



Outdoor Industry Association Priority Issues Brief:

Down

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1. Overview

Down is an insulating material that provides unique performance characteristics that cannot be replicated by any man-made material. The outdoor industry is committed to using down, as well as synthetic insulation, as part of a balanced portfolio of materials, to most effectively achieve the performance requirements necessary for each product. As with any fiber that is an animal by-product, the industry is committed to ensuring that the down it is sourcing is produced using responsible and ethical practices, and leveraging its presence in the down supply chain to collaborate with all involved stakeholders to achieve these best practices at scale.

2. History

Around 2010 a number of outdoor industry companies became aware of the potential mistreatment of animals in the food supply chain from which they sourced down. Up until this point, most companies relied on self-declarations from down suppliers, but it became evident that this was not sufficient to ensure that practices such as force-feeding and live-plucking were not occurring in outdoor industry down supply chains.

In 2012, in partnership with other global organizations including Textile Exchange, the European Outdoor Group, and the German Sporting Goods Association (BSI), a Down Task Force was established under the umbrella of the Outdoor Industry Association (OIA) Sustainability Working Group.

The Down Task Force, representing brands, retailers, suppliers, and other stakeholders across the global down supply chain, convened at least twice a month over a period of three years to establish a shared understanding of the traceability challenges within the global down supply chain, align on best industry practices, and identify common reference points.

Over this same timeframe, a number of outdoor industry companies developed and adopted their own standards and protocols for ethical down sourcing.

In June 2014, a community of stakeholders who had pioneered standards for ethical down sourcing began meeting together to share progress on development and implementation of the various standards and to outline the path forward toward further harmonization of efforts within the global down supply chain.

3. Key Facts and Context

- Down and feathers are a by-product of raising waterfowl for meat.
 - Various estimates suggest that down is estimated to comprise just 5-10 percent of the economic value of a bird – the majority of the value is from the meat.
 - The use of down and feathers for natural insulation reduces the amount of agricultural waste, as these materials would otherwise be put into landfill.
- Breakdown of Total Global Market
 - The two main geographic regions from which down is sourced are Eastern Europe (particularly Hungary and Poland) and China.
 - In Eastern European countries, live plucking and force feeding are the key issues to be managed. The majority of farming operations are smaller and often family-owned, rather than industrialized.
 - In China, the issues to be managed are more predominantly around how the birds are slaughtered and transported, rather than live plucking and force feeding. Industrialized farming operations are more prevalent.
 - The majority of the global down and feather supply comes from China, with estimates ranging from 70-90% of the total global supply.
 - Another statistic that illustrates the significance of the Chinese down market: an estimated 900 million geese are raised in China each year, vs. 4 million in Poland and 5 million in Hungary.
- The outdoor industry uses less than 1% of the total global production of down.
 - Although this is at a time when down usage within the outdoor industry is at an all-time high, it equates to less than 1% of the total global production of down (estimated to be at least 270,000 tons.) A total of 1,058 tons of down was measured in a survey conducted by the European Outdoor Group (EOG). The EOG estimated that this represents somewhere in the region of 65%-75% of the down used by European/American outdoor brands. This gives a projected outdoor market volume of between 1,410 and 1,630 tons of down annually.

4. What OIA and its members are doing

The outdoor industry has been proactively leading the charge toward establishing best practices for the ethical sourcing of down and feathers for a number of years.

With the development of individual standards and protocols for ethical down sourcing within the industry, the Down Task Force as well as the Global Down Standard Stakeholder Group are now focused on the following objectives:

- Articulating the “equivalencies,” as well as key differences, among existing standards, to help other companies in the outdoor industry understand which practices might work best for them;
- Working with standard owners to leverage the existing tools toward a draft shared reference point “continuum of performance” on ethical down sourcing, which may ultimately result in a shared standard for the industry; and,
- Engaging other industry sectors with significant influence in the global down supply chain – such as the home textiles and hospitality sectors as well as the food industry – to join the outdoor industry in establishing best practices for the goose/duck supply chains.

OIA and its members are committed to pursuing these objectives in partnership with the diverse group of stakeholders who share our desire to adopt global environmental and social best practices to benefit the operations and communities in which we conduct our business.

5. Key Resources:

- European Outdoor Group, <http://www.europeanoutdoorgroup.com/news/new-insights-into-the-outdoor-down-market-now-available>
- IDFB <http://www.idfb.net/faqs/>
- IDFL, <http://www.idfl.com>
- NSF and the Traceable Down Standard, <http://www.nsf.org/services/by-industry/sustainability-environment/global-traceable-down-standard/>
- Textile Exchange and the Responsible Down Standard, www.responsibledown.org
- Downpass Standard, http://www.downpass.com/fileadmin/user_upload/PDFs/Downpass_Flyer.pdf

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