



## THE ITALIAN TANNING INDUSTRY IN 2015

The Italian tanning industry closed a difficult 2015.

Thanks to its dynamism however, the sector reported a limited and general decline, overall around -2% for the value of production (5.2 billion Euros), for its volume (124 million square meters of finished leather, 26 thousand tons of sole leather) and for the exports, accounting for 77% of national turnover (value: € 4 billion).

Many were the critical aspects that the Italian tannery had to tackle: the slowdown in the luxury, the negative impact on consumption of the terrorist threat. Not last, the effects of Brexit, yet to be assessed.

It remains confirmed the international supremacy of Italian leather, which is worth 65% of European production and 19% of world production.

The economic momentum is not easy, but the hope is that 2016 will close at the same levels of 2015.

*Source: UNIC - National Union Tanning Industry*



UNIC

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ITALIAN TANNING INDUSTRY

President's report

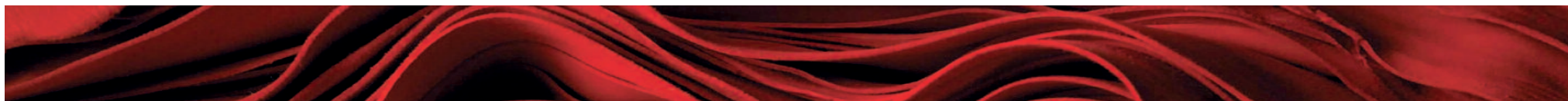
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ECONOMIC DATA | 2015

ASSEMBLY GENERAL 2016

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Milan, June 28 | Palazzo delle Stelline



