

# LINEAPELLE

LINEAPELLE 102 (FIERA MILANO RHO, 19/21 SEPTEMBER 2023)

*THE FUTURE OF THE MARKET AND STYLE,*

*THE VALUE OF CRAFTSMANSHIP, THE NEED FOR GREEN INNOVATION:*

*1,330 EXHIBITORS FROM 47 COUNTRIES, 25,000 VISITORS EXPECTED  
FOR THE GLOBAL SUPPLY CHAIN'S REFERENCE EXHIBITION PLATFORM*

A **fundamental exhibition platform** capable of defining the horizons of the global fashion, luxury, and design supply chain. **LINEAPELLE 102** from 19 to 21 September at Fiera Milano Rho, proposes a trade fair experience renewed in its ability to **explore the future of the market** and style, enhance craftsmanship, and explore the new frontiers of responsible and sustainable innovation. Three days of creative sharing and business will allow **1,330 exhibitors from 47 countries** to meet with **approximately 25,000 visitors** from all over the world and, in particular, from **neuralgic markets for fashion & and luxury manufacturing and consumption**: United States, France, Germany, Spain, Turkey, China, South Korea, Japan.

## THE LEADERSHIP OF LINEAPELLE 102

The leadership of LINEAPELLE is also demonstrated by the weight and **value of its Italian exhibitors**, who generate an annual turnover of more than **6.3 billion euros**, 70% of which comes from exports, employing a total of around 25,000 people. In detail, **the tanneries exhibiting** at the fair are worth a turnover of almost 4 billion euros per year, **accessory and component manufacturers** 1.7 billion euros, and **fabrics and synthetics** almost 600 million euros. With regard to the **Italian tanning sector in particular**, LINEAPELLE 102 takes place in the context of **a complex and contracted economic situation**, which reaffirms the state of **slowdown in production and exports** seen in the first months of 2023. France confirms its role as the leading destination country for Italian leather exports (worth 70% of the value of its production), followed by Romania, Spain, the United States, China, and Portugal.

## LINEAPELLE 102 TRENDS

To go beyond. Redefining one's nature and transforming oneself. These are, in a nutshell, the creative inputs that LINEAPELLE launches for winter 2024/2025. It encapsulates them in the **Metamorphosis** concept and illuminates them, in the true sense of the word, with the graphics chosen to communicate this new evolution. A yellow dot supported by three words - **Everything, Everywhere, Everytime** - by the hashtag **#doyouthinkyellow**. It is an invitation to "maximum mental openness towards **contamination** and **experimentation** and to activate creative paths without limits". A call to action that is mirrored in the trends developed by the LINEAPELLE Fashion Committee for Autumn- Winter 2024-25. It will be a season under the banner of naturalness and **hyper-technical research**, leaning towards the future. The result: **evolving materials** new and surprising shapes. Colours play with opposites and express calm and confidence, but also vision, research, and exploration. Familiar atmospheres and reassuring colour harmonies are awakened by digital flashes. Research and **sustainability** characterise creativity. Low-tech and hi-tech meet in games of reliefs, constructions, and illusions in volumes, effects, and textures that make digital prints three-dimensional but also recall craftsmanship. Solutions are experimented with from the perspective of **no-waste** and

# LINEAPELLE

**circularity**, even in accessories. The immersive dimension of LINEAPELLE's stylistic approach is reaffirmed as it renews its presence in the **Metaverse**, with a virtual space presenting samples from its Trend Areas.

## THE EVENTS OF LINEAPELLE 102

LINEAPELLE 102 confirms its fashion dimension by constructing an itinerary of fashion shows and presentations inside and outside the fair: **Lineapelle Designer Edition**, from 21 to 25 September, at the **Spazio Lineapelle** in Piazza Tomasi di Lampedusa in Milan will feature the presentation of the creative project La Sirena conceived by designer **Alessandro Enriquez**. During the three days of the fair, there will be **five fashion shows** that will put the leather material in the spotlight. The fashion shows will be held in order: **Francesca Liberatore** and **Mario Dice** (Tuesday, 19 September); **Anton Giulio Grande and Cassel** (Wednesday, 20 September); **Yezael by Angelo Cruciani** (Thursday, 21 September).

The value and excellence of craftsmanship will be the protagonists of **In The Making**, a multidisciplinary and interconnected space developed in collaboration with Giorgio Linea, in which the LINEAPELLE community will be able to directly experience the highest declination of Italian savoir-faire related to the use of leather.

The need for responsible innovation will be the subject of the **Science Based Fashion Talks** organised in collaboration with SPIN360. A three-day event of presentations, debates, and thematic comparisons between more than 30 high-profile speakers, launches the challenge of designing new, sustainable, and innovative supply chain scenarios.

