



Market trends 2nd quarter 2013

RAW HIDES AND SKINS

The fast rise in prices for **bovine** hides continued unabated in the second quarter. Bull hides and calf skins showed the highest increase. Modest growth, on the other hand, is reported for **sheep and goat** skins, driven up mainly by the lively trend recorded in New Zealand before the seasonal stop.

SUPPLIERS

The **tanning industry** recorded positive average change in sales for the main types, but the overall picture remains mixed. The driver of demand is represented by the expeditions to the Far East and, to a lesser extent, to the European area, while in the U.S. some slowdowns are reported. Positive trend of orders for leather goods, footwear and automotive.

For **accessories, components and alternative materials**, there was a slight rise, particularly for textiles/ synthetics and components for footwear, while there was a slight decline for metal parts and other accessories. Widespread increases in the short term.

CLIENTS

Footwear was on the rise even in the second quarter in the year-on-year comparison.

The liveliness of the Iberian producers is coupled by moderate rises in Italy and

France. Slight declines for German and English footwear manufacturers.

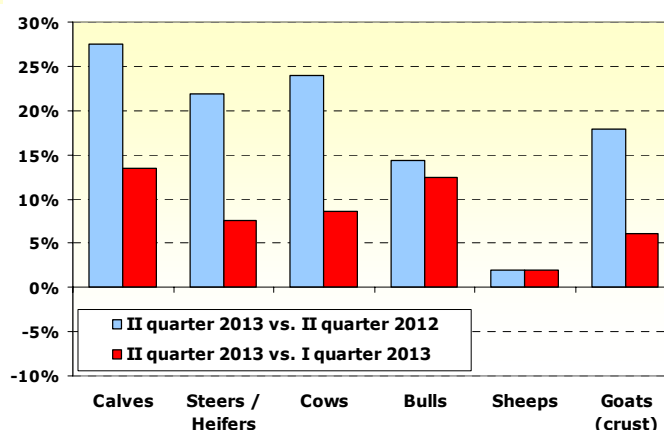
Leather Goods posted another positive result, although with some slowdown. Dynamism of the Italians is confirmed, followed by the good performance of France and Spain. In Asia, China's exports rise, some fall in production in Turkey.

Leather clothing recorded increasing turnover compared to the second quarter of last year. Positive trend for Italy, France and Spain, thanks to exports. Marginal increases in production in the Middle East and marked declines for Chinese export.

European **upholstered furniture** is still suffering, even with partial recovery in exports. Moderate increases for U.S. orders.

For the **automotive** industry, despite a still negative trend in registrations in Italy and the EU, some signals of recovery in orders are emerging. Car production is on the decline in Asia, while a growth emerged in the NAFTA area.

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PRICE variations for animal type



Full report (15 pagg.)
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