreach meeting during the Athens Excellence Fair with Mette Lykke Nielsen, CEO of Fur Europe, as one of the speakers. This event convened a broad participation including Ministers, General Secretary, Members of Parliament, representatives of political parties, and regional and local authorities to promote the fur industry and the people involved. Environmental issues were also high on the agenda in 2015. Two different projects were initiated and they aim to handle waste and water and create a fully recyclable system utilising farm waste for energy and fertiliser purposes to the benefit of both farmers and society.

Hungary:
Fur fashion and design is thriving in Hungary, a country with a rich furrier tradition. In November, the Hungarian Fur Trade Association arranged the KREÁCIÓ'15 event displaying 60 garments from 16 local producers, amongst them 5 young designers participating in the national edition of the international REMIX competition for young designers. The event was massively covered by the media including several reports on national television. The Hungarian Fur Trade Association also participated in official state delegations to Kazakhstan and Iran. In Kazakhstan they signed a cooperation agreement with Kazakhstan Fur Trade and Industrial Association in the presence of the two countries’ prime ministers.

Romania:
A luxury tax introduced in 2014, putting a heavy burden on luxury goods like fur, yachts and certain cars, was removed again largely due to political work done by the Romanian fur sector. Ultimately the legislation was lifted as the luxury tax did not add any economic benefits to the state budget. At the association level, the different fur organisations in the countries started the discussion to ultimately create a national fur association which will integrate the entirety of the fur value chain.

Slovakia:
The Slovakian Fur Trade Association organised its annual Gala dinner for over 400 guests with the well-known celebrity Marianna Durianová as the presenter. The event included a showroom where the attendants could see and try on fur garments to have a real experience with fur. The dinner received great media coverage, including a dedicated reportage on the news station TV Markiza.

Bulgaria:
An emerging fur producing country in Europe, a handful of fur farmers in Bulgaria joined forces in a national association followed by membership of Fur Europe through the European Fur Breeders’ Association. Bulgaria produced 40,000 mink skins in 2015, but the production is expected to increase in the years to come due to further investments from local and Western European farmers.
Animal welfare and society
WelFur takes the animals as its starting point

Farmed animals have no preference of whether they become food or fashion. The only thing important to them is the welfare provided for them whilst they are alive. Fur Europe’s animal welfare programme WelFur is established on animal-based indicators wherever possible, meaning that measurements are taken directly on the animals rather than assessing the housing systems. That is, animal indicators are the best possible way to ask the animals themselves how they are since we cannot ask the animals directly.

Based on the principles of the European Commission’s Welfare Quality programme, WelFur was developed by independent scientists from seven European universities. The WelFur protocols for mink and foxes, that work as manuals for independent assessors, approach animal welfare from various angles including health, housing, feeding and species-specific behaviour. This sets a whole new standard for animal welfare assessment, and no existing animal welfare system on a continental scale is as advanced as WelFur. All existing scientific literature on mink and fox farming have been considered in the development of the WelFur protocols and takes the biology of the fur farmed species into consideration. Based on that, the scientific community is very clear in stating that it is possible to provide the animals with the experience of a good life on European fur farms.

Aside from being a science-based, farm-level animal welfare assessment system, WelFur excels as being a tool for the farmer to improve animal welfare, just as WelFur will provide transparency to consumers about the welfare standards on the farms.
THE PROJECT

The WelFur programme progressed with the launch of a pilot project in 10 European countries that will extend into 2016. The purpose of the pilot is to test the assessment system and make sure it is robust and works the same under differing circumstances, such as differing climatic conditions. Following the test period and with the logistic challenges settled in 2016, the pan-European implementation of WelFur on all fur farms associated with Fur Europe is planned to begin in 2017.
Legislative bans on animal products or productions based on various notions of morality have entered the European society at both national and European levels. Alongside other animal use sectors, the European fur industry is certainly at the forefront of this morality trend beginning with the ban of 13 mink farms in the UK in 2003. The central argument in the UK legislation was “The protection of public morality”, and the same line of reasoning continued in the bans on fur farming initiated in Austria, The Netherlands, Croatia, and Slovenia. Apart from The Netherlands, all these legislations appeared to be political trade-offs since there are no or only few fur farms around.

Morality, however, is not a “help yourself” luxury buffet table from which people can pick and choose. The very purpose of the various moral philosophies originating in Western philosophical tradition is to establish a consistent moral framework from which to make moral decisions. Ethical subjectivity is corrosive because when peoples’ moral choices are random, it becomes difficult to identify and correctly answer the real moral problems when they arise.

Considering fur unethical because it is labelled as an “unnecessary luxury good” is morally inconsistent as long as steaks, eggs, yoghurt, leather shoes and wool sweaters are kept legitimate products. Though we do need to eat, we do not need animal protein to survive in the same way that people can dress up in alternatives to fur coats when fulfilling the basic need to stay warm. Are the human benefits of eating animal protein larger than the benefits of wearing fur? That too is difficult to assert. The long-lasting abilities of fur products provide an environmentally friendly alternative to oil-based textiles. On a more individual level the human pleasure derived from eating a chicken wing lasts until you are hungry again, while a fur item can be enjoyed year after year – only to be enjoyed by the next generation as well.

The opinion of the majority of the public is not a benchmark for moral rights and wrongs either, even if this argument may be politically appealing. In fact, the protection of minorities against majorities has concerned moral philosophers for centuries, and today such philosophical ideas are embedded in, for example, the European Convention on Human Rights.

Banning fur farming on grounds of subjective notions of what is right and wrong is not strengthening the morality of society. Instead it leaves the door wide open to ban other animal practices on the same blurry grounds. After all, it is difficult to argue that a fox deserves more protection than a pig, in the same way it is hard to argue that a Caucasian man deserves more protection than an African man.
MORALITY IS NOT A LUXURY
Traceability and fur

CHAPTER THREE
Pursuing continuous progress on traceability and certification

In 2015, the European fur sector embarked on a series of initiatives to develop a framework on traceability and certification based on Fur Europe’s animal welfare assessment programme WelFur, and combine existing programmes with new elements.

The purpose is to progress on this major topic and create capacity building across of the whole value chain to inform and answer stakeholders’ relevant questions about animal welfare and the origin of fur.