In terms of training, LINEAPELLE 102 will, as in every edition, open its doors to some of the **most prestigious international fashion institutes**, giving their students the opportunity to present creations and prototypes. The relationship between the common imagination, shoes, and the accessories/components that make it up will be the protagonist of the **STAR STORIES** project, much more than a photographic exhibition: a real Movie Lounge within which to walk through time and the world of cinema discovering footwear models that have made history.

LINEAPELLE 102 will also be the stage for an unexpected combination with the art of haute cuisine. In fact, the **4 TASTES** gastronomic project will be present at the fair, where it will be possible to discover and taste the wonder of the 'wandering cuisine' created by chef **Carmelo Chiaramonte**.

Finally, to celebrate **130 years** since the publication of the first issue, dated August 1893, the trade magazine **La Conceria** set up its editorial office at the fair, entering into the heart of the supply chain of which it has become the most authoritative voice.

## THE SYNERGIES OF LINEAPELLE 102

LINEAPELLE 102 remains at the centre of an exhibition system based on the partial concurrence with the other chain fairs: **Micam**, **Mipel**, and **TheOneMilano** (Fieramilano Rho), on the complete concurrence with the event dedicated to technology, **Simac Tanning Tech** (also scheduled at Fiera Milano Rho from 19 to 21 September) and the presence within it of MIPEL Lab (an exhibition dedicated to the excellence of Italian leather goods outsourcing). Strategic synergies, further enhanced by the concomitance also with **UITIC**, the international footwear congress staged between Vigevano and Milan from 19 to 22 September.

Lineapelle Press Office: [press@lineapelle-fair.it](mailto:press@lineapelle-fair.it)

# LINEAPELLE

TRENDS FOR WINTER 2024/2025

RETHINKING THE SENSITIVE

IN THE SIGN OF METAMORPHOSIS

"To talk about evolution, we have chosen the term **Metamorphosis**. An ancient term, which is very much back in fashion and represents one of the new contemporary approaches".

**LINEAPELLE 102** presents the **Fall-Winter 2024-2025** season trends, elaborating a sort of creative exploration with a precise objective: to define the terms of a transformation process that must allow materials, accessories and components to go beyond and redefine their nature.

Here, then, is the invitation to enhance **naturalness** even more by combining it with **hyper-technical** research, leaning towards the future. Materials are constantly evolving and experimenting with new and surprising shapes. Colours play with opposites and express calm confidence but also vision, research, and exploration.

Digital flashes illuminate familiar atmospheres, and colour harmonies with new light. Research and sustainability define the path of creativity. Low-tech and hi-tech meet in games of reliefs, constructions and illusions in volumes, effects and textures that make digital prints three-dimensional but also recall craftsmanship. No waste and circularity are absolute imperatives, even in accessories.

In light of these stimuli, the exhibitors at LINEAPELLE 102 have developed their collections, of which they will present the most significant highlights in the usual Trend Areas set up at the fair in halls 9, 22 and 13.

Metamorfosi will then be narrated and explained at the Fashion Theatre (Hall 13) during two seminars in Italian (19 and 20 September, 11 a.m.), two in English (19 and 20 September, 2.30 p.m.) and one in Chinese (19 September, 2.30 p.m.).

Finally, LINEAPELLE 102 reiterates the immersive dimension of its stylistic approach by renewing its presence in the **Metaverse** with a virtual space for presenting the samples of its Trend Areas.

Lineapelle Press Office: [press@lineapelle-fair.it](mailto:press@lineapelle-fair.it)

PRESS RELEASE

**LINEAPELLE DESIGNERS EDITION**  
LEATHER FASHION WEEK  
s/s 24

**FASHION, DESIGN, CULTURE AND SUSTAINABLE ENGAGEMENT**  
**CELEBRATING LEATHER MADE IN ITALY**

**Supported by UNIC–Concerie Italiane and promoted by Lineapelle,  
the event will take place between Spazio Lineapelle in the heart of Milan and the pavilions of Fiera Milano Rho.  
A week of events dedicated to creativity and its protagonists  
to enhance a unique, iconic, versatile and inimitable material.**

September 2023 - **LINEAPELLE DESIGNERS EDITION**, an event created to support and valorise leather and its most original and creative applications, reaches its fourth edition with a packed calendar of events that will take place **from 19 to 25 September 2023**, in conjunction with Milan Fashion Week and the 102 edition of Lineapelle (Fiera Milano Rho - 19/21 September 2023). Six brands and creatives will present their collections between **Spazio Lineapelle**, in the heart of Milan (Piazza Giuseppe Tomasi di Lampedusa) and **Fiera Milano Rho** during **Lineapelle**, where fashion shows will be held in a dedicated area in Pavilion 24.

