China's Fur Trade
and its Position in the Global Fur Industry

Update Executive Summary 2020/2021
June 2022

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ACT Asia

Education for a more compassionate world
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We work to drive long term, sustainable change for animals, people and the planet through a range of tailored education programmes across Asia. Our UN awarded education programmes work across three sectors of society: children, consumers and professionals.

We would like to thank the following organisations for the photographs used in this report:
ACTAsia
Bogna Wiltowska/Otwarte Klatki
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Cover image: Photo by Jo-Anne McArthur | WeAnimals Media
Published: June 2022
Researchers: Yu-Jieh Lin (2020) and Dr. Yuan-Chih Lung (2021)
Editors: Dawn Kotuwage and Cecilia Fischer

Executive Summary

In early 2020, the COVID-19 outbreak severely affected human health, testing our healthcare systems, disrupted the global economy, and halted travel and transport worldwide. Outbreaks occurred in mink farms in 12 countries, leading to culling or breeding bans in many countries. There has been significant momentum for international brands, designers and countries to go fur free.

In early 2020 the COVID-19 outbreak disrupted general travel and transportation through government restrictions, making it hard for the world to maintain usual business operations (Saga Furs, 2020a). Initially, the fur industry was not affected. But later in 2020, fur farms in Europe, the US and Canada felt the effects of restrictions and started to report outbreaks. Towards the end of 2020, Denmark culled its entire 17M mink population (Murray, 2020). Soon after, Kopenhagen Fur announced the shutdown of its business by 2023, the Netherlands brought forward a fur ban three years earlier than scheduled; France, Italy, Estonia, and Ireland banned fur farming, Hungary banned fur animal breeding, and Israel banned fur sales. The momentum has been gathering to permanently ban this globa industry. Retailers, brands, and designers are following suit: In 2021 Kering, Adidas, ELLE magazine all chose to become fur free, and in China, fur free brands are gaining popularity.

WHO and China's joint study on the origins of COVID-19 in China confirmed that the introduction through an intermediary host as one pathway of infectious disease emergence is *'likely to very likely'*.

China strongly believes that the country will most likely be able to avoid concerns related to COVID-19 over fur farming practices. Based on this perception, monitoring and surveillance has not been put into place on fur farms in China. As a result of the Danish mink cull and the announced closure of the Kopenhagen Fur auction house by 2023, there is bound to be a sharp reduction in the supply of raw material for fur imported into China. In the short term, there will be a severe shortage of imported mink fur, which will certainly affect the price trend in China and globally; however, in the long term, China will most certainly achieve a substantial domestic fur production level and domestic market. So far, the interest of Chinese buyers remains strong at international fur trade auctions.

In May 2020, the Ministry of Agriculture and Rural Development in China, issued an update to the *National Catalogue of Livestock and Poultry Genetic Resources,* which included 16 additional wild animals, including deer, frogs and ostriches among others.

Four species listed as not farmed for meat: mink, blue foxes (Arctic Fox), silver foxes (melanistic form of red fox) and raccoon dogs. This means that the fur farmed animals were removed from the Wildlife Protection Law and placed under the Animal Husbandry Law as livestock. This is a worrying prospect for other wild species that may also be considered livestock in the future. If this list continues to grow so too does the risk to human health as 1) over 70% of new emerging infectious diseases are of a zoonotic origin (Can et al., 2019), and 2) wildlife farms are known as potential reservoirs for zoonotic diseases (Li et al., 2021).

In 2016 China's fur industry was worth an estimated RMB 389B (US$ 55.98B)[1] (Williams, 2021), which is considerable, even though this translates only to about 0.5% of China's national Gross Domestic Product (National Bureau of Statistics, 2018).