One of the activities undertaken by the European fur sector was the participation of Fur Europe, the International Fur Federation and other European fur representatives in a fur luxury industry roundtable with big luxury good brands, facilitated by the global non-profit organisation, Business for Social Responsibility (BSR). The objective of this initiative was to identify a common ground for discussion and collaboration between the fur supply chain and big luxury brands on topics of shared interest, such as the third-party certification of farms, the traceability of the fur supply chain, the engagement of experts on welfare standards, and broader sustainability issues applicable to the sector. As a result, the fur industry has presented a proposal for a new traceability and certification scheme with a double focus on fur farmed species and animal welfare on one hand and the dressing and dyeing stage and the management and handling of chemical substances on the other. Third party validation is paramount across the assessment process.

“Traceability in general across all raw materials is a real trend and companies and corporate brands are looking for traceability across all their materials, and that includes fur”, stated Tara Norton, Director of Supply Chain Sustainability, BSR, during her intervention at Fur Europe’s event ‘This is Fur’ in September 2015. “Traceability is very important for the fur industry. I think being able to have a credible traceability system that fur farmers are ready to support and implement, and can be carried through the whole value chain, will help the fur industry to show its good practices and will enable brands who are buying fur to more confidently support the industry” added Ms. Norton.

Additionally, the International Fur Dressers’ and Dyers’ Association (IFFDA) has commissioned an independent assessment of European fur dressing and dyeing plants. The assessment results have been published in the IFFDA’s first ever sustainability report (more detailed information provided in the next section of this annual report). The assessment addresses sustainable development from various environmental and social angles including the use of chemicals, waste water management, ethical issues, and workers’ rights.

“Traceability in general across all raw materials is a real trend and companies and corporate brands are looking for traceability across all their materials, and that includes fur”, stated Tara Norton, Director of Supply Chain Sustainability, BSR, during her intervention at Fur Europe’s event ‘This is Fur’ in September 2015. “Traceability is very important for the fur industry. I think being able to have a credible traceability system that fur farmers are ready to support and implement, and can be carried through the whole value chain, will help the fur industry to show its good practices and will enable brands who are buying fur to more confidently support the industry” added Ms. Norton.

Additionally, the International Fur Dressers’ and Dyers’ Association (IFFDA) has commissioned an independent assessment of European fur dressing and dyeing plants. The assessment results have been published in the IFFDA’s first ever sustainability report (more detailed information provided in the next section of this annual report). The assessment addresses sustainable development from various environmental and social angles including the use of chemicals, waste water management, ethical issues, and workers’ rights.
First ever International Fur Dressers’ and Dyers’ Association sustainability report

The International Fur Dressers’ and Dyers’ Association (IFDDA) achieved a major milestone in 2015 with the publication of its first ever sustainability report, partly funded by Fur Europe, demonstrating its commitment to sustainability and open communication.

This report provides the outcomes of an independent assessment of European fur dressing and dyeing plants commissioned by the IFDDA. The assessment covers a range of environmental and labour performance indicators from water and energy consumption or the use of chemicals to the organisation structure, training or ethics, amongst others. Additionally, the IFDDA adopted a code of Corporate Social Responsibility aimed at promoting the social and environmental responsibility of its members, with a great focus on labour and human rights.

The IFDDA has seven European companies amongst its 14 members. Its current President, Roberto Scarpella, who is the Managing Director of Manifattura Italiana del Brembo SpA (MIB) has shared his views about this new report below.

Why have the IFDDA and its members decided to release the first ever fur dressers’ and dyers’ sustainability report?

The story of the fur dressing companies is old enough to witness their capability to produce with full respect of the rules. Let me report what one of our members told me some days ago: “All the necessary chemicals used in the fur dressing process are non-toxic and can all be found in the supermarket.” Basically this is true and allows us to comply with all the limits set out by REACH. The Sustainability Report is therefore a direct consequence of this: once the first milestone is set, everything will be easier for all our members, having now understood that we can and we must be more transparent. In 2016 we will have some new entries from the Far East … this is a great result for all our trade! And all our stakeholders, customers or media will take advantage from it.

As the results of the Environmental Performance Indicators are indicated in technical terms, how could you compare the environmental impact of the European fur sector in comparison with other sectors, if known?

Hypothetically speaking, only a comparison with leather production could be done. In this case, a better performance of fur production would be evident because some of the main steps of the tanning process, like the hair shearing process, are not applicable to furs.

Can you provide a couple of measures or initiatives taken to improve any of the key performance indicators reported?

Chemicals changed and are changing again a lot and dressing techniques are improving quickly: water consumption is much lower than a few years ago and formaldehyde is not used anymore in most of the plants as well as chrome.

How does IFDDA respond to some consumers’ concerns on the possible use of toxic chemicals in fur garments?

When placing an order to the manufacturers for fur products, people should always specify the limits that the manufacturers should observe. If the supplier of the fur product informs you that they cannot comply with the limits, please contact us at IFDDA; our member factories have the ability to comply with all the limits set out by REACH.
Roberto Scarpella - President, IFDDA.
Stakeholder engagement
‘This is Fur’, a major success in EU policy outreach

In the spirit of its policy of openness, transparency, and reliability, Fur Europe is strengthening its engagement with a wide array of stakeholders in order to build a constructive dialogue and anticipate trends at the political and societal level. By liaising with other business sectors, the academia, policy makers, media, and society at large, Fur Europe has undertaken awareness, communication and advocacy activities in order to tackle the challenges and grasp the opportunities the European fur industry is facing.

After the major performance of the ‘This is Fur’ event in January 2014, Fur Europe and its members achieved an even greater success in 2015. Following the elections of the European Parliament and the nomination of the new European Commission in mid-2014, Fur Europe continued its policy of openness and transparency with an intense three-day event (29 September to 1 October) in the main hall of the European Parliament. Hosted by Mr Nils Torvalds (Finnish member of the European Parliament, from the European Liberal and Democrats Alliance), the event resulted in around 200 bilateral meetings with Members of the European Parliament (MEPs), representatives of EU Member States, civil servants from the European institutions, and other stakeholders. The fur industry was represented by more than 140 representatives from 25 European countries.

The stand offered an exhibition of fur garments and featured live fur crafting by a furrier. Thanks to multimedia interfaces and the presence of fur farmers and retailers, the stand successfully achieved the goal of giving voice to the entirety of the European fur industry, providing guests and stakeholders with reliable and objective information about the sector.