THE STRUCTURE  
OF ITALIAN  
TANNING  
INDUSTRY

COMPANIES

1,243



EMPLOYEES

17,824



VOLUME

124 million square metres  
*finished leather*

26 thousand tons  
*sole leather*



PRODUCTION  
VALUE

5.2 billion euro



EXPORT

4 billion euro



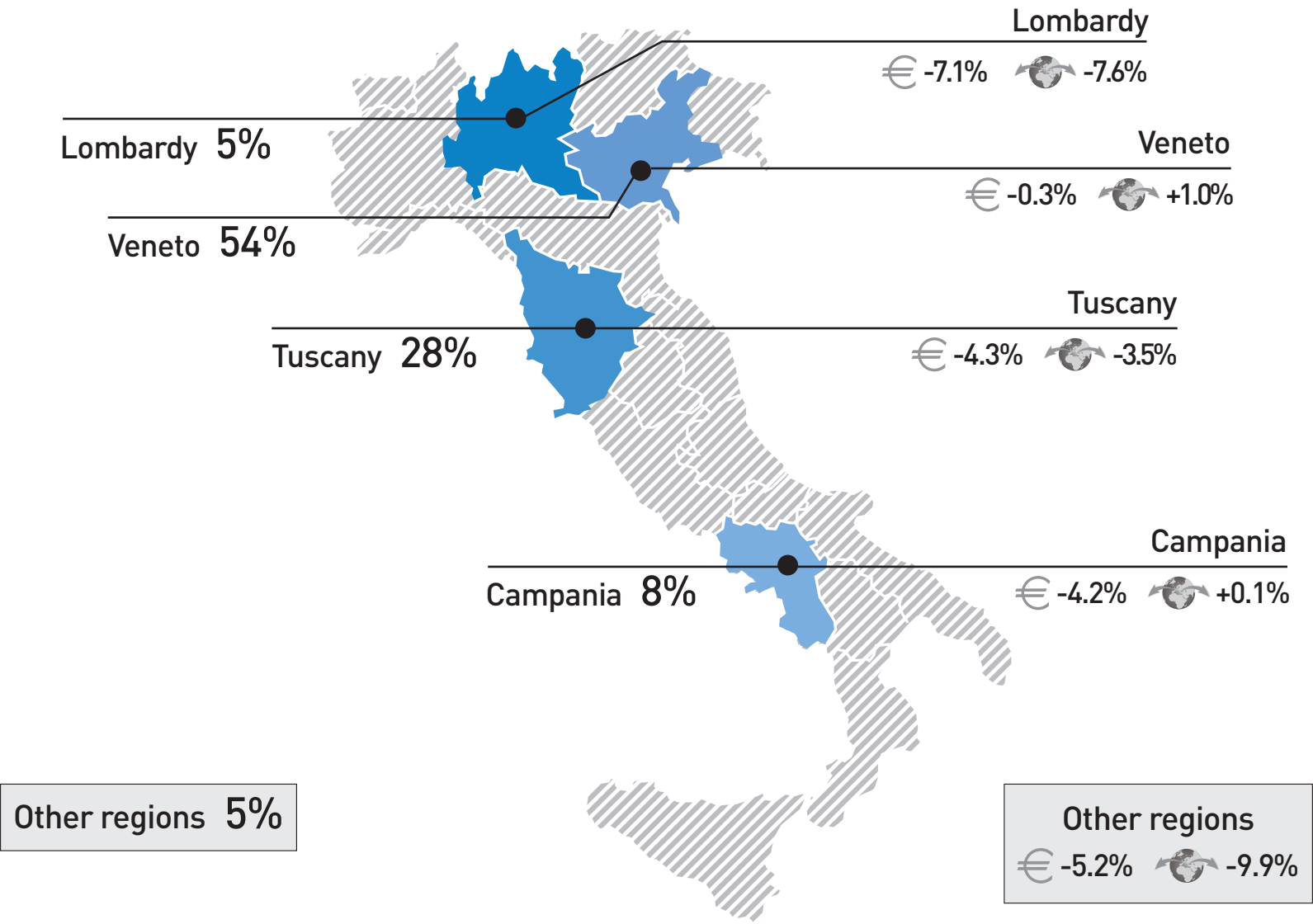
year 2015



# ITALIAN TANNING INDUSTRY DISTRICTS

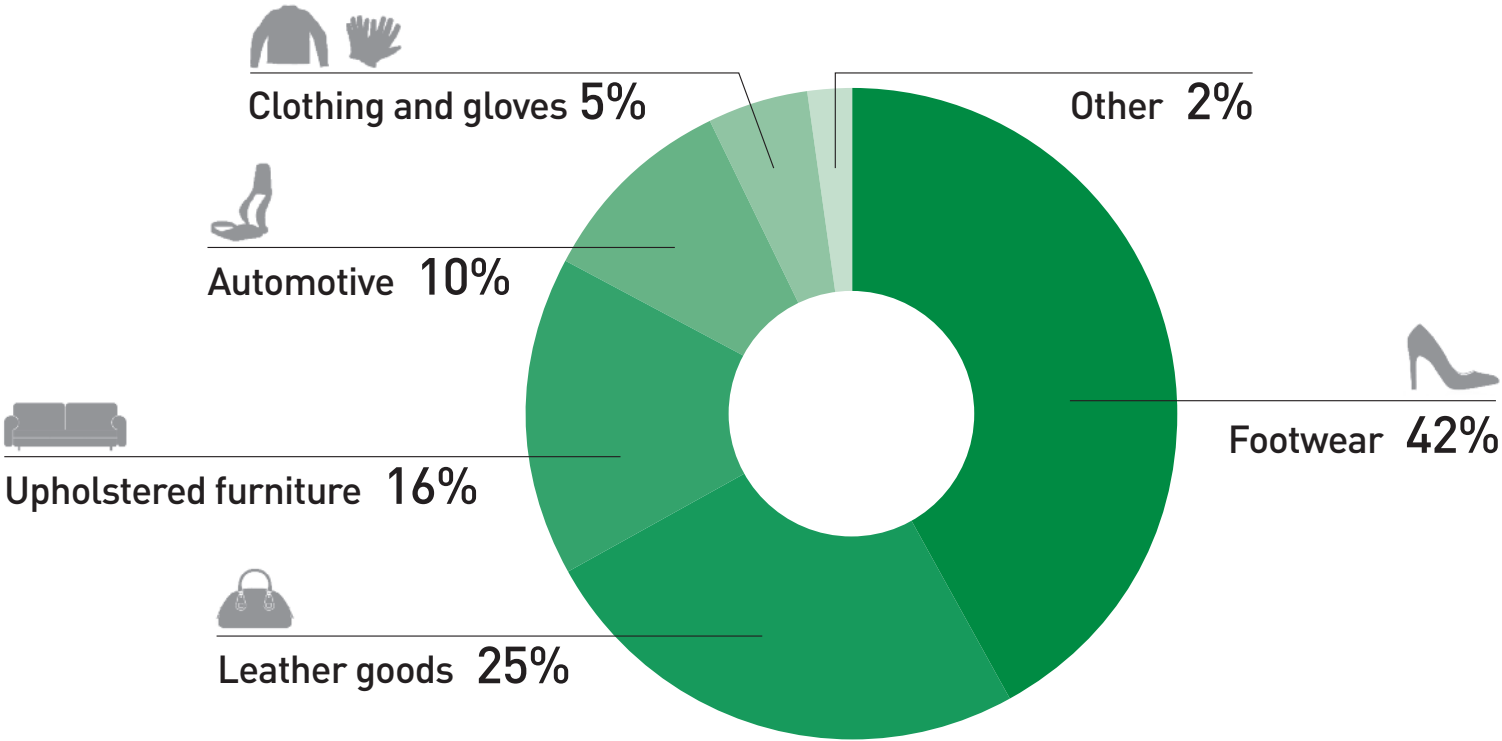
