FUR HISTORY WRITTEN IN 2014: 
A NEW ROADMAP TOWARDS SUSTAINABLE DEVELOPMENT

2014 became a milestone in the history of the international fur industry. As a result of a merger between the European Fur Breeders’ Association and the European members of the International Fur Federation, a new organisation called Fur Europe was formed. The European fur sector sets the global standards on animal welfare, research, innovation, design, sales and marketing and the environment. By creating a united European fur sector, Fur Europe facilitates activities of the entire value chain, thus contributing to maintaining Europe's position as a world’s leading fur hub. This is manifested in the Fur Europe Roadmap, which outlines the road to sustainable economic, environmental and societal development and the steps that need to be taken both in the short term and the long term.

A flagship of the roadmap is the world’s most advanced animal welfare assessment programme, called WelFur, has begun its implementation in 2015 with 10 countries participating in the pilot scale.

In 2014, Fur Europe also hosted the largest advocacy, awareness and information event in the European fur industry's history targeting policy makers and a variety of stakeholder groups. The event, entitled 'This is Fur', took place in the European Parliament in Brussels attracting thousands of visitors in addition to over 100 bilateral meetings, which were set up between national fur associations, EU politicians and civil servants. 'This is Fur' became a symbol of our values of 'openness, transparency and reliability' and highlighted Fur Europe’s ability to engage effectively with policy-makers as well as opponents.

In collaboration with the International Fur Federation, Fur Europe also presented the ‘Fur Now’ campaign promoting the innovative and youthful aspects of fur products. Once again, fur dominated the catwalks as a preferred choice of material amongst the world’s most celebrated design houses and fashion brands.

Politically and financially, 2014 was a challenging year and the European fur industry felt the impact of the Russian-Ukrainian crisis. Nevertheless, the European fur sector’s engagement with designers, universities and commercial brands has kept Europe innovative and competitive in a globalised world.

The fur industry was global 400 years before the word ‘globalisation’ was invented. The international fur trade between Europe and North America played an essential role in building the new continent, and still today, fur continues to be a European core competence. The roadmap points to innovating this heritage responsibly into the future to ensure the industry’s competitiveness in a multifaceted and pluralistic modern world where many ideologies coexist side by side. Our ideology is one of pro-animal use, and this ideology has its foundation in the human-nature relationship; the circumstance that man has always benefitted from natures resources including animals and that this has characterised human history and heritage.
FUR EUROPE, THE UNITED VOICE OF THE EUROPEAN FUR SECTOR

Fur Europe is an umbrella organization, established in 2014, covering the entire value chain of the European fur sector with activities in 28 European countries. Fur Europe is the result of a merger between the European Fur Breeders’ Association and the European members of the International Fur Federation. The organization’s headquarters is in Brussels (Belgium). Fur Europe is based on the values of openness, transparency and reliability and pursues the continued sustainable development of the European fur sector with regards to economic, societal and environmental issues.

Its role is also to provide a realistic image of the fur sector by providing factual and science-based information. Moreover, Fur Europe represents the European fur sector’s interest at EU level.

Fur is a European core competence in terms of production, design, manufacturing, marketing and sales of fur. 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 in the various parts of the European fur sector’s value chain is the driving force behind Europe maintaining its world-leading position. The European fur sector sets the global standards from farm to catwalk and Fur Europe’s job is to facilitate the innovation, creativity and continued development of a historical and cultural European heritage in a responsible manner into the future.

As a material, fur excels beyond any other textile with regards to the opportunities of human creativity, which is acknowledged by the widespread use of fur in the fashion collections of almost all international design houses. As a product, fur has a wide audience ranging from buyers of sophisticated luxury to more relaxed and complimentary use of fur as capes, scarfs, trims, accessories, home furnishings and other decorations. Behind both design houses and consumer choices of using fur lies the ongoing innovation and product development of the fur material that adds value to entire fashion collections as well as individual wardrobes.

A new organisational structure, operating procedures and guidelines were created in 2014. Fur Europe is governed by its board, which consists of members representing the fur value chain ranging from farming, auction houses, manufacturing to retail. The first ever Fur Europe board has 10 members coming to the board via the European Fur Breeder’s Association (EFBA), the International Fur Federation (IFF) and the two large auction houses, Kopenhagen Fur and Saga Furs.

Fur Europe’s staff consists of a strong and dynamic core team in Brussels. The team is composed of a growing number of truly Europeans, who are largely young professionals coming from six countries across Europe and who are committed to helping to deliver on the objectives and goals of the organisation.
FUR EUROPE REPRESENTS THE WHOLE FUR VALUE CHAIN

Fur Europe represents the interests of the whole value chain needed to provide the end product (e.g.: fashion garments, accessories, furniture, home design, etc.) to the consumers.

The actors/suppliers of the fur industry value chain are:

- **Farmers**
  European fur farmers produce nearly 44 million farmed fur skins of the mink, fox, finnraccoon and chinchilla species annually. The production makes up almost 50% of the global production. Highly innovative breeding software makes sure that European fur farmers are at the forefront in breeding selection on various genetic parameters related to quality, health, animal welfare, production and the development of new fur types. Fur is farmed on more than 5,000 farms in 22 European countries and is solely located in rural areas where the productions are important to local economies.

- **Auction houses**
  Europe is home to the world’s two largest international fur auction houses, Saga Furs in Finland and Kopenhagen Fur in Denmark. The auction houses are at the centre of the international fur trade as the auction houses both collect and sell fur skins during a total of nine annual auctions that gathers the international fur trade in the two European capitals. Due to advanced sorting technology the European auction houses offer advanced intersorting of fur skins which is sought after by international fur customers and unmatched in the world.

- **Trappers**
  European hunters are not organised under the Fur Europe umbrella but, due to their market-leading positions, the European fur auction houses offer a wide selection of wild fur during their auctions. Because of this Fur Europe and the European fur sector support the development and humane trapping standards and works to implement the Agreement on International Humane Trappings Standards (AIHTS) in Europe.

- **Brokers and buyers**
  Buyers of fur from the European auction houses travel in from all over the world. In order to establish the correct world market price for raw fur skins, the international fur auctions are surrounded by the highest level of transparency. Price levels are publicly communicated, and anyone has the opportunity to participate in the bidding. Most often, however, the buying of fur at the international auctions happens through fur brokers. These professionals are trusted to 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. Having quickly grown to become the centre of the international fur trade after World War II, London remains at the heart of fur trade and the home of many international fur brokers.
Design Centres and Academia

Knowledge-sharing is the keyword for Europe’s three fur design centres. Saga Furs Design Centre and Kopenhagen Studio are operated by the Finnish and Danish fur auction houses respectively. The Dutch Fur Breeders’ Association operates FurLab in Amsterdam, The Netherlands. All the design centres are dedicated to develop new fur techniques and methods of working with fur and share the knowledge with established designers as well as design students and commercial partners from all over the world. The longest running design centre of the three, Saga Furs Design Centre, has had more than 30,000 visits from designers since 1988.

Manufacturers

Even though much of the European manufacturing of fur garments has been outsourced to China, a considerable fur manufacturing cluster still remains in Europe. As opposed to other textiles, the fur material requires a delicate craftsmanship which is a traditional European core competence. A large part of fur manufacturing companies are family-owned businesses which have existed for several generations. In recent years, the product development of fur has entered entirely new areas and today fur is used in the production of shoes, handbags, hats, key hangers, jewellery, furniture, and decorations and interior. The major centres of fur manufacturing in Europe are located in Italy, Greece and Germany.

Dressers and Dyers

In order to obtain its long-lasting abilities raw fur skins require special chemical treatment. Dressers and dyers can also give fashionable colours to fur skins, or shear or pluck them which enhance the creative possibilities of the fur material. Product development also includes laser print and press pattern, and the processing of raw fur skins are done by dressers and dyers. In Europe the processing takes place in Greece, Germany, Italy, Poland, Lithuania and Denmark. The European dressers and dyers are subject to the European Union’s REACH regulation (Registration, Evaluation, Authorisation, and Restriction of Chemicals) that is adopted to protect human health and the environment from the risks of chemicals.

