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in a commodity chain perspective

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Prepared for the European Sociological Association meeting
in Murcia, September 2003

First draft. Do not quote
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The first part of this paper documents the biography of the fur coat (Kopytoff 1986) through its rise, fall and recent return. The second part discusses the return of the fur coat in terms of global commodity chains which link producers and consumers. It points to the critical link between the Danish fur breeders’ marketing organization SAGA and high-fashion designers as a particular source of power in buyer-driven commodity chains. Finally, the commodity chain approach is discussed in relation to the anti-fur campaigns that also tended to play on the contrast between production and consumption. This opens for a discussion of cultural critique and the opulence of fur.

1: Towards a biography of the fur coat

The fur coat as we know it is an eminently modern garment. It is only a little more than one hundred years ago that fashionable people in Western cities first began wearing fur coats. To be sure, fur garments have been worn by a variety of ethnic groups since prehistoric times, and it is older than garments made from woven fabric. However, when fur was adopted by fashionable society of European courts, nobility and wealthy merchants from the medieval period, it was used for trimmings and small items such as hats, muff, collars and cuffs. That it was considered to be exclusive is obvious from the frequency with which it appeared in sumptuary legislation.

Furriers have told me that the first modern fur coat was made for the Paris Exhibition in 1989. I have not yet been able to confirm this, but as a piece of fur-lore it is evocative in making an association between the Eiffel Tower, the landmark of the exhibition, and the modern fur coat. Both were in a way engineering feats of construction; like the Eiffel Tower’s supporting iron construction, the fur coat was constructed out of many small strips of fur which had been cut up and reorganized before they were sewn together again so that the overall visual effect of the coat was like the fur of a single large animal. Also in other ways was the fur coat associated with modern technology: travel by motor car and by aeroplane as well as hot-air balloon exposed the human body to extremely low temperatures, making warm fur coats and specialized outfits indispensable.

However, more than anything else, the fur coat came to be associated with modern upper-class femininity. Examples come from Sacher-Masoch’s Venus in Furs (written in 1916), which describes the main character Severin’s infatuation with the fur lady Wanda who fascinates because of her cold marble-like body that she conceals under numerous heavy fur coats. Other examples are Judith Emberley’s analysis of ‘Freudloser Gasse’, Pabst film from 1926, and Thomas Hardy’s poem ‘The Lady in Furs’(1925).

Wartime proved to be stimulating for the fur trade, largely because global trade in wool and cotton came to a halt, thereby increasing demand for alternatives. The decades following World War II were the golden era of the fur coat. A key figure in fur-lore was U.S.-based Fred the Furrier who was famous for his vision to make fur coats so affordable that all middle-class wage-earners could buy one for his wife. We note that this vision contains a particular sexual politics, compatible with Veblen’s concepts of conspicuous and vicarious consumption. This development continued in
the 1960s and 70s; however, by this time, fur coats came to be increasingly expensive. This has less to do with an increase in the real price of a fur coat, and more with the overall development of garment manufacturing. The emergence of synthetic fibres and increasing industrialization and rationalization, including the shift to global production, advanced marketing which had succeeded in making shopping a casual event – all these factors have on the whole made garments much cheaper than they used to be. This is reflected, for example, in the marked tendency for the proportion of a family income spent on clothing to decrease (Lipovetsky 1994).

In such a fashion environment dominated by youthful looks and changing trends the fur coat stood out. The sexual politics of the classical fur coat inevitably seemed outdated. And as an once-in-a-lifetime investment (which all coats used to be, except for the upper classes) it needed to retain a rather conservative design to allow for changes in the owner’s body. Furriers did what they could to glamorise the image of fur, for example by using a wide variety of pelts, including dyed and shaven fur as well as wild cats and other endangered species. However, this was brought to an end in the 1970s when the first international agreements to ban the industrial use of endangered species were signed. (Even today coats of tiger and ocelot fur are made, though, for a small exclusive clientele that is prepared to pay exorbitant prices for unique garments. In the 1970s seal fur from Canada, Iceland and Greenland were also pushed out by anti-fur campaigns, most notably led by Brigitte Bardot.