With such large commercial profits at stake, the challenge to ban fur farming in China is considerable. As a result of the changes in the Danish fur industry, mink pelt prices in China have increased by as much as 30% within one year, an unprecedented situation in over a decade (NBD, 2020). The fur industry in China assesses that in the short term, there will be a severe shortage of "high-quality" mink, which will certainly affect the price trend, with prices of "high-quality" mink pelts from European countries increasing. That is why, in the long term, China is less likely to be dependent on imports and achieve a substantial domestic production by targeting the domestic consumers. China's entire wildlife industry is worth an estimated RMB 520B (US$ 74.83B)[2] with fur worth 75% of that total. With the cost of the pandemic adding up to a loss of up to US$ 5.6T in GDP worldwide from COVID-19 in 2020 (Dobson et al., 2020), it would seem, however, that the loss of the fur industry to China (and globally) would be outweighed by the reduction in risk to public, animal and environmental health.

China's fur industry has not been restricted by the COVID-19 pandemic, with greater reliance on the domestic market and fur production set to take a major share.

As the global production of mink pelts has continued to decrease, the industry has demonstrated its capacity to quickly recover from the oversupply situation by using up stock and stores of pelts. However, China relies increasingly on its domestic market to sustain demand (mpcyxh.com, 2019), and will continue to do so, with maximum use of marketing and sales channels to promote affordable fur-trimmed and lined parka coats, with a keen focus on accessories. With its competitors in Denmark and the Netherlands losing business and profits in fur farming or local sales, China might take the chance to acquire a bigger market share in the global trade. It might even support and sustain the global fur industry, as strong international support and collaboration is encouraged by current legislation and governments. It is estimated China and Poland

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will become the main mink fur producers, together accounting for almost half of global production.

A comparison of the six major fur producing countries in Europe, the USA and Canada, and China show that mink and fox fur production is declining. In 2021, raccoon dog production fell to its lowest point since 2013 in China. But China remains the largest pelt producer and importer of fur pelts worldwide (Murray, 2020; Saga Furs, 2020b).

The ACTAsia's 2019 report China's Fur Trade and its Position in Global Fur Industry examined this claim in detail, assessing and interpreting data on production from 2011 to 2018. The overall data for China shows that 2014 was the boom year with a total of 87M pelts produced, which was followed by a decline in production of all species (mink, fox and raccoon dog), resulting in a total annual pelt output of 39M in 2019, and only 27M in 2021. However, this annual total production remains the highest worldwide.

[1] The currency exchange rate is from 01 Jan 2017.
[2] The currency exchange rate is from 01 Jan 2017.

The overall scale and profit of the fur industry in China is on a decreasing trend.

From 2017-2019, the number of fur-related enterprises written off in China has exceeded 4,000 for three consecutive years, and, to date, over 52% of fur-related enterprises in China have been written off or revoked (Chan, 2021). The sales revenue of the fur industry as a proportion of the leather industry decreased in 2019 and 2020. Although fur production in China is declining, mink fur production is still well above the industry's original estimates. On balance, the proportion of mink produced in China as compared to global production will increase and should remain at a similar level in recent years. Hong-Kong, China is the third largest exporter of fur clothing in the world. Hong-Kong's fur garment exports plummeted by 58% in 2020 due to the impact of the COVID-19 pandemic, but then recovered gradually in 2021. From January to September 2021, Hong-Kong furriers saw a significant increase in sales to all export markets.

The fur industry has created a marketing strategy to promote fur as a sustainable option, not only environmentally friendly but also with high animal welfare standards, and deliberately mislabelled and branded fur as ideal "slow fashion".

The fur industry's ties with higher education institutions in both mainland China and Hong-Kong, China, attracting young designers to design with fur, offering knowledge, guidance, raw materials, support for events, and in-person training in fur design skills in Northern Europe. Meanwhile, Saga Furs, Kopenhagen Fur and Haining China Leather City supported future fashion designers so they can use and design with fur, keeping the trends of furand trim in the fashion pipeline through the cooperation with universities in China. The fur industry provides knowledge guidance, raw materials, support for events and offers of in-person training in fur design skills in return for their next generation of designers' audience, to push fur as a mainstream material. Projects with higher education institutions in China include: Tsinghua University in Beijing (in partnership with Kopenhagen Fur Auctions), Beijing Institute of Fashion (in partnership with Haining China Leather City and with support from Saga Furs), and institutions in Hong-Kong, China. In order to respond to the need for informed and sustainable fashion for future designers, ACTAsia launched its online course in 2020, available in Chinese and English, with support from John Lau, Dean of Academic Strategy at the prestigious London College of Fashion (LCF). With the fur industry selling greenwashing as a sustainable option and promoting these values to the next generation of designers, there is a real urgency to call for an ethical dimension within fashion, where sustainability can be evaluated and values developed with the close interlinkages between animals, people and the environment recognised and considered.