Retailers

Traditionally sold solely from furriers, the fur retail sales in Europe today follow the trend of other products and are nowadays sold and distributed through a variety of sales channels. These include fashion boutiques, commercial brands, decoration and interior shops, department stores, and online sales in addition to the traditional local furriers. The historical European furrier craft still plays an important role in the European fur sector because the furriers – quite often family-owned businesses - have the expertise to repair and remodel fur garments. The latter has grown to become a popular activity amongst the ever more responsible consumers who are attracted by the environmental benefits attached to a making a product last for decades.
Financial results of Fur Europe include operating charges and income for the year 2014. A part of those results are coming from EFBA and IFF separately as Fur Europe was not yet formally created in the first part of 2014. The total budget for the Fur Europe Network of Association activities, both at the pan-European and National level, amounted to around 4 million Euros, including the WelFur programme and national member association projects, partly or totally funded by Fur Europe. Fur Europe’s total operating income in 2014 consisted mainly of membership fees and European Auction House contributions. Fur Europe’s financial results for 2014 were audited by KPMG.

### FIGURES OF THE EUROPEAN FUR SECTOR:
#### PRODUCTION AND EXPORT

*Overview of Fur Production and Garments Export*

| Country       | No. Farms | Mink Production | Fox Production | Chinchilla Production | Finnraccoon Production | Fur Production | Exports €, 2014 |
|---------------|-----------|-----------------|----------------|-----------------------|------------------------|---------------|-----------------
| Austria       | 19        | 200 000         | 200 000        | 9 000                 | 9 000                  | 200 000       | 8 619 969.00   |
| Belgium       | 50        | 20 000          | 20 000         | 3 200                 | 4 200                  | 20 000        | 9 098 892.00   |
| Bosnia-Herzegovina | 22    | 17 880 000      | 17 880 000     | 6 300                 | 17 921 000             | 17 921 000    | 5 564 766.64   |
| Croatia       | 86        | 130 000         | 130 000        | 5 400                 | 149 700                | 149 700       | 17 124 506.00  |
| Czech Republic | 12       | 20 000          | 20 000         | 5 000                 | 20 500                 | 20 500        | 5 554 766.64   |
| Denmark       | 914       | 1 900 000       | 1 900 000      | 130 000               | 3 830 000              | 3 830 000     | 4 939 047.00   |
| Estonia       | 13        | 200 000         | 200 000        | 500                   | 200 500                | 200 500       | 94 998 626.00  |
| Finland       | 13        | 200 000         | 200 000        | 500                   | 200 500                | 200 500       | 94 998 626.00  |
| France        | 98        | 1 800 000       | 1 800 000      | 500                   | 1 800 000              | 1 800 000     | 229 752 942.00 |
| Germany       | 200       | 3 600 000       | 3 600 000      | 500                   | 3 600 000              | 3 600 000     | 519 957.00     |
| Germany       | 13        | 200 000         | 200 000        | 500                   | 200 500                | 200 500       | 94 998 626.00  |
| Greece        | 13        | 200 000         | 200 000        | 500                   | 200 500                | 200 500       | 94 998 626.00  |
| Hungary       | 98        | 1 800 000       | 1 800 000      | 500                   | 1 800 000              | 1 800 000     | 229 752 942.00 |
| Iceland       | 13        | 200 000         | 200 000        | 500                   | 200 500                | 200 500       | 94 998 626.00  |
| Ireland       | 13        | 17 880 000      | 17 880 000     | 6 300                 | 17 921 000             | 17 921 000    | 5 564 766.64   |
| Italy         | 13        | 200 000         | 200 000        | 500                   | 200 500                | 200 500       | 94 998 626.00  |
| Latvia        | 8         | 770 000         | 770 000        | 5 600                 | 776 500                | 776 500       | 563 702.00     |
| Lithuania     | 131       | 1 500 000       | 1 500 000      | 36 000                | 1 538 050              | 1 538 050     | 5 712 908.00   |
| Norway        | 340       | 850 000         | 850 000        | 165 000               | 1 015 000              | 1 015 000     | 115 112.16     |
| Poland        | 1 144     | 7 800 000       | 7 800 000      | 60 000                | 7 945 000              | 7 945 000     | 3 833 334.00   |
| Portugal      | 134       | 8 000 000       | 8 000 000      | 60 000                | 8 180 000              | 8 180 000     | 463 727.00     |
| Romania       | 134       | 8 000 000       | 8 000 000      | 60 000                | 8 180 000              | 8 180 000     | 463 727.00     |
| Serbia        | 134       | 8 000 000       | 8 000 000      | 60 000                | 8 180 000              | 8 180 000     | 463 727.00     |
| Slovakia      | 120       | 2 000 000       | 2 000 000      | 30 000                | 2 030 000              | 2 030 000     | 1 585 098.00   |
| Slovenia      | 134       | 8 000 000       | 8 000 000      | 60 000                | 8 180 000              | 8 180 000     | 463 727.00     |
| Spain         | 134       | 8 000 000       | 8 000 000      | 60 000                | 8 180 000              | 8 180 000     | 463 727.00     |
| Sweden        | 134       | 8 000 000       | 8 000 000      | 60 000                | 8 180 000              | 8 180 000     | 463 727.00     |
| Switzerland   | 134       | 8 000 000       | 8 000 000      | 60 000                | 8 180 000              | 8 180 000     | 463 727.00     |
| Total         | 5 249     | 41 224 000      | 41 224 000     | 2 071 350             | 2 071 350              | 2 071 350     | 871 817 265.60 |

* Production figures indicate number of animals
* Farm data collected from Fur Europe’s national association members
* Production data collected from Fur Europe’s national association members
* Fur garment export data: http://comtrade.un.org/data/commodity code 4303. Data used for 2013 as all data for 2014 not available at the time of producing this report.

### FIGURES OF THE EUROPEAN FUR SECTOR:
#### FINANCE AND SALES

The great majority of European fur is sold through two major international auction houses, Kopenhagen Fur in Denmark and Saga Furs in Finland.

The Value of Exported Fur Garments for 2013 was €871 817 265 (113 432 025. Currency rate: $1 = €0,783 ).

Total European Fur Production (2014) was 43 637 450 pelts.

2. Saga Furs’ Audited financial statements: http://www.kopenhagenfur.com/auction/auctions/sales-reports
2014 was a dynamic year for the fur industry at large and Fur Europe in particular, but also for European member countries. Fur Europe and key countries jointly organised more than ten country workshops with members of the fur value chain in each country. The purpose of these country workshops was to introduce the new organisation and identify the common ground for collaboration. Below are some examples of country updates in 2014. It should however be noted that this list is not exhaustive as each country is different with its own particular circumstances, challenges and opportunities.

**Austria**

**Association Name:** Wirtschaftskammer Österreich Bundesgremium des Agrarhandels

**Website:** [www.wko.at/Content.Node/branchen/oe/Agrarhandels/Startseite_-_Agrarhandels%2C_Bundesgremium.html](http://www.wko.at/Content.Node/branchen/oe/Agrarhandels/Startseite_-_Agrarhandels%2C_Bundesgremium.html)

The Austrian fur industry was involved in different fur promotion activities in 2014. The REMIX design competition 2014 was a huge success in Austria, where Austrian furriers collaborated with the chamber of couture and other important stakeholders. Moreover, Austrian furriers cooperated with the Austrian Central Hunting Federation participating, amongst others, in its annual fair. The furriers also took part in the Hunting Federation fair’s design competition, focusing this year on red-foxes and different commercially applicable techniques. As a result, a look book was created showing the collection of the different designs and clothing lines presented. This publication will be distributed to Austrian fur boutiques as a guide for consumers on the latest fur-related fashion trends. Another important communication tool with consumers for the fur sector was labelling, as it provides consumers with information about the source of the fur they are buying. Therefore, the buyers have the guarantee that the fur acquired comes from a country where welfare regulations or standards governing fur production are in force. The Austrian fur sector also faced a challenging anti-fur movement environment. That movement was in part backed by the government and some members of the media. Despite some negative media coverage the Austrian fur industry, in cooperation with other stakeholders, advocated successfully for its position in society. This cooperation will be reinforced and enlarged in 2015.