The 2015 edition of ‘This is Fur’ centred its programme on sustainable development, hosting debates and presentations about responsible animal sourcing, sustainable use of chemicals, traceability of products – offering an open platform for speakers from different backgrounds, including universities (e.g. Dr. Nikos S. Panagiotou, Aristotle University, Faculty of Economic and Political Sciences); EU institutions (e.g. Nils Torvalds, Finnish MEP, and Christel Schaldemose, Danish MEP), non-profit (Tara Norton, Director of Supply Chain Sustainability, Business for Social Responsibility); independent researchers (Dr. Elisabetta Scaglia, Veterinary specialist in applied ethology and animal welfare); and the fur sector (Mr. Kenneth Ingman, Chairman of Fur Europe).

INUIT SILA AWARENESS CAMPAIGN

In light of the amendment of the EU regulation on the import of seal products, Fur Europe and the non-profit organisation Inuit Sila, which represents the Inuit seal hunters in Greenland and Nunavut, included an activity in the programme to raise public awareness outside the European Parliament. This initiative focused on presenting the Greenlandic Inuit seal hunt and culture through the display of local songs, dance, food and animal products in order to inform the EU parliamentarians and officials about the Inuit seal situation and promote the sustainable hunting of seals. The Ambassador of Denmark in Belgium, Ms. Louise Bang Jespersen, gave the opening speech and several MEPs visited the event.
Overview of EU political engagement

The political debate in 2015 was characterised by several topics of relevance for the fur industry, and Fur Europe placed importance on issues like animal welfare, sustainability, farm management, and trade policy.

Regarding animal welfare, Fur Europe stepped up its effort to expand the implementation of WelFur and promote it before the EU policy-makers on different occasions, such as the organisation of a lunch meeting with many members of the European Parliament in March and during the ‘This is Fur’ event in September. Moreover, Fur Europe has been in constant contact with the European Commission about the development of the online Animal Welfare Platform, where its primary focus has been on getting the platform to work with a science-based approach to animal welfare. Furthermore, the European Commission highlighted WelFur as an example of initiatives implementing best practices and properly enforcing the current EU legislation on animal welfare – as shown in an answer the Commission gave to a question from the European Parliament. Additionally, in light of the future adoption of the new Strategic Approach to EU agricultural research and innovation of the Commission, Fur Europe engaged with the European Parliament (EP) in order to promote a science-based approach to farm management innovation and animal welfare, becoming part of the Rural Networks Assembly and its steering council. Furthermore, Fur Europe intervened during the EP Intergroup on the Welfare and Conservation of Animals’ meeting dedicated to fur farming in November 2015. Although Fur Europe’s request to have a speaking slot for a balanced discussion was rejected, it managed to get the message on the European fur sector’s willingness to an open and constructive dialogue.

Regarding trade policy, Fur Europe strengthened its position on the Transatlantic Trade and Investment Partnership (TTIP) with the United States, giving voice to the sector’s calls for lowering administrative barriers, facilitating e-commerce, and providing adequate support to small and medium-sized enterprises (SMEs). Based on these elements, Fur Europe constantly took part in the Civil Society Dialogue with the European Commission, updated its position paper on the TTIP and worked for the publication of a collection of fur retailers’ opinions about the trade agreement. Besides TTIP, Fur Europe also monitored the progress of the free trade agreement between the EU and Japan and the situation between the EU and Russia. Fur Europe also succeeded in including the need for information about market access of Inuit seal hunters in the review of ‘EU Regulation on the ban on import of seal products’. Moreover, Fur Europe worked together with the European Commission and other business stakeholders in order to identify and remove specific market access barriers in different countries.

On the fashion policy, Fur Europe’s CEO participated in an EU High Level Group on Fashion in June chaired by the EU Commissioner of Internal Market, Industry, Entrepreneurship and SMEs, Elżbieta Bieńkowska. The meeting brought together the CEOs of Europe’s high-end fashion industries such as leather, shoes and fur to discuss how the EU can assist these industries in developing the new skills and approaches needed for competitiveness.

On the EU funding policy, Fur Europe monitored European funding programmes and attended numerous information and networking events related to this area. The continuous engagement with EU officials relevant to the EU funding and networking with potential project partners aims at future shaping of the funding programmes in line with fur sector’s needs and facilitating the fur sector operators to access funding.
The European Commission’s (EC) WORTH pilot project, which aims to foster through designers and digital/technology companies’ partnerships the skills and know-how that define Europe’s high-level fashion industry resource base, selected two fur projects. One of the fur fashion partnership was set up between the Dutch fur designer, Coen Carstens, and the French knitwear manufacturer, Maille Création, to create a unique product of fine, knitted fur fabrics and garments. Another collaboration using fur brought together Anne Sofie Madsen, a young Danish fashion designer, and the Italian fur accessories manufacturer, Roberto Ardigò, with 40 years of experience in the assemblage of fur, to produce a capsule fur collection.
Education is a key element for the competitiveness and the future of the European fur sector, contributing to the preparation of the future workforce and upskilling the current professionals, tutors and technicians. Therefore, Fur Europe and its national members are building bridges of collaboration with universities, design schools and other educational institutions at national and European level. Some of the initiatives carried out in 2015 are listed in this section.

Many of Fur Europe's members have close relationships and cooperate with the best fashion/design schools and universities at the national level such as Hetzendorf in Austria, ESNE in Spain, or ESMOD Fashion School in France and Norway. Some of Fur Europe's members collaborate with educational institutions from other countries, such as the Estonian Fur Association with the University of Centria in Finland and the Belgian Fur Federation, which organises trips for the students of the Belgian Fashion Academies to visit, attend and learn at Furlab in Amsterdam.

In Denmark, Kopenhagen Fur's design center, KiCK, which provides a commercial platform (Nexus), and creativity lab (Kopenhagen Studio), and a showroom for its collection (Kopenhagen Fur Fab), expanded its ‘Imagine initiative’ in 2015. This stakeholder programme enlarged its partnerships with universities in Greece, Russia, Turkey and Kazakhstan, joining the existing list of design universities from six other countries. As part of this initiative, students from these universities participated in courses on fur and in the ‘Imagine Talents Show’. Additionally, KiCK continued the research project ‘Fur and Sustainability’, in partnership with the Design School Kolding (Denmark), whose conclusions will be publicly presented at an event about sustainability in the garment sector at the Danish Parliament in March 2016. The aim of the collaborative project is to investigate what kind of role fur should play in the 21st century, proposing potential sustainable practices of processing, designing, communicating, selling and using fur.