The aim is to present the public with a wide range of creative interpretations of leather. Designers from different backgrounds and styles will compete, supported by the Italian tanneries and the exhibiting companies of Lineapelle that carry out extraordinary work on this material.

The fashion **shows organised at the Fair** will take place over the three days of the event in an area of more than 1,000 square metres between fashion, art and sustainability.

**Art**

The **artistic installations created for Lineapelle Designers Edition by Malvina Antal**, a Hungarian artist who recently exhibited her sculptures at the Salone del Mobile, stand out in the middle of the catwalk arena: three majestic white aerial spirals, light and floating, to arouse a unique aesthetic emotion in the eye of the beholder. The abstract biomorphic forms loosen the rigidity of the geometric structures, like the architectural components of an interior and give the show arena an illusory effect. The dynamism of curved and elliptical lines creates an organic movement to static and angular spheres. Beyond pure formal definitions, the atmosphere is surreal, at times mystical.

**Sustainability**

If tanning production is already sustainable and circular by nature - its raw material is a waste product of the food industry, and the recovery processes of further waste has reached almost 100% - in Italy, this paradigm finds a further degree of commitment and investment thanks to the widespread recovery, treatment and reuse of the various production process waste for sectors such as agriculture, the food industry, cosmetics, and construction.

To emphasise the sustainable nature of tanning production, the arena was covered with **ecological salt**, recovered from leather processing and reused by the Dal Maso Group to make roads safe and prevent ice formation. **Ecosgelo®** has been certified Remade in Italy® and is just one of many examples of the tanning industry's focus on circularity.

**Fashion**

Here is the calendar of events:

**FIERA MILANO RHO - HALL 24 | T29**

**Tuesday 19 September**

**11.30 am FRANCESCA LIBERATORE LEATHER - Francesca Liberatore**

Francesca Liberatore ventures for the first time into a **collection made entirely of leather**, in which it is the experimentation of surface workmanship that expresses with aesthetic force the multiple applications and ductility of the material, moving from close-fitting silhouettes to sculptural structures.

In order to speak of the infinite cycle of living material, the neutrals of the dermis are emphasised, the passage of time with discolouration and ageing, the bright alterations of sap green and its complementary magenta, and the reuse through surface patinas that tear.

The project is presented with a Liberatore "to the seventh power", with which the designer/teacher has included 7 students in the style office - **SCFEFGZ** - who, in addition to participating in the preparatory steps to creation, have shared the values of sustainability, cyclicity, traceability, dear to those who approach this material, treated in the collection with the eternity and exclusivity of a piece of art.

**4.30 p.m. MEDEA - Mario Dice**

Designer Mario Dice is inspired by the famous work steeped in mysticism and mystery by presenting a collection of clothes that retrace, in a modern key, the contrasting life of this mythological figure.

The experimentation and processing of leather, typical of his creativity and skill in handling this material, is further accentuated with SS24: hyperbolic lashes coupled with fabrics, pleating, and elaborate weaves, demonstrating that leather is versatile and can be treated like light silk.

In the collection, a Limited Edition of bags resulting from the partnership with the brand of excellence Amato Daniele will undoubtedly become a 'must have'. The 'Medea' bag with its sculptured handle, made of leather and satin, is accompanied by three pieces of the 'Queen Micro' it-bag made of the same fabrics as the Dice collection.

### Wednesday 20 September

#### 11.00 CUIR COUTURE - Anton Giulio Grande

Anton Giulio Grande's couture bets on leather and elaborates new codes to infuse his personal vision of the collection, reinventing iconic garments in a modern key made of leather. This observation reaffirms the fundamental fashion rule of exclusivity and refinement, filtered through a contemporary reinterpretation.

To read his couture, it is important to understand that AGG has never stopped at the surface and has never been content, striving for the ultimate in opulence in every detail. Unique garments loved by stars from all over the world, who wear them, bringing them to life. In fact, his work has been labelled as spectacular.

For this collection, AGG revisits the archives, an infinite heritage that has allowed him to forge a new identity, succeeding once again in proposing exclusive leather garments, unhinging the conventions of 'conventional' couture. What emerges is a new modern elegance with leather jackets and bomber jackets elaborated with fringes, studs and Swarovski.

#### 4 p.m. LEATHER HERITAGE - Cassell

The Cassell brand casts its roots on familiar ground and makes leather the basic material of its collections. Thanks to a strong heritage, it draws on materials of excellence, which to the eye reveal clean, essential and elegant lines, but it is to the touch that they reach their peak.

The collection's flagship product is the down jacket made entirely of goose down and top-quality leather.