**Belgium**

**Association Name (Trade):** Belgische Bontfederatie VZW

**Website:** [www.bontfederatie.be](http://www.bontfederatie.be)

**Association Name (Farming):** Belgische Federatie van Pelsdierhouders (Belgian Fur Breeders’ Association)

**Website:** [www.pelsdieren.be](http://www.pelsdieren.be)

The Federal parliamentary election held in Belgium in 2014 brought many changes on the political level where the issues of relevance for the fur industry are dealt. The matters concerning animal welfare moved from the federal to regional level. This change made the discussion about fur farming ban very present at regional level in Wallonia and Brussels. The newly elected animal welfare ministers in those regions wanted to introduce a ban on the sector. In Wallonia a proposed text was adopted at the end of 2014, despite the absence of fur-farming activities in the region. The ban was solely based on arguments from anti-fur movement organisations. In the region of Flanders, where the Belgian fur breeders operate, they actively engaged in the debate and met with many politicians to provide sound information and advocate for the industry. The Belgian Fur Trade made equally important contributions to the fur sector efforts with the organization of press trips to Kopenhagen Fur (Denmark) and the Dutch Design Center, FurLab (Netherlands). Besides, the Belgian association increased its cooperation with young designers as one of its priority.

**Denmark**

**Association:** Kopenhagen Fur (Danish Fur Breeders’ Association)

**Website:** [www.kopenhagenfur.com](http://www.kopenhagenfur.com)

**Association:** Dansk Pelsgrossistforening

The Copenhagen Fashion Week, held in February 2014, launched the event agenda of the fur industry in Denmark. Over 800 guest from politics, business and culture attended the opening show sponsored by Kopenhagen Fur. The Danish fur auction house, Kopenhagen Fur, unveiled what fur fashion will look like in the upcoming fall and winter season, trends which were followed closely by the international journalists and buyers present at the show. In September the Danish fur farmers opened their farms to the general public as part of the ‘Open Farm Day’ programme. Thousands of curious people visited the open farms, confirmation that the strategy of openness works. The event offered different activities such as a guided tours, kids’ entertainment and food to make the Open Farm scheme an event for the whole family. In addition, the farmers, in cooperation with fur retailers, displayed fur garments during the event.
Europe's WelFur programme in 2015. In addition, a farm in rural areas and opportunities for increased exports. Two scale in 2014 but offers great potential for job creation in Finland. The renewal of the Animal Welfare Act in Finland progressed but was not finalized by the end of 2014, as expected. As part of this project, the Council of State regulation on the protection of fur animals will slightly change. Its adoption is expected before the Parliamentary election in 2015. Besides, the Ministry of Agriculture acknowledged challenges caused by the current agricultural trade faced some instability due to a warm winter, lack of Russian tourists and the devalued Russian ruble.

In 2014 the Hungarian Fur Trade Association and the Hungarian Chinchilla breeders’ association's advocacy efforts effectively contributed to the defeat of a mink and foxes farming ban proposal submitted by the Hungarian government the previous year. In the political arena, the situation remained stable after the parliamentary election held in April, with the parties Fidesz-KDNP and the Prime Minister Viktor Orbán remaining in power. Otherwise, with an important Chinchilla fur production and trade in the country, the Hungarian Chinchilla breeders’ Association organized the first time ‘International Chinchilla Show' in November. The same month, the Hungarian Fur Trade Association celebrated the fourth annual fashion design competition and show 'Kreáció'. This well-attended event aims at promoting and encouraging furriers and designers to showcase their creativity and good results in using fur and the right accessories and techniques. The interest in the competition has grown year by year thanks to the collaboration with different design schools. The competitors were furriers, designers and young graduates who have started their work life in the fashion industry.
Iceland
Association Name: Skinnar IFTA (Icelandic Fur Trade Association)
Website: www.ifta.is
Association Name: Samband Íslenska Lódyrabaenda

The fur farmers, in cooperation with the Icelandic Fur Breeders’ Association, continued during 2014 their project of self-control and animal welfare in the Icelandic mink farms. This project began in 2013 after an assessment of the fur farms state done by consultants from Kopenhagen Fur. The consultants provided a report of the final assessment to each individual farmer. As follow-up, the farmers had a visit in 2014 from Danish veterinarians, who focused on the health status on the farms and shared tips and advice with the farmers on how to improve their production. The Icelandic Fur Breeders’ Association was greatly satisfied with the participation of all of the farmers, on a voluntary basis, in those visits and control and their positive feedback.

Ireland
Association Name: Irish Fur Breeders’ Association

The three mink breeders operating in Ireland received licenses to continue their businesses from the Ministry of Agriculture, Food and the Marine. The licenses were issued for one, three and five years respectively. Besides, all the mink farmers can achieve five year licenses upon completion of the implementation of the new mink farm regulation. This is a victory for the Irish mink breeders relative to prior license standards. That new regulation requires a maximum of two animals per standard cage, and three animals in the so-called ‘climbing cages’, with an additional floor. Moreover, group housing of up to four animals per cage is allowed if the cage has larger dimensions. The regulation also obliges the building of concrete floors with plastic channels under the cages to avoid mink manure in the ground and soil contamination. Finally, fencing around the mink farms must be upgraded by the end of 2016, when security systems become mandatory. In parallel, anti-fur movement protests outside fur selling shops and farms took place with no significant impact for the industry.

Italy
Association Name: Associazione Italiana Pellicceria
Website: www.aip.it
Association Name: Associazione Italiana Allevatori Visone (Italian Fur Breeders’ Association)
Website: www.aiav.it

2014 was again an active political year for the fur sector in Italy. A new government was in place and several initiatives were launched by animal rights organisations to ban the sector. A positive law on a tax credit for agricultural activities to boost e-commerce, innovation and enterprise networks was also adopted. This legislative measure provides a good opportunity for young fur farmers. The farmers and the trade in Italy are working closely together on the political interventions and are involved closely in each other’s activities. At market level, the Italian Fur Association published a research report titled ‘A Market without Boundaries: the Present and Future of the Fur Market in Italy’, conducted by the independent party PWC Advisory SpA Italy. Besides, several AIAV’s members organized Open Farms days with a good general public attendance, with a main focus on young people. In addition, AIP continued its outreach activities through diverse ways such as the fur fashion website www.wonderfurs.it and supporting MiFUR, the International Fur and Leather Exhibition. AIP also continued its long-lasting cooperation with twenty of Italy’s main fashion schools, providing courses for schools’ management and teacher, and sponsoring the fur section of the end competition for New Talents.
The Latvian Fur Breeders’ Association had an intense year in 2014. On animal welfare, the Latvian fur farmers volunteered to be the first European country to implement the WeilFur assessment programme in 2015. At the political level, the Parliamentary election results were relatively favourable for the fur industry. A citizens’ initiative to ban fur farming, which was submitted by an animal rights organization in December 2014, was rejected by the Latvian Parliament in February 2015. Amongst the arguments given for this decision, the Ministry of Agriculture stressed the importance of the fur industry as a creator of jobs in rural areas. The Latvian Association undertook some major public and political outreach to respond with realistic and fact-based information to the media attention triggered by an unfavourable video broadcast on Latvian national television. Additionally, Fur Europe held a country workshop in Riga in October 2014 followed by an Open Farm day on a large mink farm, established in 2013, in Grobiņa.