In Finland, Saga Furs Design Centre, which cooperates with 25 international design schools and has had over 25,000 visitors since its creation in 1988, invited designers and students to specialised seminars. As part of its Fur IQ programme, where Saga DC provides an opportunity for expanding skills to talented people, Naja Pultz, who studied in a Danish Fashion Design Academy, started her two-and-a-half-year internship there to become a future furrier. Saga Furs also held its yearly grading course with 13 participants from seven different countries completing it. Furthermore, the Finnish Fur Breeders Association financially supported a two-year research and development programme (2015-2017), FutureFOXstudio, developed by Centria University of Applied Sciences. This EU funded project, whose primary chosen material is the Blue Fox for its relevance in Finnish fur farming, has conceptual and demonstration stages and offers workshops, seminars and company visits.

In Italy, the Italian Fur Trade Association (AIP) offered a 12 hours course on fur to the best fashion and design institutions and a visit to AIP’s Design lab, ‘Centro Studi’, in Milan. The Hellenic Fur Federation (HFF), meanwhile, organised a four days ‘Discovering Fur Excellence’ Workshop & Factory for young designers during the Athens Fur Excellence Fair.

In Norway, Pelsinform supported students at ESMOD Fashion School in Oslo by providing free sewing machines and garments for redesign and holding speeches.

In addition, the British Fur Trade Association (BFTA), established a university outreach programme for upskilling tutors and technicians to strengthen the fur component of the fashion courses and to provide academic and logistical support to students working on dissertations and fur projects. This programme is arranged in close cooperation with 12 educational institutions, including Manchester Met, UCA Rochester, the University of East London and the Westminster University. This initiative offers an ethics/sustainability lecture, followed by an introduction to real fur pelts; a skills training for tutors/technicians and students, and support to individual students with fur-related dissertations and projects. It also loaned fur machines to Manchester Met and UCA Rochester. Over the two years that this programme has been in place, there has been a 33% increase in students entering the BFTA’s annual design competition. In 2016, both BFTA winners were selected to be part of the 12 finalists in the IFF’s REMIX competition.
‘ALICE IN FURLAND’ MULTIDISCIPLINARY UNIVERSITY PROJECT

The ‘Alice in Furland’ fashion and photography project started when the Italian fur fashion magazine, Pellicce Moda, contacted the Centria University of Applied Sciences in Finland for a reportage featuring Centria’s fur clothes with ‘Alice in Wonderland’ as the theme. Soon after, three students studying photography at Novia University of Applied Sciences in Pietarsaari (Filand) and students studying beauty and cosmetics at Novia in Vaasa collaborated with fur designers from Centria University and seven models on this intense assignment. The result was a playful dive into the world of fashion photography which had a snowball effect, from the series publication as a ten-page spread in Pellicce Moda and its presentation in MIFUR in Milan, to a Saga Furs’ sponsored photo exhibition at Novia’s Campus Allegro and an e-booklet. The fur used for this project came from the Finnish Fur Farmers, Saga Furs, Dressing Manifattura Italiana del Brembo (MIB), Modifur, and the Kvarken Council.

DESIGN SCHOOL KOLDING’S ‘REFURBISH’ PROJECT

As part of the Design School Kolding’s ‘Fur and Sustainability’ research project, done in partnership with Kopenhagen Fur, the PhD Karen Marie Hasling and Assistant Professor Ulla Ræbild worked with fashion design students at Design School Kolding on the re-design of fur. The re-design was based on the collection of donated fur garments that were exhibited at the National Museum in Copenhagen for the huge fur exhibition ‘Life and Death’ in 2014-15.
Fur Creativity Summer School 2015, educating young generations on fur

This intensive ‘school’ convened 26 young participants from 11 European countries and various disciplines who received a general, high quality education about fur and its creative processes. The event programme, which offered a range of programmes from seminars to visits to facilities representing the fur value chain, got good traditional and social media coverage at the regional and national level.

“We are really satisfied with the overall positive result of this project, which will continue as a flagship activity of a wider Fur Europe’s Youth Initiative that we will launch next year,” commented Mette Lykke Nielsen, CEO of Fur Europe.

This ten day pilot project exceeded the expectations of the organisers and participants, setting up a strong and motivated youth network around fur, attracting new talents to the fur business, promoting fur and becoming an eye opening life experience for most of the participants.

“This trip has completely changed my life and has turned my head towards my new career goals,” said Emily Oldroyd, one of the participants.

Despite the diverse backgrounds (farming, business management, manufacturing, trade, design, communication), the students quickly plunged into the theoretical and practical elements of the programme, which covered seminars on communication, ethics, fur techniques, fabrics, and visits to fur manufacturers, fur farms, wholesalers, retailers and a dressing plant. The key focus of the summer school was fur and its whole creative processes (material, sector, business, manufacturing, craftsmanship, communication).

“I am proud of the class of the 1st Fur Creativity Summer School. It was a ‘complete’ experience and I hope we will continue to practice, in the quest for excellence,” stated Vasilis Kardasis, creative tutor.

The auction houses Kopenhagen Fur and Saga Furs also engaged in the project through the participation of some employees, material sponsorship and media coverage.

“It is extremely important to provide young professionals of different sectors with the opportunity to experience the vital and dynamic fur industry by getting acquainted not only with the material but also with the whole production chain,” said Sophia Dimitriou Kourkopoulos, Saga Furs Area Manager in Greece.

As follow-up action, each of the participants submitted a 2-page idea paper reflecting the learning and ideas generated at the event, which has been used as one of the event assessment projects to build on this success for future editions.
Dispelling customers and consumers’ concerns

As relevant stakeholders for the fur value chain, Fur Europe and its national members have undertaken different initiatives during 2015 to answer frequently asked questions from direct customers and end-consumers regarding the fur industry’s activities.

For the customer’s perspective, Fur Europe has participated in a fur luxury industry round table with the big fashion brands, launched in 2015, and created an internal working group on traceability. The publication of the International Fur Dressers’ and Dyers’ Association’s (IFDDA) first ever sustainability report was also a major communication and transparency initiative on the sector’s environmental, social and economic impacts and measures taken for continuous improvement on areas such as corporate social responsibility, water, waste and energy consumption and the use of chemicals. Furthermore, there are regular contacts at national and EU level with fashion brands and along the segments of the fur value chain to learn and solve the needs and concerns of key customers for the fur industry. Another example is the Saga Furs’ annual corporate social responsibility report published every year to strengthen the company’s view on the importance of responsible business conduct to stakeholders.