### Wednesday 21 September

#### 11.00 am INFINITE CONNECTIONS - Yezael by Angelo Cruciani

'EVERYTHING IS ONE': from this concept comes INFINITE CONNECTIONS, the SS224 Men's Collection that Angelo Cruciani has designed in collaboration with UNIC Concerie Italiane and Lineapelle.

The animal is a sacred living being that makes its energy and beauty available to allow man to develop and evolve naturally.

A concept that starts from a distant point of view: Angelo Cruciani is, in fact, vegetarian from birth but accepted the invitation of UNIC | Lineapelle to introduce an innovative perspective on the use of animals in clothing.

The collection was made from blessed skins energetically charged by shamans for over a month of purification rituals to transform the garments into amulets.

INFINITE CONNECTIONS speaks of the relationship between man and the universe around him, seeking to enhance the relationship of respect and connection.

### SPAZIO LINEAPELLE - Piazza Giuseppe Tomasi di Lampedusa Milan

#### 21 to 25 September

#### H 11.00/20.00 ERA UNA SIRENA - Homage to Giuseppe Tomasi di Lampedusa

##### Alessandro Enriquez

Telling the Mediterranean in Milan. A story of love, fashion and culture.

Enriquez presents itself at Fashion Week with a schedule of events that will last four days and will culminate on 21, the opening day, with the concert 'Futura: viaggio nella poetica rivoluzionaria di Lucio Dalla' (Futura: a journey into the revolutionary poetics of Lucio Dalla) by singer-songwriter Lidia Schillaci and her all-women band, and the projection in the square of the fashion movie 'Era una Sirena' (It was a Mermaid), inspired by the novel by Tomasi di Lampedusa.

Alessandro presents a series of leather garments for the first time in the collection: sequins of Nappa leather embroidered with fish scales, weaves like fishing nets, and natural colours inspired by the Mediterranean.

"**Lineapelle Designers Edition** celebrates leather. It tells of its beauty and versatility. It demonstrates its ability to arouse emotions, to be transgressive and to position itself as a fundamental material for the world of fashion, luxury and design. This is why we want to support the creativity of those who use leather in their collections in an exemplary manner. A few seasons ago, we started to collaborate with designers and brands with different styles, and today we are presenting a dedicated event. We hope that these expressions will be a stimulus for all creative people," - declares **Fulvia Bacchi, Managing Director Lineapelle and General Manager UNIC – Concerie Italiane.**

**Lineapelle** is the world's most important trade fair for global fashion, luxury and interior design manufacturing. It takes place at Fiera Milano Rho twice a year and, in the next edition, will welcome 1,337 exhibitors (tanneries; manufacturers of accessories, components, fabrics and synthetics) from 48 countries and expects about 25,000 visitors arriving from all over the world.

#### LINK/TAG

@lineapellefair  
@unicitalia  
#lineapellefair  
#lineapelledesignersedition

@francescaliberatoreofficial  
@mariodicedesigner  
@anton\_giulio\_grande  
@cassel leather  
@yezael\_angelocruciani  
@alessandroenriquez

@antalmalvina.artist  
@maurizio\_calcagno  
@tonipellegrinoartandscience  
@franco\_curletto

For more info:

**Eliana Trentalancia - ITALENTS**  
mob +39 3486534810 et@italents.it

**LINEAPELLE DESIGNERS EDITION**  
LEATHER FASHION WEEK  
s/s 24

LINEAPELLE Via Brisa 3 20123 Milan  
+39 02 8807711 press@lineapelle-fair.it

## ABOUT...

### LINEAPELLE DESIGNERS EDITION

UNIC Concerie Italiane and Lineapelle's project to create a closer collaboration between the tanning sector and creative people was launched in February 2020 with the inauguration of Spazio Lineapelle. The aim: to celebrate leather Made in Italy and to tell every time, through events and shows organised in collaboration with the interpreters of this material, that leather is a unique and iconic material, versatile, inimitable, a vehicle of extraordinary emotions without equal, and that it is possible to make tanning products in total harmony with the environment thanks to the sensitivity and know-how of most Italian companies, which have become an example worldwide in terms of sustainability and circular economy.

Not everyone knows that leather is a waste product of the food industry, otherwise destined for landfill or incineration, and it is precisely from this waste that an asset considered precious for Made in Italy is born and transformed into a material with high added value.

The events supported by UNIC Concerie Italiane and Lineapelle are, therefore, an opportunity to create more knowledge and awareness of the craftsmanship and innovative value of this material, communicating its many uses, from fashion to automotive, from design to furniture.

### SPAZIO LINEAPELLE

It is called **Spazio Lineapelle**. It is the first permanent exhibition centre to host exhibitions, events, and meetings, whose common denominator is the promotion and dissemination of the culture of the Italian tanning sector, with the aim of highlighting the quality and value of constantly evolving stylistic and technological research, as well as the great sensitivity towards the sustainability of the strictly Made in Italy tanning industry.

