
On Fashion Industry Status and Design Innovation Strategies for Chinese Leather

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Abstract: The leather fashion industry has always been one of China's important industries with a higher degree of industrial agglomeration and internationalization. After 30 years of precipitation, adjustment and reform, it is now marching towards a stage of in-depth innovation. Based on the analysis of the current situation of the leather industry and leather wear design, this paper puts forward the main status and problems faced by the Chinese leather wear design: style convergence, seasonal limitations, environmental issues, and talent problems. According to the characteristics of materials, craftsmanship and structure of leather wear, this paper attempts to propose specific design strategies from the following perspectives: design resource integration, design methods, design thinking, and collaborative innovation. These perspectives provide the following four aspects of innovation strategies for advancing the overall design level as well as design value for Chinese Leather wear: integration and optimization of design resources, innovation in design methods, improvement of design thinking, cross-border collaborative innovation and joint efforts of the government, enterprises, and colleges. On this basis, this paper explores and studies development ideas, and thus puts forward four suggestions on new directions of Chinese leather wear design, that is technology, refinement of positioning, branding and sustainability.

Keywords: Leather Wear, Fashion Design, Innovation Strategy

1. Introduction

Owing to the continuous advancement of science and technology, our country has developed rapidly in the leather industry and has gradually become a global tannery producer [1]. Under the new Internet economic model, the leather fashion industry of China, represented by Haining China Leather City, has become one of the benchmarks for the transformation and upgrading of traditional textile and fashion industry. Meanwhile, with market changes and industry develops, how to improve the design and innovation ability of leather fashion has become the key to the sustainable development of enterprises. On the one hand, the "indoorsy" economic model and the new economic form of the mobile Internet has led to the emergence of online sales, cross-border e-commerce, and live streaming sales, which has overturned the traditional model of design and sales. As a result, a large number of well-known brands both domestic and overseas have flooded into the market, intensifying the competition. On the other hand, the global spread of

COVID-19 from 2020 to 2021 has caused a major impact on the entire industrial chain of China's leather fashion industry. Raw materials are in short supply, leading to rising costs; stores are closed and sales are frustrated; and the production capacity of factories has been declining due to power curtailment and shutdown. The leather industry has been hit hard both on the design and production side and also on the downstream demand side. In the face of tremendous changes and crises, the innovation and improvement of leather wear design is of great significance to accelerate the transformation and upgrading of the entire leather industry and even fashion manufacturing industry. Furthermore, it also has practical significance for improving the overall level of the leather industry and surrounding textile industries.

2. Overview and Problem Analysis of Leather Wear Design

China's leather industry has long been focused on export

and processing, and lacks a complete and effective horizontal collaboration system in terms of R&D, design, and branding. Design innovation has become a weak link in the development of leather industry, and many problems such as insufficient design capabilities and declining sales have become increasingly prominent. Currently, the main problems facing leather fashion are as follows:

2.1. Convergence of Style Design

Take Haining, the leather capital of China, as an example. There are nearly 10,000 leather companies in Haining, and 85% of them still follow the traditional model in style design and development, that is purchasing sample clothes, copying and modifying drawings, and integrating samples. That's why the design is convergent and lacks innovation. In such old model, leather products are homogenized. It is not surprising that the same or similar styles appear in different brand stores, causing a weak recognition in brands. The convergence of style design has become an important problem restricting Haining's leather wear innovation and promotion. It is also the main reason why most Haining brands cannot have a long-term, stable and loyal customer base. Under this design system, leather wear companies have formed a design echelon group with managers as the core, relying heavily on "sample clothes" rather than creativity. This kind of group lacks reasonable resource allocation and effective design process. As a result, there have been few brand classics with originality and "lasting vitality".

2.2. Seasonal Limitations

Leather wear has strong seasonality and short periodicity. It has a large purchase volume in autumn and winter every year, while it is often unsalable in spring and summer, which severely restricts the trade and consumption of leather wear [2]. According to the survey, leather wear mainly focuses on the autumn and winter consumer groups as well as the northern consumer groups. Designers frequently focus on the warmth and sense of quality of their products, while the style is often thicker and calmer, emphasizing the practicality and functionality of wearing. The products are mainly coats, windbreakers, and jackets, with a relatively single structure, which brings great limitations to the design and innovation of leather wear. How to break such limitation of seasonal and unitarity will become one of the breakthrough points for leather fashion's innovation and improvement [3]. Therefore, it is suggested that leather wear enterprises actively adjust the structure of their products, expand the new functions, materials and technology, and extend the wearing cycle and consumption season, so as to enhance the fashion and durability of leather garments.

