

# China's fur trade

and its position in the global fur industry





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# Contents

<b>Executive summary</b>	4
<b>Methodology</b>	7
<b>1. Introduction to China's evolving position within the global fur industry</b>	8
<b>2. Fur farming in China</b>	10
Species and quantities of animals used for fur	10
Case study: Northern China model farm	12
Scale and geography of fur farming and processing in China	14
The links between North America and Europe with China	21
Legislation around fur production in China	23
<b>3. China's position in the global consumption and sales of fur</b>	26
China's domestic fur market	27
Demographics and types of fur consumption in China	28
China's position within global sales of fur	31
<b>4. Animal welfare, environmental and health concerns and the role of outreach education</b>	34
Can education reduce China's appetite for fur?	35
Sino-European and North American student programmes	37
The fur industry's self-promotion	38
The welfare of fur-farmed animals in China from breeding to slaughter	39
The potential for harm to the environment through fur production and processing	42
Toxic fur and other associated health risks	43
<b>Conclusion</b>	45
<b>Recommendations</b>	47
<b>References</b>	48

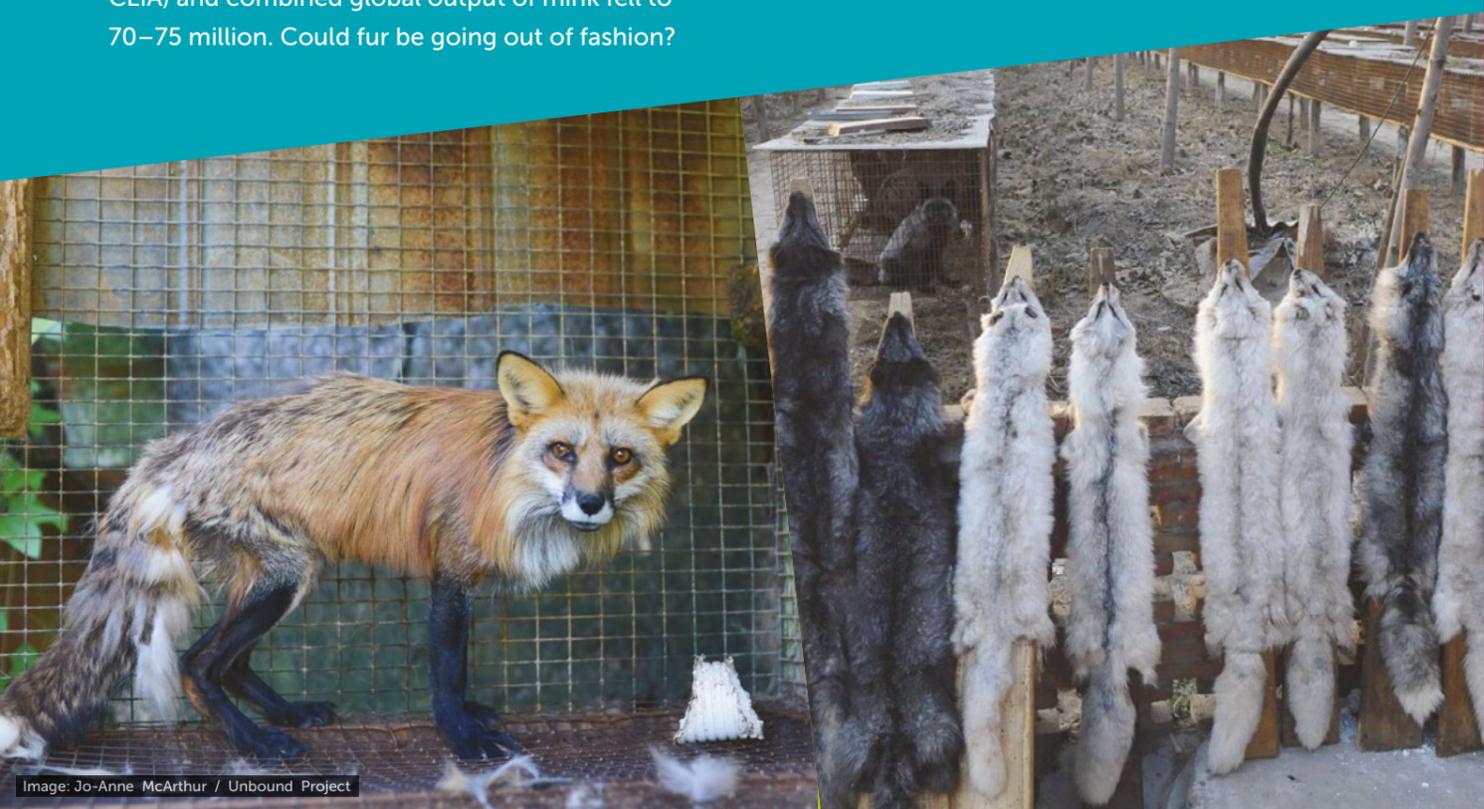
# Executive summary

In 2014, the global fur trade was estimated to be worth \$40 billion.<sup>1</sup> Data published by the International Fur Federation (IFF) and Fur Europe asserted that the world's production of mink pelts had reached 87 million, with 35 million of these derived from China.<sup>2</sup> However, these figures do not align with data from the China Leather Industry Association (CLIA),<sup>3</sup> whose records show that China alone produced 60 million fur pelts in 2014, bringing the global total to 112 million. It appears the rest of the world underestimated China's contribution. China was also consuming the biggest share of fur, with its production industry using 60% of its domestic fur pelts, and the domestic market purchasing 80% of fur garments produced in China.

This peak in China was widely described by media and the fur-free movement as 'a bubble', which inevitably would pop. Once supply outweighed demand, stock began to pile-up in storage across the world, but especially in China where output was greatest. Prices fell. As predicted, by 2016 China's annual production of mink pelts had plummeted from 60 million to 26 million (as documented by the CLIA) and combined global output of mink fell to 70–75 million. Could fur be going out of fashion?

Five years on in 2019, time and data have shown that although the bubble did pop, fur was not on its way out of fashion in China. This report seeks to illustrate that it is misleading to rely solely on mink production figures to evaluate whether the fur industry in China is growing or shrinking. All species must be considered. In examining the fur production chain - farmers, auction houses, buyers, designers, manufacturers and retailers - this report explores the possibility that despite a decline in the numbers of mink since its colossal peak in 2014, China's fur industry itself may not be in decline, in contrast to media claims. Indicators suggest it is now in the process of consolidating its strength through international collaboration, and by adapting its supply of fur in line with new fashions for fur trim.

New international enterprises are opening doors to China's affordable resources, including a cheaper workforce and potentially 1.4 billion consumers. Legislation protecting workers, animals and the environment add to production costs in other parts of the world, but in China costs are low and profits high, making it an attractive partner to the west.



As perceptions of fur continue to shift in society, demand has changed among consumers, and the fur industry has been forced to accommodate new sensitivities in order to survive. In the west, Fur-Free announcements by top fashion designers and retailers have begun to chime with the buzz-phrase 'sustainable fashion', as the world seeks to reduce the damage of consumption to the planet. Public exposure of the environmental impact of fur farming adds to the industry's difficulties in justifying itself.

Reports of selectively bred 'monster foxes' in Finland - recently in China too - and cannibalism in European mink farms, call morals into question. Countries that were once major players, including Norway, the Czech Republic, Luxembourg and Belgium have recently joined the UK, Austria,

Germany, the Netherlands and Croatia in announcing imminent bans on fur farming. But while Europe sets a Fur-Free precedent, China's industry is quietly building strength.

Fashions have deviated from full-length fur coats, and advocates for fur have tapped into a new style, and a new audience in China. Discrete fur trim has become ubiquitous for hoods, collars, pom-poms and accessories. As China follows western fashions, its appetite for fur trim has increased. Fur is no longer a practical material of warmth, once worn exclusively in the colder climate of north east China, but has become an essential fashion item in the wardrobes of young people. Trim is no longer an offcut from a luxury fur coat, but it is now a trend that is serious enough to sustain a growing industry.



International programmes between Europe and China include the export of stud animals, joint fur-fashion student courses, reliance on China's buying-power, and the introduction of GOOD4FUR in China in association with the IFF's WelFur accreditation. These are now important collaborations for the international industry to survive.

This report presents a view of China's fur industry today, in a global context. It aims to gain a better understanding of the status of the fur trade in China, by analysing the primary processes of the production chain: fur farming, sales and consumption.

With reference to fur farming in part 2, it includes:

- an assessment of the main species and quantities of animals used in the production of fur in China
- analysis of the industry's scale, growth, adjustment and stabilisation in China
- examples of joint-ventures between North America and Europe with China
- modernisation of China's industry through international joint-ventures
- importation of live stud animals from Europe and North America to China for breeding
- expansion through selective breeding and sophisticated market positioning, and
- the reasons for strengthening international partnerships.

In connection with fur consumption and sales in part 3, it explores:

- research into China's import and export markets
- a comparison between global and domestic Chinese demands for fur, and
- the reasons why fur is so affordable in China.

In part 4, this report explores:

- the status of animal welfare in fur farms and role of self-certification programmes
- possible threats to the environment and impact on human health
- relevant government regulations (or lack of).

By reviewing consumer perceptions of fur in China, this report considers the potential impact that outreach education through ACTAsia's Fur-Free Life programme may have on the public, with the support of principled fashion designers and retailers.

China's role as producer and consumer is now so pivotal to the global fur trade, that efforts by the Fur-Free movement to understand and oppose the fur trade must begin here. China is the most significant international partner in fur farming, production, processing and consumption. Global industry relies on China to secure profits, and as international designers increasingly turn their backs on fur, China underpins the long-term survival of the global fur trade.

# Methodology

## Terms of reference

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 and GOOD4FUR; 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 targetting 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.

It 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, used in this study to explore statistics and developments in fur farming, processing and retail. Primary data includes a series of 4,000 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 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),

Fur Europe, Fur Commission USA, Copenhagen Fur, Saga Furs and North American Fur Auctions (NAFA).

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.

Discrepancies regarding China's yield of fur pelts occur in public data because it is only since 2017 that the international fur industry has taken into account China's own data, published through the CLIA. Although data continues to suffer from both national and international inconsistencies and contradictions, it has become generally more accurate since 2017.

Other limitations in research include difficulties deducing data on rabbits, where the meat and fur industries cooperate 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 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.

# 1. Introduction

## China's evolving position within the global fur industry

Over recent decades, China has made a transition from being a country whose people traditionally produced and wore fur on a small scale in the colder, north-east extremes, to become a country that has taken fur production to a new industrial level of economic growth and national consumption. Until the mid-20th century, animals were trapped, bred and slaughtered for their fur in the north-east region of China, where associated processing plants also existed. It is documented that fur farming in China began to develop beyond this in 1956, once the People's Republic of China was established. To boost the economy, the state began to facilitate the growth of the fur farming industry and organised the import of live breeding foxes and minks, initially mainly from Russia. By the 1970s and 80s, animals were imported from Nordic countries and from North America, to improve breeding stock. During the 1980s and 1990s, China's fur industry really began to boom as the country opened up commercially, and foreign investment flowed in. The western fur industry brought its years of expertise in breeding animals, and introduced a business strategy where fur pelts were not only to be manufactured into clothing for warmth, but also into garments to suit modern fashion trends developing in the west. Since the mid-20th century, fur has grown enormously in popularity across the whole of China.

### China produces more fur pelts than any other country in the world

Part 2 of this report examines this claim in detail. It assesses production from 2014, and aims to collate and interpret data published since 2017 in a global context. It appears 2017 was the year the international fur community first referenced China's own statistical national data on fur production. In 2011, China's Ministry of Forestry entrusted the development of scientifically reliable methods of data collection to the China Leather Industry Association (CLIA) – responsible for the fur industry. Accepted methods

include verifying the number of pelts produced by collecting survey data, as well as calculating how many animals farmed for fur have been vaccinated, with the help of pharmaceutical records.

While there has been a slow-down and partial recovery of global fur pelt production since the peak in 2014, data examined in part 2 of this report assesses China's current and predicted contribution.

### Global production of mink is in decline, suggesting a shift in demand for fur

By 2016, the production of mink pelts had fallen dramatically since a peak in 2014. This report asks the reasons for the decline, seeks to assess its extent, and expose conflicting evidence available in public forums. Part 2 begins to illustrate how China's fur trade has entered a transformational phase of scale and stabilisation. It discusses changing fur fashions, and how a decline in mink production doesn't necessarily mean a decline for the whole fur industry.

### China is stabilising and expanding through new production methods

Part 2 of this report illustrates how Chinese fur farms are transforming. There is a gradual move away from small, family-run farms to large-scale farms and joint funding from Chinese and foreign sources. Evidence shows that farms are moving closer to western methods in terms of equipment and technology. Through cooperation with Europe and North America, China is introducing more efficient production facilities, skilled foreign workers and farming techniques, as well as importing breeding studs to improve their domestic animal gene pool. Fur farming has been quietly developing to become another form of factory farming in China.

### China is the biggest importer of fur pelts globally

Chinese buyers are active in the world's largest fur auctions, and are reported to be the dominant

customers at some European fur sales. Live streaming of auctions which can be followed online has helped to strengthen this international market. This study considers information from major European producers and auction houses who report a high percentage of customers from Asia, particularly China. Data in part 3 of this report attempts to evaluate the extent of China's appetite for foreign fur, despite its domestic expansion to meet its own demand.

### China is the biggest consumer of fur garments globally

Data suggests that 80% of the fur garments produced in China are sold and consumed domestically. This figure is largely led by China's millennials, citizens born in the 1980s who reached young adulthood around the year 2000. In a country with a population of 1.4 billion, they are the biggest consumer group of fur in the world. Because of their collective buying-power, fur-fashion in China tends to determine the

global value of fur, and to stimulate and maintain the world's fur industry. Part 3 of this report considers trends in consumption more closely.

