

LINEAPELLE

IT IS TIME FOR TOMORROW TO BLOSSOM:
21 TO 23 FEBRUARY AT FIERAMILANO RHO,
LINEAPELLE OPENS ITS DOORS
TO THE FASHION, LUXURY AND DESIGN INDUSTRY

*Make Tomorrow Bloom. **Let's make tomorrow bloom.** This is the slogan with which **LINEAPELLE** is presenting itself at the start of its **101st edition**, scheduled to be held at Fieramilano Rho from 21 to 23 February and dedicated to the development of innovative, top quality collections for the **2024 summer season** of leathers, fabrics, synthetics, accessories and components necessary for the **fashion, luxury and design supply chain.***

THE NUMBERS

LINEAPELLE is the sector's most important business experience and, in its 101st edition, will host **1,161 exhibitors from 42 countries** (61.7% Italian, 38.3% foreign) occupying a total area of almost 42,500 square metres: **544 tanneries, 403 accessories/components, 164 fabrics and synthetics, 50 companies** from other sectors.

The degree of internationality of LINEAPELLE thus definitively returns to pre-pandemic levels, confirming the international leadership of a show that has experienced **two significant international previews** in recent weeks.

The first was in London on Tuesday, 24 January, at the Ham Yard Hotel, where 43 exhibitors took part in a stimulating and constructive day of creative and business networking.

The second was in New York, on Wednesday, 1 and Thursday, 2 February, at the Metropolitan Pavilion, where 109 exhibitors tested the economic condition of the US market, which proved to be solid and interested in, not least by virtue of an increase in admissions that brought **LINEAPELLE NEW YORK** back to pre-pandemic atmospheres.

THE CONJUNCTURE

LINEAPELLE 101 arrives in an economic phase that retains the uncertainties and complexities that were particularly evident in the second half of 2022. The **questions** due to the problematic situation in China are matched by the substantial **solidity of the other markets in the Far East, which are** showing significant interest in Italian-made materials and products. The **European market** does not show particular brilliance, while the **United States**, as witnessed by the outcome of LINEAPELLE NEW YORK, remains a fundamental destination for Italian leather, despite some indications pointing to the possibility of a slowdown. In general, as far as production is concerned, 2022 ended with declining volumes, and 2023 did not get off to a better start, but the feeling is that from spring onwards, the slope could be reversed.

TRENDS

For the 2024 summer season, the LINEAPELLE Fashion Committee launches the creative mood entitled **Other People's Eyes - Stories of Transformation**, based on **pictorial suggestions, digital hybridisations** generated by **Artificial Intelligence** and the centrality of the **chromatic dimension**, with colours that will be the real protagonists: vital, positive, almost therapeutic. The stylistic challenge will be to "appropriate the most advanced technologies and techniques for the benefit of man and within nature". Wide-ranging themes are of great necessity to **reconstruct a vision of**

the future that will be declined by the samples and materials that also tell of the exhibitors' daily commitment to the development of increasingly circular and traceable products. All this, as usual, can be touched on in the three **Trend Areas** located in pavilions 9, 13 and 22; it can be explored in depth during the seminars scheduled at the **Fashion Theatre** (pavilion 13), it can be discovered in the **Metaverse**, where LINEAPELLE, since the last edition, has opened a permanent exhibition space.

LINEAPELLE DESIGNERS EDITION

LINEAPELLE 101, as in the past edition, goes beyond itself and updates the formula of an event that has brought it out of the spaces of Fieramilano Rho and into the heart of the city of Milan. **Lineapelle Designer Edition** proposes from Tuesday 21 to Friday 24 February performances and presentations at the Spazio Lineapelle in Piazza Tomasi di Lampedusa, and two fashion shows that, instead, will take place at the fair. The protagonists with their Fall/Winter 2023/2024 collections will be **Mario Dice, Alessandro De Benedetti, Annalisa Caricato** and **Amato Daniele**. The aim is to support and valorise the creatives who propose an innovative vision of the use of leather and to offer tangible examples of a sector, the tanning industry, that over the years, in an excellent and pioneering way, has been able to be among the first to develop a production model based on the concept of the circular economy.

EVENTS

The **Amici per la Pelle (Friends of Leather)** competition, organised by **UNIC – Concerie Italiane**, will also be back at the fair. Each edition involves over 1,000 middle school students from the Italian tanning districts. This time the students have been invited to use leather to interpret artistically the theme **Leather in Our Life - New Uses of Leather in Everyday Life**. The works created will be exhibited and voted on at the fair and online, while the award ceremony for the winning classes will take place at Fieramilano Rho on Thursday, 23 February, in the presence of all the students who took part in the initiative.