### UNIC – Concerie Italiane

UNIC - Concerie Italiane is today the most important and organised worldwide association in the tanning sector. Established in 1946, it is a member of Confindustria, the European Confederation of Tanners (Cotance, Brussels), the International Council of Tanners and is a member of various national and international bodies and institutions for synergic innovation and growth activities. It represents 1,200 companies, 17,500 employees and has a turnover of around 5 billion Euro per year (exports: 76%). The Italian tannery is a leader in technological and quality development, circular and environmental commitment, and innovative style missions.

Italian leather is number one in the world by value, dominates the European scene with a 62% share of production volumes (22% on a global scale) and is unique in the world for its recognised sustainable approach. An approach based on tangible values of transparency and accurate compliance with the most stringent regulatory constraints on safety, quality, consumer responsibility, traceability and animal welfare.

[www.unic.it](http://www.unic.it)

### LINEAPELLE

LINEAPELLE is a business experience conceived and promoted by the Italian tannery. It is the world's most important exhibition for leather and the entire sector that gravitates around it. Two editions a year in Milan (Fieramilano Rho), more than 1,300 exhibitors from 40 countries and more than 25,000 visitors from the footwear, leather goods, clothing, furnishing, design and automotive sectors from over 100 countries, Lineapelle is not only an essential moment of productive and commercial comparison: it is also fundamental from a stylistic point of view, anticipating the creative needs of the market by developing trends that each exhibitor declines according to its own product and customer dimension. LINEAPELLE MILANO is the fulcrum of a global trade fair network, which includes the previews of LINEAPELLE London and LINEAPELLE New York and the presence at other international trade fair events through group shows and workshops.

[www.lineapelle-fair.it](http://www.lineapelle-fair.it)

# LINEAPELLE DESIGNERS EDITION

LEATHER FASHION WEEK

Spring/Summer 2024

[www.lineapelle.fair.it](http://www.lineapelle.fair.it)

## FASHION SHOW

FIERA MILANO RHO  
HALL 24 • T29

**Reserved entrance from  
hall 22/24 reception**

### 19 SEPTEMBER 2023

11.30 am

*FRANCESCA LIBERATORE*

**"Francesca Liberatore Leather"**

4.30 pm

*MARIO DICE*

**"Medea"**

### 20 SEPTEMBER 2023

11.00 am

*ANTON GIULIO GRANDE*

**"Cuir Couture"**

4.00 pm

*CASSELL*

**"Leather Heritage"**

### 21 SEPTEMBER 2023

11.00 am

*YEZAEI BY ANGELO CRUCIANI*

**"Infinite Connections"**

## EVENT

SPAZIO LINEAPELLE

Milano, Piazza Giuseppe Tomasi di Lampedusa

### 21-25 SEPTEMBER 2023

11.00 am - 8.00 pm

*ALESSANDRO ENRIQUEZ*

**"Era una Sirena"**

Homage to Giuseppe Tomasi di Lampedusa



# LINEAPELLE

## SCIENCE-BASED FASHION TALKS

Fiera Milano Rho, 19/21 September 2023

LINEAPELLE, IN COLLABORATION WITH SPIN360,  
DRAWS NEW INNOVATIVE AND SUSTAINABLE SUPPLY CHAIN HORIZONS:  
A RICH SCHEDULE OF MEETINGS AND INSIGHTS  
AT FIERA MILANO RHO FROM 19 TO 21 SEPTEMBER

The challenge is to design new, sustainable, and innovative supply chain scenarios. To open the doors to new ideas and put them into a system, **LINEAPELLE** - in collaboration with **SPIN360** - is organising **Science-Based Fashion Talks** during its next edition. From 19 to 21 September at Fiera Milano Rho, over **30 speakers** of the highest academic and corporate profile will be the protagonists of three days of presentations, debates, and thematic discussions.

LINEAPELLE is the **world's most important trade fair** for global fashion, luxury, and design manufacturing. It takes place at Fiera Milano Rho twice a year, and in the next edition, it will welcome more than 1,300 exhibitors (tanneries, manufacturers of accessories, components, fabrics, and synthetics) and expects about 25,000 visitors from all over the world. It has always paid special attention to the themes of sustainable innovation of processes and products, involving its community in projects of in-depth scientific and technical sharing.

The **Science-Based Fashion Talks**, organised in collaboration with SPIN360 (a company specialising in innovation and sustainability in the world of fashion and luxury), offer a **rich agenda** of inclusive and culturally elevated meetings and debates on science, **innovation, and the market** of industrial interest.