[3] Furmark® is the global certification and traceability system for sustainable natural fur that promises to ensure the highest animal welfare and environmental standards. However, the claims underpinning Furmark® have been scrutinised, and it seems the certification scheme almost totally fails when it is assessed against a set of 12 criteria that any credible scheme would be expected to meet and thus appears to be little more than a public relations exercise (Pickett, 2021).

Besides the established Welfur and GOOD4FUR certification schemes as a means of greenwashing, Furmark®[3] was officially launched in China in September 2021. Seven fur producers have been certified by Furmark® in China.

Furmark® has set up promotional bases in Xinji, Hebei Province and Yuyao, Zhejiang Province, two major production and trading towns, and in the future will set up promotional bases in Jiangsu Province, Liaoning Province and other cities and regions with high quality fur chains. Even though this greenwashing strategy could dilute the sustainability discussion in China, with its strong focus on university students and Generation Z, consumers do not consider fur to be an essential material, and fur has a high potential to be replaced if technologies and materials are available that are more in line with price perspectives, fashion styles, and values, announcing a changing trend in purchasing behaviour.

ACTAsia's Chongfu Fur Market Field Research in 2021 confirmed ACTAsia's long-standing research and monitoring of the fur industry and consumer market in China. Despite the downward trend in production, exports and overall profitability of fur pelts and fur garments, the fur industry in China is offering a wider range of fur products through online marketing and live streaming, as well as a more diverse range of fur products tailored to the needs of the different markets in China.

Field research found that the overall size and profitability of the fur industry has been decreasing since 2019, as has the fur industry's sales revenue as a percentage of the leather industry. However, the fur garment industry has developed a more diverse and refined range of styles in line with the changing and new design needs of the market, with the importance placed on practicality in both the northern and southern markets. Fur retailers have also become very familiar with the online business and live streaming, and the WeChat "circle of friends" operated by merchants is updated very frequently. The sales generated by live streaming are now indispensable in the fur sales market. In addition, the fine hair that is loosened from pelts when preparing them for sale or design are collected and used to be turned into fur wool. During the visit to Chongfu Fur Market, pelts were seen being blasted with industrial hairdryers so that the hairs could be collected and used for "fur wool".

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Field visits to fur markets found that fur garments sold in shops do not always state accurate information on the labels including materials the garment is made from, some information was unclear, and some had been altered.

Firstly, most businesses are highly defensive and are vague when it comes to questions about the type of fur, where it is farmed, etc. There is also a large amount of domestic fur that is passed off as imported fur. Some shops provide auction system labels (with numbers) on their garments to prove the origin of their fur clothing. The label information on their products is randomly filled in, with traces of handwriting, suggesting that accurate labelling that can be trusted is not part of the shopping experience when buying fur. This is a problem with most shops in the Chongfu Fur Market, but ACTAsia expects this to be the case also in other shops across the country. There were no Furmark® labels found. A quarter of consumers cannot identify fur, which compounds the difficulty consumers face when trying to make compassionate choices.

ACTAsia's consumer survey in 2020 shows that the COVID-19 pandemic has influenced public opinion on the use of wildlife, turning many against it.

Even though this is a good start, this awareness must be further guided by a compassionate approach, facts and scientific proof, so the Chinese public can understand the necessity to ban fur, even when they are faced with cheaper and therefore more tempting choices of fur apparel. If the marketing strategies mentioned above, e.g. for fur-trim and lined parka coats, are successful, consumers might very well choose cheap fashion items over their moral values. Moreover, fur products are diversifying. In terms of craftsmanship, many new techniques are being developed in response to market demand. Findings are promising, with 71% of respondents expecting fur free to be the next trend.