LINEAPELLE 101 will also host **two** in-depth **seminars**. **On Wednesday 22**, the spotlight will be on traceability, transparency and circularity in the leather supply chain. Organised by UNIC – Concerie Italiane, the meeting will host speeches by WWF World Wildlife Fund, Tapestry, SDA Bocconi, Cotance, ICEC and Al Invest Verde. **On Tuesday 21**, on the other hand, Cotance will present Leatech, a new training project coordinated by the University of Lleida (Spain) within the framework of the Erasmus programme that aims to create a joint master's degree in the tanning sector.

SYNERGIES

LINEAPELLE 101 will be held **partially concurrently with the** Milan Women's Fashion shows (scheduled from 21 to 27 February), with Micam, Mipel and TheOne scheduled from 19 to 22 February and with HOMI Fashion&Jewels from 17 to 20 February (Fieramilano Rho).

LINEAPELLE 101 will also host the new edition of **Mipel Lab**, an exhibition organised by Assopellettieri and reserved for 10 top Italian leathers goods outsourcing companies.

Debating at LINEAPELLE 101 is the United Nations programme **The Ethical Fashion Initiative**, whose aims to bring together international development, creative industries and the fashion and lifestyle sector, offering services, products and development projects for sustainability.

Confirmed, finally, is the exhibition presence of the **Conscious Planet - Save Soil** movement, which sets itself on the urgent task of denouncing the global crisis caused by soil degradation and activating concrete political action to counter it.

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LINEAPELLE

OBSERVING THE FUTURE THROUGH THE EYES OF OTHERS: LINEAPELLE 101 DISCOVERING TRENDS FOR SUMMER 2024

It's called Other People's Eyes. It is the starting point and the common denominator of the trends developed by the LINEAPELLE FASHION COMMITTEE for the 2024 summer season. And it is also the title of the Trend Book that LINEAPELLE 101 is presenting at the fair.

"**Through *the eyes of others*,**" explains LINEAPELLE, "that is images and words that tell the contemporary through creativity. New art that redesigns magical places and, like a window on the world, gives us an insight into how we look at others and how others see us'. Openness and inclusiveness, then, for "stories of transformation" based on pictorial suggestions, digital hybrids generated by Artificial Intelligence, to which "in a game of perceptions stimulating intuition and imagination", has been entrusted with the creation of some of the Trend Book's images (cover included).

Summer 2024 will be a season in which the colour dimension will be central. Colours will be the real protagonists: vital, positive, and therapeutic. Starting from them, the stylistic challenge will then shift to the need to "appropriate the most advanced technologies and techniques for the benefit of man and within nature" to reconstruct a vision of the future that will be declined by the samples and materials that also tell of the exhibitors' daily commitment to the development of increasingly circular and traceable products.

All this, as usual, can be experienced at the **three Trend Areas** located in **Halls 9, 13 and 2** and can be explored in depth during the **seminars** scheduled at the **Fashion Theatre** (Hall 13, Tuesday 21 and Wednesday 22 February at 11 a.m. in Italian and 2.30 p.m. in English). And that's not all, as LINEAPELLE 101 reiterates the cross-media nature of its approach by returning to the Metaverse, where, as in the last edition, it has set up an interactive virtual space where you can discover the samples on display in the Trend Area in digital mode. To access it, just [click here](#), register for free and start your meta-navigation.

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**AT LINEAPELLE 101 UNION IS THE STRENGTH OF THE SUPPLY CHAIN
SPACE AT THE FAIR FOR LEATHER GOODS OUTSOURCING WITH MIPEL LAB,
TO THE UNITED NATIONS ETHICAL FASHION INITIATIVE PROGRAMME
AND ON THE RETURN OF THE MOVEMENT, SAVES THE GROUND**

Synergies and presences in the name of an increasingly solid, widespread and shared will work as a system.

The fourth edition of *Mipel Lab*, the format conceived and promoted by **Assopelleтери** in collaboration with Lineapelle to expand contact opportunities between brands and the excellence of Italian leather goods savoir-faire, is back at LINEAPELLE 101. Mipel Lab takes place in person twice a year, while online, the B2B matchmaking platform Mipel Lab is active all year round. Exhibiting at this edition, in the space set up in **Hall 9**: BMB Manifattura Borse, Bric's Industria Valigeria Fine, Mabi International, P&C, Pelfim Pell. Fiorentina Montecristo, Rica Unipersonale, S.A.P.A.F., Tigamaro Tivoli Group, Tripel Due.