### Fur-pelt production in China is especially profitable because welfare and environmental standards are compromised

There is very little legislation around fur farming that is enforceable by law in China. There are no penalties for businesses that do not follow suggested standards outlined by legislation. Animal welfare standards are apparently given very little consideration in breeding or slaughtering animals, and the cheapest methods tend to be most common. Toxic waste is commonly released into rivers and lakes, and fur-workers are offered no protection from the potentially carcinogenic and otherwise toxic chemicals they come into contact with on a daily basis. The subject of legislation is explored in part 2 of this report, while animal welfare, human health and environmental protection are considered in part 4.



## 2. Fur farming in China

### Species and quantities of animals used for fur

China has three sources of fur supply: farming, wild trapping and theft of pet or stray cats and dogs. This report focuses on a range of species raised on fur farms, including mink, fox and raccoon dog. Data for other species is not easily available. It is estimated that tens of millions of rex rabbits are also used each year for their pelts, but because these rabbits are also used for their meat, it is difficult to separate data from the two industries and state which is the primary purpose of breeding. Taking published figures from 2011 to 2012 as an example, 130 million rex rabbits were reportedly bred and processed into fur in China.<sup>4</sup> However because of the lack of available data, this report does not include research into rabbit farming.

For more information on the trade in dogs and cats for their fur, particularly significant for the international market as a very cheap source of fur trim, please refer to ACTAsia's *Report of the Dog and Cat Fur Trade*.<sup>5</sup>

#### The use of mink as an indicator species

Historically, more mink have been farmed for fur than any other species. Mink pelts have dominated the output of farmed-fur across the world, in an industry worth an estimated \$40 billion.<sup>6</sup> It is

because of its popularity among farmers, designers, retailers and consumers that it has long been used as an indicator for the general health and productivity of the global fur industry. For example, according to the CLIA, China produced 60 million mink pelts in 2014 compared to 13 million fox and 14 million raccoon dog pelts.<sup>7</sup>

However, in 2014, the global market for mink pelts had reached saturation point, and stores began to stock-pile. The reasons for overproduction were varied. Although China's appetite for fur seemed insatiable, even with a population of 1.4 billion it could not immediately absorb its own 60 million mink slaughtered over the previous year. It seems the momentum for animal breeding and fur processing was being fuelled by the industry itself, regardless of demand. Farmers, processors, factory owners, wholesalers and retailers were all eager for a share of the profits to be claimed. But as production surpassed demand, mink pelts filled cold-storage warehouses and prices fell. Other reasons for over production could be a crackdown in China on corruption in the production chain, and a financial crisis in Russia between 2014 and 2016. Russia had been a steady buyer of Chinese fur, with allegedly 65% of imported fur products coming from China.

China's production of mink pelts fell from 60 million to 44.5 million in 2015, and to 26 million in 2016. Europe's production was 39 million in the same year,<sup>9</sup> while North America's output remained fairly stable at nearly 5.6 million.<sup>10,11</sup> As stock-piles were absorbed and preferences for type of fur began to change, mink could no longer be considered an accurate indicator species for China's fur industry.

#### Inconsistencies within industry data

Confirming accurate production figures of fur pelts is fraught with difficulties. The fur industry appears to contradict itself with its official published data. Examples can be found in discrepancies between data from Copenhagen Fur, stating global output of mink in 2016 was around 54 million<sup>12</sup>, whereas IFF<sup>13</sup> and Fur Europe<sup>14</sup> both state that global mink output was 75 million in 2016.

The quantity of animals farmed for their fur in China has historically been underestimated by the rest of the world, due to questions around the reliability of data collection. For example, international figures published before 2017 put China's production of mink in 2014 at 35 million, which was only 40% of global output,<sup>15,16</sup> instead of the 60 million mink pelts recorded by China's Leather Industry Association (CLIA), which was 53% of that year's production. This would mean that global production of mink pelts in 2014 was 112 million, and not the 87 million estimated by Fur Europe.<sup>17</sup> These inconsistencies are due to a

slow acceptance of China's official data, collection of which was entrusted to the CLIA by government offices in 2011. Data collection methods include surveys and vaccination records, considered to be reliable sources. Copenhagen Fur predicts global mink production will drop to around 37 million in 2019, with China contributing only 7 million, which appears to underestimate China's productivity.<sup>18</sup>

#### China's production of fox and raccoon dog exceeds that of the rest of the world

In 2014, China produced 13 million fox, while Europe produced only 2 million, making China's yield more than six-times that of Europe.<sup>19</sup> In addition, China produced one hundred times as many raccoon dog pelts as Europe<sup>20</sup> – 14 million pelts in 2014, the same year that Europe produced 140,000.<sup>21</sup>

The illustration below shows the world's production of mink, fox and raccoon dog pelts in 2014, while the chart on page 12 shows that in 2016 the combined output of mink, fox and raccoon dog pelts from China was 53.5 million. When compared with the output of 47.5 million from Europe and North America, this illustrates China's sustaining power, despite a decline in the number of farmed mink.<sup>22</sup>

However, China's output plateaued between 2017 and 2018, as illustrated on page 13.

### China's production of mink, fox and raccoon dog pelts in 2014

#### China's mink pelt production

60m of 112m total global production (53% of global output)



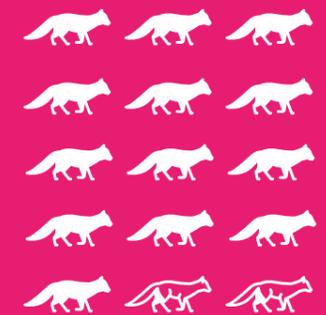
#### China's raccoon dog production

14m of 14.15m EU/China total (100x EU production)

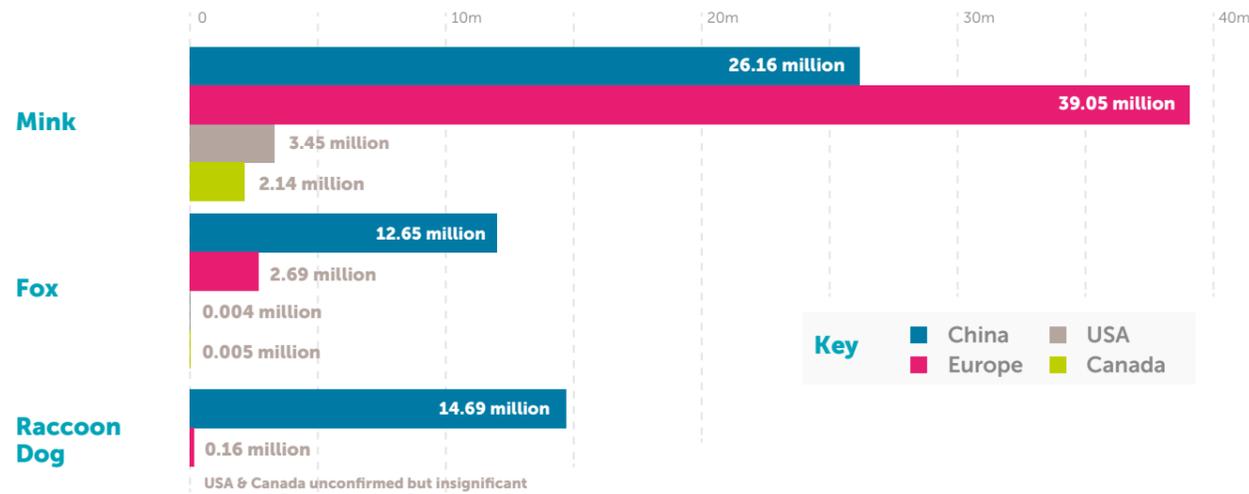


#### China's fox pelt production

13m of 15.01m EU/China total (over 6x EU production)



## Comparison of the estimated production of mink, fox and raccoon dog pelts between China, EU, USA and Canada in 2016



## Case study: Northern China model farm

A model farm in Northern China promotes itself as **'the largest fur farm in China'**.

The company declares that **all breeding minks are imported from Denmark by plane**. As part of its business, it owns a mink skinning factory, a fur garment factory, and a mink feed processing factory.

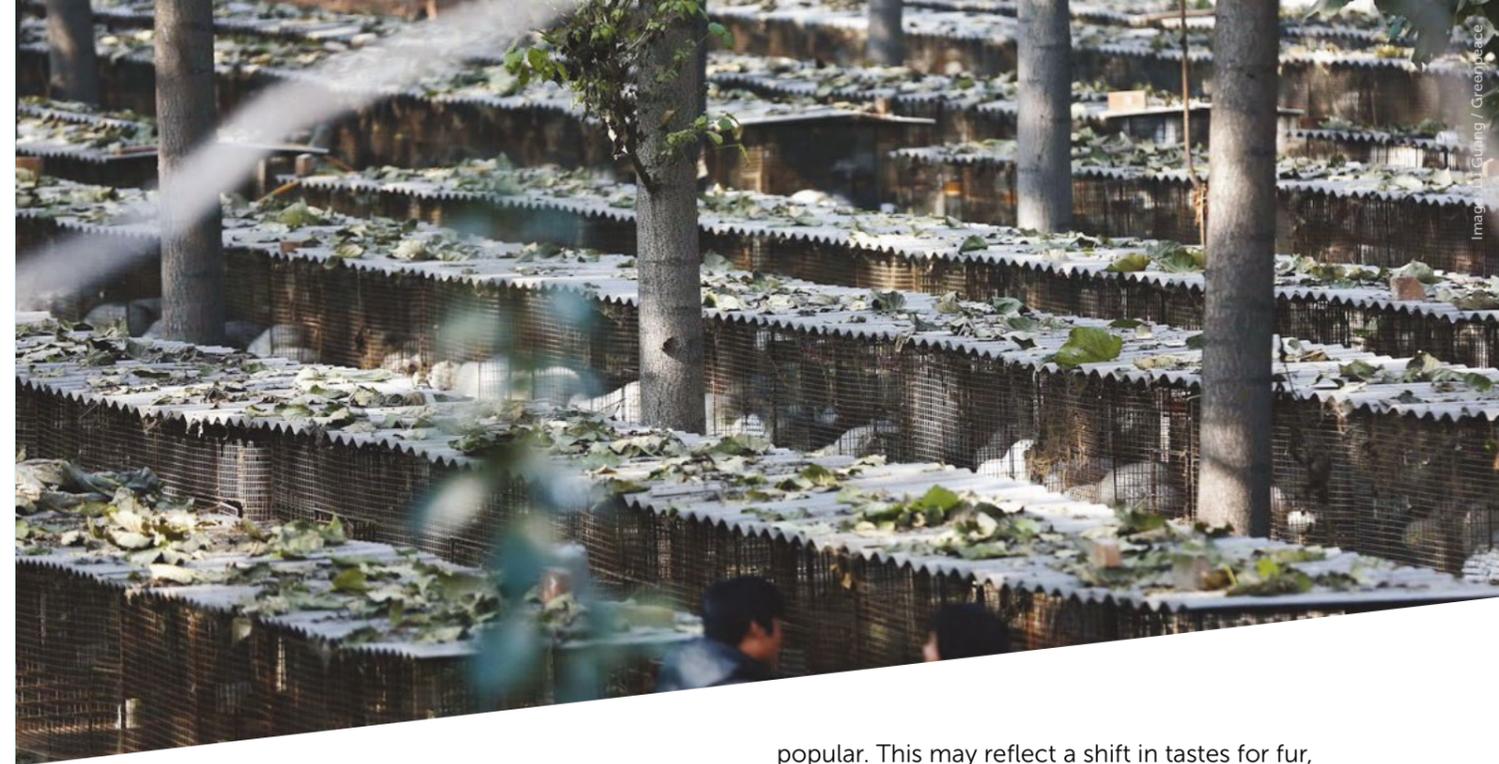
These extracts from the model farm's website underline how it promotes itself in 2019:

### 'Creating perfect fur products with high quality mink'

*'International state-of-the-art mechanised feeding mode, the world's most advanced breeding and product processing equipment as well as the most reasonable feed formula imported from abroad'*

*'The company first created China's first Sino-foreign joint venture of mink farming with a Danish company in 2003. Since then all the minks are imported from Denmark by plane. There are now a total of 52,000 breeding mink in 15 varieties. We hire foreign experts on a regular basis to carry out mink feeding and feed formulation. The company is China's largest export base of mink species source and the farm providing imported minks. It is also one of the top ten breeding bases recognised by the Breeding Committee of the Wildlife Conservation Association of China.'*

*'The company's grand objective of development: to establish a fur trading institution in China, enhance the development of the mink farming industry, strengthen the international competitiveness of the fur clothing industry, and promote the healthy development of the logistics and trade of furs and leathers.'*



### The decline in mink output and increase in fox

The diagram below shows a steady growth in mink pelt production in China from 2010 to 2014. It reaches a peak of 60 million in 2014, then falls by two-thirds until 2017, when it starts to stabilise at 21 million per year. Over the same period, the output of fox and raccoon dog pelts has fluctuated slightly. The number of fox pelts rose from 2010 to 2011, from 2012 to 2015, and from 2016 to 2018, over each period by 4 to 5 million. Production of fox reached its highest in 2018 with a total output of 17 million pelts.