Lithuania

Association Name: Lietuvos Žvėrelių Augintojų Asociacija (Lithuanian Fur Breeders’ Association)

The political landscape for the fur industry in Lithuania was marked by the active engagement and advocacy work of the Lithuanian Fur Breeders’ Association in the political debate on the new animal welfare legislation. This new law, which will enter into force in May 2015, includes specific regulations for fur farming and bio security. Biosecurity is a separate regulation which is still in process but it is already accepted by the fur breeders’ association who stand ready to implement this legislation upon entering into force. On the societal landscape, the Chief Executive Officers (CEOs) of the Lithuanian Fur Breeders’ Associations, Fur Europe and the Finnish Association Profur participated in a media outreach campaign, including media interviews and a press-breakfast. They shared factual information about the fur industry and clarified potential questions in response to the illegal actions of an anti-fur movement activist who recorded an undercover footage of several Lithuanian fur farms.

Netherlands

Association Name: Nederlandse Bont Instituut

Website: www.furlab.nl

Association Name: Nederlandse Federatie van Edeelpelsdierenhouder (Dutch Fur Breeders’ Association)

Website: www.nfe.nl

2014 was a successful year for the Dutch fur farmers and the European fur sector at large with the court case victory against the Dutch state, which aimed to ban fur farming in the Netherlands. The lack of compensation that violates the European Convention on Human Rights was the winning argument. The Dutch state has appealed the decision and consequently the Dutch Fur Breeders’ Association (NFE) has submitted documentation to the High Court for the hearing expected in 2015. In addition, the animal welfare legislation changed, reducing the number of inspections per year but becoming more comprehensive. Moreover, the welfare regulations were integrated in the National Welfare Law of Animals. The anti-fur movement activists switched their main focus from the fur farms to the retail shops and consumers. On the other hand, the industry continued its support to fur in fashion through its design center Furlab’s activities including its educational collaboration with known design centers and designers (see the ‘Design Centers’ section). Furlab and Fur Europe also jointly launched a retail campaign, supported by the fashion retailer association, to educate fashion retailers about fur, developing a special info-kit and visiting fashion retailers.

Norway

Association Name: Felisinform (Norwegian Fur Trade Association)

Website: www.pelsinform.no

Association Name: Norges Pelsskyddslag (Norwegian Fur Breeders’ Association)

Website: www.norpels.no

The Norwegian government set up a professional commission in 2013 to analyse the Norwegian fur farming sector and deliver a report with positions on two possible future alternatives: either sustainable development or the termination of fur farming. The commission’s fact-based report was published on 15 December 2014 with a majority of the commission members voting in favour of the sustainable development option. The report also included several suggestions for improvements. An active Norwegian anti-fur lobbying published an undercover documentary, ‘Pels’, on 10 December on the national public service TV station, NRK, to influence the Commission and the politicians. In response, the Norwegian Broadcasting Council, a law-bound public council appointed to assess journalistic standards at NRK, publicly criticised the documentary broadcast. The Norwegian Fur Breeders’ Association (NPA), from its end, efficiently responded to false claims and developed an extensive media campaign to counterbalance the social pressure to politicians. The fur industry in Norway is fully committed to sustainable development and will provide written answers for a public hearing in the Norwegian parliament set to be at the end of April 2015.

Poland

Association Name: Polski Związek Hodowców Zwierząt Futerkowych (POLFZ) (Polish Association of Fur Animal Breeders)

Website: www.polfz.net.pl

A series of workshops started in 2014 in Poland to introduce the new Fur Europe organization, with the first country workshop being held in June. This workshop had three main topics: the particular situation of the Polish fur industry, the possibility to join forces at national level, and the identification of areas for cooperation between the fur trade and breeding associations. Ever since, the main national fur associations have jointly achieved a huge progress in obtaining a common understanding on the key issues. For that purpose, the Polish Association of Fur Animal Breeders (POLFZ) has used substantial resources to strengthen the communication between the national and local associations. From the trade side, the Polish Fur Federation (SFP) was actively involved in the FUR NOW campaign in Poland. It advertised FUR NOW in the national Polish fashion magazines and promoted it through Facebook and the association’s website. The federation has also closely worked with the Polish Fur Breeders Associations at national and regional levels on the dialogues with public authorities.

Romania

Association Name: Uniunea Crescătorilor de Chinchilla din România–UCCR (Romanian Union of Chinchilla Breeders–RUCB)

Association Name: Asociatia Generala a Femeilor si Crecitorilor Individuali de Chinchilla din Romania–AGFCICR (General Association of Individual Chinchilla Farmers and Breeders in Romania)

Website: www.agfcicr.ro

The Romanian fur sector experienced a relatively calm year in 2014. While chinchilla production dropped by around 30% compared to the previous year, mink production increased significantly with the start of a large mink farm close to Brașov. The Russian market problems had a mild impact on the sector. On the political arena, neither the politicians nor for the anti-fur movement had fur as a priority topic. The only legal action slightly affecting the sector was a measure imposing an excise tax on luxury products, including fur, which entered into force on 1 April 2014. Furthermore, the two Fur Europe’s chinchilla farming member organisations arranged an Open Farm day in May. During the event, six farms from all around the country welcomed the general public and provided visitors with information. Also a Fur Europe country workshop was held in July to debut the new European umbrella organization and identify any common ground for collaboration.
Slovakia

**Association Name:** Asociácia kožušníkov Slovenska (Association of Furriers of Slovakia)

**Website:** www.asociaciaks.sk

The year 2014 in Slovakia was a politically active year with three elections. The Association of Furriers of Slovakia (AKS) effectively established relations with tens of the European election candidates. At national level, changes in government did not affect its good relations with the fur sector. In parallel, AKS continued with its public outreach activities during the whole year. The book ‘Fur in Europe’, with an official translation into Slovak, was further disseminated. Furthermore, intensive cooperation with media was maintained through the direct engagement of AKS’s representatives and the promotion of the FUR NOW campaign. Similarly, AKS organized its 12th annual representative evening event, a flagship social event featuring the fur sector through the dissemination of information material, the FUR NOW campaign promotion and a fashion show.

Slovenia

**Association Name:** Obrtno-podjetniška zbornica Slovenije (Chamber of Craft and Small Businesses Section of Furriers and Tanners)

**Website:** www.ozs.si

The Slovenian fur sector results in 2014 were less positive than the previous year due to several factors such as a mild winter. The year 2014 was also a phase-out year during which all fur farming in the country needed to be liquidated due to a fur farming ban adopted in 2013. This fur-farming ban had a negative effect on the sector image at large. Moreover, the economic problems in Russia led to a significant reduction of the amount of Russian tourists, traditional fur customers, visiting Slovenia. On the other side, the national elections, won by a centre-left party with a vegetarian leader, did not heavily influence the sector.

Spain

**Association Name:** Organización Empresarial Española de la Pelletería-OEEP (Spanish Fur Trade Association)

**Association Name:** Asociación Gallega de Criadores de Vison – AGAVI (Spanish Fur Breeders’ Association)

**Website:** www.agavi.es

**Association Name:** Federación Española de Pelletería y de Criadores de Moda–FEPYCM (Spanish Fur Federation), which has also been involved in the activities of FUR Europe

**Website:** www.fepycm.com

A key achievement of the fur sector in Spain at large in 2014 was the commitment reached by the various associations to find a common ground and establish a united and strong Spanish association bringing together all the existing ones. This commitment was reiterated at the Fur Europe’s country workshop in Madrid in June 2014 where the key stakeholders in the value chain gathered to discuss matters related to fur. Work is in progress to create the new association. Furthermore, the Spanish fur industry in 2014 organized and participated in various events and communication activities with customers and stakeholders to promote fur in fashion through catwalks, exhibitions, media outreach and other collaboration activities with stakeholders (public authorities, academia, designers).
Sweden

Association Name: Svensk Mink (Swedish Fur Breeders’ Association)
Website: www.spr.nu
Association Name: Pälsbranschrådet (Swedish Fur Trade Council)
Website: www.svenskmink.se

The Swedish Fur Breeders’ Association (Svensk Mink) arranged various activities during 2014 to reach out more broadly to the general public. A major event was the Open Farms Days programme organized in May and August with a record number of visitors. Svensk Mink also showed a mink house with live mink during a football game and invited school classes for a farm visit. Besides, the fur farmers introduced in recent years their own initiative to implement a comprehensive animal welfare control system, Minkhälsan, which complements official controls with quarterly inspections by veterinarians from the Board of Agriculture.