2.3. Environmental Issues Derived

The leather industry is a resource-consuming industry, and a series of environmental issues arising from leather design have always been unavoidable. Take the processing and production of leather fabrics as an example. To process a raw

hide into leather garment fabrics, it needs to go through more than 10 processes such as soaking, degreasing, squeezing, pickling, softening, and tanning. Each process generates tons of waste water. Furthermore, the waste and pollution caused by the cutting, dyeing, and sewing of the design process result in new environmental problems, which become a serious test facing the industry. Besides, more and more environmentalists and animal protectionists have begun to reject leather clothing, which has also formed a huge impact on the development of the industry [4]. How to achieve ecological and sustainable development in the design and production process has become the key to the transformation and upgrading of the leather brand.

2.4. Lack of Leather Talents

Compared with other clothing categories, leather garments have complex craftsmanship and strong professionalism. In addition, the regional particularity leads to the low stability of designers. The talent problem has become an important "short board" restricting the development of leather garments design. According to the author's investigation, among the clothing design colleges in our country, only a few offer courses in leather wear design. The designers graduated from colleges often lack knowledge of leather crafts and the professional market. When designing, they only apply ordinary techniques to leather wear, or copy and imitate the style of foreign brands, which brings great resistance to the independent innovation of leather wear in China. In this case, it is suggested that enterprises, professional colleges and industry associations cooperate to solve the problem of professional personnel training.

3. Analysis of the Innovation Strategy of Leather Wear Design

3.1. Integration and Optimization of Design Resources

The integration and optimization of design resources are significant to solve the convergence problem of leather wear style design. According to the survey, the leather wear market is a professional market segment, with obvious regional differences in market as well as consumer groups segmentation. However, at present, most companies, taking Haining as an example, still adopt the so-called "patterning" method in style development, that is, buying sample clothes, restoring samples, combining and rectifying products. Due to the lack of precise positioning of target consumer groups and target products, and the lack of standardized processes, design resources have been lost and wasted.

Therefore, leather wear companies should formulate a standardized design procedure, including the entire process from target market research, fashion trend analysis, inspiration collection, theme style refinement, series product development to terminal product confirmation. Moreover, they need to formulate a clear division of responsibility system, rationally structure human resources and information

resources, rather than just request designers to imitate and restore samples.

In the preliminary process of market research and design positioning, companies should conduct scientific analysis on the collected information and target markets to expand product possibilities. For example, actively develop spring and summer products, so that leather garments are no longer just consumable in autumn and winter; research and develop new leather materials (such as new ultrathin leather, etc.), combine and match leather with different fabrics, and expand the use of leather products.

During the design and development of leather garments, different designers may have diversified opinions and ideas on the market in the same quarter. Managers can take a "brainstorming" approach to allow team members to participate in the entire design plan, complementing each other and giving full play to their strengths. By this, companies can replace the planning model with the design director as the core, thereby stimulating the innovation of the entire team as well as the initiative of the designers, and bringing more economic benefits for themselves.

3.2. Innovation in Design Methods

3.2.1. Composite Application of Heterogeneous Materials

The composite design of heterogeneous fabrics is one of the popular trends in recent years. Various materials are broken and reorganized to present a variety of textures [5]. In view of the seasonal problems of leather garments, on the one hand, designers can break through the single characteristics of traditional materials, combining leather fabrics with silk, knitting, lace, plastic, down and a variety of new fabrics; on the other hand, new combinations can be explored, and the original characteristics of leather can be improved through deconstruction, weaving, splicing, and reorganization, so as to enhance the wearability and artistic beauty of leather clothing, and also make the design more fashionable and diversified. According to research, Hermes, the top luxury leather brand in France, has launched a chiffon crocodile skin that is "thin like paper", which integrates the soft texture of chiffon into leather fabrics. The use of the composite material on dresses has achieved an innovative breakthrough in leather fabrics.