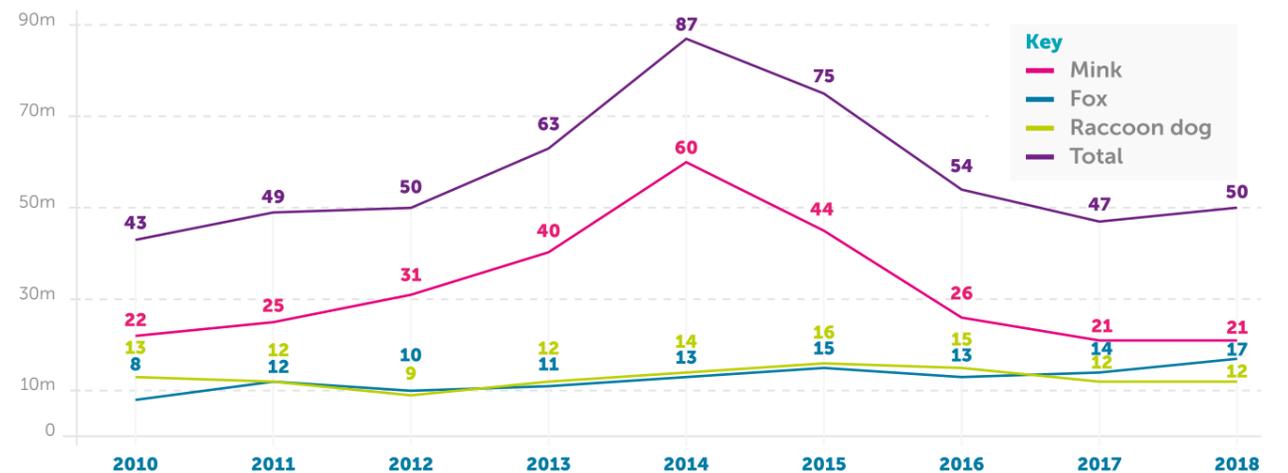
Although overall fur production has been dominated by mink, data suggests that fox is becoming more

popular. This may reflect a shift in tastes for fur, leaning now towards fur trim, which is often derived from species including fox and raccoon dog.

The link between new markets for fur trim and an increase in fox pelts seems to suggest that output of fur is stabilising in China. It will be necessary to carefully observe the industry over the coming years to establish whether data supports this trend. This is difficult in China, where data is not always accessible and the labelling system of fur products is not well established. In assessing China's fur industry, it is essential to consider the entire production chain, including the scale of farming, all species of animal, breeding methods, facilities, technology, sales and market trends.

### China's production of fur pelts by year from 2010 to 2018 (units in millions)

Source: Statistical Report on the Production of Skins of Mink, Fox and Raccoon Dog in China. China Leather Industry Association (2014, 2015, 2016, 2017, 2018)



# Scale and geography of fur farming and processing in China

Large-scale farming of animals for fur in China is mainly concentrated near the Shandong, Hebei and Liaoning provinces, although there are also isolated farms in other provinces across China. Clusters of farms within certain provinces are supported by nearby processing and wholesale markets, keeping distances easier to manage. Due to high profit margins, the industry has been expanding, with a growing workforce.

## The development of fur farming in China

In recent years, fur farming has developed quickly in China, and its geographical spread has extended as more people seek a share of its profits.

Despite numerous industrial and news reports, it is challenging to determine the actual quantity of fur farms in China. Because of this barrier, industry reports and academic research tends to measure the number of fur farms based on whether they reach a certain output, or hold a certain quantity of animals.

## Types of fur farms

According to the *Criterion of Breeding and Utilisation for Mink, Fox and Raccoon dog*, Chinese fur farms can be categorised into three types as seen below:

Animal	Number of animals per breeding facility type		
	Large-scale	Regular	Household
Mink	>10,000	1,000-10,000	<1,000
Fox	>1,000	300-1,000	<300
Raccoon dog	>1,000	300-1,000	<300

## Definitions of the three categories

1. Large-scale breeding facility: able to breed more than 10,000 mink, 1,000 foxes or 1,000 raccoon dogs. Large-scale breeding facilities are staffed with skilled workers for breeding, animal feeding and management, disease prevention and product processing.
2. Regular breeding facility: can breed between 1,000 and 10,000 mink, or between 300 and 1,000 foxes, or 300 to 1,000 raccoon dogs.
3. Household breeding facility: can breed less than 1,000 mink, less than 300 foxes or less than 300 raccoon dogs. Household breeding businesses are stand-alone areas in the eyes of the law, with their own relevant standards, including cage size.<sup>23</sup>

## Possible decline in the number of household breeding facilities with potential increase in the number of large-scale farms

The main regions farming and processing fur pelts in China include Wendeng, Zhucheng in Shandong Province, Suning and Changli in Hebei Province. There are also more than 1,000 fur farms of various scales in other regions of China, including Dalian in Liaoning. Evidence shows that joint investments into large-scale fur farms between China and foreign companies are developing. Mergers between smaller-scale farms in certain areas have led to a reduction in the number of farms, but increase in number of animal pelts produced.<sup>24</sup> It is claimed by the industry that 12% of farms are large-scale, 32% regular and 46% household, but in an attempt to prevent the spread of zoonotic diseases, the industry is now gravitating towards larger farms. In Zhejiang Province, the number of small-scale household farms has actually risen with the expansion of the fur industry, but the overall movement is towards a larger-scale mode of production.<sup>25</sup>

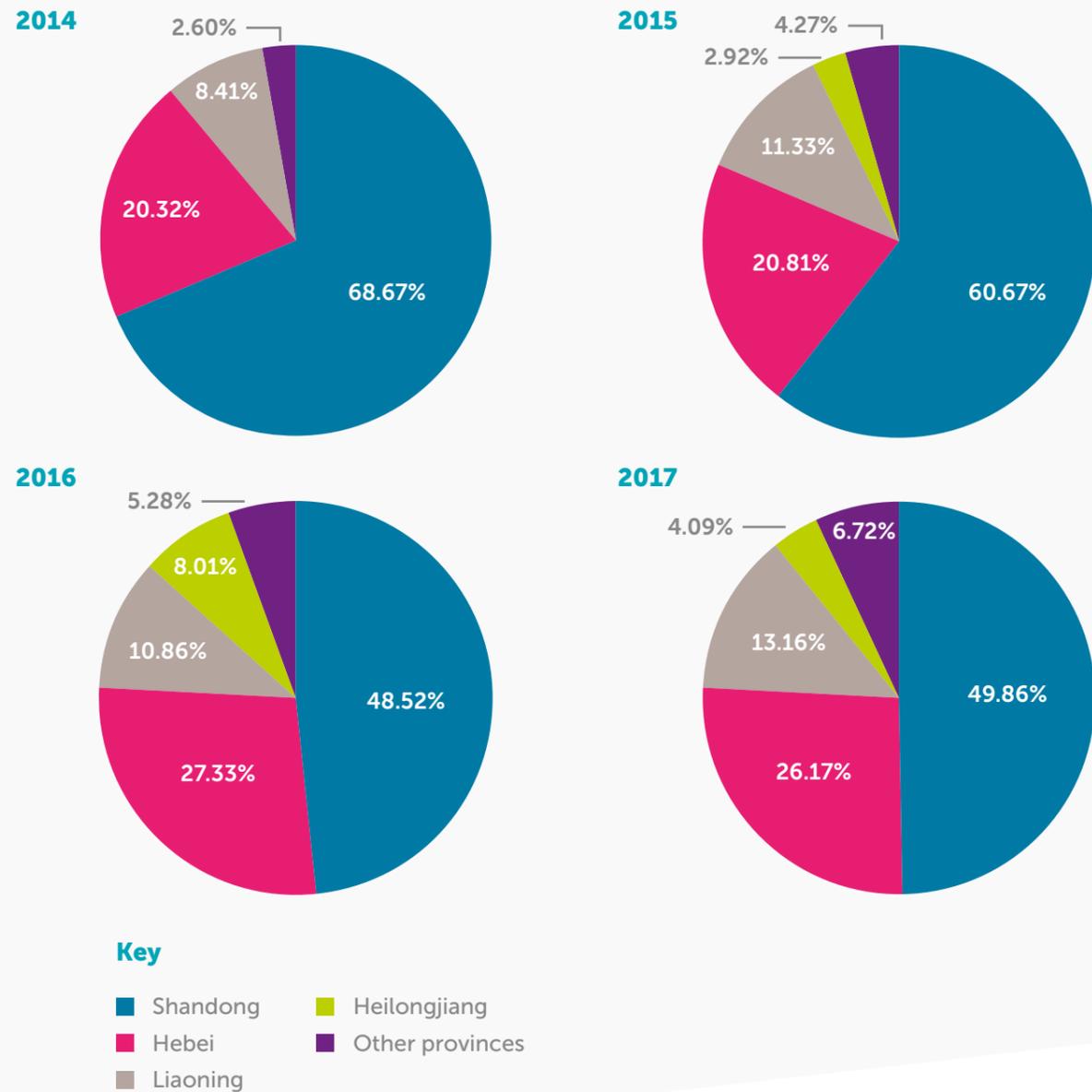
## Geographic distribution of the Chinese fur industry

This report has already referenced a traditional preference for fur in far north east of China, where the climate is cold. Local fur farms were established in the region to meet demand. In central and southern China, fur has only become popular in recent decades through the influence of fashion from the west. The map below shows the main fur farming areas in China, where fur processing and wholesaling are also very active. Many fur farms remain in the established north east, whereas processing and wholesale has spread south, down the eastern provinces of China, towards the auction houses in Hong Kong.



### Annual production of mink, fox and raccoon dog pelts by province in China

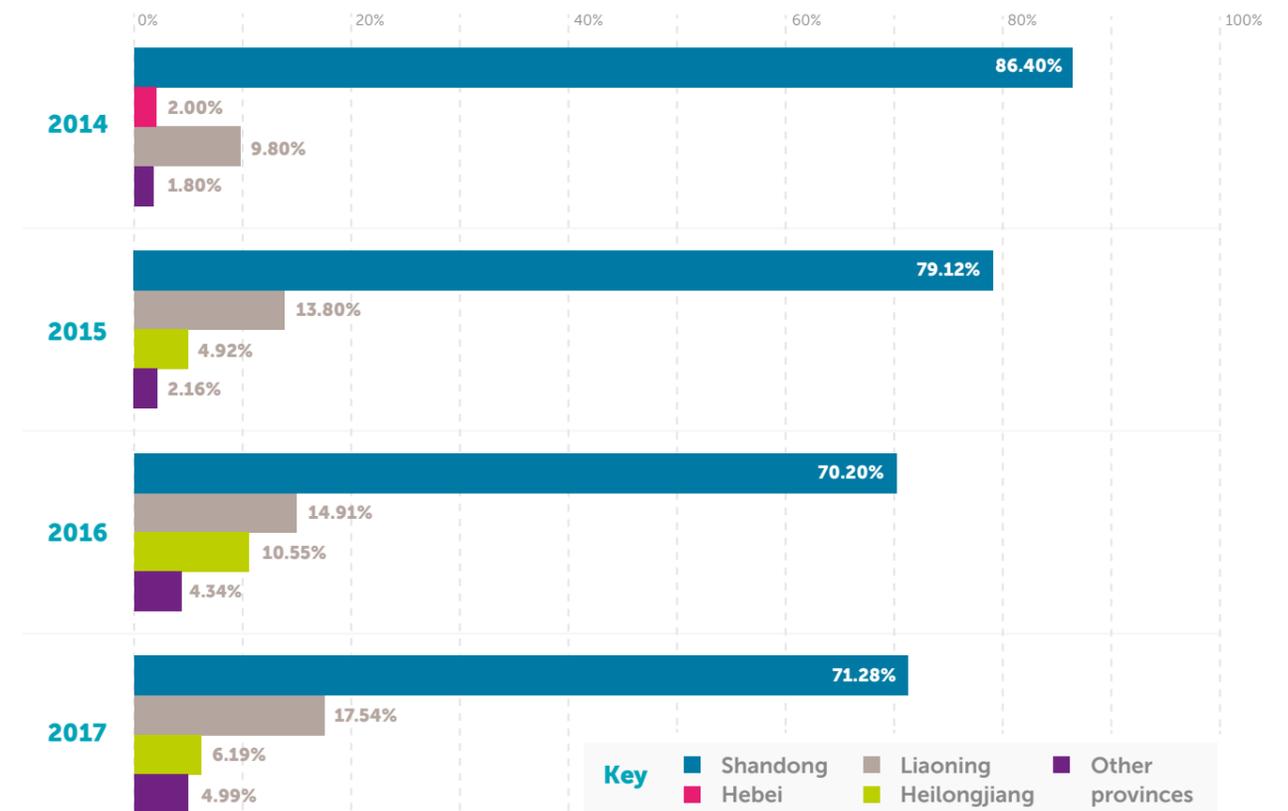
Source: Statistical Report on the Production of Skins of Mink, Fox and Raccoon Dog in China. China Leather Industry Association (2014, 2015, 2016, 2017)



The data collected by the CLIA shown above demonstrates that the highest concentrations of fur farms are in Shandong, Hebei, Liaoning and Heilongjiang provinces, together accounting for more than 90% of fur output in China. From 2014 to 2017 it can be seen that production has increased proportionally in Hebei, Liaoning and Heilongjiang compared to Shandong, which in 2014 was responsible for almost 70% of fur production. The main species farmed in Shandong is mink, and the decline in mink production since 2014 may explain the overall reduction in fur farming in this region.

### Annual production of mink pelts by province in China

Source: Statistical Report on the Production of Skins of Mink, Fox and Raccoon Dog in China. China Leather Industry Association (2014, 2015, 2016, 2017)



The data illustrating production areas of each species helps highlight the major provinces and cities involved in fur farming and how this geographical distribution has changed.