The United Nations programme The Ethical Fashion Initiative (Hall 9) makes its debut at LINEAPELLE 101, a set of projects that articulates its activity along three lines. The first: it manages a supply chain in Africa, producing luxury fabrics, including organic cotton, rainforest cotton and organic dyes, for major Italian and European fashion and luxury brands. The second: we run an accelerator for emerging African fashion brands. The third: we are an advocacy centre for SDGs and sustainability with which we created a due diligence system shared with CMNI (Camera Nazionale Moda Italiana), adopted by major Italian brands and tested by others in Europe.

The **Save Soil** movement, supported by the **World Food Programme**, the **United Nations Convention to combat desertification** and 9 United Nations agencies (**UNCCD, UNFCCC, UNEP, UNWFP, WHO, UNESCO, UN SDG Lab Global Soil Partnership**), returns to LINEAPELLE 101. Save Soil will be present to renew "the urgency of concrete political action to address and solve the problem of farmland degradation that already afflicts 52% of the planet's existing soils. According to the Food and Agriculture Organisation of the United Nations, we might only have 60 years of crops left if this critical issue were to be perpetuated. And an inevitable global food crisis would follow. Save the Soil is a worldwide response to this crisis'. LINEAPELLE, which with its exhibiting companies, has committed to the Planet as one of its priorities, will host Save Soil in **Hall 9**.

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**LEATHER IN OUR LIVES:
NEW USES OF LEATHER IN EVERYDAY LIFE
AT LINEAPELLE 101
THE 12TH EDITION OF THE AMICI PER LA PELLE COMPETITION**

Amici per la pelle is a nationwide competition organised by UNIC – Concerie Italiane and LINEAPELLE. It involves students in the last two years of lower secondary school classes. In particular, those in the main national tanning districts (Tuscany, Veneto, Campania, Lombardy) introduce the students to the production reality of their territories.

LINEAPELLE 101 is celebrating the award ceremony for its 12th edition, which involved around 1,000 pupils and 11 schools, proposing an artistic exploration of the theme "**LEATHER IN OUR LIFE - New uses for leather in everyday life**", intended as a stimulus to seek new ideas for new uses of leather in everyday life because leather is and can be everywhere, thanks to its characteristics that allow it to add value to practically anything.

The children's works and films will be exhibited at the fair in the '**Amici per la Pelle**' space (**Hall 9**), where it will be possible to vote for them and where a special jury of insiders will assess them. As usual, there will be online voting through an active Facebook page on 21 and 22 February.

The **award ceremony** is scheduled on the last day of LINEAPELLE 101, **Thursday, 23 February** (11 a.m.), at the Auditorium of Fieramilano Rho, an invitation-only event. Max Angioni and Albe will speak.

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LINEAPELLE

LINEAPELLE RENEWS ITS CULTURAL MISSION
LINEAPELLE RENEWS ITS CULTURAL MISSION AND UPDATES ITS CODES
ALSO HOSTING AN EXHIBITION IN THIS EDITION
ORGANISED BY THE DE CHIARA DE MAIO FOUNDATION
AND PROMOTED BY UNIC – CONCERTIE ITALIANE

The exhibition entitled "**A Fernando Botero and some Francesco Paolantoni. Donatello chez les fauves (Donatello among the beasts)**" will be staged in **Pavilion 15** at Fieramilano Rho and presents a particular and interesting stylistic feature.

"On display," explain the **De Chiara De Maio Foundation**, "will be some works by **Francesco Paolantoni**, best known to most as an actor. They are not paintings, not even sculptures, not even mosaics, and they are cubes of various materials (clay and leather, initially even bits of bread) to tell of people, characters and places dear to the artist. There is so much of Naples with Vesuvius and the sea, with its icons such as San Gennaro and Totò, but there are also references to the human condition in general, especially the sense of loneliness in search of a possible identity that is difficult to achieve. The exhibition's title also certifies the presence of a marker on cardboard by the Colombian artist **Fernando Botero** (Mona Lisa, 1963), rather than highlighting an abyss to stimulate continuity even with different languages. Botero's drawing (among Paolantoni's works) indirectly explains the subtitle of the exhibition Donatello chez les fauves (Donatello among the beasts), which refers to the presence, in early 20th century Paris, of artists who broke with the classicism of the past, known precisely as Fauves.