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The ten key findings of the 2020 ACTAsia consumer survey are:

(1) Mink is no longer the indicator species for fur popularity, with fox, rabbit and raccoon dog coming in just as popular.

(2) Fur-trimmed coats replaced full-fur coats as the most popular item in 2020.

(3) Full-fur coats are more popular with older rather than younger consumers.

(4) Warmth and functionality are key influencers for fur-consumers, raising concerns around the falling prices of fur and direct link to popularity.

(5) 59% of fur-consumers thought fur production causes pain to animals, while 45% thought it causes environmental damage.

(6) Only 17% of both fur-consumers and non-fur consumers thought fur production posed a risk to human health.

(7) 84% of fur consumers said they would not buy fur again after learning about production methods. However, the quality and texture of real fur is also considered impossible to match. According to ACTAsia's survey, it seems that consumers who already have their heart set on wearing fur for the reasons above, are willing to purchase it, even when it might be expensive or when they know fur farming will cause cruelty to animals.

(8) Values of consumers are changing, with a major finding that 71% of consumers said they would rather buy fashion items from fur free brands and expect it to be the next trend.

(9) 25% of consumers were not able to identify fur, confusing it with leather.

(10) 70% of participants thought there should be a complete ban on the commercial trade in wildlife, while 85% felt there should be a complete closure of all wildlife markets, and 87% affirmed a complete ban on eating wildlife (ACTAsia, 2020).

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Methodology

This report has been written for governing bodies and law-makers with influence over the fur farming industry in China, both local and central; animal welfare organisations and the Fur Free movement; the international fur industry, including the architects of self-certification schemes such as WelFur, GOOD4FUR and Furmark®; stakeholders in the fashion and retail industries who may include or consider including fur in their collections; researchers; and international media for purposes of public outreach education, mainly targeting consumers in China.

It has been written to update readers on the evolving status of China's part in the international fur industry, and to alert all involved to the problems within the trade itself. It also comes with a caution to all interested parties that the fur industry in China should not be ignored.

The original report published in 2019 was researched and prepared over the course of two years, from 2016 to 2018, by a Chinese researcher in collaboration with ACTAsia staff. This report is based on evidence gathered from a range of sources compiled over 2020 and 2021 to update the original report and inform the reader of the impact of COVID-19 and the recent developments in China.

Data within this update includes a comparison of consumer surveys conducted over four years by ACTAsia. Secondary data includes desk research by ACTAsia and other international NGOs, including articles and reports published by international media and data published by sources connected with the fur industry. Empirical data includes observations and experiences provided by investigators visiting fur markets in China and personnel connected with the fur industry in China.

The main sources of statistical data used in this report are published by the Chinese Leather Industry Association (CLIA), International Fur Federation (IFF), International programmes between Europe and China, which include the export of stud animals, joint fur-fashion student courses, reliance on China's buying-power, and the introduction of Fur-mark® in China as an umbrella certification scheme for GOOD4FUR. These are now important collaborations for the international industry to survive. It should be noted that there are differences in data between sources globally and depending on who is producing the data. The CLIA data is the chosen source within this update report, with some input from other sources to verify.

There are many challenges and constraints in sourcing reliable data to represent the global fur industry, but in particular that of China, where published resources are not widely accessible. There are often inconsistencies in data between nations and figures reported. Discrepancies regarding China's yield of fur

[4] For example, the FIFUR statistics used show 1.8 million pelts produced in the USA in 2020. However, the Fur Commission site (https://furcommission.com/fur-industry-statistics/) showed the USA produced 1.4 million pelts that year.

pelts occur in public data because it is only since 2017 that the international fur industry has considered China's own data, published through the CLIA. Although data continues to suffer from both national and international inconsistencies and contradictions[4], it has become generally more accurate since 2017. Other limitations in research include difficulties collecting data on rabbits, where the meat and fur industries overlap, and it is not possible to state the primary purpose of breeding. Therefore, this report does not include data on rex rabbits used for fur. Data on the full list of species used for fur is limited. This report takes only the most commonly farmed species for fur only, into account: mink, fox and raccoon dog.