The final part of the fur value chain is the end-consumer, which is a critical stakeholder for the fur industry. Though it is a responsibility shared by all parts of the fur sector, the furriers and retailers have the closer and direct contact with the consumers and therefore different activities took place in 2015 to equip them with enough information to answer consumer’s questions. In a recent thematic meeting with fur retailers, they have identified animal welfare, traceability, certification, chemical management and a consumer friendly communication material as major areas of demands from their clients.

On the animal welfare concerns, different national fur breeders’ associations, often in collaboration with the trade organisation, organised Open Farm Days as a public awareness activity to continue the European fur sector’s effort to provide a realistic image of fur farming in an open and transparent way. In Lithuania, for instance, the Lithuanian Fur Breeders’ Association organised, with Fur Europe’s support, the first ever Open Farm Day, with a general positive visitors’ reaction and good media coverage. Another Baltic country, Estonia, where a citizens’ initiative has been raised in the parliament to ban fur farming, a mink and fox farm opened its doors for the second time in February to politicians, neighbours and animal rights’ activists. Other countries such as Norway, Denmark, and Sweden, continued their annual Open Farm Day programme. Additionally, the Italian Fur Breeders’ Association (AIAV) and the Italian Fur Trade Association (AIP) held an Open Farm Day for Furriers, enriching their knowledge of the entire fur value chain and sharing views on several issues.

Another initiative to support the retailers was the launch of the International Fur Federation’s new B2B website for retailers, ‘Business of Fur’, which features useful information on fur (type, labelling), auction houses, craftsmanship and suppliers. Furlab also continued, with Fur Europe’s collaboration, its information campaign for retailers in The Netherlands, “Wat Koop Jij?”, where its retailer manager visited 80 fashion stores to present and hand over an information kit to improve the provision of information about responsible fur to shop owners and employees. In Italy, AIP organised fur courses for shop assistants of international fashion brands.
Fur and fashion
The International Fur Federation (IFF), in cooperation with Fur Europe, have launched the second edition of the global fashion campaign ‘Fur Now’ in October 2015, focusing on the concept of family. This campaign is supported by a digital platform which provides video and social media content and, for the first time, includes an e-commerce functionality to purchase the garments featured in the campaign.

‘This is Fur Now’ website also offers a link to a look-book featuring fur garments from 14 selected top fur designers and manufactures and three young talented designers whose creations can be bought online. These young designers are Yusuf Kalem, the Turkish winner of IFF Remix contest 2015; Django Steenbakker, a Dutch designer who is the creative director of Furlab; and the British designer Rebecca Bradley.

The multi-generational focus of the campaign and the different styles of the characters highlight the versatility and timelessness of fur as well as the current trends in the ways fur is used in clothing. The vast range of personalities featured in the campaign—from the edgy teens Phil and Hailey, to dignified father Adrian, to elegant grandmother Gloria—are all reflected in the fur they wear. Web pages on the campaign’s website give the history of the family members. Additionally, a mini Christmas campaign was launched as well.

The ‘Fur Now’ campaign included a promotional advertising campaign running from October until December 2015 across a range of print and digital media around the globe, including 26 European countries. Fur Europe’s national associations were directly involved in this advertising campaign at national level. The media selection varied from known fashion magazines such as Elle, Cosmopolitan, Harpers Bazaar, Tatler, Vogue, Glamour and Marie Claire to airline companies’ magazines such as Blue Wings (Finnair) and digital media like Tatler.com, Vogue.com and Catwalk.ee. In addition, IFF provides the latest news on the campaign through social media like Twitter, Facebook, YouTube and Instagram, and the support of a number of European bloggers. Figures illustrate the initial success of the campaign with almost 100 000 views on Youtube and 463 000 views on Facebook in less than a month’s time. A total of 1.5 million European Facebook users viewed the campaign, reaching 10 million people and demonstrating its success.

WeChat Global Fashion News and WeChat Fashion Front reached Asian audiences with over 5 million impressions, and World Fashion Channel reported an audience of 52 million in Eurasia. 15 bloggers and over 93 online news portals around the world reported on the campaign, making it an international success.

The previous year’s ‘Fur Now’ campaign was also a huge success reaching over 634 000 views on YouTube alone with advertisements in fashion media such as Vogue, Elle and Harper’s Bazaar. The campaign reached an estimated 42 million people worldwide through social media and print magazines.
In a continuous quest for new creative ideas and techniques to promote fur in fashion and design as well as explore new markets, the European fur sector carried out several activities in 2015 at national and international levels, often in cooperation with external stakeholders.

As a unique show-window beyond the main European fur fairs (MIFUR, Athens Fur Excellence, Kastoria Fur Fair), Fur Europe’s members organised national fashion competitions to further boost the presence of fur in fashion, which continues to trend on the runways of the major fashion weeks (Paris, London, Milan and New York). Many of these fashion competitions in countries like Austria, Greece, Hungary, Norway, Switzerland, and the UK correspond to the national edition of the International Fur Federation’s (IFF) annual competition for young designers, REMIX. The winner of the REMIX 2015 final contest was the Turkish designer Yusuf Kalem, whose winning creations were used in various advertising campaigns and editorial shoots (e.g. Vogue Italia, the event’s official supporter, and Harper’s Bazaar US).

In Austria, the Austrian Federal Agro Wholesalers Association awarded three annual prizes: the ACF Award (Austrian Creative Fur) - the most famous national fur award supported in 2015 by the painter Christian Ludwig Attersee, the HCA (Haute Couture Award), whose jury is formed by master tailors and furriers, and the Red Fox Austria Award. Meanwhile, the Hungarian Fur Trade association held the fifth edition of its mode contest KREÁCIÓ, prizing innovation, skills and quality craftsmanship in fur design. The event, which obtained impressive media coverage, convened 16 furriers, including five young designers, who displayed 60 fur garments.