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THE LESSER-KNOWN USES OF LEATHER AND A GAME TO TEST THE LINEAPELLE 101 COMMUNITY

AT THE ENTRANCE TO HALL 13, VISITORS TO THE FAIR WILL FIND
A VERY SPECIAL WALL: ALL TO BE DISCOVERED BY INTERACTING WITH IT

Of leather, a material of excellence for the fashion, luxury and design industries, not enough is ever known. On the contrary: unfortunately and all too often, very little is known about it, ending up being fascinated by clichés that attack it and negative perceptions that debase it. LINEAPELLE 101 is setting up a sort of **interactive Leather Wall** at the entrance to **Pavilion 13** (Aisle A) to access the spark of a less superficial critical approach. A wall where some less common but significant uses of leather will be narrated in words and images. But also a space where the entire LINEAPELLE community at the fair will be able to put itself to the test by participating in a game of skill. **Five digital stations** will provide the opportunity to access a quiz with prizes on leather composed of **20** multiple-choice **questions** that will be proposed in random mode out of a total of 50. A small game to try to stimulate the LINEAPELLE audience on the tremendous and instrumental ignorance surrounding leather and the industry that transforms it into a high-quality fashion and green material.

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MARKET INSIGHTS

FEBRUARY 2023



LINEAPELLE

ITALY – Based on currently available data (January-October 2022), over the past year, the Italian tanning industry reported an 8.8% **increase** in **turnover** overall, against a **very slight decline** (-0.5%) in **production** volumes.

2022 was undoubtedly a year with two faces. The sector recorded **impressive upturns from the beginning of the year until May**, with intensities that, if confirmed at the end of the year, would lead to a full recovery to pre-pandemic levels. Instead, from **June** onward, there was, unfortunately, a **sharp slow-down in demand levels** and, consequently, in production, and this slackening continued in the following months, leading to the above-mentioned partially disappointing figures. The causes of this cooling appear to be exogenous to the leather supply chain and should mainly be searched in the economic consequences of the Russian-Ukrainian conflict and the Chi-



nese sanitary measures (raw material increases, inflation, decline in purchasing power, reduction in consumption...).

The **export performance of Italian leather**, which is confirmed to have an incidence of more than 70% of the sector's total turnover, also shows diffusely positive changes in value, with a growth of 9.3%, and a slight decrease in volume (-1%). The analysis of individual export flows **by main country of destination** is very interesting, revealing different conditions depending on the individual market. After almost thirty years of uninterrupted "domination," China and Hong Kong cease to be the top foreign destination for Italian leather, due to the significant drop suffered by our shipments to the Asian giant in 2022 (-10%). The picture is similar for the other major Asian destination, Vietnam, which has grown a great deal over the past decade but declined by 27% last year. On many other important geographic markets, however, the situation is the opposite, with Italian leather exports not only growing over the past year but also recovering and surpassing pre-Covid levels. This primarily involves the flow to France (+35% over 2021, +16% over 2019), which is the new top foreign destination for Italian leathers, then Spain (+30% and +3% respectively), Portugal (+25%, +12%), Germany (+4%, +0.2%), Serbia (+45%, +31%) and Tunisia (+37%, +10%). Shipments to Romania (+9% over last year but -8% over 2019) and the U.S. (+6% and -1%, respectively) still lag partially.

An economic analysis of the **individual production segments** of the Italian tannery reveals few exceptions to the above-mentioned overall panorama of the sector. If bovine leather (including calves) and ovine leather show slightly negative signs in the square meters produced and good growth in sales values, goat leather registers widespread rises, while, in terms of use, slowdowns appear more marked on footwear and automotive. From the initial data and qualitative reports received, **the close of last year and the beginning of 2023** unfortunately **do not seem to have shown significant changes** in the economic trend described. However, it should be emphasized that the sector is once again polarized between tanneries that are suffering, even heavily, from the slowdown in economic dynamics and companies that, by investing in quality, cost efficiency, customer focus, sustainability, and product innovation, manage to intercept the new directions of customer demand more effectively, especially of those at the higher end.

OTHER COUNTRIES – The 2022 global picture for **bovine leather** shows yearly growing sales results for the main Asian producing countries (China, India, Pakistan, Turkey), while the sign is negative for the most important Latin American players. In Europe, differentiated trends (up in Spain, France, Germany, UK, and Portugal, down in Austria, Poland, Netherlands). In contrast, the **sheep and goat segment** shows widespread rises in both the EU and Asia.

