

The Socio-Economic Impact of European Fur Farming

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Where does fur come from?

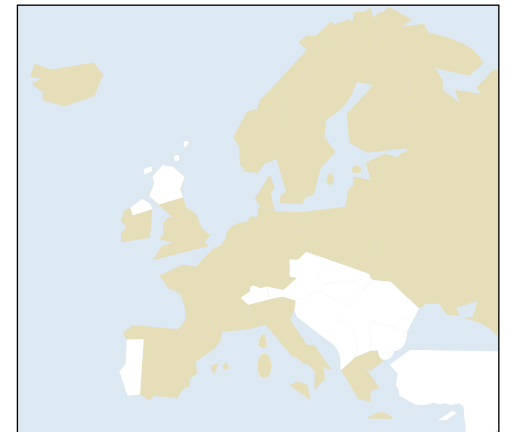
Fur is obtained from both farmed and wild species of fur bearing animals. 85% of world pelt production originates from farmed species that have been domesticated.

The wild species that enter the fur trade are normally taken for pest/predator control or wildlife management reasons.

Fur farming started at the end of the 19th century in America and spread to Europe in the beginning of the 20th. Today, it is an important branch of animal husbandry in many countries. The animals have adapted to their farm environment and the farming systems have evolved to meet the animals' needs. These systems provide high standards of animal welfare, housing, husbandry methods and disease control.

The main farmed species are mink, fox, fitch (polecat), finn racoon, chinchilla and nutria, the first two being the most important ones. Except for Portugal and Luxembourg there are fur animal farms in all EU member states.

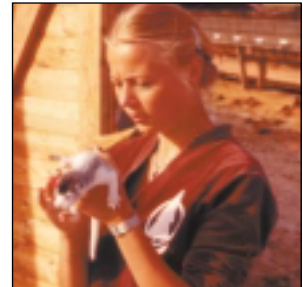

European
Fur Farming





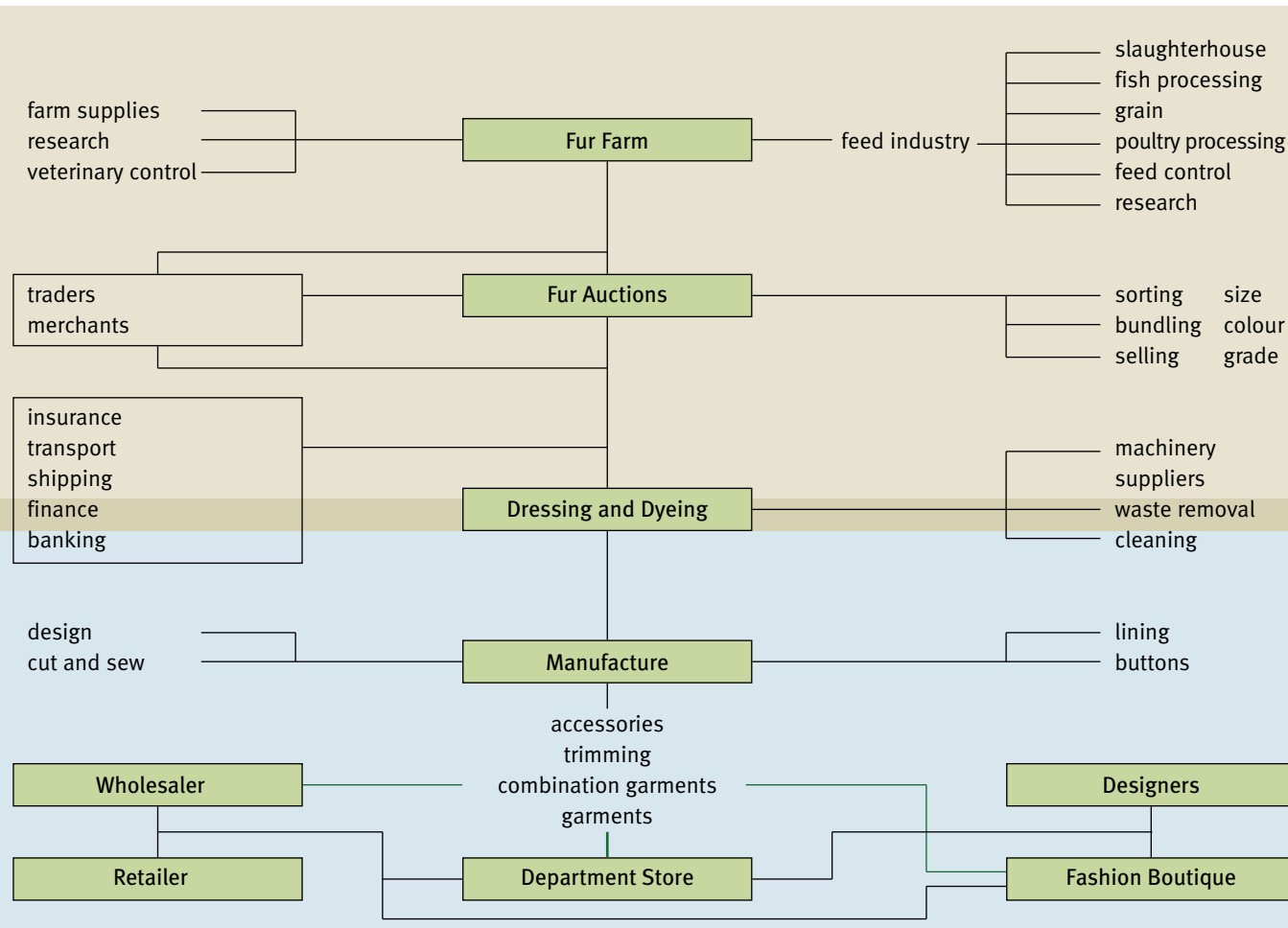
EU fur sector in figures (1999)