A similar competition was organised by the British Fur Trade Association (BFTA), whose BFTA Design contest showed a 40% increase in student participation in 2015, awarding the first prize to Edda Gimnes. Additionally, the British fur sector commemorated the 70th anniversary of Hockley, the long-lasting and respected British fur design and retailer house, at an exclusive fashion show and a dinner held in London. The list of selected guests included fashion editors of well-known magazines and newspapers, leading designers, fashion influencers and representatives from Central St Martins and Kingston fashion schools. For this occasion, Izzet Ers, Creative Director of Hockley, presented a special collection of 20 pieces with fur provided by the Finnish auction house, Saga Furs. This auction house also organised several promotional activities such as a unique 60-piece collection for Fall/Winter 2016 jointly held by Saga Furs and BIFTPARK in Beijing (China), and the release of Saga Furs...
RED FOX AUSTRIA AWARD

The Austrian fur industry, in close cooperation with the hunting community, organised its annual Red Fox Austria Award in 2015. This competition aims at promoting the sustainable use of the skins of red foxes killed in Austria every year in order to keep the ecological balance in the woods. In this competition, the participants have to use the fur of killed Austrian red foxes, contributing to the reduction of red fox fur waste in the country and demonstrating its sustainable use in fashion as a by-product. In 2015 more than 20 companies took part in the event, gaining increasing popularity at national and international levels. The designs are presented at Austria’s largest hunting and offroad Fair “Hohen Jagd Salzburg,” which is attended by over 45,000 visitors.

Lookbook A/W 2015-2016. This Lookbook illustrated over 300 selected pictures of fur creations from A/W 15-16 Ready-to-Wear and Haute Couture collections seen on catwalks of the main fashion shows. Most of the fur creations included material and innovative techniques created at Saga Furs Design Centre. Another of Saga Furs’ major events was its annual Fur Vision, launched 15 years ago. ‘Fur Vision’ is a roadshow where invited guests can discover the latest innovation on fur proposed by Saga Furs Design Centre in different main fashion cities (e.g. New York, Milan, London, Paris, Beijing, Shanghai). The event brought a record breaking number of guests in 2015.

Additionally, Furlab launched a unique collection of fashion accessories and gadgets, Atelier Furlab, in which each piece was guaranteed by a certificate of origin, demonstrating transparency by the Dutch mink farms who supplied the skins. Those farms comply with the highest animal welfare standards in the world and can be visited by the buyers of the collection. In addition, Furlab supported three young designers who participated in the Amsterdam Fashion Week.

In Copenhagen (Denmark), the designer Jesper Havring presented a fashion show with seal skin creations at Copenhagen Fashion Week to support Great Greenland and the Inuit hunters, convening a broad political support at the event. Furthermore, the Danish auction house, Kopenhagen Fur, fostered fur in fashion through a variety of initiatives. Kopenhagen Studio’s presented new fur styles in its 2015 collections, designed solely by Kopenhagen Fur’s furriers, while it also launched ‘Kaleidoscope’, its new commercial hub which houses several of Kopenhagen Fur’s external creative partners. In addition, it presented its ‘Imagine Talents 2015’ show, which showcased the futurists’ creations designed by 21 students selected from around the world.

Meanwhile in Iceland, the country’s most famous fashion designer and the biggest outdoor apparel company teamed up with a new design collection using silver fox trim. In a similar sort of collaboration, Kopenhagen Fur worked together with the Danish jewellery brand ‘Bukkehave’ in the making of a collection called ‘Tundra’, whose jewellery was primarily made from steel and sealskin. The Association of Furriers of Slovakia will also plan joint events with jewellery makers and goldsmiths in 2016.

On the other hand, many Fur Europe members use social media and other communication channels, such as the Italian Fur Trade Association’s Wonderfurs online magazine, to learn about the latest fur trends in fashion and design.

FUR PRESENCE IN THE MAIN FASHION WEEKS

% of collections that contain fur:

<table>
<thead>
<tr>
<th>Location</th>
<th>A/W '14-'15</th>
<th>A/W '15-'16</th>
</tr>
</thead>
<tbody>
<tr>
<td>LONDON</td>
<td></td>
<td>73%</td>
</tr>
<tr>
<td>MILAN</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PARIS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NEW YORK</td>
<td>71%</td>
<td></td>
</tr>
</tbody>
</table>
Facts and figures of the European fur sector: Farming

Total number of fur farms in Europe:

5072

Countries with the most farms:

- Denmark: 1518
- Finland: 960
- Poland: 713

Pelts per species:

- Mink: 42,669,000
- Fox: 27,330,000
- Chinchilla: 206,000
- Finnraccoon: 155,000

Total number of pelts produced:

45,763,000

Production increase:

2005 → 2015 +65%

Evolution of combined European mink and fox production

% = annual percentage increase
<table>
<thead>
<tr>
<th>Country</th>
<th>No. of Farms</th>
<th>Total Peels Produced</th>
<th>Mink Peels Produced</th>
<th>Fox Peels Produced</th>
<th>Chinchilla Peels Produced</th>
<th>Finnraccoon Peels Produced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belgium</td>
<td>17</td>
<td>160 000</td>
<td>160 000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bosnia-Herzegovina</td>
<td>55</td>
<td>14 000</td>
<td>5 000</td>
<td>9 000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bulgaria</td>
<td>3</td>
<td>40 000</td>
<td>40 000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Croatia</td>
<td>17</td>
<td>5 000</td>
<td></td>
<td>5 000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Czech Republic</td>
<td>9</td>
<td>20 500</td>
<td>20 000</td>
<td>500</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Denmark</td>
<td>1518</td>
<td>17 837 500</td>
<td>17 800 000</td>
<td>2 500</td>
<td>35 000</td>
<td></td>
</tr>
<tr>
<td>Estonia</td>
<td>41</td>
<td>166 500</td>
<td>150 000</td>
<td>11 000</td>
<td>5 500</td>
<td></td>
</tr>
<tr>
<td>Finland</td>
<td>960</td>
<td>4 385 000</td>
<td>1 740 000</td>
<td>2 500 000</td>
<td>145 000</td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>14</td>
<td>200 000</td>
<td>200 000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>19</td>
<td>201 000</td>
<td>200 000</td>
<td>1 000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Greece</td>
<td>100</td>
<td>2 000 000</td>
<td>2 000 000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hungary</td>
<td>195</td>
<td>18 000</td>
<td></td>
<td>18 000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Iceland</td>
<td>32</td>
<td>200 000</td>
<td>200 000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ireland</td>
<td>3</td>
<td>180 000</td>
<td>180 000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>27</td>
<td>180 000</td>
<td>180 000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Latvia</td>
<td>14</td>
<td>758 000</td>
<td>750 000</td>
<td>5 000</td>
<td>3 000</td>
<td></td>
</tr>
<tr>
<td>Lithuania</td>
<td>305</td>
<td>2 022 000</td>
<td>2 000 000</td>
<td>2 000</td>
<td>20 000</td>
<td></td>
</tr>
<tr>
<td>Norway</td>
<td>280</td>
<td>990 000</td>
<td>840 000</td>
<td>150 000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poland</td>
<td>713</td>
<td>8 650 000</td>
<td>8 500 000</td>
<td>60 000</td>
<td>80 000</td>
<td>10 000</td>
</tr>
<tr>
<td>Romania</td>
<td>153</td>
<td>2 11 500</td>
<td>200 000</td>
<td>2 000</td>
<td>9 500</td>
<td></td>
</tr>
<tr>
<td>Serbia</td>
<td>300</td>
<td>20 000</td>
<td></td>
<td>20 000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Slovakia</td>
<td>1</td>
<td>4 000</td>
<td>4 000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td>51</td>
<td>800 000</td>
<td>800 000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sweden</td>
<td>85</td>
<td>1 200 000</td>
<td>1 200 000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Switzerland</td>
<td></td>
<td>13 000*</td>
<td>13 000*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Netherlands</td>
<td>160</td>
<td>5 500 000</td>
<td>5 500 000</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: 5 072 45 763 000 42 669 000 2 733 000 206 000 155 000