"We felt it necessary to give life to this project," comments **Fulvia Bacchi**, CEO of LINEAPELLE, "in the light, first of all, of the evolution of new regulations and legislation awaiting approval that will have a substantial impact on the management of the tanning business and, more generally, on the green transition of the fashion, luxury, and design industries. Sectors under great pressure in relation to the value of their sustainable approach. This is why we believe that an event such as the Science Based Fashion Talks can offer **important analysis tools** together with **concrete and authoritative answers**."

"It is very prestigious to have been appointed curator of the agenda of the meetings to be held in the September edition of LINEAPELLE," explains **Federico Brugnoli**, founder of SPIN360. We have always had a vocation for sustainability issues based on a **rigorous scientific approach**. The appointments will be a time to delve into five central topics for the future. Science will accompany and run through the various workshops precisely because it is transversal to the various areas of interest in this transition era'.

# LINEAPELLE

The Science-Based Fashion Talks will explore **five thematic areas**: Our Common Future, The World of Trends, Eco-Design Solutions, Neutral Supply Chains, and Circular Economy. There will also be five workshops over the three days of the fair: 'The Evolution of the World - What's Ahead'; 'The New Supply Chain Relationships'; 'The Role of Designers in the Roadmap for the Future'; 'The Leather Case and Circularity'; 'The Role of Materials in the Race for Neutrality'.

Press Office

press@lineapelle-fair.it

*LINEAPELLE is the world's leading trade fair for leather, textiles, accessories and components for the fashion, design and automotive industries.*

*A reference point involving over 60,000 companies and generating a turnover of more than 150 billion dollars/year [www.lineapelle-fair.it](http://www.lineapelle-fair.it)*

# SCIENCE BASED FASHION TALKS

by LINEAPELLE

The **Science Based Fashion Talks**, organised in collaboration with SPIN360 (a company specialising in innovation and sustainability in the world of fashion and luxury), offer a rich agenda of inclusive and culturally elevated meetings and debates on science, innovation and the market, of industrial interest. The appointments will be a moment to explore five topics that are central to the future, with the involvement of international speakers from the world of science, international institutions, brands and companies in the sector.

LEM 3  
Ponte dei Mari  
Front hall 11

19<sup>th</sup> SEPTEMBER 2023

11.00 am / 1.00 pm

## OUR COMMON FUTURE – THE EVOLUTION OF THE WORLD

*Moderator*

**Federico Brugnoli** (SPIN360)

*Speaker*

**Minori Lee** (United Nations Environment Programme)

**Loredana Napolano** (EU Commission, Joint Research Center)

**Claudia Ricciardi** (BIRD&BIRD)

**Greg Thoma** (Colorado State University)

**Emily Moberg** (WWF)

The world is changing at a very fast pace and science clearly describes the urgency of a comprehensive set of actions to mitigate the environmental impacts of human activities. Being informed about the economic, demographic and environmental global scenarios and their evolution is one of the keys in the definition of the companies' strategies, on global and local point of view. "Our Common Future" digests the essential inputs for the future of the fashion industry.

2.00 pm / 4.00 pm

## THE WORLD OF TRENDS – EMERGING SUPPLY CHAIN RELATIONSHIPS

*Moderator*

**Filippo Santoro** (SPIN360)

*Speaker*

**Kerry Bannigan** (Fashion Impact Fund)

**Fabio Crosignani** (Eurizon Capital SGR)

**Silvia Gugliotta** (Manolo Blahnik)

**Nicolò Giusti** (Tommy Hilfiger)

**Elisabetta Baronio** (Timberland)

**Luca Tonello** (Deda Stealth)

**Nick Aubrey** (The New Zealand Luxury Group)

Fashion is one of the biggest industries in the world and at the same time is one of the most impactful from a production point of view. Luxury groups and brands business objectives must take economic, demographic and environmental global scenarios and their evolution into account in order to accelerate the transition towards sustainable lifestyles. How is the market responding? What are companies strategizing to align to science and consumers request to care for the world we live in?

20<sup>th</sup> SEPTEMBER 2023

11.00 am / 1.00 pm

## CIRCULAR BUSINESSES – THE LEATHER CASE

*Moderator*

**Federico Brugnoli** (SPIN360)

*Speaker*

**Eugenio De Martini** (Università degli Studi di Milano)

**Francesca Romana Rinaldi** (SDA Bocconi Monitor for Circular Fashion)

**Jim Kleinschmit** (Other Half Processing)

**Andres Gines** (Ministry of Industry and Commerce of Paraguay)

**Noemie Dumesnil** (Authentic Material)

**Ludovica Cantarelli** (Biomat)

**Gianluigi Calvanese** (Stazione Sperimentale per l'industria delle pelli e delle materie concianti)

The need to change how we impact on issues such as climate change is clear. Designing the process, the product, and the structure of the teams matters most. Sometimes this means designing products for reuse, or for disassembly and remanufacturing. It can also mean shifting to new consumption models or to work on A CIRCULAR BUSINESS that has always been there, like the leather one, but continues to evolve.