Number of fur farms in EU Member States	6,000
Number of fur farms in EU-applicant countries	290
Value of EU farmed fur (skin auction price value)	625 million Euro
Number of EU-based fur sector enterprises (retailers, dressers, auction houses, brokers, etc.)	29,125
Number of full time employees in fur sector	164,000
Number of part time employees in fur sector	174,000
Value of fur sales in the EU 1998/1999	3,385 million Euro
Value of fur sales estimated in the EU 1999/2000	4,789 million Euro
Amount of animal by-products fed yearly to fur animals in the EU	
poultry processing	220,000 tonnes
fish and fish processing	365,000 tonnes
slaughterhouse	62,000 tonnes



Early handling of mink kits

From farm to consumer



From farm to consumer – a truly international trade

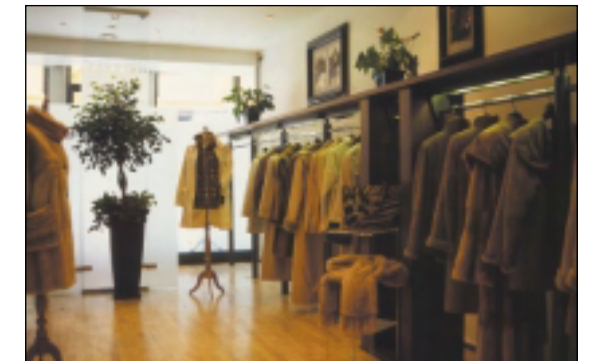
The fur sector is complex and international with the fur pelt produced by the farmer normally passing through several countries and undergoing various processes before it reaches the final consumer. Though fur is largely produced in countries with cold climates, the end products are worn all over the world.

Most of the world's farmed fur is produced by European farmers. The EU accounts for 67 % of global mink production and 70 % of fox production. Denmark is the world's largest producer and exporter of mink skins – the staple raw material of the fur industry worldwide while Finland is the world's largest producer of fox pelts – another industry staple.

To produce a pelt, the farmer cannot work alone. The farmer's network includes links with, for example, feed kitchens, transport companies, specialised auction houses, veterinarians, seasonal workers, etc. This network becomes truly international when the pelts are sold as raw dried skins at the auction house.