* No fur farming activities in Switzerland. The 13000 reported are wild red fox hunted legally to balance the ecosystem.
Facts and figures of the European fur sector:Trade

Overview of European Auction Houses and Garment Export

**Saga Furs:** (Nov 2014-Nov 2015)

- **Auction Sales:** €637 million
- **Pelts Traded:** 11.1 million

**Kopenhagen Fur:** (Nov 2014-Nov 2015)

- **Auction Sales:** €1,47 billion
- **Pelts Traded:** 30 million

**Value of Exported Fur Garments (2014):**

€994,350,959

($1,043,409,623 - Currency rate: $1 = €0.94)

**Leading Export Countries:**

- Italy: €409,819,000
- Greece: €249,498,000
- France: €108,650,000

**European Fur Garment Export**

+14% increase
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>€9 732 510,00</td>
<td>€8 619 169,00</td>
</tr>
<tr>
<td>Belgium</td>
<td>€16 489 600,00</td>
<td>€9 098 892,00</td>
</tr>
<tr>
<td>Bosnia-Herzegovina</td>
<td>€11 690,00</td>
<td>€7 552,03</td>
</tr>
<tr>
<td>Croatia</td>
<td>€9 098 872,00</td>
<td>€1 118 711,25</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>€4 925 290,00</td>
<td>€5 554 765,64</td>
</tr>
<tr>
<td>Denmark</td>
<td>€9 173 890,00</td>
<td>€4 562 018,00</td>
</tr>
<tr>
<td>Estonia</td>
<td>€3 909 100,00</td>
<td>€17 124 506,00</td>
</tr>
<tr>
<td>Finland</td>
<td>€5 088 290,00</td>
<td>€4 939 047,00</td>
</tr>
<tr>
<td>France</td>
<td>€108 650 000,00</td>
<td>€79 064 378,00</td>
</tr>
<tr>
<td>Germany</td>
<td>€101 993 000,00</td>
<td>€94 998 626,00</td>
</tr>
<tr>
<td>Greece</td>
<td>€249 498 000,00</td>
<td>€229 752 942,00</td>
</tr>
<tr>
<td>Hungary</td>
<td>€96 259,40</td>
<td>€159 957,00</td>
</tr>
<tr>
<td>Iceland</td>
<td>€54 570,60</td>
<td>€41 921,00</td>
</tr>
<tr>
<td>Ireland</td>
<td>€6 038,44</td>
<td>€4 918,00</td>
</tr>
<tr>
<td>Italy</td>
<td>€409 819 000,00</td>
<td>€359 473 818,56</td>
</tr>
<tr>
<td>Latvia</td>
<td>€575 111,00</td>
<td>€563 792,00</td>
</tr>
<tr>
<td>Lithuania</td>
<td>€4 299 910,00</td>
<td>€5 712 908,00</td>
</tr>
<tr>
<td>Norway</td>
<td>€271 374,00</td>
<td>€185 112,16</td>
</tr>
<tr>
<td>Poland</td>
<td>€3 793 240,00</td>
<td>€3 833 334,00</td>
</tr>
<tr>
<td>Portugal</td>
<td>€450 600,00</td>
<td>€463 727,00</td>
</tr>
<tr>
<td>Romania</td>
<td>€1 699 100,00</td>
<td>€1 585 098,00</td>
</tr>
<tr>
<td>Serbia</td>
<td>€32 554,20</td>
<td>€35 678,96</td>
</tr>
<tr>
<td>Slovakia</td>
<td>€157 852,00</td>
<td>€64 965,00</td>
</tr>
<tr>
<td>Slovenia</td>
<td>€113 908,00</td>
<td>€59 563,00</td>
</tr>
<tr>
<td>Spain</td>
<td>€15 360 400,00</td>
<td>€12 813 773,00</td>
</tr>
<tr>
<td>Sweden</td>
<td>€5 034 950,00</td>
<td>€2 484 730,00</td>
</tr>
<tr>
<td>Switzerland</td>
<td>€7 341 380,00</td>
<td>€5 459 263,00</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>€8 140 570,00</td>
<td>€4 226 580,00</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>€26 722 900,00</td>
<td>€19 807 520,00</td>
</tr>
</tbody>
</table>

**Total:** €994 350 959,64 **€871 817 265,60**
Acknowledgements & references

ACKNOWLEDGEMENTS

Fur Europe would like to express its gratitude to its network of association members, board members, management team, staff and external stakeholders for their relevant contributions to this report.