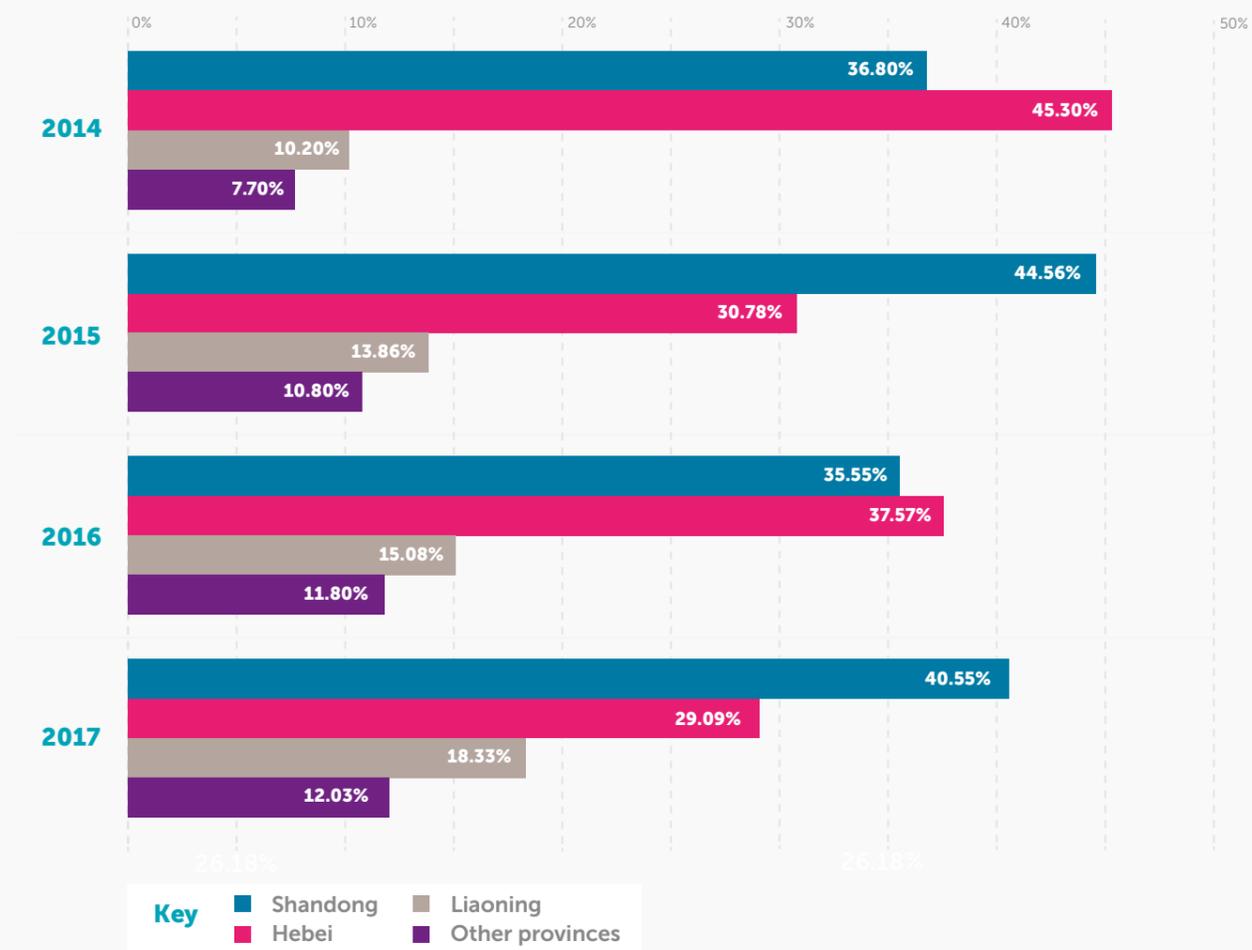
Each year between 2014 and 2017, in the region of 75% of the total output of mink were bred in Shandong Province, where Wendeng District in Weihai and Zhucheng are the main farming cities. Mink farming began in Wendeng in the 1950s and with the support of local government, cooperative businesses have emerged nearby, including feed processing, pelt processing and fur wholesale. Because of this concentration of industry, Wendeng has been given the titles 'City of fur and leather in

Shandong Province', 'Exemplary City for Chinese Fur Industry Development' and 'Base of Chinese Fur Industry'. In 2015, there were reported to be 8,600 breeders locally to the area. Zhucheng has become another of the biggest mink farming cities in China, since it began to import black mink from Russia in the 1970s.

Allegedly, it is said that Zhucheng's mink output accounts for more than 25% of the entire country's mink production. The more established fur farming regions, including Liaoning and Heilongjiang provinces in north east China, come in second and third place for their production over the past few years, totalling in the region of 24% in 2017.

### Annual production of fox pelts by province in China

Source: Statistical Report on the Production of Skins of Mink, Fox and Raccoon Dog in China. China Leather Industry Association (2014, 2015, 2016, 2017)



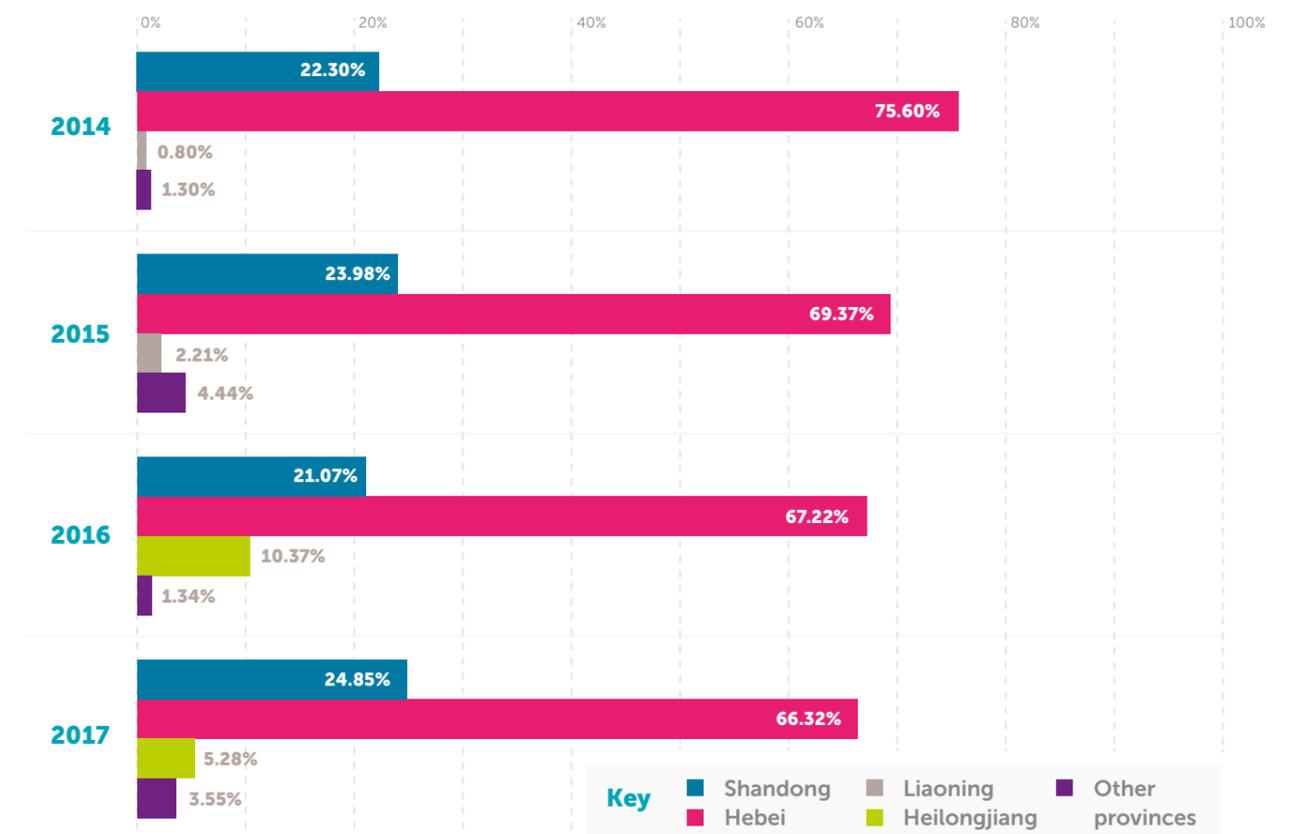
The graph above shows that from 2014 to 2017, the two biggest output regions for fox were Shandong and Hebei Provinces, accounting for 80% of countrywide fox production in 2014, slowing to 70% in 2017. Sunning County in Hebei Province is the biggest fur city, selling mainly fox. The proximity of this market-outlet to fur farms, processing factories and international trading centres aid convenience.

Other important cities in Hebei include Xinji City, Changli County, Wuji County, Daying Town and

Gucheng County. Liaoning Province and other areas also prove to be gradually producing more fox pelts as their annual output percentage has grown steadily over the past four years. This may indicate that fox farming has slowly attracted more breeders from other parts of China. The reason for the sudden rise in annual fox production by 10% in Shandong Province is not understood, nor is the sudden drop in Hebei in 2015. One plausible explanation is that mink breeders in Shandong have shifted to fox farming after experiencing a loss of mink business in 2015.

### Annual production of raccoon dog pelts by province in China

Source: Statistical Report on the Production of Skins of Mink, Fox and Raccoon Dog in China. China Leather Industry Association (2014, 2015, 2016, 2017)



It can be seen from the graph above that raccoon dogs are mainly bred in Hebei Province, accounting for more than 60% of China's annual output, and Shandong Province follows with 23%. There is no obvious focus of cities specifically producing raccoon dog pelts.

In most fur farming regions, associated businesses such as processing and wholesale, as well as market retail, are very common, forming a complete industrial cluster. Xinji and Suning in Hebei Province, Haining in Zhejiang Province as well as Tongerpu in Liaoning Province are major processing cities.





## The links between North America and Europe with China

### The considerable fur workforce and unstable industry profits

Nearly seven million people work in China's fur industry. Based on a household average of three people, the industry directly affects the lives of nearly 20 million people - not including fashion retailers or designers. For example in Suning County and in Leting Town in Hebei Province, around a third of the populations work in fur farming - 80,000 and 47,000 people respectively.<sup>26</sup> There are reports that when the fur industry's profits are unstable, workers are forced to find alternative ways to make a living. Fur farmers with small farms suffer the most when the fur market fluctuates. In Weifang City in Shangdong Province, the local mink farming cooperative consisted of 150 farmers, but by late 2013 only 80 remained. It is clear that fluctuations in the fur industry mean it is an unreliable income for farmers.<sup>27</sup>

There is evidence of growing international cooperation between the fur industries of Europe and China, as well as North America and China, as the world collaborates to build on the industry that China began to grow in the 1950s. These joint ventures go beyond more established collaboration for the sale of fur at international auctions houses. There has been an increase in fur businesses and design programmes for students, as well as joint breeding programmes. Further studies need to be carried out in order to establish whether European and American companies are using China to produce the fur pelts on behalf of their own brands in these areas.

Media reports from the early 21st century suggest that China's fur market saved the US mink farming industry around that time. According to one mink farmer in Wisconsin, the US's biggest fur-farming state, in 2003 US mink farming was unable to compete with foreign peers, and prices were dropping fast. But due to the wealthy Chinese market, their business began to grow again. The farmer states, "The global market offers a protection to US mink farmers. China's supply of mink pelts cannot meet its own domestic demand."<sup>28</sup>

Although this report does not explore Canada's seal fur industry, evidence exists to show China's market is also helping to sustain Canada's commercial hunting of seals through its purchasing power.<sup>29</sup>

### The import of live animals as studs

Historically, China has relied on the import of live stud animals to expand fur farming to a large-scale industry, with studs being imported initially from Russia in the 1950s, from northern Europe in the 1970s and North America in the 1980s. Since China's economic reform in 1978, the fur industry has grown steadily with foreign involvement. Since 2000, more

and more Chinese fur farms have been privately importing live mink and fox as studs for breeding. Finnish fur farmers, for example, have been actively trying to gain influence in China; Finland held its first fur fashion show there in 1986, and has been actively exporting studs as well as breeding technology.<sup>30</sup> Denmark is the main source of mink stud imports to China through collaboration with Copenhagen Fur.<sup>31</sup> Stud animals are imported because breeding techniques in China are less advanced, and the quality of fur tends to decline after a few generations of breeding. Fresh blood, or new stud animals from other countries are used to boost quality.

Large breeding centres serve as central hubs for imported studs, which are then distributed to smaller farms. The import of studs is so common that 'green passage' customs offices were established in Dalian, Heilongjiang and Jilin in 2014, to make the process easier. This 'green passage' simplifies inspection procedures, which also helps dealers to avoid existing regulations.<sup>32</sup>

While European fur producers such as Copenhagen Fur and Saga Furs are keen to promote joint ventures with China regarding fashion design and warehouse storage and guidance for practices in farming,<sup>33</sup> they seem less eager to advertise the opening of joint-venture fur farms in China. In 2003, a new mink breeding facility was founded in Dalian China, as a collaborative effort with European partners.<sup>34</sup> The Danish company involved is a member of the Danish cooperative association DPF/DPA. The breeding company in China claims investment has been 45 million RMB; the farm size is 100,000 square metres; and the number of breeding mink is 52,000 mink studs in a total of 15 different species. Their website states they plan to sell 20,000 mink for



## Legislation around fur production in China

The International Fur Federation (IFF) defines itself as: 'Representing 56 member associations in over 40 countries around the world. The members encompass all parts of the fur trade including farmers, trappers, dressers, manufacturers, brokers, auction houses, retailers and designers. Each of these members has signed a strict code of conduct committing them to uphold the industry-relevant laws they fall under in their home countries.'

However some countries, including China, have no relevant industry laws, and a strict code of conduct is flawed. Suggested standards do exist, but are not enforceable. Therefore IFF-approved farms can vary enormously in their standards across the world, without any international principles.<sup>39</sup>

The CLIA, which represents the fur sector in China, is also a member of IFF and is supervised by the State Forestry Administration (SFA) of China, the managing authority of the fur farming industry.<sup>40</sup> In 2005, CLIA and SFA co-published *Temporary Regulations for Domestication, Breeding and Utilisation of Wild Fur Animals*.<sup>41</sup> The publication attempts to establish a set of technical and animal welfare standards for the fur farming industry to follow, but these standards are not mandatory. Since then, the Chinese fur industry has claimed that safeguarding policies for farm-animal welfare will be improved, allowing standards in China to meet international criteria. No evidence shows that these standards have since been met.