On the anti-fur movement side, activity has declined because society largely supports punitive measures for crimes against fur farming. With respect to this, Svensk Mink set up a working group with other animal using industries (hunters, zoos, pharma, etc) to exchange information and enhance collaboration. From the trade side, the Swedish Trade Council reported a national increase of fur in fashion collections and consumer use. The council fostered this trend through support to students at Beckmans School of Design for the use of fur in their graduation collections as well as fur promotion in various ways such as fashion shows, VIP guests and press.

Switzerland

Association Name: SwissFur–Schweizerischer Pelzfachverband
Website: www.swissfur.ch

The political agenda of the Swiss fur industry was primarily marked in 2014 by the implementation of the fur declaration ordinance. Following this law and after an adaption period, furs and fur products sold in Switzerland are required, as of 1 March 2014, to be visibly labelled with information for the consumers. That information, provided in at least one official Swiss language, refers to the scientific name (Latin) of the animal species, country of origin and source (farmed, hunted or trapped), and the different species of fur used on a product. The Swiss Fur Trade association (SwissFur) assisted furriers in their compliance with that ordinance.

SwissFur also closely monitored and advocated in political debates on animal rights and animal protection, which continued to be part of the parliamentarian political agenda, especially related to the agricultural policy 2014-2017. On the other hand, SwissFur, as a member in the intercantonal apprenticeship board, cooperated with other stakeholders to communicate fur industry issues (e.g. the creation of a strong international quality labelling regime) and promote fur craftsmanship skills (e.g. participation in a craft exhibition in the Ballenberg museum, supported by SwissSkills).

United Kingdom

Association Name: British Fur Trade Association
Website: www.britishfur.co.uk

The fur industry in United Kingdom had a positive year in terms of sales with a 15-20% increase versus the previous year, as reported by the British Fur Trade Association (BFTA) retailer members. Moreover, BFTA recruited new members by offering value-added services and launching a new membership tier for Associate Members, which is free for students and new graduates. BFTA also increased its collaboration with fashion colleges and universities, helping them in the development of fur subjects for their fashion courses. On the catwalks, London Fashion Week increasingly show more fur in the collections present. In the political arena, BFTA started its efforts in reaching out to the politicians with the focus on the general election to be held in May 2015. On media side, the fur trade came under increasing media attention which covered the attacks of anti-fur movement organizations, with a particular focus on the Origin Assured label. BFTA has collaborated on a number of positive articles in leading UK media, including Daily Mail, Guardian and Daily Telegraph as well as engaging in live broadcast debates with anti-fur activists.
CHAPTER TWO

ANIMAL WELFARE
AND SOCIETY
ANIMAL WELFARE BEGINS WITH THE ANIMALS

The existing assessment systems in animal agriculture, used for example by national authorities, are insufficient in accommodating the complexity of animal welfare and evaluate the emotional states of animals. Acknowledging this, the European fur sector, more than 5 years ago, has taken the lead to ask a consortium of seven European universities to develop WelFur, a professional and science based animal welfare assessment programme. WelFur is based on the EU Commission’s Welfare Quality® project. This project defined four animal welfare principles, that is, good feeding, good housing, good health and appropriate behaviour. Within those four principles, Welfare Quality® project also established 12 specific animal welfare criteria. Based on those principles and criteria, independent scientists from these seven universities developed WelFur, selecting a number of specific welfare measurements for mink and fox for their scientific validity, reliability and feasibility. In simple terms, scientifically validated animal indicators are the best way to gain reliable information about the emotional state of animals.

Based on the revision of the WelFur current protocols, recommendations from independent assessors and the availability of new scientific knowledge, the programme will be reviewed on a five year basis.

To this end, WelFur is a dynamic farm level certification programme. It will work to address not only the welfare of the animals, but also any public concern over animal welfare issues by giving the general public insights into the welfare status on European fur farms in an open and transparent manner. At the same time WelFur works as a tool to improve welfare standards because the precise farm assessment can help identify possible opportunities for welfare improvements and optimization of farm management systems.

WelFur has been developed for mink and fox, the two most commonly farmed fur species. The pan-European implementation begins in 2015 with 10 countries participating in the pilot scale. WelFur is by far the world’s most comprehensive animal welfare assessment system to be implemented on a continental scale.

Animals are sentient beings and should be treated as such. To this end animal science recognises that animals can feel pain and are capable of experiencing positive emotional states. Recognising this means to accept that animal welfare cannot only be assessed with a view to the animal’s health status or to the animal’s capability to produce.
Why is WelFur important?

Animal welfare is one of the most important aspects of this industry, and any improvements and scientific work in this area must be considered as positive elements aiming at the further development of the industry in a sustainable way. In general, it is also important that our animals are well provided for, not only because better welfare equals better skin quality and better skin quality equals better prices, but also because the life we give to the animals must be a good life.

Do you consider WelFur a worthy future investment for your business?

Definitely. Improvements of any kind, which are related to animal welfare, must be considered as an investment that not only brings benefit to the individual animal and the farm, but also improves the image of the industry as a whole. The implementation of WelFur is positive since it not only provides a chance to document the animal welfare for each individual farm, but also allows to compare the welfare conditions between farms. In this way, WelFur is the solid foundation for constant improvements to optimise farm management.

Why have you decided to participate in the pan-European testing phase of the WelFur programme in 2015?

In my opinion, WelFur is the right tool to demonstrate to the general public that animal welfare is one of the main pillars of the whole industry. We are constantly following scientific research and look for ways that will allow us to improve animal welfare, and it is important that the surrounding society also knows about all our welfare initiatives, which also include open farms and better communication with the public. I want to help in this process.

Will WelFur contribute to clearing up the ethical concerns about animal welfare raised by some parts of society?

The WelFur programme will allow us to reduce the concern of the general public about lack of transparency of the industry, as well as improve the general public opinion on animal welfare conditions on the farms. Of course, we will organize open days and actively communicate about the industry with the media. We have already provided information to media about Latvia being amongst the first countries to test the WelFur programme nationally.

How important is it for the sector’s credibility that WelFur is validated by independent third parties?

This aspect is significant in the implementation of the programme, since it indicates the openness of the industry and allows third parties to evaluate welfare conditions. Involvement of third parties in scientific and economic activities will provide additional credibility in the opinion of the general public, thus dissolving the opinion that animals are kept in bad conditions at our farms.

Latvia is the first country in the world to implement WelFur on a national scale. The country volunteered to have all its farms participating in the 2015 WelFur validation and pilot program. Arnis Veckaktins is a 42-year old Latvian farmer who runs one of the biggest farms in Latvia Gauja AB since 1995. Here is his view on the WelFur programme.
ANIMAL ETHICS IS ABOUT PROVIDING ANIMALS WITH GOOD LIVES

The fur industry’s ideology is one of pro-animal use, and this ideology is to exist amongst many other ideologies. This pro-animal use ideology has its foundation in the human-nature relationship; the circumstance that man has always benefited from nature’s resources including animals and that this has characterised human history and heritage. Fur Europe works under the assumption that animal farming is a legitimate human activity. Since the dawn of man we have utilised nature’s resources, and even though they were isolated from each other, all pre-historic human cultures in the world have succeeded in domesticate both plants and animals to the benefit of the human evolution. Eating the meat and wearing the skin of an animal were of equal importance to our forefathers.

With the introduction of the WelFur programme, Fur Europe has taken European leadership on animal welfare. To the extent that the societal debate over human use of animals becomes more and more important, Fur Europe insists that such debates are founded on a scientific basis. It is a central point in Western philosophy that inconsistent moral choices eventually will leave us blind to what is truly morally right and wrong conduct, and that only science can guide us in determining whether the animals are experiencing a good life or not.