ACCESSORIES, COMPONENTS, SYNTHETICS

TEXTILES, SYNTHETICS AND LEATHER ALTERNATIVES – Although slowing down in the last quarter of the year, the industry's performance in the 2022 cumulative shows to be excellent: +7% the EU average when comparing with 2021. Significant double-digit increases for Italian and Spanish manufacturers in particular. At the segment level, the annual comparison shows the resilience of regenerated leather fibers, moderately up in all EU countries except for Italy. Both synthetics and synthetic fabric materials did well.

ACCESSORIES AND COMPONENTS – The last quarter of the year confirmed the sector's bullish trend observed in the previous periods as well. Large and widespread increases in fact confirm the dynamism of the sector, which is experiencing double-digit annual growth in all segments and in almost all major European players. Some discord for other footwear accessories, where Germany is retreating, with a slight decline.



MANUFACTURING SECTORS

FOOTWEAR – The **Italian footwear sector**'s post-pandemic recovery continues, recording double-digit growth in exports and sales in 2022. Rising costs, however, are eroding business margins, strained by rising raw material and energy prices. Brilliant picture for the sector at the EU level, also up in double digits. Equally positive signs for major non-EU footwear manufacturers, despite a deceleration in China in the last quarter of the year.

LEATHER GOODS – Although with a slightly lower growth, the last quarter 2022 confirms the expansive trend in European leather goods, which ends the year with intense and widespread rises for all major EU manufacturers. Casting a shadow on this positive picture are the decreasing Romanian producers. Non-EU competitors are also on the rise.

GARMENTS – The annual figures confirm the predominantly positive EU picture already outlined during the last two quarters of the year just concluded. All European garment manufacturers except the Iberians are doing well. China's upward momentum strengthens. India and Pakistan also close the year on a positive note.

UPHOLSTERY – After a record year 2021, European **upholstered furniture** is experiencing a slowdown in 2022 related to a cooling of demand. The resilience of Italian and Polish manufacturers is excellent, supporting the EU average (+6%), in front of a decline for Germans. China is performing well, while the U.S. market is still suffering some criticality. The **automotive** sector closed the past year with signs of uncertainty. At the EU level, new car registrations fell by -5%, although the market showed signs of improvement in the latter part of the year. Decidedly modest uptick in the German market (+1%). Italian registrations collapsed (-10%). US registrations were also down (-9%). China bucks the trend (+10%).

LUXURY BRANDS – Generally positive 2022 close for all major European high-end fashion brands. Nevertheless, uncertainties emerge in the final part of the year, where the results of the last quarter slowed down the performance of some of the major luxury fashion players. In the short term, the scenario appears uncertain both economically and geopolitically: the 2023 outlook appears confident but demands some caution. French giant **LVMH** ended the year with organic sales up by 23% over 2021. Notable performance of the *Fashion & Leather Goods* division (+20% revenues), particularly thanks to Louis Vuitton, which for the first time exceeded 20 billion euros in revenues. Christian Dior, Celine, Fendi, Loro Piana, Loewe and Marc Jacobs did well, all of them posting record levels of revenues and profits in the year just ended. **Kering Group** revenues grow by 9% in 2022. The brakes on Gucci (+1%), which closed the year on stable values compared to 2021 after the thud recorded in the fourth quarter of the year (-14%), weighed. On the other hand, Yves Saint Laurent (+23% in the yearly comparison) remained dynamic. Bottega Veneta closed with +11% in revenues. Very good results for minor brands (+16%): excellent 2022 for Balenciaga. Good results for Alexander McQueen, Brioni is recovering. **Tod's Group** revenues exceed 1 billion euros in the financial year 2022, an increase of 11% (constant rates) over the corresponding 2021. Tod's growth was excellent (+16%), followed at a distance by Hogan (+9%) and Roger Vivier (+3%). The leather goods division soars: +32% year-on-year. Footwear also did well (+8%). Consolidated revenues up 6% (constant rates) in 2022 for **Ferragamo**. Good performance in the European market, very lively in the North American market. In year-on-year comparison the footwear division went up by 8%, some uncertainty for leather goods instead, which closed the year with revenues basically unchanged from 2021 (+0.1%).



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MAKE TOMORROW BLOOM

INTERNATIONAL LEATHER FAIR

SUMMER 24
21-23 FEBRUARY 2023 FIERA MILANO RHO
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