### Legislation relating to fur production in China

In November 2011, the *Specification for Leather and Fur Market Management* (SB/T 10584-2011) established by the Ministry of Commerce<sup>42</sup> in China officially came into effect. It includes animal welfare standards, incorporating rules regarding slaughtering, cage standards and prohibition of abuse. In theory,

products failing to meet these standards should not be sold on the market, in order to guarantee animal welfare in the industry.

Due to these commercial regulations, the SFA and CLIA amended the previous 2005 Temporary Regulations and published the *Criteria for Breeding and Utilisation for Minks, Foxes, and Raccoon Dogs* (LY/T 2689-2016) in 2016.<sup>43</sup> The criteria recommends fur farms should redesign and change their methods of farming. It also includes recommendations on breeding, disease prevention and slaughtering. In theory, this standard falls under supervision of the SFA and should be promoted throughout the five major fur-farming areas: Shandong, Hebei, Heilongjiang, Jilin and Liaoning provinces. The industry was given a year's transition period after the legislation took effect in December 2016.<sup>44</sup>

However, both standards SB/T 10584-2011 and LY/T 2689-2016 are only recommendations, not mandatory – identified by the letter 'T' in the title.<sup>45</sup> No penalty is in place to ensure enforcement.<sup>46</sup>

The legislative background for establishing these standards is that large-scale fur farms in China are learning farming practices from Northern Europe and North American, including importing animals for breeding, farming, slaughtering and skinning techniques that will support China's fur farming industry. The usage standards reference the EU, Canada, and Finland's relevant laws and regulations. However, the difficult issue is that China lacks mandatory regulations, common in other farming countries. Without penalties, animal welfare, environmental standards and human health remain compromised.

breeding – presumably annually. The company appears to have imported a stream of live breeding mink from Denmark since it was established.

The photos above show another Danish company, also exporting mink from Denmark to China,<sup>35</sup> while Finnish foxes are imported to a company in Heilongjiang Province in 2016.<sup>36 37</sup>

However, the import or export of live breeding animals is not always transparent. It was reported in late 2018 that the Finnish Fur Breeders' Association was against the export of live breeding.<sup>38</sup> The organisation even managed to impose a fine on farmers who export live fox to China without permission, but when the CLIA initiated talks with Finland, export of fox studs was resumed. This evidence suggests China's influence on the global fur industry should not be overlooked.

### WelFur and GOOD4FUR certification

In 2010-11, the IFF began to introduce a new certification programme: WelFur.<sup>47</sup> It claimed its purpose was to assess standards in all European fur farms, including animal welfare, and award certification where warranted. The seal of approval can be awarded by industry stakeholders as well as third-party inspectors. In July 2017, the IFF together with CLIA launched GOOD4FUR certification in China.<sup>48</sup> GOOD4FUR took its standards and protocols from the IFF, and can be considered the Chinese version of the WelFur programme.

In January 2018, a GOOD4FUR press conference was held, when five farms apparently meeting the standard were awarded 'GOOD4FUR Certified Farm'. At the event there were more than 100 attendees, including Chinese governmental officials from Forestry Administration and Ministry of Education, as well as international leaders from the fur business, CLIA, IFF and Canada Mink Breeding Association. At the event, the industry invited officials to visit approved farms, presented a select image of China's fur farms to the world, helping international organisations to publicly justify collaboration between countries.

While the introduction of GOOD4FUR and WelFur certification may seem to head towards improvement for animal welfare standards, its value as a seal of approval by its own stakeholders must be scrutinised. WelFur has recently been widely challenged and debated in the public arena by animal protection groups and international media. It has raised questions such as: do these self-moderated standards give adequate protection to animals used by the fur industry? Or do profits take precedent over welfare standards, where meeting welfare needs is costly?

Studies suggest that even the very 'best' of fur farms with the highest welfare provision cannot deliver an adequate habitat for animals. In Finland in October 2018, farms with the WelFur stamp of approval were found to fall drastically below the minimum standards outlined by their own criteria. Cases of suffering and cannibalism were reported on these certified fur farms. The UK broadsheet newspaper, the Independent, released footage revealing harrowing scenes, according to a US animal welfare organisation: 'The footage taken last month, at a fur centre where an estimated 12,000 mink are housed, "shows foxes with deformed feet and diseased eyes, and mink with open infected wounds, some even driven to cannibalism."' <sup>49</sup>

In April 2018, reports of 'monster foxes' being bred in Finland were reported internationally, showing genetically selected animals living with the pain and discomfort of hugely expanded folds of skin. This over-grown skin gives a greater fur-surface area than is natural, resulting in a bigger pelt and more profit per animal.<sup>50</sup> New research has uncovered the export of 'monster fox' from Finland to China in late 2018, by a farm breeding blue fox in Jinzhour City, Liaoning Province, see image below. International partnerships appear to be growing in strength and number.<sup>51</sup>

As studies show that WelFur farms cannot guarantee adequate welfare for the animals they breed, even in countries where legislation is enforceable by law, the GOOD4FUR seal of approval in China must be seriously questioned. The Chinese legislation Criteria for Breeding and Utilisation for *Minks, Foxes and Raccoon Dogs* has had little – if any – enforcement to-date. Part 4 of this report further questions animal welfare standards in fur farming.



### Environmental standards

Environmental protection standards have been in place in China since around the year 2000. These standards were established by the Ministry of Environment Protection of the People's Republic of China, and include the *Standard for Pollution Control on the Security Landfill Site for Hazardous Wastes* (GB18598-2001),<sup>52</sup> *Standard for Pollution Control on the Storage and Disposal Site for General Industrial Solid Wastes* (GB18599-2001),<sup>53</sup> and *Integrated Wastewater Discharge Standard* (GB8978-1996).<sup>54</sup>

Although these standards are classed as mandatory, it is only recently that claims of pollution from fur farms have been investigated. Inquiries into malpractice at fur farms in Hebei, Zhejiang, Henan and Guangdong Provinces opened two years ago.

In theory, fur farms could be closed down for failing to meet these standards. But in practice, enforcing stringent legislation would cause considerable and undesirable damage to the fur industry, because few farms or processing factories are willing to invest the significant funds needed for a truly 'green' operation.<sup>55</sup>



## China's domestic fur market

The domestic market is the cardinal market for China's fur industry. In recent years, domestic demand for fur within China has grown. The most recent data shows that the domestic market accounts for 80% of total sales of China's fur garments,<sup>56</sup> and the industry itself predicts a continued acceleration.

### Geographic distribution of China's domestic fur market

As explained in part 2 of this report, geographically, the sales and consumption of fur in China has tended to follow the pattern of production and processing, which began in the colder north east provinces where fur was originally used for warmth. There are around 4,000 tanning, processing and OEM manufacturing companies in China, and despite a recent tendency towards mergers of farms and emergence of some expansive large-scale businesses, only 600 of these 4,000 companies have over \$3 million US dollars of

annual income.<sup>57</sup> Small-scale businesses would seem to remain an important part of the industry.

China's more historic fur markets include Tongerpu in Liaoning Province and Suning in Hebei Province, both in the north, but over the past few decades, Haining in Zhejiang Province has also become a popular region to trade fur. These markets act as centres, prompting the emergence of nearby supporting industries devoted to fur processing and wholesaling. There are also 'Fur City' shopping malls in these areas, which are dedicated outlets for fur and leather. These sell pelts ready to be processed into garments, as well as manufactured fur goods ready to be worn or used.

Although retail sales of fur tend to cluster in the areas shown in the map below, it should not be forgotten that fur is sold and worn throughout the whole of China, especially as trim.

## 3. China's position in the global consumption and sales of fur

In order to illustrate how China plays a significant role in the global consumption and sales of fur, it is necessary to explore the whole production chain, from farming through to retail.

This report established in part 2 that China produces more fur pelts than any other individual country in the world. In part 3, it investigates China's level of consumption of domestic and international output. This includes both raw pelts and fur garments.



## Demographics and types of fur consumption in China

China has the biggest luxury goods market in the world, which is growing faster than any other. It also has a vast consumption potential due to its large population of around 1.4 billion.<sup>59</sup> For these reasons, it is seen as the most important consumer country in the world by the global fur market.<sup>60</sup>

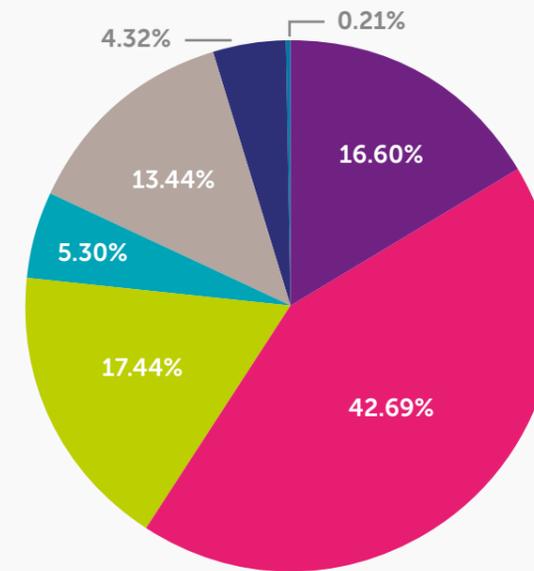
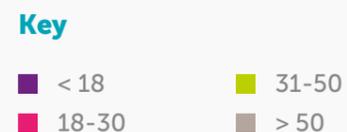
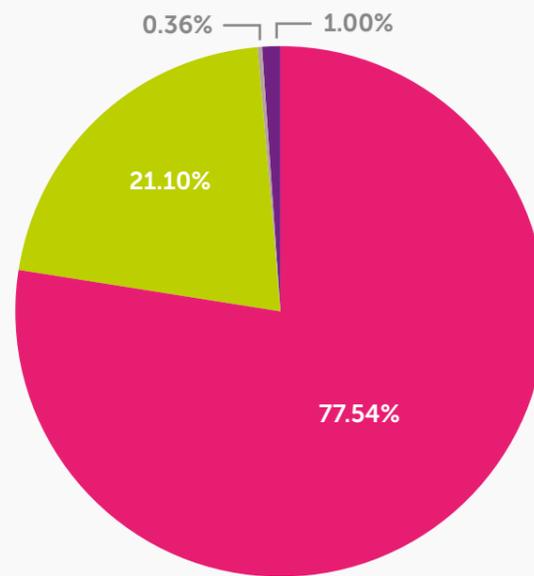
In order to examine the demographics of China's fur market, ACTAsia surveyed a small sample of 4,000 people in China over four years - the first in 2011 and then in 2014 for three consecutive years. The survey asked participants about their habits of buying and wearing fur: whether or not they buy fur, if so where they buy it, what sort of garments or products they favour, and their age.

Citizens born in the 1980s who reached adulthood around the turn of the 21st century, now aged around 18-30, are known colloquially as 'millennials'. This group of society in China has become the major group to consume fur – the biggest demographic in

China, but also the rest of the world.<sup>61</sup> Millennials in China tend to love fur-fashions, but incongruously also have a growing desire to keep pets. This is an interest they defend against criticism and sometimes intervention by older citizens, who tend to disapprove of pets, regarding them as 'bourgeois' due to generational cultural bias. There have been several cases reported of pet-poisoning, where dogs and cats owned by millennials have been poisoned by disapproving, older neighbours. Despite their allegiance to companion animals and presumably recognition of animal qualities and sentience, millennials are the main consumers of fur, as seen in the chart below. This conflict of interest would suggest a lack of understanding of the cruelty involved in fur production, and signal a need for further public education. See part 4 for further information on the role of education in changing attitudes of fur consumers.

### Age demographics of fur consumption in China

An overwhelming majority of millennials make up the group of consumers who favour fur in China. Age 18-30, they tend to buy fur as trim or accessories for its fashionable properties. The 1% of consumers aged over 50 may not be entirely representative of this group, because the survey was carried out online and a bias of computer access may influence the results.

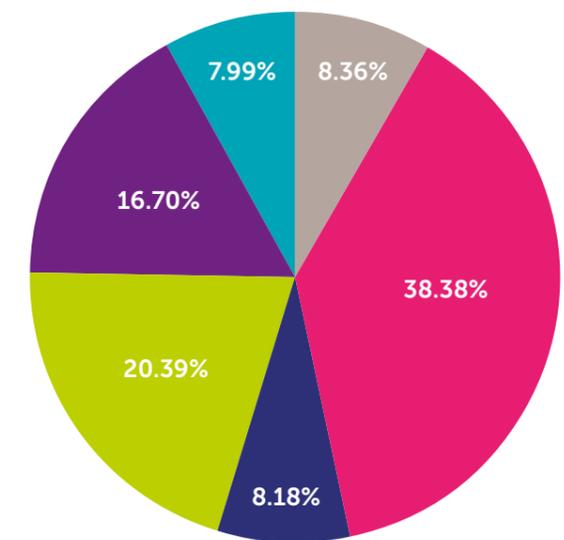


### Preference for fur product among consumers in China

Of the consumers who took part in our survey, nearly half favour fur trim. This supports suspicions that a whole industry flourishes around the production and sale of fur trim – that hood trim, collars, scarves, pom-poms and accessories are not just made from off-cuts, as often assumed by the public who buy them.