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Today, some people argue that fur is an unnecessary luxury product that we can live without. As much as this is true, the same thing can, however, be said about meat consumption and a wide range of other animal products that humans utilise. Human use of animals continues to contribute to human development, and where animal products today are largely outside the scope of human survival, the benefits remain tremendous, not only with regards to job creation and other socio-economic advantages, but also in terms of human pleasure, innovation and creativity.

Animals in human care are however within the scope of moral concern, and with the growing public concern about our treatment of animals this is possibly truer than ever. Whereas animals have no knowledge of their own end-use, they are sentient beings that will have negative experiences if treated poorly, and positive experiences if treated well. To this end, the animal welfare provided for the animals whilst alive remains the ultimate moral factor in human use of animals. In the respectful human-animal relationship where the stronger human being recognises his obligations to the lesser animal, the ethical argument arises that a good farm animal life can be provided to the benefit of both man and animal – as opposed to no animal life and no mutual benefits at all.

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As the world’s most comprehensive animal welfare programme to be implemented on a continental scale, WelFur guarantees the best-qualified and science-based insight to the general public on animal welfare standards in the European fur sector. Fur Europe is also committed to participate in the public debate over animals use in general and that over fur in particular. Additionally, throughout 2014, Fur Europe has worked with animal scientists and animal ethicists in order to pinpoint all ethical issues regarding European fur farming including animal welfare, environment, the utilisation of carcasses and public opinion.

This work will continue with the end goal of establishing an ethics committee under the Fur Europe umbrella which will work under the assumption that animals can be used for human good, including for our wellbeing, health, food, fashion and recreation.
CHAPTER THREE

STAKEHOLDER ENGAGEMENT
In January 2014, the fur sector had a remarkable start with ‘This is Fur’, the largest ever outreach event that this industry has held, at the European Parliament in Brussels. This major occasion, hosted by Jens Rohde (Danish Member of the European Parliament, ALDE) and sponsored by the Greek Presidency of the Council of the European Union, showcased an exhibition at a very visible location in the European Parliament. The event also offered several debates on key topics such as animal welfare and ethics with speakers from the EU institutions and representatives from the fur sector and animal rights organisations. In addition, ‘This is Fur’ hosted more than 100 bilateral meetings between national fur associations from 16 European countries and members of the European Parliament (MEPs), and other important EU stakeholders. This event aimed at providing ‘first hand’ factual and reliable information about the fur industry to the EU institution representatives and an engagement and open dialogue platform for all relevant stakeholders. The debates offered an open and balance approach by inviting speakers from universities (e.g. Dr. Henrik Møller of the Aarhus University), NGOs (e.g. Ann de Greef, director of GAIA), EU institutions (e.g.: Jens Rohde, Danish Member of the European Parliament), national government (e.g. Konstantinos Chalastanis, H.E. Ambassador of Greece) and the fur sector (e.g. Wim Verhagen from the Dutch Breeders’ Association). The communication activities around this event included an advertising campaign, press releases, ‘This is Fur’ leaflet, and a video that was shown through the online news portal EurActiv, becoming the most ever seen video on this media portal.

Fur Europe and its members, as responsible actors in society, engage with different stakeholders to better understand and effectively respond to stakeholder expectations and address current and emerging trends, risks and opportunities. Besides the transactional stakeholders in the supply chain with whom there are direct business relationships, the main contextual stakeholders are policy makers, academia, the media and society at large. Fur Europe has undertaken different awareness, communication, advocacy and fashion promotion activities to engage with its key stakeholders.
OVERVIEW OF EU POLITICAL ENGAGEMENT

From the advocacy perspective, Fur Europe contributed to the discussion and policy making process on relevant areas for the sector such as animal welfare and animal health policies, Invasive Alien Species, rural development, chemical management, and trade policy. On rural development, Fur Europe was granted a seat in the Civil Society Working group on Rural Development under DG Agriculture of the European Commission and a seat in the Rural Assembly’s steering group on Rural Development. On EU policy concerning invasive alien species, as part of Fur Europe’s advocacy work, the socio-economic aspects were reinforced in the criteria for the species to be listed, making it unlikely that American mink and finnraccoon will be listed. Furthermore, Fur Europe negotiated a permit system authorising for Member States to allow farming of mink and finnraccoon even if they were to be listed as Invasive Alien Species. The list will be published in 2015.

On the trade policy, Fur Europe recently released a new position paper on the EU-US Transatlantic Trade and Investment Partnership (TTIP) advocating for lowering administrative burdens, facilitating easier procedures for e-commerce and online trade in general, and creating a TTIP information helpdesk to help small and medium enterprises (SMEs). On the same policy area, Fur Europe shared with the Commission policymakers its support to create market access for Inuit hunters as part of the European Commission’s expected response to the World Trade Organization (WTO) ruling in the case against the EU ban on import of seal products. Beyond this legislation, Fur Europe has also advocated to keep the derogation on Marine Resource Management that allows for the continuation of the seal hunt in EU waters.

On Animal Welfare policy, a key priority for Fur Europe was to present and inform about WelFur during the negotiations on the Animal Health Law, and especially the Regulation on Official Controls, where Fur Europe has advocated for a science-based approach to animal welfare assessment. Fur Europe also provided input on the draft of the new EU Animal Welfare Framework law, expected it to be published in 2016. The Commission has at several meetings stated their interest in WelFur and mentioned it as a best practice example in terms of assessing animal welfare. As part of the EU agenda on consumers’ protection, Fur Europe advocated for full transparency and not only a ‘country of origin’ label on the discussion on the “made-in” label, within the Consumer Product Safety Package.

Fur Europe’s CEO and Head of Communications as well as Fur Europe’s national association executives held interviews with national media and participated to TV debates on fur related issues such as animal welfare, or ethics.
In 2014, the fur sector in Europe reinforced its educational collaboration with design and competence centres. Those centres are critical societal actors for the fur industry at large as they foster the acquisition of skills and provide education on the most innovative techniques to future fashion including home designs and craftsmanship. Within the fur sector, Europe’s three main fur design centres are Saga Furs Design Centre, Kopenhagen Studio and Furlab.

The Saga Furs Design Centre has a yearly internship programme which offers total creative freedom to the interns. In 2014 a student from Central St. Martins, for instance, had the opportunity to develop her novel idea for the theme of the samples she would present at several Fur Vision events. Also a London-based young furrier could follow two two-week sessions of intense training on the basics of the furrier trade, as part of his traineeship. In total, more than 35,000 designers, tutors, furriers and manufacturers have been trained in the Saga Furs Design Centre since its inception.

Kopenhagen Fur’s design centre, Kopenhagen Studio (also known as KiCK), established a new stakeholder programme in 2014 with leading design universities of France, United Kingdom, Denmark, Japan, China and South Korea. The programme introduces fur as a material, with an emphasis on creative fur use and product development, to the design universities by providing training to professors and students. Partner universities are chosen with a view to their level of excellence as well as their location in established fur markets, as the programme’s ambition is to convert the creative work of the design students into commercial productions. In 2015, the stakeholder programme will expand its activities to Greece, Russia, Turkey and Kazakhstan. Kopenhagen Fur’s strategy to partner with universities also includes initiatives such as the ‘Imagine Talents’ design competition and a research project on fur and sustainability called ‘Fur as a Sustainable Material’, done in conjunction with the Design School Kolding.