2.00 pm / 4.00 pm

## ECO-DESIGN SOLUTIONS – THE NEW ROLE OF DESIGNERS

*Moderator*

**Elena Barone** (SPIN360)

*Speaker*

**Hang Su** (LeNS\_Lab Polimi)

**Giulia Ber Tacchini** (Maissa)

**Marta Santambrogio** (Studio:Santa:Milano)

**Liz Alessi** (Coach)

**Assa Ashuach** (Assa Studio)

**Caterina Occhio** (Accademia Costume & Moda)

**Karen R. Pearson** (Fashion Institute of Technology)

**Graham Tabor** (Thom Browne)

One of the starting points of the roadmap to a new approach is to commit from the very early stages: design. When considering reducing impact, increasing the life of products and promoting a circular disposal, we are designing for sustainability or, more accurately, we are applying the rules of ECO-DESIGN. Eco-Design is officially being introduced in EU by a regulation; what is the legislative evolution? What does it imply? Are there conflicting opinions? do we really know what it is and how important eco-design is for the supply chain optimization/road to neutrality/circular economy? What is the role of designers in the roadmap to the future of fashion?

**21<sup>st</sup> SEPTEMBER 2023**

11.00 am / 1.00 pm

## NEUTRALITY AND GLOBAL SUPPLY CHAINS: THE ROLE OF MATERIALS

*Moderator*

**Fabio De Menna** (SPIN360)

*Speaker*

**Laura Fabris** (Politecnico di Torino)

**Carmelo De Maria** (Università di Pisa)

**Valentina Gomez** (Werewool)

**Stefano Babbini** (Mogu)

**Giovanni Bugnotto** (Cariplo Factory)

**Zack Angelini** (Public Good Provisions)

Supply chains are one key to fighting against climate change, as they generate around 60% of all carbon emissions globally. Working toward a NEUTRAL SUPPLY CHAIN objective is therefore an essential step in achieving net zero. Supply chains play a critical role in enabling companies to achieve broader total enterprise reinvention; all actors in the chain must be involved with a view to collaboration and improvement of their own and the group's performance. Materials and components are crucial parts in the production process and can play a big part in the roadmap to neutrality. Investment in innovation is one of the key drivers to guide and support the transformation of the supply chain.

# LINEAPELLE

**IN THE MAKING by LINEAPELLE**  
ART, WORKSHOPS, TALKS:  
THE LEATHER PROTAGONIST OF AN EXCITING  
AND MULTIFACETED EXPLORATION OF CRAFTSMANSHIP

Moving out of the leather/fashion binomial to embrace other points of view, through the eyes of designers, artists, architecture studios, planners, but also innovative professionals and tech companies.

**IN THE MAKING by LINEAPELLE** (Hall 24) is a multifaceted space where one can be inspired, learn, get to know, change perspective, and find oneself with a whole new idea of leather as a material. A place for training, knowledge, and artistic installation at the same time: an agora where roles are contaminated, creating the premises for new synergies. At **LINEAPELLE 102** (Fiera Milano Rho from 19 to 21 September 2023), an exciting and multifaceted exploration of craftsmanship that places leather in the leading role will be staged. Organised in collaboration with **Giorgio Linea** (a reference point in the made-in-Italy leather goods sector), the concept expresses a transversal and multidisciplinary vision aimed at the search for unprecedented solutions and innovative processes in leather processing.

The artistic direction of the project is entrusted to **Marika Tardio**, a young designer who boasts significant collaborations with important brands in the furniture design sector and is co-founder and creative director of the MaVoix Exclusive Wallpaper brand.

Among the names that will be taking turns in the talk area of **IN THE MAKING by LINEAPELLE** are international design icons such as **Luca Dini Design & Architecture**, the studio that is directing work on the NEOM megacity in Saudi Arabia, where a Golf Club entirely made in Italian leather, made structural through a special hardening process, is already taking shape. But also emerging realities such as **Zerolab**, the first hub for the creative recovery of leather waste, a training centre and incubator for young designers, and the driving force behind a b2b platform to bring supply and demand together.

For the entire duration of the fair, **IN THE MAKING by LINEAPELLE** will host a calendar of technical workshops dedicated to the students of **MITA Academy and other prestigious academies**, who will also be able to draw inspiration from the past, drawing from the fully digitised historical archive; and from the future, looking at the most innovative processes with partner **Destec**, the world leader in reverse engineering, with its latest generation 3D scanning machines. And then explore further worlds with the protagonists of the workshops: from the light as the air of **Mazzanti Piume** to the floating one of **FL Yacht**, from the metal accessories forged by **Amom** to the high-precision engineering of **Promel**.