The world's largest fur auction houses are in Copenhagen, Helsinki, Oslo, New York, Saint Petersburg, Seattle and Toronto. The bulk of the pelts are purchased by buyers from all over the world. From the auction house, the pelt moves to be dressed and dyed. In the EU, the main centres for these processes are in Italy, France and Germany. Subsequent to being dressed and dyed the pelts are ready to be manufactured into a fur garment or incorporated into a textile garment or used to make accessories.

Manufacture of full fur garments, combination garments and garments with trim takes place worldwide. Today, fur garments and accessories reach the final consumer via a wide range of retail outlets: specialised fur shops, department stores and fashion boutiques.



Fur fashion boutique



1	2
3	4

- 1 Fur farm
- 2 Fur auction
- 3 Dressing/Dyeing
- 4 Working a fur technique

The fur sector in Europe

In the EU, fur farming is concentrated in Denmark, Finland and the Netherlands. The most important Member States as far as fur garment manufacture is concerned are Greece, Italy, Germany and Spain.

Fur farming was worth 332 million Euro to Danish farmers in 1998 and fur is that country's fourth largest agricultural export product after bacon, cheese and canned meat. In Finland the annual value of fur production at 250 million Euro is greater than that of beef. Fur farming is also important in some of the Central and Eastern European countries that have applied for EU membership – Latvia, Poland, Lithuania and Estonia. In Poland the production figure for mink skins is estimated to be over 400.000 in the year 2000.

Revenue from fur farming allows many farmers to supplement income from other agricultural activities. In this, fur farming contributes to maintaining viable rural communities. Fur farming also allows farming to remain economically viable in areas where climatic conditions limit the options open to farmers in terms of what they can produce and market profitably – in Finland an estimated 50% of fur farmers rely exclusively on fur farming for their incomes. Even where climatic limitations are not an issue, other factors can limit the alternative possibilities open to farmers e.g. quotas for products such as beef and milk, environmental and planning restrictions, etc. It is important to note that unlike many other farm animal husbandries, fur farming exists without the need for EU subsidies.

Fur farming provides an efficient use for animal by-products that are purchased from fish and poultry processors. Fur

animals in the EU consume on an annual basis 220,000 tonnes of by-products from poultry processing, 62,000 tonnes of slaughterhouse by-products and 365,000 tonnes of fish and fish processing by-products. The consumption by fur animals of these by-products not intended for human use helps to keep down the actual cost of human food production.

On-going research is an important aspect of European fur farming and a considerable amount of research has been done with the findings incorporated into law and/or farming practice to benefit the animals in areas such as housing, disease prevention, nutrition, husbandry and breeding. Research is paid for by farmers and national governments.

When it comes to the manufacture of fur garments, Greece is the most important EU Member State. The fur sector dominates the economies of two areas (Kastoria and Siatista) where opportunities outside the fur sector are very limited.

However, the EU is not just a producer of raw pelts and a manufacturer of fur garments, it is also a leading consumer of finished fur garments and fur is very much a part of the EU's fashion industry. Fur sales in the EU have been increasing sharply since the mid-1990s thanks in large measure to product development – e.g. lighter furs, sheared furs, knitted furs, and to a dramatic increase in demand for so-called "combination" garments (i.e. fur combined with other materials).

Sales of full fur and fur trim in the EU in the 1998/99 season amounted to an estimated 3,385 million Euro (US \$3,936 million). Estimated sales for the 1999/2000 season are 4,789 million Euro (US\$ 5,568 million).



1

3

2

- 1 Fur farming research
- 2 Distributing straw on a fur farm
- 3 Veterinary care on a fur farm

Research yields results that benefit animals

A considerable amount of research has been undertaken into different aspects of fur farming. In 1999, government and fur sector research spending on fur farming in four of the main producing countries – Denmark, Finland, Norway and The Netherlands – exceeded Euro 1.600.000. Research results have in many instances been incorporated into law and/or farm practices to benefit farmed fur animals in areas such as:

- housing (e.g. the introduction of nest boxes for mink and observation platforms for foxes)
- disease prevention (e.g. Aleutian disease)
- nutrition (e.g. composition, hygiene and control of feed)
- husbandry (e.g. the promotion of early handling of kits)
- breeding and selection (e.g. selection for more confident animals).