SHARE ON NATIONAL PRODUCTION AND VARIATIONS 2015/2014

year 2015

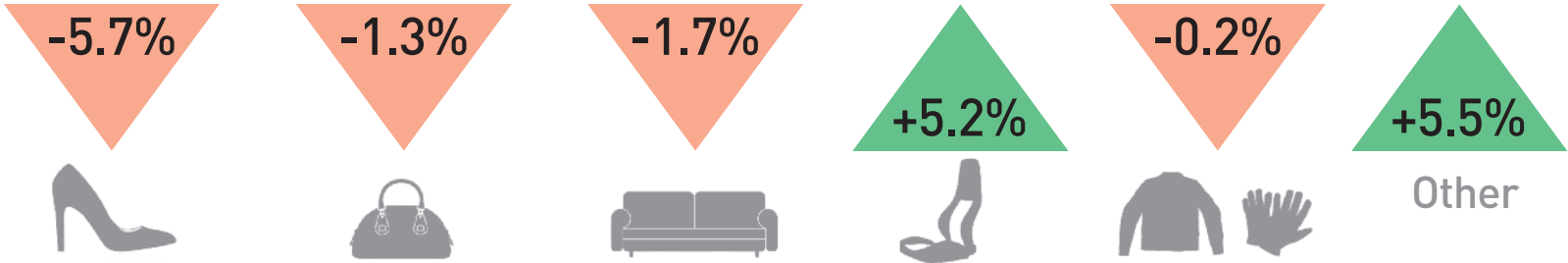


# DESTINATION SECTORS OF ITALIAN LEATHER

SHARE



% VARIATION



year 2015



# INTERNATIONAL LEADERSHIP OF ITALIAN TANNING INDUSTRY

year 2015

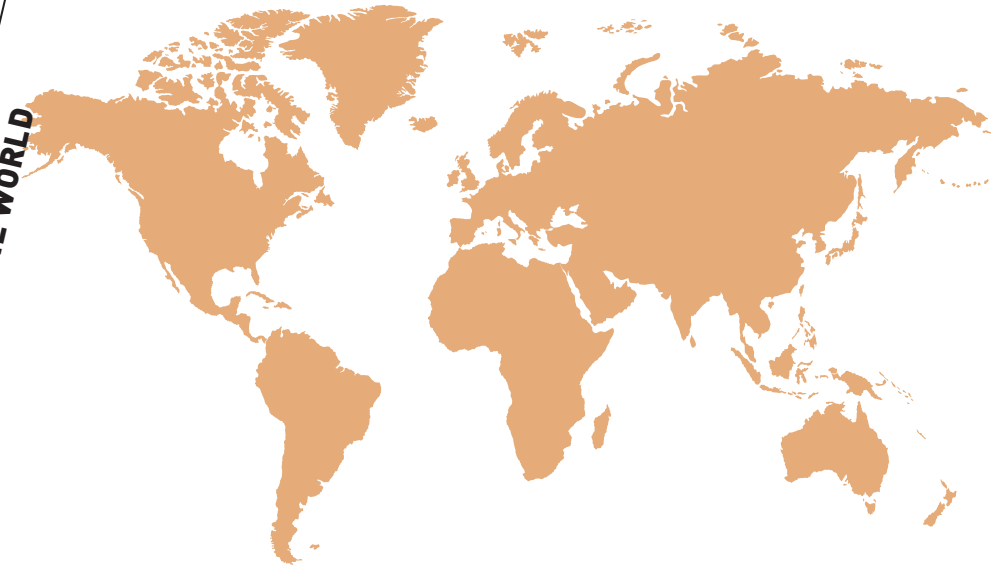
IN EUROPE