### Where do consumers buy fur products in China?

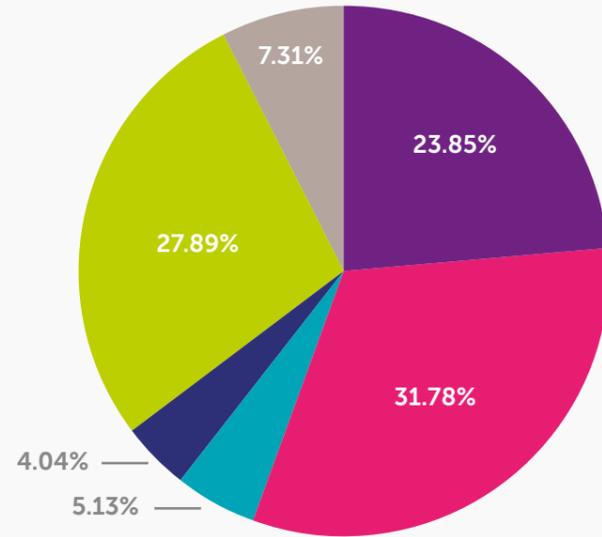
This chart shows that collectively, the majority of fur in China among our survey group is bought at department stores, small clothing stores, or on the internet. Although only just over 8% of consumers surveyed here travelled to a fur city with the express purpose of buying fur garments, this bias is indicative of the age demographic, as fur cities do serve a significant section of the fur market in China but the majority of their customers are aged over 50, and less likely to participate in online surveys. Considering that high street stores are much more likely to sell fur trim than complete fur items such as a coat, it would support the assertion that the majority of fur pelts provide manufacturers with fashionable trim, rather than complete pelts for entire garments.



**What motivates consumers in China to buy and wear fur?**

Establishing a clear picture of consumers of fur is a vital part of outreach education. From the chart to the right, it can be seen that 27.89% of participants in our survey claimed that they didn't even notice they were buying real fur – either because they thought it was faux fur, or because they just didn't think about it. Potentially, this group of people who bought fur incidentally could be the first group to change their habits after outreach education, and convert to a Fur-Free future.

Future surveys should identify the age group and socio-economic level of customers, whether they buy fur regularly, occasionally or never at all. This information will help to form a Fur-Free strategy for the future.



**Key**

- Keep warm
- Fashion or beauty
- Needs for occasions or gifts
- Brand support
- Didn't notice fur/thought it was fake fur
- Other reasons



**China's position within global sales of fur**

**China is the biggest buyer and importer of raw fur in the world**

China's fur trade has had an increasing focus on importing and processing fur. Fur pelts from Chinese fur farms satisfy 60% of domestic manufacturing demand. The 40% shortfall is imported to meet demand for high-end, quality pelts, which are not produced in China. Despite its huge output as a country, China demands fur imported from abroad.

To-date, numerous sources suggest that China remains the biggest fur processing country in the world, supplementing its own supply of raw pelts with those from abroad to manufacture into garments. There is also evidence to show that China is the biggest global buyer of fur. Some of the raw pelts bought by China are manufactured into goods for export back to the global market. Crucially, China has the buying-power to strongly influence the global price of raw fur. Single-handedly, it is able to lead and stimulate the global fur trade.<sup>62 63</sup>

It is widely recognised that China is the biggest national importer of mink pelts.<sup>64</sup> Research shows that around 85% of fur produced in the US is for

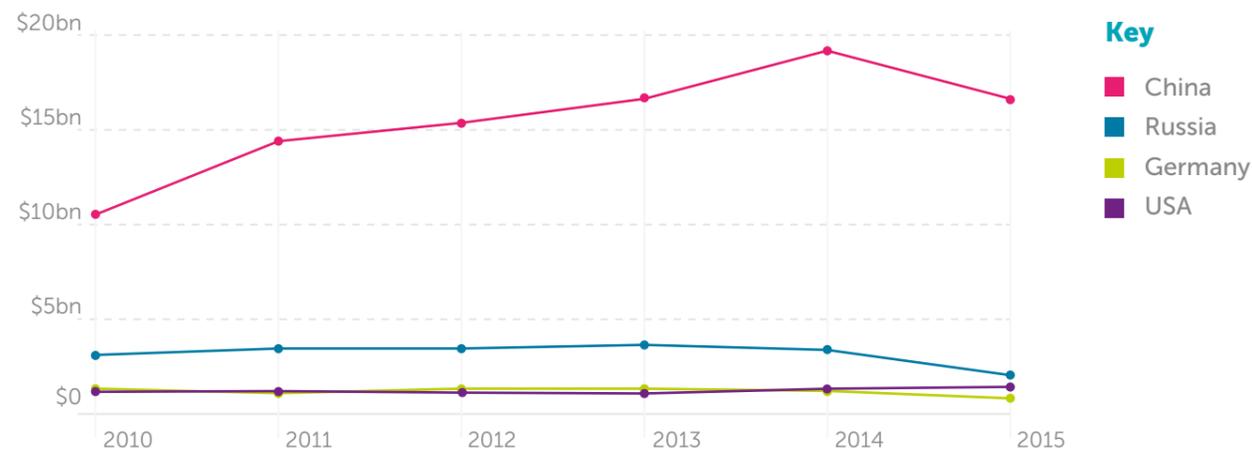
export (mostly mink),<sup>65</sup> and China is its biggest buyer.<sup>66 67</sup> In 2012, the US exported \$215.5 million of mink pelts to China. In 2018, North American Fur Auctions (NAFA) reported that China was the dominant buyer at auction of mink and raccoon dog pelts.<sup>68</sup> China is also influential when it comes to the purchase of raw mink from Europe. Copenhagen Fur and Saga Furs together supply approximately 75% of mink pelts sold at auction houses,<sup>69</sup> with China one of its main customers. In 2011, Copenhagen Fur sold 70% of its fur to China.<sup>70</sup> In 2015, around half of all buyers at both Saga Furs<sup>71</sup> and Copenhagen Fur<sup>72</sup> auctions were from mainland China and Hong Kong.

In 2017, Copenhagen Fur anticipated that 'approximately 450 customers will visit the auction house in Glostrup during the sales, and approximately half of them are from Asia.' In addition, many customers from China buy at auction via live streaming over the internet, supported by large streaming facilities provided by Copenhagen Fur in Beijing, Tonggepu and Yuyao. In fact, Copenhagen Fur also has an office in Beijing, which supports more than 60 minor streaming facilities in Zhejiang, Liaoning, Hebei, Guangdong as well as other fur manufacturing regions in China.<sup>73</sup>



## Consumption of fur in China compared to other countries

Source: IFF



### China is the biggest consumer of fur garments in the world

The diagram above is based on data from IFF, and shows that retail sales of fur reached nearly \$17 billion in China in 2015.<sup>74</sup> Sales in Russia and the US were less than \$5 billion respectively. Although the sales include foreign goods as well as domestic, it highlights China's tremendous purchasing power when it comes to fur products.<sup>75</sup>

According to the *2014 Report on the Chinese Fur Clothing Market and its Development Trend*, the domestic market is the main market for fur garments produced in China, absorbing more than 80% of its own output.<sup>76</sup> The popularity of clothes made entirely from fur has declined in China along with the rest of the world, while the market's trends grow towards trim and accessories. Fur producers around the globe no longer advertise fur's insulating properties, but instead focus on fashion.

Haining is the capital of China's fur-sales, producing half of all fur products made in China. The deputy general manager of Haining China Leather City states how development of the industry has been very fast over the past 20 years, and there is no sign of it slowing as China continues its love affair with fur.<sup>77</sup>

In 2017, global fur retail sales were reported to be worth \$30 billion, with China contributing more than half at \$17 billion. In comparison, Europe is the second biggest fur market at \$7 billion of sales, followed by Russia at \$2.2 billion and then the US at \$1.4 billion. These figures reinforce claims that China is the largest consumer of fur garments in the world.<sup>78</sup>

### The export of fur garments from China is dominated by fur trim

Although China consumes approximately 80% of its own output of fur garments, its export market should not be overlooked. A significant part of China's fur sales are international. Studies show that in 2011 and again in 2014, 27% of China's fur garments were exported.<sup>79</sup> While raw pelts may initially be bought by the domestic market, resulting manufactured goods may afterwards be exported.

Fur exported by China follows similar trends to fur consumed by the domestic market: the advertising focus is on fur trim and fashion, rather than the more traditional property of warmth. Far more fur is exported for trim and accessories than for full fur coats, jackets or other entire fur garments, although some markets, such as Russia, still demand significant quantities of fur coats. The most common export

markets include Russia, South Korea and other Northeast Asia emerging markets, but also Europe and North America.<sup>80</sup>

As well as fur from farmed animals, a proportion of the fur exported and used as trim derives from dogs and cats.<sup>81</sup> Garments may be manufactured in China, or dog and cat fur may be exported for manufacture elsewhere. Although it is illegal to import dog and cat fur into Europe, the US and Australia, common mislabelling makes the source difficult to identify without scientific analysis. As the sale of dog and cat fur is covert outside China, it is difficult to assess the extent of its use, but it is commonly found for sale on market stalls as the cheapest fur supply for the cheapest products. However, in Canada it remains legal to sell dog and cat fur. According to Industry Canada, 60% of all fur garments that enter the country come from China, but it is not known how much of this derives from dogs and cats.<sup>82</sup> Although Canada has come under pressure to ban the use of dogs and cats for fur, it has put up resistance, suggesting such a ban may undermine its own export industry around seal fur and related products.<sup>83</sup>

### Hong Kong is the third biggest fur-clothing exporter in the world, connecting China with global markets

In 2014, Hong Kong traded 70-80% of global fur pelt exports.<sup>84</sup> By 2015, 80% of fur was being re-exported to mainland China where processing is much cheaper.<sup>85</sup> But the most recent research shows that Hong Kong's dominance over trade in pelts appears to be declining as stronger, direct links between Europe and China are established. In the first five months of 2018, mainland China accounted for only 49% of the total number of pelts exported through Hong Kong.<sup>86</sup>

According to Copenhagen Fur's WeChat account (which is the favoured social media platform in China) they have established cold-storage warehouses in Beijing and Tongerpu to support its relationship with China.<sup>87</sup> At the end of 2017, Copenhagen Fur exited its warehouse operation in Hong Kong. At the time, they offered reassurance to customers of Global Fur Logistics that the advantages of their new operations in mainland China would offer better opportunities than their Hong Kong warehouse.

In the early 2010s, Hong Kong still facilitated international trade of 70-80% of the world's processed fur products, a separate market from fur pelts.<sup>88</sup> But by 2018, Hong Kong could only claim to be the world's third biggest fur-clothing exporter, according to the research of the Hong Kong Trade Development Council, with its main export markets being Europe, South Korea and Canada.<sup>89</sup>

Despite a decline in trading in recent years, Hong Kong still makes a significant contribution to the global fur industry. Many makers, known as OEM manufacturers, produce high-end garments of the most sought-after fashions for well-known brands, and sell them through the Hong Kong market. This allows them to gain recognition for their own brands. In addition, the Hong Kong International Fur & Fashion Fair (HKIFFF) organised by the Hong Kong Fur Federation remains the largest fur trade event in Asia, attracting around 200 exhibitors from many countries over the past few years.<sup>90</sup>





## 4. Animal welfare, environmental and health concerns and the role of outreach education

Arguments against the fur trade, including animal cruelty, pollution of the environment, and health risks to fur-workers and consumers are given repeated media exposure in Europe and North America. With the production of fur increasingly hard to justify in a world more conscious of its own sustainability, many luxury fashion brands including Gucci, Versace, Chanel and Michael Kors have recently committed to a fur-free future for their fashions. Yet despite this turning tide at the high end of the market, production of fur continues in China.

Fur Free Retailer (FFR) is a scheme run by the Fur Free Alliance (FFA), which helps both retailers and consumers to identify brands committed to Fur-Free fashions. There are currently more than 1,000 retailers worldwide who have signed up to a Fur-Free future, including approximately 30 brands in China. The number of committed fashion brands and retailers has been growing fast recently, as high profile names seek to reassure customers that there is no place for cruelty in their brand.<sup>91</sup>

### Can education reduce China's appetite for fur?

The sustained popularity of real fur garments in China means it is the biggest national consumer of fur in the world. To make a significant reduction to the quantity of animals bred and slaughtered globally for their fur, an outreach education programme in China is essential to reduce demand among consumers.

#### Surveying attitudes to real fur before and after education

Part 3 of this report refers to a survey carried out by ACTAsia, that defines the demographics of a sample of around 4,000 consumers, in China who have chosen to buy fur. The participants were also offered an introduction to how fur is produced, including facts about farming animals, killing methods, common production techniques, the environmental and health risks associated with wearing fur, and working as a labourer within the industry. A film was also used to demonstrate the evidence. The research

was carried out over four years, the first in 2011, and then from 2014 over three consecutive years.

After participants were exposed to the facts about farming fur, between 60% and 80% declared they would move away from fur garments and accessories. Many consumers had not previously understood the procedures of farming and killing animals for fur, nor the implications of pollution to the environment, or the health and safety compromises made by workers. Once informed, the majority were keen to make Fur-Free choices.

The results of this survey give a useful indication of the significant impact that education programmes can make on public perception of fur in China, as well as accepted behaviours. This is especially true of individuals who already have an understanding of animal sentience.





## Sino-European and North American student programmes for business and fashion development in the fur industry

In order to promote fur to the Chinese market, the western fur industry cooperates with Chinese colleges and universities to run education courses for students. After 20 years of effort by Saga Furs to nurture relations with the Chinese market, a seminar was held in 2010 when innovative fur designs were presented and relevant promotional activities planned. These efforts help to guarantee a market in China for fur products from northern Europe. Early in 2018, Saga Furs began working with the Beijing Institute of Fashion Technology (BIFT) as well as Haining China Leather City (HCLC).<sup>93</sup>

Saga Furs state their goal is 'To create a fur training and education academy and a full service-centre in fur, to become a leading fur training and education academy in Asia, and invite other Chinese design schools, tutors and students to take part.'