3.2.2. Application of Digital Technology

Traditional leather wear design is inseparable from tools such as tanning equipment, sewing machines and cutting scissors, which limits the design and to some extent, brings negative impact on ecology and environment. Affected by the Internet celebrity economy and technological storm, digital technology is gradually subverting traditional clothing design. Emerging scientific and technological achievements have brought new inspiration and possibilities to leather design. For example, the emergence of 3D clothing printing technology allows designers to break the constraints of traditional manufacturing technology and achieve more complex and refined designs. 3D body scanning technology establishes an accurate human body database through advanced body measurement and data analysis, which

provides technical support for mass production of garments and mass-customized e-commerce sales. "Virtual fitting" allows designers to make personalized designs and modification based on information input by customers, making the design process more humanized and ecological, thus creating a good consumer experience. In addition, digital tanning technology, high-efficiency digital printing technology, wearable technology and other high-tech achievements are also bringing huge changes to the industry. Companies can actively introduce and absorb these new technologies, develop new processes and materials for leather clothing, and then promote innovation with science, thereby enhancing the ecological connotation and core competitiveness of their products.

3.2.3. Fusion of Traditional Elements and Modern Crafts

Pietro Beccari, global CEO of the famous Italian luxury brand FENDI, once said: "Leather is not one of the craftsmanship that people are best at, but it is an artistic expression, that is, innovation and tradition will never be separated." when design leather garments, traditional elements and modern technology can be effectively integrated by the diversity of the leather itself, and the design quality can be improved from the characteristics of leather fabrics. In the design process, leather apparel can inherit the traditional elements and ancient craftsmanship with Chinese characteristics while closely following the international fashion trends, so as to enhance the cultural connotation and aesthetic taste, as well as the international influence of Chinese leather.

3.3. Improving Design Thinking: Sustainability

Design thinking is the starting and ending point of leather wear design, and it affects the final effect of leather wear products. Introducing sustainable thinking into leather wear design not only adapts to the sustainable development of leather industry, but also reflects the design orientation and the transformation of lifestyle. In the era of low-carbon economy, leather apparel should actively improve design thinking and originality, strengthen the designer's sense of responsibility, and organically integrate the concept of "health, environmental protection, and sustainability" into design. Sustainable leather design should be advocated to improve the ecology of leather industry, and to lead the fashion trend with the concept of sustainability.

3.4. Cross-border Collaborative Innovation

Due to the limitation of professional and industrial resources, the innovation and upgrading of leather wear cannot be solved by designers or garment professionals unilaterally. Cross-professional knowledge and cross-industry cooperation can provide new materials, methods and ideas for leather wear design. Innovative inventions in safety sciences, biological sciences, materials chemistry and other disciplines continuously provide the latest equipment and materials for leather wear design; branding, marketing, management and other interdisciplinary

knowledge can provide inspiration and creativity for leather enterprises; the collaboration among government, enterprises, industry associations and colleges can actively promote the training of leather apparel professionals.

Especially in view of the shortage of design talents, enterprises can cooperate with domestic and foreign industry associations, scientific research institutions and colleges to jointly participate in the development of products and projects; colleges may consider setting up special courses of leather wear design, solving the problem of talent demand through various methods such as industry-college-research linkage, school-enterprise cooperative training, and project-based collaboration. In addition, relevant industry associations should introduce excellent design teams, and regularly appoint designers to training and research, so that information and technology can be continuously updated. All industries should actively establish and improve the cooperative innovation mechanism of leather garments, and coordinate production, education and research to jointly shape the development of leather industry with the concept of "rethinking, redesigning, and rebuilding".

4. The Development Trend and Suggestions on the Direction of Leather Wear Design

4.1. Towards Technology

Due to the constraints of materials and technology, leather garments have certain limitations in style design and craftsmanship. Emerging science and technology can provide more space and possibilities for fabric design, style design, craftsmanship and clothing display design of leather apparel. In the development of the leather industry, high-tech and information network technologies can be adopted to accelerate the technological transformation through innovation, so as to achieve overall leapfrog development [6]. At the recent leather wear exhibitions in 2021, cutting-edge technological achievements such as smart leather weaving, 3D clothing printing, wearable computing technology, and washable leather have attracted wide attention from the design circle. The integration of technological intelligence and fashion has become a new direction for future clothing design. All kinds of new crafts, fabrics and technologies have entered the leather industry to realize the digital upgrade of the textile and garment industry. As a special category in the fashion industry, the combination of leather design and technology can greatly enhance the additional value and technical content of leather apparel products, improve the design quality of companies, and boost the overall level and innovative capabilities of leather fashion design.