**65%**  
of production value

**70%**  
of finished leather export  
versus non-EU Countries

IN THE WORLD



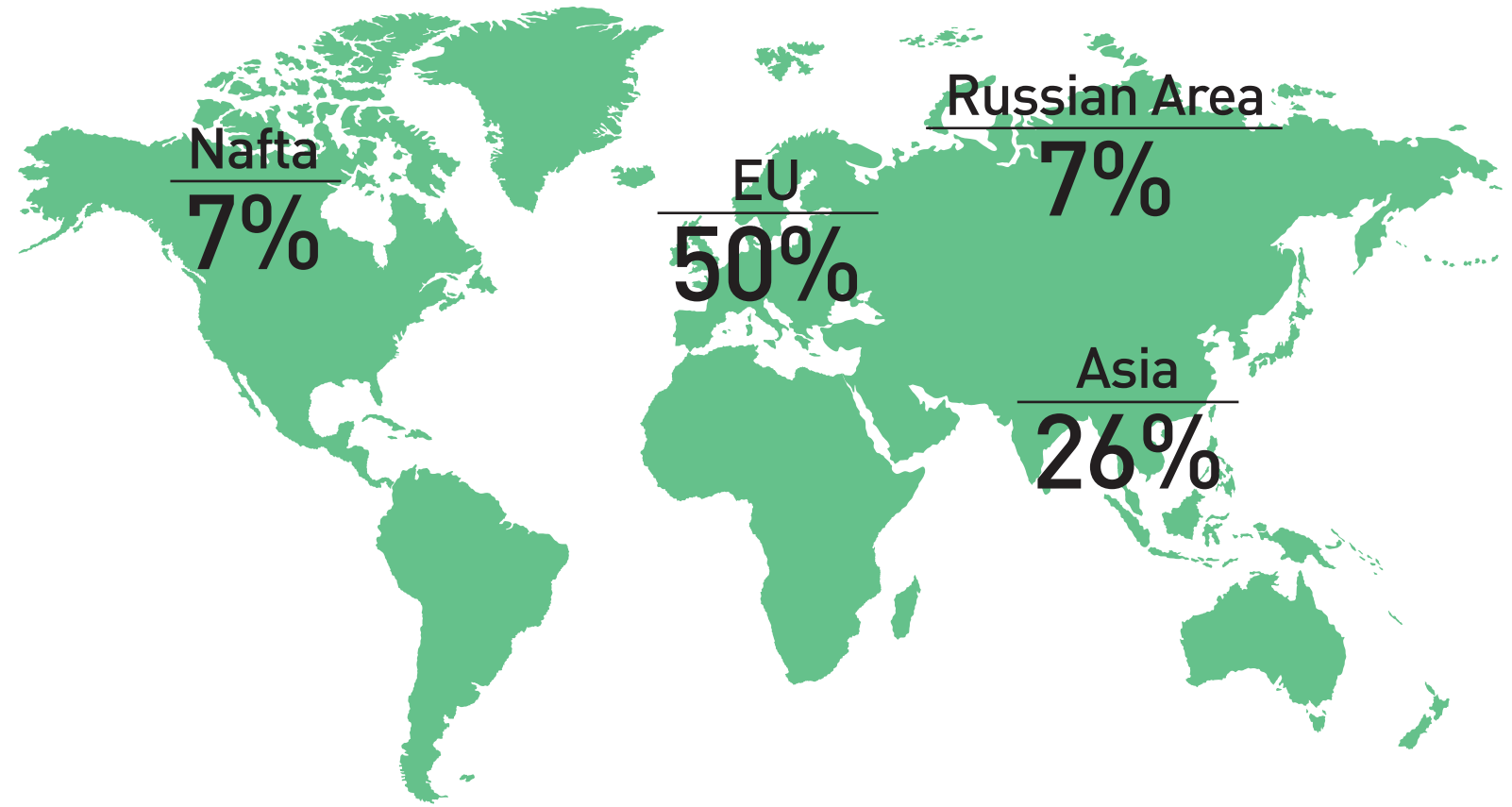
**19%**  
of production value

**25%**  
of finished leather export

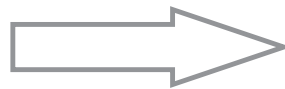


# THE EXPORT OF ITALIAN TANNING INDUSTRY

SHARE PER DESTINATION AREA



4 bn €



122 Countries