'The Chinese market is very important to Saga Furs, and the company was the first international auction house to establish an office in China already 30 years ago,' explains Saga Furs on their website.<sup>94</sup>

HCLC also stresses the importance of joint-working with Saga Furs: 'Haining has the advantage in fur manufacturing, whole sale and retailing, but is also facing the challenge of transition. We need superior resources, such as Saga Furs and BIFTPARK to settle here to create leap-forward development together.' Chairman of the Board of HCLC.<sup>95</sup>

A programme between Copenhagen Fur and Tsinghua University has also been underway since 2007. The Copenhagen Fur Studio at the Academy of Arts and Design states its goal is: 'To improve Tsinghua University's fashion design students' skills and innovation in fur design. High class fur is provided by Copenhagen Fur.'<sup>96</sup> They also run a joint MBA.<sup>97</sup>

In 2017, North American Fur Auctions (NAFA) launched a Heritage Campaign at an event held by FURCHINA and the Yuyao Fur Chamber of Commerce in Yuyao City, Zhejiang Province, showcasing fur garments with top designers.<sup>98</sup> Their new office facility for regional representatives in China was also set up in Tongerpu in 2017. In 2018, NAFA attended the 2018 Haining International Leather & Fur Fabrics and Accessories Exhibition, demonstrating eagerness to nurture business with China.<sup>99</sup>

Since 2003, the IFF has run an annual regional competition titled the REMIX Fur Design Award for talented young students, inviting entries from Asia, Eurasia, North America and Europe. More than 1,000 students from 25 countries have participated in this competition since its inception.

In 2017, the Asia Remix Grand Final was a runway show and competition held during the Taipei In-Style Fashion Week in Taiwan, during November.<sup>100</sup> In January 2018, Remix 2018 China Selection's finalists were announced at the 'Fusion Night' in Beijing, in collaboration with local fur events.<sup>101</sup>

As the evidence above shows, if Fur-Free outreach education is to make a significant impact, programmes should target fashion students as well as consumers, promoting alternatives to real fur.



### Understanding the truth through education

An article published by Global Times in December 2017 reports on a cumulative backlash after a video taken in 2005 of a raccoon dog being skinned alive for its pelt was repeatedly shared on social media. The film, *Fun Fur*, caused shock among viewers in China. Resulting interviews with fur-farm workers found staff who were not prepared to wear the fur they produced themselves – 'because it's too cruel'.<sup>92</sup> It also found that many viewers who witnessed the cruelty in the video swore never to buy or wear fur themselves.

China's buying power is huge. With a population currently in excess of 1.4 billion citizens, it has the power to make an enormous impact – negative or positive – on the entire global fur market. Financial incentives for producers remain high, while legislation to tighten procedures is rarely enforced. If ACTAsia's small survey sample is representative of the population at large, understanding the truth is key to reducing demand for fur in China. Education outreach has the potential to make a profound impact on fur farming if demand falls among such a highly populated, geographically extensive country.



## The fur industry's self-promotion

The fur industry promotes itself as a caring, sanitised, modern provider of luxury materials to the fashion industry and to public consumers themselves. Self-regulating monitoring bodies are becoming more common in response to societal concerns over the morals of farming wild animals for a luxury product. Examples include the European-based WelFur programme established around 2011, and the more recent GOOD4FUR certification in China, introduced by the CLIA and International Fur Federation (IFF) in 2017 (see 'Legislation' in part 2 of this report).<sup>102</sup>

WelFur states its three objectives to be:

- To provide a reliable on-farm animal welfare assessment system based on scientifically proven measures and independent third party assessments.
- To improve animal welfare on European fur farms through analysing of the assessment data and education of the farmers.
- To provide consumer transparency on the welfare status on European fur farms by publishing assessment data.

The fur industry claims that animals farmed for fur live happy lives in comfortable conditions. It dismisses assertions of cruelty and exploitation made by the Fur-Free movement as unfounded, and even rejects photographic evidence presented by reputable organisations of failing welfare standards. This includes the rejection of a report based on extensive

research into animal welfare standards in fur farms, including farms certified by WelFur, published by Respect for Animals in 2015: *The Case Against Factory Farming*. The report provides evidence to support claims that fur farms do not meet the basic needs of animals, not even on certified farms. The claim is supported by the experience offered at open days of industry-approved farms, where it is possible for stakeholders to assess standards for themselves. WelFur claims to base certification on good housing, good feeding, good health and appropriate behaviour, with regulation coming primarily from within the industry itself. WelFur-approved cages are wire on all sides, without any firm or natural ground for animals to stand on; cage size restricts movements to a couple of paces; and water is never provided for bathing. A key question must be would it ever be possible to make good provision for tens of millions of animals living short lives in manmade, confined spaces, designed to be labour and cost affective? Reported and photographic evidence suggests not.

WelFur's goal is to certify all 4,000 fur farms in Europe by 2020. China's GOOD4FUR initiative certified eight farms in China in January 2019, bringing its total to 13. Conditions on certified Chinese farms show similar failings to the WelFur farms investigated by Respect for Animals. Yet even when the facts are on view for all to see, the fur industry maintains that certified fur is high-welfare, derived from happy, healthy animals, and is environmentally friendly.



## The welfare of fur-farmed animals in China from breeding to slaughter

By default, there is limited consideration of welfare given to animals farmed for their fur, whether they are farmed in Asia, Europe or North America; restricted budgets and the nature of factory farming make that unavoidable. In China, animal welfare failings are still endemic to farming practices of fur-bearing animals, and many investigations support this position. Rising demands by the domestic market mean the quantity of animals farmed remains extremely high. Fur farms use drugs to stimulate the rate of growth in captive animals, reducing animal-husbandry costs and maximising profits, but not without compromise to the well-being of the animals. Farming methods are widely considered to be cruel and immoral, while slaughter involves killing animals in a production line for others to witness. There are many reports of routine atrocities to animals farmed for their fur, which are common in China, and more details can be found in *Fur Fur? A Report on China's Fur Industry*, published by Care for the Wild, Swiss Animal Protection and East International.<sup>103</sup>

### Melatonin is commonly used in mink farming to stimulate growth

Due to market demand in recent years, the maturing periods for farmed animals are being shortened with the use of drugs, so output and profits are rising quickly. Taking mink as an example, media reports state that traditionally, mink born in April were skinned in November or December, requiring seven or eight months to mature. Currently, mink

born in April can be skinned as early as August, with a maturity time of as little as four months. For fur farms, this is a large cut to labour and food costs.<sup>104</sup> The reasons for shortened maturity are due to the use of melatonin. Its effects cause hair to grow at a quicker pace, but side effects also cause the bones to grow too quickly, affecting bone density, seasonal reproduction, and sleep patterns. In Denmark and Finland, among several other countries, melatonin is banned from use by the fur industry.<sup>105</sup> In contrast, melatonin is used widely in China.

### Skinning alive and the difficulty of its prohibition<sup>106</sup>

The physiology of an animal's death process determines the fact that the Chinese fur industry often skins animals while they are alive. Evidence shows a lack of improvement in welfare or standards to fur production in China in recent years. Cruelty on many levels persists, with inhumane methods of skinning being routinely used even more widely as the trade has expanded. The most recent in-depth report into welfare on fur farms in China states: 'Skinning begins with a knife at the rear of the belly whilst the animal is lying on its back or hung upside-down by its hind legs from a hook. A significant number of animals remain fully conscious during this process. Helpless, they struggle and try to defend themselves to the very end. Even after their skin has been stripped off, breathing, heart beat, directional body and eyelid movements were evident for 5 to 10 minutes.'<sup>107</sup> The fur industry claims that



despite many recorded incidents of live-skinning by undercover investigators, the practice is not routine. The reason for this common occurrence is that animals in China are routinely knocked unconscious by workers before they are skinned, to stop them from struggling. Workers hold animals by the hind legs and swing their heads against a hard surface – the ground or a wall. Sometimes this impact may kill them outright, but most times this bludgeoning merely renders them temporarily unconscious. And so it is that an unconscious yet living animal is peeled of its skin, sometimes breathing through the process, sometimes returning to consciousness as their skin is removed. All of these practices are due to the fact that labour hired for live skinning is often cheaper than investing in high-tech killing methods, especially for household breeding fur farms. Anecdotal evidence shows there is also a common belief in China that live skinning helps to preserve a better quality of fur.

#### **Mobile skimmers and the import of foreign equipment are helping expansion**

In addition to the routine slaughtering and skinning of animals carried out by fur farms, some businesses are hiring extra workers to slaughter animals for them. During the skinning season, 'mobile skimmers' move from farm to farm, slaughtering and skinning animals as fast as they can, which can lead to skinning alive, methods for which are described above. In addition, China is beginning to hire more technical workers, applying techniques and equipment from Northern Europe to facilitate expansion. Evidence also shows that some large-scale farms are using carbon dioxide to kill mink.<sup>108</sup>

#### **Other common welfare issues**

Stereotypical captive behaviour has been witnessed at every fur farm investigated in China. This includes self-mutilation, infanticide, and repetitive pacing, witnessed across the board of all farms investigated in China. Cub mortality is high. Cage sizes fall short of EU recommended standards, and animals are commonly found in isolation, unable to make physical contact with others. There is no provision for captive wild animals to run or forage or, in the

case of mink, to swim. Food is given as a processed paste. Wire bases to cages lead to injuries from limbs becoming caught, especially with young animals. Although nesting boxes are compulsory for certified WelFur and GOOD4FUR farms, they are a highly unusual addition to animal housing in China. Cages in Chinese fur farms have been found to be barren, exposed to the elements whether the climate is cold or hot, and severely inadequate in providing shelter or comfort, serving only to keep captives alive for long enough to grow a pelt of acceptable size.

Although there has been a rise in the number of industrial-scale fur farms in China, small, family-owned operations are still very common, as reported in a 2010 US Department of Agriculture report.<sup>109</sup>

Investigations have found that animals are kept in small, dirty cages exposed to the rain and sun, experience rough handling, and suffer high infant mortality rates. Abnormal behaviours indicative of poor welfare are common, including extreme fearfulness, unresponsiveness, and self-mutilation. And farmers themselves reported infanticide and difficulty breeding, also signs of poor welfare.<sup>110</sup>

Despite acknowledged indicators of poor welfare, WelFur continues to approve small wire cages without enrichment, which often lead to tail-biting and fur-chewing, recognised signs of boredom and derangement, as outlined in *The Case Against Factory Farming*.



## The potential for harm to the environment through fur production and processing

The pollution of the environment by the fur industry is reported to be extensive, and caused by various processes. Damage caused by disposal of animal waste, the slaughtering process, invader species, and the enormous chemical pollution caused by disposal of toxins used in the processing and dressing of fur must all be taken into consideration.

### The high-cost of pollution caused by animal farming, slaughtering and waste animal products

According to the media and industry information, disposal of animal faeces from Chinese fur farms rarely follows the practice outlined article 49 in *Environment Protection Law of PRC*. The article explains that animal faeces, their bodies and waste water should follow regulated processes and be disposed of scientifically.<sup>111</sup> The pollution caused by fur farming has been gradually recognised and acknowledged by local government and local residents to varying degrees.

While some animal carcasses are used to cannibalise subsequent generations of animals as feed, there remains a large quantity of bodies after skinning for disposal. Their potential to cause pollution to the environment is a serious threat. There is no easy way to dispose of such enormous quantities of dead animals. Incineration would produce toxins and pollute the air; burying would produce toxic decomposition products; rendering skinned animal bodies tends to cost a lot of energy, and would also create chemical pollutants.<sup>112</sup> Any of these methods of disposal cause significant environmental concern.

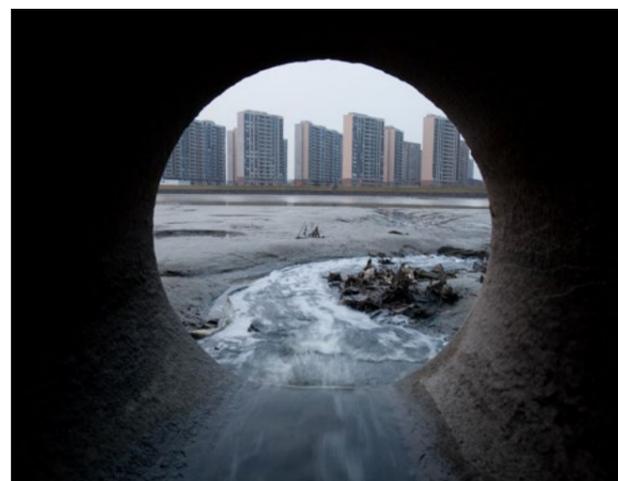
### Chemical pollution resulting from the processing of pelts

The water and land pollution caused by chemical pollutants released from fur processing plants is a common and well-known problem in China. Many individual examples of problems caused by fur

processing are acknowledged by the authorities and the Chinese fur industry. There have been many occasions when pollution has severely endangered both the environment and human health.<sup>113</sup> Tanning is one of the worst processes for creating toxic waste, but is essential to fur production to prevent the skins from rotting. The contaminated water left behind after the skins are chemically treated is commonly flushed out into rivers, devastating wildlife, natural habitats, and the water table used by people.

### Invader species and related environmental issues

The incidence of alien species first occurred during the early development of China's fur industry. It happened because in some cases animals were released from farms into the local environment, or in other cases escaped from their cages. There have been severe problems caused to local habitats and indigenous wildlife by invader species – such as mink – in recent years. Yet despite the damage caused by animals released from fur farms, individually the animals lack survival skills and cannot adapt to life in the wild, so the majority die after a relatively short period of time.<sup>114</sup> A large number of released animals are hunted by people or die through starvation, lack of suitable habitat and exposure to the elements in the wrong climate.