However, really powerful anti-fur campaigns did not start until the 1980s when the issue was taken up by social movements such as Greenpeace, Lynx and others. Since the fur trade predominantly consists of small companies, it was particularly vulnerable to this attack, and many furriers closed their businesses. In fact, the fur business entered a major crisis. One strand of the antifur argument was cruelty to animals; another, which was possibly more evocative, was the attack on luxury and the bourgeois femininity that fur symbolized. Examples of antifur slogans are ‘It takes forty dumb animals to make a fur coat; it take one to wear it’, and the contrast ‘Rich bitch/poor bitch’ – the first referring to a woman wearing a large fur coat, the second to a fox, caught in a leg-hold strap. This latter poster was designed by Linda McCartney, among others; and the number of celebrities involved in anti-fur campaigns indicate that we are dealing with a phenomenon that can only partially be seen as the people versus global capitalism (Emberley 1998).

Perhaps it should rather be seen in the context of the fashion business’ ambivalent relation to upper-class women who with their willingness to spend make up the mainstay of exclusive fashion markets, although with their interest in elegance and their vicarious consumption they rarely represent the image fashion wishes to project. In her autobiography, Helen Storey has described this under the striking term ‘signorinaism’ (1996).

After this crisis it was hard to imagine that it would ever again be respectable to wear fur. However, fur has returned to fashion, but only after a severe market repositioning. Firstly, fur marketing has increasingly adopted anti-fur rhetoric. Hence when it was attacked as artificial and unnatural luxury, it now markets itself as ‘close to nature’. This goes for the Royal Greenland seal fur parkas and anoraks that became popular in the late 1990s; they had a component on ethnic fashion (although they did not include ‘ethnic’ ribbons and trimmings like many Canadian seal coats did), at the same time as they also carried symbolic connotations of ‘the great outdoors’ in a manner that directly contrasted the image of other types of fur such as swakara and mink. But wait and see – these years there is a revival of swakara and breitschwanz, South African curly lamb which is marketed as the ultimate organic fur, partly
because these sheep were among the first animals to be domesticated in prehistoric times, partly because the meat from the fur-bearing lamb is eaten, hence the whole animal is used, which is not the case with the animals of prey that otherwise make up the mainstay of the fur trade: mink, fox, weasel and chinchilla. Chantal Nadeau has further argued shown the extent to which fur is now marketed as a ‘second skin’ (2000).

Secondly, fur has been ‘pushed into the trend’, as a marketing document from the Copenhagen fur auctions has it. This implies that the fur business has shifted from being a small industry with its own retail and marketing to a supporting industry that serves the fashion market. The most tangible example of this is the design center that was set up by SAGA, the marketing organization of the Copenhagen fur auctions, in the early 1990s north of Copenhagen. This center gives designers an opportunity to become familiar with the techniques of fur manufacturing, and to further develop innovative designs. During their stay, visiting designers also learn about mink and fur farming – Denmark is the largest mink-farming nation in the world – so that they are able to take a sophisticated stand in the fur debate. Famous visitors to this center include Gianfranco Ferré and Valentino (check other names), but many small name-designers and fashion teachers from Europe, North America and Asia have also attended the center’s weekly course.

In this development, fashion designers have arrived in a trade in which craft traditions have been exceptionally strong. This has resulted in a shift from conservative working methods, aimed at minimizing waste, to an emphasis on visual effect and design concept and experimental working methods. The irony is that even though the fur business has been attacked as emblematic of fashion and global capitalism, its reliance on expensive and unique pelts has forced it to retain craft-based production methods throughout the era of sweeping industrialization that has totally changed fashion production. It is only in recent decades that the fur business has adopted industrial production methods, and it is still newcomer to concepts of trends and planned obsolescence.

The first signs of the return of fur which were visible from the late 1990s were predominantly to ethnic fashion, as well as to trimmings, collars, cuffs and handbags. These include many of the innovations that were first made in the SAGA design center, such as shawls, sweaters and hats knitted from fur yarn, cut from the pelts, rather than spun. Many of these products have a lightness which was unthinkable in older fur products, partly because the old techniques involved a lot of sewing, leaving heavy seams on the back of the material. In the same vein, there are now light fur coats without lining, weighing less than 2 kilos. These are made from relatively large pieces of fur and the leather side is used as one side of reversible coats.