Other  
10%

year 2015



TOP TEN  
DESTINATION  
MARKETS  
OF ITALIAN  
TANNING  
INDUSTRY

year 2015



Vietnam



+21%

Poland



+15%

USA



+13%

Tunisia



+8%

France



+5%



Portugal



0%



Spain



-5%

China Area



-9%

Romania



-9%

Germany

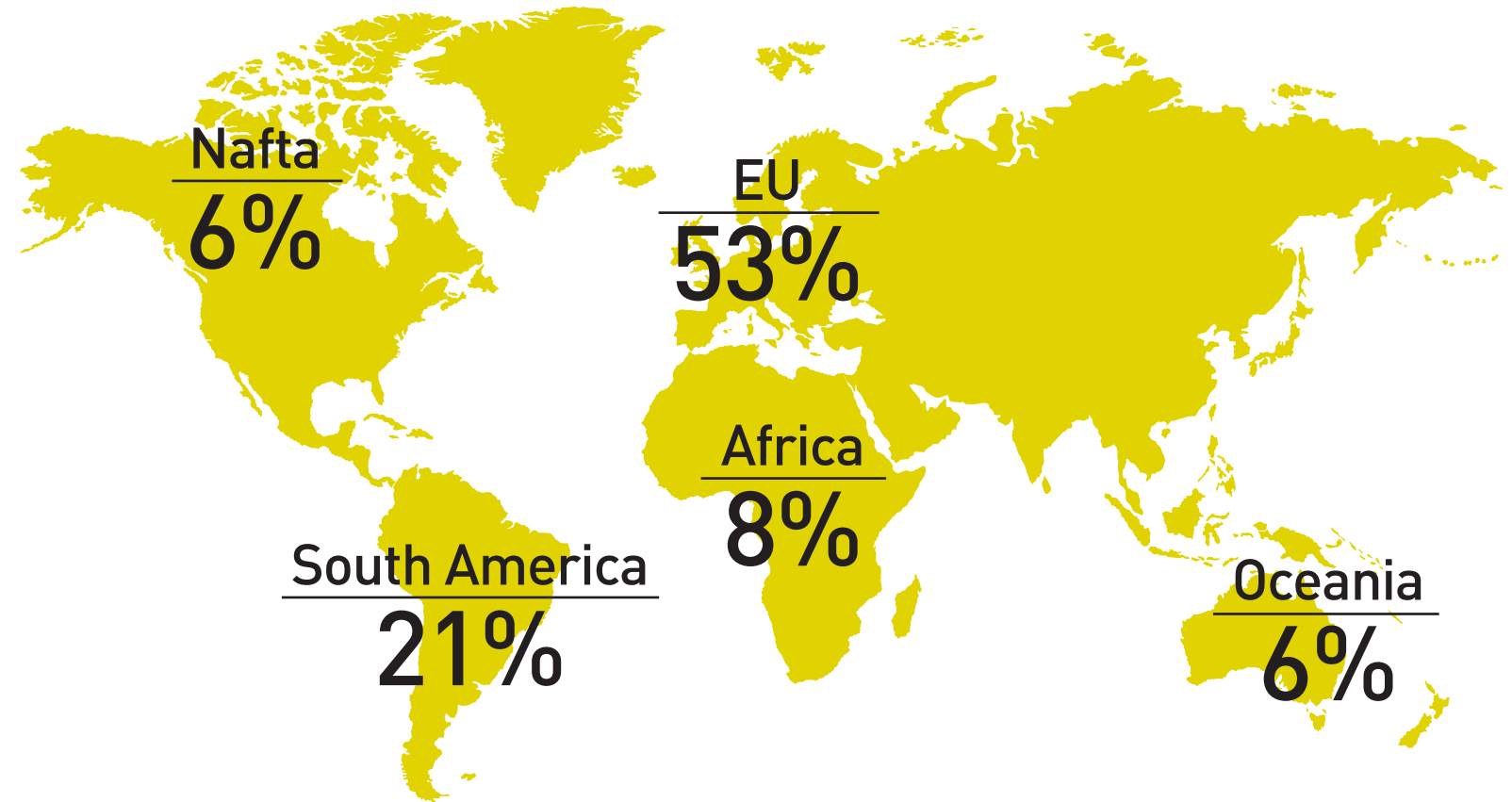


-17%

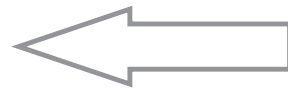