## Toxic fur and other associated health risks

### Toxic residues in fur present a health risk to the consumer

Recent scientific research carried out by ACTAsia in collaboration with the Fur Free Alliance found that illegal concentrations of toxic residues are routinely found in fur products across China. Chemicals found included carcinogens and serious allergens, such as Formaldehyde, Chromium VI, Polycyclic aromatic hydrocarbons (PAH), Alkylphenol ethoxylates (APEO + NPEO), Azo Dyes and Heavy metals such as lead. For more details please refer to the report *Toxic Fur*.<sup>115</sup>

Several European investigations over the last ten years have also analysed fur items for toxic residues and found similar results to our research in China. Samples have come from different clothing brands, within different price ranges, adult and children's items, dyed and non-dyed, and manufactured in different countries. In total, 116 items have been investigated in ten European countries. The majority of the analysed samples were substantially contaminated with hazardous chemicals at levels breaching legal industry standards.<sup>116</sup>

### Health risks to workers

Recent research in China has underlined that the use of potentially dangerous chemicals in fur production, alongside a lack of health and safety legislation, can have devastating effects on industry workers. As stated in *Fur is not Green* by Respect for Animals.

'The surfactants, solvents, acids, tannins, fungicides, dyes and bleaches subject industry workers to a risk of acute and chronic conditions, ranging from skin complaints to eye irritation, cancer, and even death'.<sup>117</sup>

The two main methods for dressing fur skins use chemicals listed as toxic to humans. While the chemical residues found in the finished products pose a risk to consumers, the risk of exposure and harm to fur industry workers, who come into sustained, direct contact with toxic chemicals is far greater.

Formaldehyde is used to protect fur follicles and prevent skins from shedding hair. It is unanimously recognised as a toxic substance, listed by the US Environmental Protection Agency (EPA), Toxics Reporting Industry (TRI), the American Apparel and Footwear Association Restricted Substances List (AAFA-RSL) and the California Proposition 65 Super List of chemicals known to cause cancer. The International Agency for Research on Cancer (IARC) states: 'this chemical is carcinogenic'.<sup>118</sup> As well as a cause of nasopharyngeal cancer in humans, there is also evidence that formaldehyde causes leukemia.

Chromium is used in the tanning process and is known to be toxic, as well as carcinogenic in some forms. It is listed by the California Proposition 65 as a chemical known to cause cancer as well as reproductive effects.

In 1996, a study of workers published in the American Journal of Industrial Medicine found that women employed as leather and fur processors may also have an increased risk of breast cancer.<sup>119</sup>

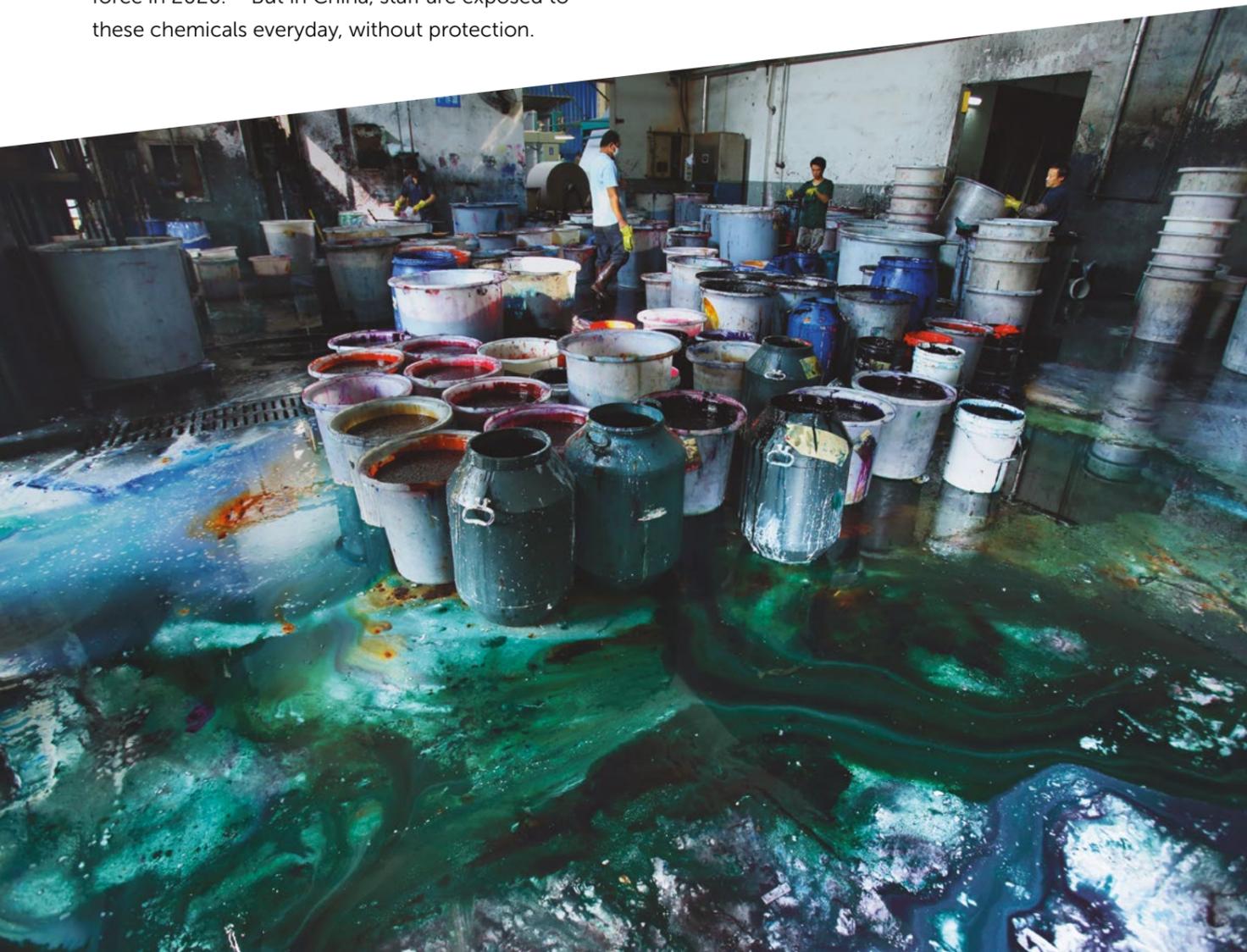
The process of dressing fur has been ranked as one of the world's worst industries for toxic-metal pollution. The Environmental Protection Agency (EPA) in the US has issued fines to a total of six fur processing plants for causing high levels of pollution and for using solvents in dressing fur that 'may cause respiratory problems and are listed as possible carcinogens'.<sup>120</sup>

In China, fur workers are ill-informed about the toxic nature of the chemicals they work with. They are repeatedly exposed to chemicals that are Carcinogenic, Mutagenic or Toxic for reproduction (CMR). A recent ruling by Reach, the European Regulation on Registration, Evaluation, Authorisation and Restriction of Chemicals, has imposed a ban on the use of 33 CMR chemicals, which will come into force in 2020.<sup>121</sup> But in China, staff are exposed to these chemicals everyday, without protection.

A film by Antonia Coenen, *Die Wahrheit über Pelz (The Truth about Fur)*<sup>122</sup> clearly documents workers in a hot, processing environment, showering in the toxic chemical waste water from dressing fur pelts.

#### **Skinned by-products are used as animal feed**

In the past, the mink flesh left after skinning was consumed by the farmers themselves, or sold collectively to meat traders, flowing into the food market for people. Nowadays, due to the much larger quantities of skinned animals and the use of drugs in developing them, most fur farms prefer to feed skinned animals to the next generation of farmed animals in their factory of cages.<sup>123</sup> Scientific experts have criticised this practice as potentially harmful, causing animal welfare concerns.<sup>124</sup> Media reports have claimed that meat from skinned animals is falsely labelled as a different species, and sold into the food market for human consumption.<sup>125</sup>



# Conclusion

## The key findings of research into China's fur trade

### **1. China's fur industry appears to be consolidating and stabilising, despite a slowdown after 2014.**

The industry is in a phase of transformation through industrial centralisation, which may have contributed to a fluctuation over the past few years. Centralisation happens as the industrial chain matures: small household farms are replaced by fewer large-scale farms; the workforce grows in response; and regional specialisms result, as new geographical areas of China recognise financial opportunity. Over-production affected the global market after the peak, and happened because of the financial incentive to farmers, who breed more animals even faster every year, while the processing industry expands in response.

### **2. Although the popularity and production of fur are in decline in North America and Europe, demand in China is still strong.**

Real fur has become harder for many designers and brands to justify, especially in North America and Europe. Increasingly, high-end brands as well as high-street retailers are now Fur-Free. The use of real fur has become more subtle, more ambiguous when compared to high quality

faux fur, and perhaps even more devious in its popularity as trim. While market demand falls in the western world, demand from China supports and prolongs the global fur trade.

### **3. Joint ventures between China, Europe and North America are increasingly common, both in breeding fur-bearing animals and teaching the trade to students.**

Many established names in fur from Europe and North America are becoming increasingly reliant upon business partnerships with China, because standards and penalties against misconduct in fur farming have risen in the western world. There is evidence to show several countries have already found rich reward in joint ventures with China. The most common area for collaboration is breeding stud stock, but fashion and business programmes for students are also popular. By exporting large quantities of quality stud animals to China for breeding, the fur industry in countries including Denmark, Finland, Russia as well as North America sees profits soar. There is no evidence yet to reveal whether fur from animals that have been bred and processed in China through joint ventures with international partners, ends up with a label stating

a European or North American country of origin. Evidence suggests the global fur industry is taking advantage of the freedom it finds in China to support an industry increasingly maligned in the west.

#### **4. The absence of enforceable law, neglected animal welfare, environmental damage and human health risks are rising concerns as fur production grows in China.**

As the farming of fur-bearing animals in China expands and the life-cycle speeds up, concerns for animal welfare are greater than ever. Profits are maximised through cheap husbandry, cannibalisation of waste-animals in feed, and cheap slaughter methods. The absence of enforceable law makes it impossible to safeguard animal welfare. Enforcing legislation would make it harder to exploit animals, reduce profits and make the trade less desirable.

Environmental pollution and invader species are routine consequences of fur farming in China, where farmers and processors do not incur environmental taxes and do not need to meet minimum standards.

Toxic residues found in finished fur garments produced globally can be absorbed through skin, potentially causing allergies, cancer and affecting reproductive capabilities. Health implications for industry workers are even greater, especially in China.

#### **5. Educating consumers and retailers on the reasons to avoid buying or selling fur are key to eliminating China's fur trade.**

As wealth grows in China, the luxury goods market is expanding, taking fur with it. Education improves public understanding around the processes involved in producing fur, and introduces desirable moral boundaries into society, including a Fur-Free life.

#### **6. China:**

- **produces more fur than any other country in the world**  
Regardless of whether one single species or all species combined are considered, the quantity of animals whose fur is harvested in China is the highest of all countries in the world. More than 50% of fur output in the world comes from China.

- **imports more fur pelts than any other country in the world**

It is predicted that China's market will continue to develop, while the demand for imported fur is likely to grow. Imported fur has a higher status and commands a higher price.

- **consumes more fur garments than any other country in the world**

China's appetite for fur remains high. Until now it has consumed around 80% of domestic production and contributed more than half of global fur retailer sales.

- **plays an increasingly dominant role in the global fur market.**

China continues to drive the global fur market. Exports are predominantly to Russia, South Korea and other Northeast Asia markets, but also in significant quantities to Europe, Australia, and the US. Fur trim and accessories have become increasingly popular and affordable items since the turn of the 21st century. False labelling and the ambiguity between real animal fur and faux fur help fuel demand for trim. Dog and cat fur are exceptionally cheap to produce and help to subsidise the industry further, with false or insufficient labelling facilitating export to countries where their use is illegal. A recent surge in joint ventures with other countries facilitates high profits globally through the low costs of exploited workforce, lack of welfare standards and inhumane breeding and slaughter methods.

#### **7. The future**

As the fur trade spreads its network of production, processing and sales across China, it has become more significant as a national industry. As China's fur industry hopes and prepares for possible expansion, the global fur trade is likely to become increasingly reliant on it in future. Without China's support, the global trade cannot continue profitably in the longterm. An effort to educate younger generations in China and encourage global designers and retailers to join the Fur-Free movement is urgently needed in order to work towards ending this inhumane and exploitative new form of factory farming in China.

# Recommendations

## We recommend the following actions:

- That China's Government immediately establishes and enforces legislation to reduce pollution and animal suffering in the industry, and protect the workforce. As reference for setting enforceable law, China should use the standards and policies of countries where fur farming has been banned or is no longer economically viable, such as Austria and the UK. China should also ensure that live skinning does not take place.
- The Fur-Free movement should carry out further research into the export of stud animals from Europe and the US to China, the establishment of green customs channels and international business cooperation, and learn more about the partnerships between China and the fur industry in Europe and North America.
- Relevant authorities and NGOs should address the global significance of China's fur trade as an influential force on the world's fur industry.
- China's fur industry must be held accountable by relevant provincial authorities and trade associations for the psychological and physiological harm to factory workers, the destruction of the environment by industrial waste and suffering of animals in factory farms.
- The fashion industry including designers, brands and retailers should join the Fur Free Retailer scheme and acknowledge their responsibility to influence the future of fur.
- International universities and colleges should develop Fur-Free policies, and use their creativity and influence to find and promote alternative, sustainable materials to real animal fur.
- Education campaigns should target the public in China with a focus on millennials. Education should help the public to understand methods employed by China's factory fur farms, and as a result to make responsible fashion choices.
- Future research into China's fur trade should focus on the tendency in China to integrate the whole chain of fur production, including farming, processing, wholesale and retail, with a view to countering further development and halting the long-term threat to animals, the environment, associated factory workers and consumers.



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