Data illustrating trends in fur production often take mink as the indicator species and may not be an accurate representation because fashions and preferences around mink have changed.

False labelling of fur trim produced in China for export may also corrupt data. This may occur when real animal fur is labelled as 'faux fur', and when dog and cat fur are labelled as 'rabbit' or 'raccoon dog'. This is especially common when fur is exported to Europe, Australia and the US, where the Fur Free movement is strongest, and the use of dog and cat pelts is illegal.

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Recommendations

We recommend the following actions:

- ACTAsia believes that a country-wide biomonitoring program should be established as soon as possible to prevent the fur production sector from remaining a reservoir for future spillover of SARS-CoV-2 to humans. We believe that early and ongoing monitoring and surveillance of mink farms and humans living near the farms should be carried out to detect possible spillovers and the presence of new COVID-19 virus variants early (Badiola et al., 2022). Constant epizootiology monitoring is a crucial step in preventing new outbreaks of zoonotic diseases (Rabalski et al., 2021). The safest approach would be to stop high risk activities, including the import and export of live animals for fur, and, as a precautionary measure, to stop the import and export of pelts due to the risk of disease transmission. A ban on fur farming should be considered to protect public health. To better understand this issue of SARS-CoV-2 transmission from processed pelts, the origin of the virus should be further monitored, as this is one way to understand the transmission pathways from animals to humans, possibly via fur, even when processed (Kravitz et al., 2021). With China's huge influence on the world and the leading role it can play in changing the outlook for global human health, the pandemic provides an opportunity to put the dangerous and devastating impact of fur farming into the history books.

- ACTAsia calls for all wild species to be removed from the *National Catalogue of Livestock and Poultry Genetic Resources* under the Animal Husbandry Law. The future of the fur farming industry and market, including mink, is uncertain and the CLIA advises farmers not to invest blindly in breeding (CLIA, 2022, 2021, 2020). By recognising the dangers of fur farming to the public health, animal cruelty and damage to the environment, the central and local governments and industry organisations in China should consciously reduce the scale of farming until the industry is retired. ACTAsia therefore encourages a ban on wildlife farmed for commercial purposes. Closing these loops for disease emergence and creating long-term change would show the world that China is indeed a leader for biodiversity protection and public safety.

- Although the fur market has heavily begun greenwashing and expanded into new areas through new marketing techniques such as live streaming, fur is not an irreplaceable material in the minds of many Chinese consumers, with 55% prefer next generation animal-free materials to animal leather (MII, 2021). Fur free brands are already popular in China, and this more ethical option is also popular with younger consumers. Furmark® should be identified as a greenwashing strategy and not be taken seriously by the fashion industry or consumers, Furmark® is ineffective in protecting animal welfare and lacks credible assessment of environmental impact. Chinese consumers and the industry should be fully aware of this and should reject it and fur products. Consumers in China should be made aware of the impact of fur on animals, people and the environment and a key lesson in identifying real fur should be high on the list of actions.

- To steer the future of the fashion industry in China towards a sustainable one, the next generation material industry should join forces to create links with universities and set courses, design challenges and exhibitions to shape the future of the next generation of designers. Higher Education Institutions should retire their partnerships with the fur industry, and lead students into a sustainable future adhering to the SDGs and demonstrating a fur free future. Online course, available in English and Chinese, is a model example for the promotion of long-term behaviour change through education.

- The fashion industry including designers, brands and retailers should join the Fur Free Retailer scheme and acknowledge their responsibility to influence a fur free future. Alongside the shift away from fur by consumers, policy should change to acknowledge the risk to public health, poor animal welfare and environmental cost of fur farming. Fur farming should be phased out in countries that continue to operate fur farms and eventually banned in all countries globally.

- The public, as well as the fashion industry, must become capable of discerning the true meaning of sustainable fashion and identifying animal cruelty, harm to people and damage to the environment even when such factors are disguised by manipulative marketing. Education campaigns should target the public in China with a focus on Millennial and Generation Z. Education should help the public to understand the implications of China's factory fur farms, and as a result to make responsible fashion choices.

Photo by Bogna Wiltowska/Otwarte Klatki

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