4.2. Towards Positioning Refinement

According to the survey, with the influx of a new generation of consumers, young consumer groups are gradually taking the place of the main forces of leather consumption. Traditional leather wear design and sales that

mainly rely on middle-aged and older consumers to maintain consumption will not be sustainable. In the context of big data and youth subculture, nutrition from the lower class is gradually infiltrating into the field of fashion and bringing new popularity. The impression of nobility, elegance and luxury of traditional leather clothing is gradually weakening. On the other hand, as a design symbol, the "information" and "civilian" design elements featuring street fashion, yuppie, casual, leisure and civilian will become the popular trend of leather clothing, and will bring new changes of design orientation and style. Positioning is the prerequisite of design. For leather garment design, it is even more necessary to clarify the specific characteristics of its target market and consumer groups [7]. Therefore, enterprises should actively change their thinking, refine their positioning in the process of design and development, identify the target consumer groups and business circles, and integrate new dressing needs and lifestyle into the fashion design of leather clothing.

4.3. Towards Branding

In recent years, with the development of leather industry, major leather markets and enterprises across the country are growing rapidly. Therefore, the competition has become increasingly fierce. For leather wear companies, the beauty of an individual style is not the most important. It is consumers' recognition and loyalty to the brand that guarantee lasting value [8]. Due to the ambiguity of design positioning and the lack of differences in products, brand convergence and homogenized competition among enterprises have become the main obstacles to the development of leather wear. In the market with increasing competition, companies should strengthen the efforts for brand building and characteristic product researching, and continue to differentiate, refine, and excavate the brand culture with identification and uniqueness. what's more, they should also learn to use branding and diversified design techniques to better express the designer's intent and ideas, and make clothing more artistic and fashionable. At the same time, companies should expand the boundary of leather fashion design, lead the innovative development of leather with the brand value, enhance the spiritual connotation and build the additional value of products with culture.

4.4. Towards Sustainability

The traditional leather industry is a high-pollution and high-energy-consuming industry. Wastes and toxic substances in leather wear design, such as pentachlorophenol, aromatic amines, and hexavalent chromium, have brought many negative effects on the environment and consumers' health. Sustainability will become an inevitable trend in the future development of leather wear. In 2021 Haining China International Leather, Fur and Fashion Accessories Exhibition, the new concept of green and sustainable ecological health has become the theme of the event.

Sustainability means more durable, more ecological, and healthier, representing a new direction for future fashion

development. Sustainability in leather wear design are as follows: Firstly, to actively research and develop new leather fabrics and processes to expand the wearing cycle and functions of leather clothing [9]. Secondly, to strengthen designers' sense of responsibility and sustainable design thinking, use subtractive design, fabric reconstruction and cyclic design as much as possible in leather wear design to advocate environmentally friendly design, digital production and clean production, and to reduce waste of raw materials and pollution. Thirdly, to focus on developing healthy, ecological, personalized leather products with brand characteristics, such as functional leather wear, plant tanned leather wear, washable leather wear, etc., thereby extending and developing products in terms of performance and connotation. In 2021, Burberry, the well-known British luxury brand, launched a biodiversity strategy to support global efforts in environmental protection and resource recycling. One of the special focuses will be to support the protection and resource regeneration of grasslands in the leather supply chain. No doubt, responsible and sustainable fashion will be an inevitable trend in the future development of the global fashion industry [10].

5. Conclusion

As fashion gradually becoming a modern way of life, leather wear is not limited to functionality and practicality, but has become a carrier of cultural style and a way of displaying personality. After nearly 30 years of rapid development, China's leather industry has entered a period of bottleneck and transformation. Design innovation has become an important path for the transformation and upgrading of the leather fashion industry. From "made in China" to "created in China", the author's research also tries to explore new strategies and directions of China's leather wear design and innovation under

the new situation, so that the industry is more and more adaptable to the need for new era and development concepts. Furthermore, the author also hopes to inspire more designers' attention and exploration on China's leather wear design.

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