FurLab, an education and information initiative of the Dutch Fur Institute, also organized several workshops on fur and fashion during 2014. FurLab invited design students from the Amsterdam Fashion Institute and the Royal Academy of Fine Arts Antwerp, the most important schools in the Netherlands and Belgium, as well as from the Albeda College Rotterdam, to participate in those workshops. Its collaboration programme with design centers has progressively grown, working currently with six of the most renowned fashion and design schools in the Netherlands and abroad. This collaboration has also been reinforced with the opening of a showroom at FurLab’s premises in Amsterdam, where the fur pieces created by 17 graduate students in fur design are exposed and lent to stylists. In addition, the designer and creative director of FurLab, Django Steenbakker, launched an online petition on individual basis to advocate for the creative freedom of material use during the fashion weeks. This petition was endorsed by 56 renowned creative professional located in The Netherlands and UK. Furthermore, several universities (e.g. Centria University), design schools (e.g. Istituto Marangoni, ENE, IED, ESMOD France), and members of the fur value chain (Deutsches Pelz Institut, Hockley) offered a series of fur-related university degrees, courses, vocational training and placements.

In addition, the International Fur Federation (IFF) continues to support and inspire the next generation working with fur through its international young community initiative called FUR FUTURES.

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1 Saga Furs Design Centre: www.sagafurs.com/en/company/about_us/saga_furs_design_centre
2 Kopenhagen Studio or KiCK: http://www.kopenhagenfur.com/kick/kick
4 FurLab: http://www.furlab.nl/
OPEN FARM DAYS BRING FUR SECTOR CLOSER TO SOCIETY

The general public and consumers are amongst the key societal stakeholders for the fur sector as their demand is vital for continued business success. Therefore, Fur Europe and its members organized a number of different activities in 2014 to share information and create a more realistic societal image of the fur sector.

One of these activities is the ‘Open Farm scheme’ organized in several European countries during spring and fall. As part of the sector’s efforts to promote transparency and public acceptance, more than 150 fur farms across Europe opened their doors to all citizens in 2014. Open Farm Days for the general public were held in 2014 in countries like Denmark, Finland, Latvia, Norway, Romania and Sweden, with an overall positive perception mentioned by visitors afterwards. School students, politicians, media, citizens and members of animal rights organizations were amongst the regular visitors receiving guided tours on farms. Many visitors took the opportunity to ask questions to farmers, engaged in dialogue and appreciated the additional information materials such as brochures and leaflets. A pan-European survey1 conducted by the independent market research company IPSOS in 2013 showed that the more information people have about fur and fur farming, the more they accept the use and production of fur. As result, the survey concluded that 69% of the people interviewed, who have visited a farm, accepted fur farming versus 35% of the people interviewed who accepted fur farming before visiting a farm.

Since 2010, open fur farm schemes have spread across European countries, and the concept has been largely successful. The ‘Open Farm’ idea builds on the qualified knowledge that people are willing to change their attitudes towards fur and fur farming when they have seen the life and conditions the animals live in, as opposed to forming attitudes stemming from perceptions based on prejudices, myths or factual errors.

The European Open Farm events are usually announced by advertising in various media at local and national levels.

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CHAPTER FOUR

FUR AND FASHION
FUR NOW CAMPAIGN, SHOWING THE MODERN FACE OF FUR

One of the main fashion initiatives of the European fur industry in 2014 was the launch of the FUR NOW advertising campaign. This was a joint initiative between Fur Europe, who paid for the campaign and the International Fur Federation (IFF), who administered the campaign based on its previous experience in the fashion promotion area. The campaign received great exposure, both online via social media (Facebook, Twitter and Instagram) and through print magazines, reaching out to more than 42 million people worldwide. The campaign aimed at communicating the modern “Face of Fur” predominately to young people.

It included a video on YouTube, pictures, gifs (moving pictures) and teaser films. Just the video on YouTube reached over 634,000 views from 177 countries. Well-renowned media such as Vogue (USA, Italy), Style.com, Fashion Magazine (Canada) and Visala (China) supported the campaign, adding over 6.5 million hits to the campaign on these platforms alone. Additionally, influential bloggers generated millions of views by disseminating the content via their blogs.

In addition to the great exposure the FUR NOW Campaign received through social media outlets, Fur Europe supported its members in advertising the campaign in European national or specialised print publications while IFF supported its members in advertising the campaign in several Asiatic nations. The campaign rolled out in well-known fashion magazines, such as Elle, Vogue and Harper’s Bazaar, in countries like Austria, Belgium, Estonia, France, Germany, Greece, Hungary, Iceland, Italy, Netherlands, Poland, Spain, Slovenia, Sweden, Switzerland and UK.
OTHER ACTIVITIES PROMOTING FUR IN FASHION

Fur Europe and its members supported in several ways the promotion of the use of fur not only in the garment industry but also in fashion and home designs, leveraging new and creative ideas and innovative techniques to work with the material.

On the catwalks, fur got a bright spotlight as 71% of the collections presented during the A/W 2014-2015 fashion weeks in Milan, Paris, London and New York had fur in their collection with 92% in Milan¹. In addition, several of Fur Europe’s national members such as, for example, Kopenhagen Fur, Saga Furs and Furlab, supported different designers with fur material and garments dressmaking during the fashion weeks in Amsterdam and London. Examples of designer support in 2014 include MMJP, D. Diem, F. Dalsjø, A-S. Madse, M. Tawadros, Giorgi Rostiashvili. Moreover, Kopenhagen Fur’s show “East-West Fusion” opened the Copenhagen Fashion Week.

The traditional annual fur fairs in Europe such as Mifur in Milan (Italy) and the International Fur Fair of Kastoria (Greece) experienced reasonably satisfying sales results despite some market instability; particularly relating to the challenges and impact of the Russian-Ukrainian crisis.

The European fur industry also promoted fur in fashion through the organization of several design competitions:

IFF REMIX 2014². The International Fur Federation (IFF), in collaboration with Vogue Italy organizes the international fashion & fur design competition called REMIX. Since its inception in 2003, REMIX has supported more than 500 talented professional from 22 countries with the purpose of revitalising creativity and interest in fur as a fashion trend. The Japanese student Shohei Ohashi received the REMIX Gold prize in 2014.

Kopenhagen Fur’s ’Imagine Talent’ Contest. Kopenhagen Studio’s stakeholder programme, established in 2014 with leading design universities in Europe and Asia, has facilitated the student design competition ‘Imagine Talents’, to be launched in 2015, with participants from the partner universities.

2014 British Fur Trade Association (BFTA) Design Competition³. The winner of the 2014 BFTA Design Competition was Amelia Friend, a student from Northumbria University who writes her own blog⁴ dedicated to fur and fashion. This competition is open to students or recent graduates following fashion or textiles courses at colleges or universities across the UK. The objective of this annual contest is to boost the innovative side of the students by continuously looking into the multiple creative design possibilities that fur offers.

Hungarian’s Breeders’ Association ‘Kreáció’ Design Competition. The Hungarian Fur Trade Association organised in 2014 the annual fashion design competition ‘Kreáció’. The event aims at encouraging furriers and designers to showcase their creativity in fur use and the innovative application of the right accessories and techniques. Melinda Farkas, who was awarded in the category of Young Designer, received a trip to the REMIX final competition in 2014.

¹ Fur in 2014 catwalks provided by Saga Furs: www.sagafurs.com/en/News/Fashion+weeks+roundup_+71+percent+of+the+collections+contained+fur
² IFF REMIX Competition: http://www.wearefur.com/fur-fashion/remix
³ BFTA Design Competition: http://www.britishfur.co.uk/index.php/fur-is-fashionable/bfta-design-competition/
⁴ Amelia Friend’s blog: www.journeyinfurfashion.weebly.com
⁵ Hungarian’s Breeders’ Association ‘Kreáció’ Design Competition: www.szormeszov.hu/kreacio
CHAPTER FIVE

SUSTAINABILITY IN FUR
FOLLOWING THE SUSTAINABLE DEVELOPMENT PATH

In 2014, Fur Europe set up its strategic framework, the roadmap towards the long-term competitive and sustainable economic, environmental and social development of the industry in Europe. Committed to ‘innovating heritage responsibly’, the industry seeks to build on this core competence and align the value chain around key shared priorities that help to innovate and remain competitive in a globalised world.