In these respects the fur business has come a long way from the stuffy old mink coat with its connotations of opulence and conspicuous consumption. Perhaps it has come so far that it is now time to return to the classical mink coat. This is at least what it looks like if we examine the businesses own plans for the next couple of years. The ambition to push classical brown mink back in fashion is the key endeavour that the fur business is undertaking these years. The reason is economic; the classical brown mink coat is the most profitable item in the industry. Thus SAGA has signed contracts with leading designers in New York, London, Milan and Paris to include mink coats and jackets in natural colours in their collections (Dansk Pelsavlerforenings Årsberetning 2000/2001:19).

In order to emphasize the exclusive character of mink, the industry now pushes natural colours. New mink coats are shaven, however, so that the shiny
covering hairs are removed, giving them a velvet-like texture. The pattern of shaving may then be used as surface decoration. In many ways, the return of the fur coat goes well with the current trends – the emphasis on craftsmanship and the ‘manicured detail’. The irony is, however, that the return of the fur coat, associated with an image of craftsmanship at the same time as the craft basis with the close connection between making and selling is disappearing from fur manufacturing in a process of interconnected industrialization and globalization.

2: Fur in global commodity chains

The commodity chain approach has been developed by economic sociologists examining the relations between developing and developed countries through the changing organization of production, distribution and consumption (Gereffi 1999; Gibbon et al.). One of the key theoretical sources is Wallerstein’s world systems theory. The most important scholar is Gary Gereffi who has written extensively, especially on the global apparel industry. From his work we have the model of a set of rings, illustrating the status of garment exports to, typically, the U.S. with Hong Kong, Korea, Taiwan and China in the inner ring, and smaller exporters, such as Bangladesh and Mauritius is the outer rings. Gereffi has further developed a series of concepts and distinctions, such as producer-driven versus buyer-driven commodity chains, which address issues of power in commodity chain, and in his recent work he focuses more on the transfer of knowledge along the supply chain.

Scholars from the Copenhagen Center of Development Studies have taken up the concept of commodity chains in the context of agricultural produce from Africa. However, the notion of commodity chains has a much wider application than these scholars’ work. It is a concept that resonates with businesspeople’s own understanding of their world, and business schools offer courses in supply chain management. The French filière approach was developed, for example, as a largely neutral model for documentation of agricultural and other colonial production. More recently, Arjun Appadurai in an edited book has presented a flow paradigm which traces the movements of things through scenarios of producer, distributors and consumers (1986). These scenarios are loosely linked in a manner that might be evocative, however, Appadurai’s notion of ignorant producers, detached traders and indifferent consumers (1986:54) can hardly be said to examine the actual power relations that structure the commodity chain.

One of the questions I wish to raise with regard to commodity chain analysis is whether it provides a useful, but largely descriptive framework for analysing global industries or whether it is in itself a critical approach. The critical content has been located mainly in the identification of the high mark-ups in the part of the commodity chains where power is usually located – large technology based corporations in the case of producer-driven commodity chains, marketing agencies in the case of buyer-driven commodity chains. However, a critical effect is also achieved by bringing producers and consumers together in the same picture. This is especially effectful in the context of long and proliferate commodity chains, such as those in garment manufacturing, where networks of subcontracting obscures the actual places and conditions of manufacturing even to the buyers in the industry. As we have seen earlier, the evocative contrast between producers and consumers also appeared in the antifur campaigns.
Although the fur business has historically depended on pelts from overseas, and therefore been instrumental for the colonization of Canada and Siberia, the global commodity chain perspective has not before been applied to fur. One reason for this is not doubt that until recently it remained a craft-based industry with a close relation between making and selling, in contrast to the textile and garment which has led the globalization process, and whose extensive proliferate transnational production networks has made it a favourite example of global commodity chains. I have already pointed out that one of the great ironies about the antifur campaigns was that the attack on luxury and inhumane treatment of animals targeted an industry that was small and fragmented and certainly no one of the key movers of global capitalism. In this respect, fur is a typically buyer-driven commodity chain, linked to volatile consumer markets.