Fur Europe would also like to thank the following organisations and individuals:

- Myriam Buenaventura
- Athina Ditsios
- Leif Fontaine
- Tony Goldstein
- Kasper Gustavsson and the rest of the “Alice in Furland” project (Centria University of Applied Sciences)
- International Fur Federation
- Tarmo Kattago
- Kopenhagen Fur
- Saga Furs Oyj
- Else Skjold, Design School Kolding
- Roberto Scarpella
- Django Steenbakker
- Julio Suarez Christiansen
- Arnis Veckaktins

Photo Credits:

- © Finnish Fur Breeders’ Association-Profur (pg: 4)
- © Kopenhagen Fur (pg: Inside Cover, 24, 41, 47, 58)
- © Saga Furs (pg: 3, 4, 11, 22, 46)
- © Arnis Veckaktins (photographer Nords Porter Novelli page 11)
- © Furlab (Django Steenbakker, pg: 12)
- © Rasmus Holm, Inuit Sila (pg: 21, 33)
- © European Union (pg: 35)
- © Kasper Gustavsson, Centria University of Applied Sciences (pg: 37)
- © Karen Marie Hasling and Ulla Ræbild, Design School Kolding (pg: 37, Refurbish project)
- © Hellenic Fur Federation and Fur Europe (pg: 38)
- © Truyman-Eeckhautd family (pg: 48, 49)
- © JorkWeismann (Cover, pg: 42, 44)
- © Fendi Collection (pg: 47)

REFERENCES

Chapter One: Fur Europe General Information

People behind Fur

- AIHTS, Agreement on International Humane Trappings Standards

Chapter Three: Traceability and Fur

Continuous improvements on traceability and certification

- First ever International Fur Dressers’ and Dyers’ Association’s sustainability report
  - IFFDA’s website: www.ifdda.info

Chapter Four: Stakeholder Engagement

‘This is Fur’, a major success in EU policy outreach

- ‘This is Fur’ event: www.fureurope.eu/news/the-european-fur-sector-paves-the-way-for-sustainable-fashion/
- Inuit Sila: www.inuitsila.org/

Overview of EU Political Engagement

- EU WORTH project: www.worth-project.eu/project-design-craft-manufacturer-europe/worth-partners.html

Building bridges of collaboration with education institutions + boxes: “Alice in Furland”, “Refurbish”

- Furlab: www.furlab.nl/#atelier/clfdo
- KICK: www.kopenhagenfur.com/kick/kick
- Saga Design Center: www.sagafurs.com/en/company/about_us/saga_furs_design_centre
- Saga Furs Internship: www.sagafurs.com/en/News/Future+furrier+New+intern+at+Saga+Furs+Design+Center
- AIP’s Centro di Studi AIP: www.centrostudiaip.com/meetings.html
- HFF’s “Discovering Fur Excellence” Workshop & Factory: www.furexcellence.com/schedule/day1-hall-a-discovering-fur-excellence-workshop/

ACKNOWLEDGEMENTS & REFERENCES
“Alice in Furland” photographs by Kasper Gustavsson and the e-book publication about the project:
www.issuu.com/centriaviestinta/docs/alice_in_furland_ebook/1 and http://kaspergustavsson.com/alice/

Fur Creativity Summer School 2015, educating young generations on fur
Emily Oldroy’s blog: http://emiloufur.com/2015/09/08/fur-creativity-summer-school-in-kastoria-day-1/
Kopenhagen Fur’s news on this event:
www.kopenhagenfur.com/news/2015/september/gallery-young-europeans-were-taught-about-fur-in-greece
Saga Furs’ coverage on the event www.sagafurs.com/en/News/Saga+Furs+sponsors+the+Fur+Creativity+Summer+School+in+Greece

Dispelling Customers and Consumers’ Concerns
Read chapter 3 of the annual report for more information about the luxury roundtable, IFFDA’s sustainability report and Fur Europe’s working group on traceability.
IFF’s ‘Business of Fur’ website : www.businessoffur.com/
Furlab: www.furlab.nl

Chapter Five: Fur and Fashion
‘Fur Now’ Campaign, Showing the Modern Face of Fur
‘Fur Now’ website: www.thisisfurnow.com
Furlab: www.furlab.nl
Rebecca Bradley: www.rebeccabradleylondon.com
‘Fur Now’ Twitter: www.twitter.com/hashtag/FurNow?src=hash
‘Fur Now’ on YouTube: www.youtube.com/watch?v=ZfPebcpcpk
‘Fur Now’ on Instagram: www.instagram.com/explore/tags/furnow/

Fostering Fur in Fashion and Design
IFF Remix 2015 winner: www.wearefur.com/node/19522
Austrian Creative Fur Award:
www.wko.at/Content.Node/branchen/oe/Mode-und-Bekleidungstechnik/Kuerschner/Austrian_Creativ_Fur_Award_-_ENGLISCH.html

British Fur Trade Association’s BFTA Design competition:
www.Visitbritishfur.co.uk/index.php/fur-is-fashionable/bfta-design-competition/
Saga Furs and BIFTPARK fashion show in Beijing:
www.sagafurs.com/en/News/Saga+Furs+with+BIFTPARK+unveil+innovatively+eye-catching+Fall+Winter+2016+collection+in+Beijing
Imagine Talents and Jesper Høvring’s shows:
www.kopenhagenfur.com/auction/about-us/read-kopenhagen-fur-news-here/kopenhagen-fur-news

Kopenhagen Fur has collaborated with the Danish jewellery brand ‘Bukkehave’: www.kopenhagenfur.com/news/2015/march/kopenhagen-fur-in-new-design-collaboration

Saga Furs data on fur presence in Fashion shows www.sagafurs.com/en/News/Fashion+weeks+roundup+71+percent+of+the+collections +contained+fur and www.sagafurs.com/en/News/Fur+on+record+breaking+73+percent+of+runways+in+fashion+week+shows
Red Fox Austria Award:
www.wko.at/Content.Node/branchen/oe/Mode-und-Bekleidungstechnik/Kuerschner/Red_Fox_Austria_Award_-_ENGLISCH.html

Chapter Six: Facts and Figures
Figures of the European Fur Sector: Farming Production (Facts and Figures)
Figures of the European Fur Sector: Trade (Facts and Figures)

Data used for 2014 as the whole data of 2015 were not available at the time of producing this report.
Currency conversion rate: 1,00 USD = 0,94365 EUR (dated 30 November 2015)

ACKNOWLEDGEMENTS & REFERENCES
Visit a fur farm or a manufacturing site

Nothing dissipates peoples’ prejudices and myths about fur and its supply chain more effectively than seeing the animals and their conditions with their own eyes. You can visit a fur farm or a fur manufacturing site in all fur producing countries in Europe. Contact Fur Europe or its national members if you are interested. The list of Fur Europe’s national members is available at Fur Europe’s website www.fureurope.eu.