Fur farmers are very conscious of the importance of continuing with this scientific research and this for two key reasons. First, fur farmers wish to ensure that farming systems continue to have a high standard of animal welfare. Second, they want to ensure that any new rules or regulations governing the sector will have a sound scientific basis. To these ends, European fur farmers have been instrumental in ensuring the establishment of the Fur Animal Welfare Research Committee. This independent group, set up in early 1999, includes scientists from the UK, Denmark, Finland, Norway and The Netherlands. It reports regularly to the Council of Europe's Standing Committee that deals with farm animal welfare and the Fur Animals Recommendation.

The health and welfare of their animals will continue to be a preoccupation of fur farmers. Keen that production systems should evolve in line with increasing scientific and practical

knowledge of the animals' needs, European fur farmers will continue to support scientific research and to embrace its practical results. Furthermore, farmers will continue working in line with legislation at national and European level.

The regulation of fur farming in the EU

Fur farming is well regulated at both national and EU level.

EU Directive 98/58 on the welfare of farm animals covers fur animals. Directive 93/119 deals with the killing of farmed animals and specifies the permitted methods for individual species. The EU Treaty protects the free trade in live animals and skins. Additionally, fur farming is covered by the common market organisation established by Regulation 827/68.

The Council of Europe adopted a Recommendation on the keeping of fur animals in 1990 and revised it in 1999. The text was developed with input from EU Member States, veterinarians, animal welfare groups and farmers' organisations. The Recommendation serves as the base for legislation on fur farming at national level and contains provisions on housing, stockmanship and inspection, management, research, killing methods and equipment. It is designed to ensure the health and welfare of the fur farmed species it covers (mink, polecat/ferret/fitch, red fox, arctic fox, coypu/nutria, chinchilla and finn racoon).

EU environmental laws that apply to agricultural activities also cover fur farming. In the main fur farming countries the farms are inspected regularly by national authorities and such inspections deal with animal welfare and environment protection.

Consumer support for fur



In the last 5 years fur has re-established its position in the fashion world with in excess of 200 leading international fashion designers working with fur in their collections. Fur is not confined to exclusive or expensive clothing or to full fur garments, it is also used for trim and accessories. This popularity of fur among designers and consumers has been greatly helped by product development e.g. the production of lighter furs, sheared furs, knitted furs. There has also been a dramatic increase in so-called “combination” garments in recent years (i.e. fur combined with other materials (e.g. coats lined with fur, wool jackets worked with fur and textile garments with fur trim).

Consumer support for fur and fur farming has also been revealed in independent surveys and polls. In the Netherlands a recent consumer survey revealed that 71% of the population agreed with the statement “it makes in principle no difference for what reason you keep animals as long as you take care of their welfare”. The latest poll (results released in November 2000) shows that 67% of the Dutch population are of the opinion that people should have a free choice to wear fur.

In the UK a February 2000 poll revealed that 81% of people believe that it is acceptable to farm animals for any purpose, provided there is good animal welfare. 62% of people interviewed consider that it is environmentally sound to use natural fibres such as wool, silk, fur and leather.

A public opinion poll undertaken in Finland in 1998 revealed that 73% of people had a positive opinion about fur as garments and accessories while 69% of people had a positive attitude towards fur farming. A January 2001 poll showed that 70% of Finns see fur farming in conformity with western moral values.

Demand for fur garments exists in all Member States and sales of fur are highest in Italy, Spain, Germany, France and Austria.

“it makes in principle no difference for what reason you keep animals as long as you take care of their welfare”



First established in 1968, the European Fur Breeders' Association (EFBA) is the umbrella organisation of 16 national fur breeders associations in Europe. It represents 8,000 fur farmers throughout Europe.

In close co-operation with its member organisations, EFBA works to promote a realistic image of the European fur farming sector.



First established in 1949, the International Fur Trade Federation (IFTF) is an independent federation of 34 national fur trade associations and organisations representing 28 countries.

Through its work and the activities of its Members, IFTF seeks to promote a factual image of today's fur trade.