Let us take a look at how the commodity chains of the fur business has been transformed in response to the crisis that ensued from the antifur campaigns of the 1980s and early 90s. Firstly, it is obvious that many retailers have been forced to close down, and few have had the inclination to reopen. For an alternative distribution system, furriers have made connection with the fashion business, which now distributes, for example, 40 per cent of Danish mink (Dansk Pelsavlerforenings Beretning 2000/01:18). This connection has been forged by contracting name designers in international and national fashion centers, as an essential part of the strategy to ‘push fur into the trend’.

Secondly, the fur business has become increasingly industrialized and globalized. It was not until the 1980s that the first factory systems of fur manufacturing were developed. This has led to an increasing internationalisation of the business. First Greek traders and craftsmen moved in, and while they continue to hold a dominant position in global fur chains, a large share has been taken over by Chinese traders and industrialists, first from Hong Kong, now increasingly from mainland China. Approximately half of the pelts traded at the Danish fur auctions goes to East Asia manufacturers.

Danish fur farming, specializing in mink and fox, took off after World War II, and it accounts for approximately one third of global mink production. The fur farming association has consolidated its position through the Copenhagen fur auctions which since the 1980s have been the biggest in the world. They have also developed their own sorting system which combines pelts in so-called bundles. Thus, the homogeneity of a bundle of pelts is guaranteed, making the job of the buyer easier. However, in this context, the most interesting aspect of the business strategies of the Danish fur farming association is its marketing organization SAGA. While in the 1980s, SAGA marketed furs directly to consumers, the SAGA trademark is now used in combination with brand names of retailers and designers.

Some of the old large markets in Europe – for example U.K. and Germany – diminished considerably after the anti-fur campaigns, whereas other – for example Italy, and also North America have remained big. Fur has also to some extent found new markets, for example in China and Russia. There are traditional reasons for wearing fur, especially in Russia, at the same time as the opulence of fur works well as new-rich display in societies undergoing large economic transformations. Fur wearers may also question the perceived notion of fur coats as a luxury item: ‘We are not so rich that we can buy cheap merchandise’, states a Russian immigrant in Brooklyn, with reference to the fact that one expensive fur coat can keep the owner warm for a lifetime, whereas designer coats need to be replaced and updated regularly (New York Times, Jan.23, 2003). In this respect, fur hits one of the main tensions in
contemporary fashion – the emphasis on individuality in a market which is increasingly standardized.

3: Conclusion: power in a fragmented industry

In the return of the fur coat I have identified the alliance of the marketing association SAGA and high-profile designers in fashion centers as being of particular significance. This alliance provides a model for linking inside and outside meaning, to use Sidney Mintz’ concepts where inside meaning refers to meanings associated with consumption, and outside meaning refers to economic meanings associated with production (Mintz 1996). The point about Mintz’ concepts is to go beyond a dichotomy between culture and economy – both inside and outside meaning are symbolic and rational.

The strategic significance of a marketing board was not invented by SAGA and the Danish fur actions, however. The most important example of a successful marketing association is the Australian Woolmark, which in terms of consumer recognition ranks close to McDonald’s (FEER) Woolmark was established to promote the use of wool which was going down because of the success of synthetic fibres. In this respect there is a similarity with SAGA in that both are established and promoted as defensive strategies to curtail the erosion of markets.

This leads us back to the question of power in commodity chains. There is no doubt that SAGA has been a powerful agent in changing the perception of fur; however, its power comes from the experience of a major crisis. It would seem, therefore, that there is an intimate connection between power and powerlessness in commodity chains, which is hardly surprising given the number of people and institutions involved in global fashion production.

Secondly, power seems to follow an indirect path; outside meaning frames and stages inside meaning. It is pertinent to use Marshall’s definition of celebrities about fashion designers for they are also ‘audience subjects’ that are construed both by cultural producers and consumers (1997). Fashion designers provide an entry point from which innovation and change is brought into the market; however, this does not merely come from the fancy ideas they dream up, but also from the contracts they sign with suppliers such as SAGA or major textile companies that wish to push their products. Because their collections are followed by producers and consumers alike, fashion designers enforce some kind of coherence on an otherwise extremely fragmented industry.