The fur sector in Europe acknowledges that different ideologies in regards to using animals co-exist side by side. It seeks to better understand stakeholder expectations on all three dimensions of sustainability, that is general environmental matters ranging from more farm-specific issues like waste management, to rural development and natural resources efficiency including biodiversity and the invasive alien species. This may also include innovative solutions for manure handling and 100% use of fur animal carcasses across Europe.

On the societal dimension, the understanding involves enhancing animal welfare and developing an overall traceability and certification scheme for fur products through new technologies and responsible manufacturing and improved supply chain management. Additionally, the softer societal issues such as education and skill transfer, jobs and employment, reporting and ethics are also taken into account.

Fur Europe and its members are determined to constantly look for new sustainable solutions and identify opportunities, both short and long-term through intra-industry collaboration and/or cooperation with other stakeholders.

Amongst the solutions are the following initiatives:

Creation of a Fur-Luxury Industrial Round table.

As part of Fur Europe’s objectives to promote fur in fashion in a responsible and collaborative way, Fur Europe accepted to join a ‘Fur-Luxury Industry Round table’ in 2014, facilitated by Business for Social Responsibility (BSR), a global non-profit business network dedicated to sustainability. With the participation of known brands such as Burberry, Yves Saint Laurent, Alexander McQueen, Kering and LVMH, this round-table offers a forum for dialogue and exchange of information focused on four topics of common interest amongst the participants. Those four areas of relevance at global include third-party certification of farms, traceability of the fur supply chain, engagement of experts on welfare standards, and broader sustainability issues applicable to the sector. Other fashion brands are invited to join this initiative, which will conclude with a report in the fall of 2015.

Kopenhagen Fur and Design School Kolding Partnership on fur and sustainability.¹

The Auction House, Kopenhagen Fur, and the Danish Design School Kolding entered a partnership agreement in September 2014 on sustainable fur. This partnership aims at providing new knowledge about fur and design within a sustainability context, based on research and development. The objective of this collaboration is to explore the full potential of fur and the way to implement a whole process with a life cycle approach (production, product development, design, and end-user) and share publicly the end results and education material. Fur Europe will contribute to this collaboration by providing valuable information from Europe. One of the partnership’s initiatives is a fourteen months research project done by four researchers affiliated with Design School Kolding, who seek to identify the connection between fur and sustainability. The purpose of this project is to identify who chooses fur and why, and better understand the emotions that people attach to this material.

Contribution to rural development

With more than 5 000 fur farms located in different rural areas across Europe, the European fur sector supports the rural development in different European countries, offering employment and an economic solution to regions with limited social and economic alternatives. For instance, as recognition to that contribution to rural development, Fur Europe was granted a seat in the EU Commission’s Civil Society Working group on Rural Development under DG Agriculture as well as a seat in the Rural Assembly’s steering group on rural development.

Sustainability reporting initiatives.

Fur Europe and the International Fur Dressers’ and Dyers’ Association (IFDDA) aim to implement a sustainability reporting process for their respective associations in the near future. Meanwhile, the auction house Saga Furs Oyj released its Corporate Social Responsibility Report (CSR) 2014, being a front-runner on CSR reporting in the European fur industry. The report was based on the Global Reporting initiative’s (GRI) latest F4 framework.


UN Global Compact endorsement.
The two auction houses in Europe, Saga Furs1 and Kopenhagen Fur2, endorse the United Nation Global Compact ten principles related to the environment, anti-corruption, human rights and labour standards, to be mainstreamed in their business activities.

Using 100% of the animal.
Striving towards a sustainable life cycle approach towards fur farming, the entire mink is used in Denmark. After pelting, the fat of the animal is used in the production of biodiesel, while the carcasses is processed into bone meal to be used for heating or partly as a fertiliser component. The ash generated by the heating processes becomes a cement, concrete and asphalt component.

Helping vulnerable societal groups.
Different members of the Fur Europe Network of Associations participated or led social activities in 2014 to assist people escaping severe poverty in different parts of the World. For instance, Saga Furs participated in the creation of the Business Council in Afghanistan to promote the national trade with the engaging countries, setting up Western business standards. Saga Furs has auctioned Karakul lamb pelts produced by Afghan nomads for 20 years. Kopenhagen Fur also supports the karakul skin trade development in that country, being involved in the development of karakul breeding, together with Danida.

Developing traceability and certification.
Acknowledging the growing societal demand for high quality animal welfare, Fur Europe has commissioned a certification group. The remit of this group is to develop principles and agree on a framework for traceability and certification building on WelFur and taking into consideration the Origin Assured (OA) label. Long term, the objective is to develop a more coherent system that covers the entire fur value chain.

1 Saga Furs’ UN Global Compact endorsement: www.unglobalcompact.org/system/attachments/8113/original/SAGA_FURS_English.pdf/1287569545
2 Kopenhagen Fur’s UN Global Compact endorsement: https://www.unglobalcompact.org/COPs/active/11288
3 More details available in ‘Kopenhagen Fur, a sustainable choice’ brochure, October 2014
SUSTAINABLE CASE:
‘GREEN DRESSING’ PROJECT, SEEKING NATURAL DRESSING ALTERNATIVES

The so-called ‘Green Dressing’ project, done in cooperation with a German dressing company, aims at investigating the possibility of replacing the chemicals used in processes for dressing fur. Before a pelt can be cut and sewn for use in fur products, it must go through a dressing process that may also include bleaching or dyeing, if so desired.

Inspired by the ancient dressing processes, which used organic compounds, several of this project’s researchers are also looking at organic, plant-based alternatives that could replace chemicals. Their main focus is on organic by-products such as fruits, seeds, leaves and other materials from different production sectors.

Various vegetarian tanning agents have been tested with reasonable result thus far, but further trials are needed. For the dyeing process, the project is still in process of research and development to test various vegetable-based dyes.

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Following Saga Furs’ commitment to sustainable development and corporate social responsibility, the Finnish auction house’s Saga Furs Design Centre showed progress in 2014 in its ongoing research project focused on developing environmentally friendly techniques for dressing furs.

The so-called ‘Green Dressing’ project, done in cooperation with a German dressing company, aims at investigating the possibility of replacing the chemicals used in processes for dressing fur. Before a pelt can be cut and sewn for use in fur products, it must go through a dressing process that may also include bleaching or dyeing, if so desired.

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SUSTAINABLE CASE: DANISH FUR BREEDERS OPTIMISE PROTEIN CONTENT IN MINK FEED

The Danish Fur Breeders’ Association has conducted multiple research projects focusing on optimising the protein content in mink feed during the last years.

These projects have a sustainability scope as the ambition is to reduce the amount of protein in the mink feed by enhancing the composition of the mink feed. Less protein in the mink feed results, from the environmental perspective, in less nitrogen in the animal manure, a reduction on the agricultural land used for spreading of manure, and a lowering of the emissions of ammonia. From the financial perspective, it decreases the feed costs.

Protein plays an important role as building blocks during the mink’s growth and development and, ultimately, in the skin quality. The research project to reduce the amount of protein in mink feed seeks a balanced approach. On one hand, it secures a high utilisation of the protein and, at the same time, ensures an optimal animals’ grow, producing consequently a high skin quality and providing good animal health. Since the project began, a number of experiments have been undertaken, and the Danish fur breeders’ have succeeded with a 15-25% reduction of protein consumption in the experimental trails.

The practical work to find the optimal feed has largely taken place at the Danish Fur Breeders’ Association’s research farm in Denmark. The results of the research have been examined on basis of the animals’ health and welfare, growth, skin quality and the environmental impact. In order to make sure that new feed compositions also secure the minks’ need in terms of nutrient content, blood and organ examinations have additionally taken place in collaboration with university partners.

“The Danish mink breeders have experienced in 2014 the benefits of protein optimisation, resulting in lowered feed consumption per breeding female, optimal skin quality, optimal health, increased skin size, and less environmental impact”, says Peter Foged Larsen, Head of Research and Consulting at Kopenhagen Fur.
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