# THE IMPORT OF RAW HIDES AND SEMI- PROCESSED LEATHER



**779.000** tons



**119** Countries

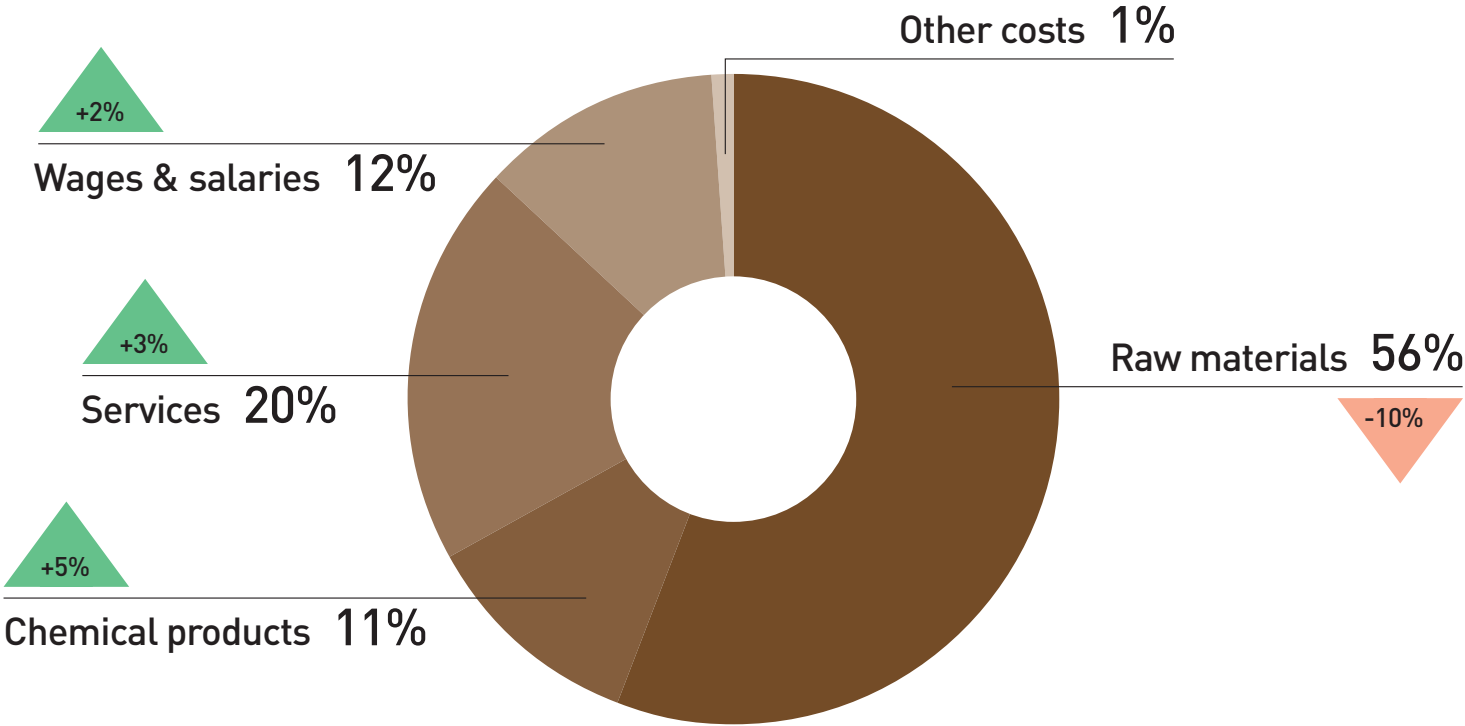
**Other**  
**6%**

year 2015



THE INCOME  
STATEMENT  
OF ITALIAN  
TANNING  
INDUSTRY

STRUCTURE AND TREND OF COSTS



PROFITABILITY  
AND MARGINS

3.8%  
EBITDA

2.7%  
ROI

1.8%  
ROE

year 2015