**IN THE MAKING by LINEAPELLE**, finally, proposes a space that hosts **works of art and pieces of collectible design created ad hoc**, but potentially ready to go into production. Overwhelmed by an Unusual Destiny (Insolito Destino this is the name of the exhibition that will come to life inside **IN THE MAKING by LINEAPELLE**) brings together the product of the ingenuity of eight artists called upon to interpret leather, each according to their own canons, style, and peculiarities.

Press Office: [press@lineapelle-fair.it](mailto:press@lineapelle-fair.it)

# LINEAPELLE

THE INTERNATIONAL LEATHER FAIR

19/21 SEPTEMBER 2023

## IN *THE* MAKING<sub>by</sub> LINEAPELLE

*Project by*

Giorgio Linea

*Creative direction*

Marika Tardio

*Artists & Designers*

Iammi Studio, Design Firm

Studio Lievito, Design Firm

Antonio Barbieri, Artist

Magnus Gjoen, Artist

Paolo Netto, Artist

Maude Leonard Contant, Artist

Pepita Studio, Design Firm

Maurizio Galante, Designer / Tal Lancman, Artisan

*(curated by VGO Associates)*

10.00 > 10.30

Opening

WELCOME TO "IN THE MAKING"

## 19/09 - First day

### WORKSHOP

10.30 am > 12.00 pm

#### THE LEATHER AND ITS FORMING

The workshop participants will create a container necklace with color transition, hand seaming and leather strobel.

Owner > *Giorgio Linea*

1.00 pm > 3.00 pm

#### THE FLOWER'S GENESIS

The bandaging of a leather flower.  
Application of modeling techniques.

Owner > *Giorgio Linea*

4.00 pm > 6.00 pm

#### PENDANTS & ORNAMENTS

Strass application on the resin flower, under the guidance of the Amom **Gioielli team**.

Owner > *Amom Gioielli*

### TALK

12.00 pm > 12.30 pm

*Meet the designer*

#### MARIKA TARDIO: SEA-NTHESIA CABINET & STROBEL POUF

The designer **Marika Tardio**, the owner of the artistic carpentry "Stile Legno" and the surface designer **Alice Corbetta**. Leather and wood combination techniques for unique design objects.

Owner > *Marika Tardio, Lorenzo Susini, Alice Corbetta, Barbara Ricchi*

12.30 pm > 1.00 pm

*Meet the artist*

#### ANTONIO BARBIERI: AUTOMATA

The artist **Antonio Barbieri**, in collaboration with **Tommaso Cecchi** (CEO Promel) and **Christian Evangelista** (CEO BCE Engineering), presents the artwork Automata, which consists of 3D printed robotic flowers, covered with leather.

Owner > *Antonio Barbieri, Tommaso Cecchi, Christian Evangelista, Barbara Ricchi*

3.00 pm > 3.45 pm

*Meet the Studio*

#### LUCA DINI DESIGN & ARCHITECTURE LUCA BALDI: THE LEATHER IN THE ARCHITECTURE DISCIPLINE

The Sindalah island in the Red Sea is shaping up to be the world's new luxury destination. Its golf course is going to be realized with several Made in Italy-leather elements. The project ownership belongs to **Luca Dini Desing & Architecture Studio**.

Owner > *Luca Baldi*



## 20/09 - Second day

### WORKSHOP

10.00 am > 11.00 am

#### **TOPS & KNOTS**

This workshop consists in the creation of intertwined handles, through nautical techniques applied to the leather accessory.

Owner > FL Yacht

12.00 pm > 1.00 pm

#### **THE LEATHER TRANSFORMATION**

The company RioTCP will make a transformation: from "crust" to "colored".

Owner > Riotcp

2.00 pm > 3:00 pm

#### **A FEATHER TO REMEMBER**

Creation of an ostrich feather keychain with **Duccio Mazzanti** (Mazzanti Piume).

Owner > Mazzanti Piume

### TALK

11.00 am > 11.30 am

Meet the artist

#### **MAGNUS GJOEN: HIDDEN IN PLAIN SIGHT WALLPAPER - CUSTOM WITH LEATHER INSERTS**

The artist's art and works, together with the leather and paper matching.

Owner > Magnus Gjoen, Barbara Ricchi, MaVoix Team

11.30 am > 12:00 pm

Meet the designers

#### **STUDIO LIEVITO: 'CIRINGOMMA' PIER GLASS**

Ciringomma, a pier glass combining together the glass workmanship, leather and textile.

Owner > Laura Passalacqua, Francesco Taviani, Jacopo Volpi, Barbara Ricchi

1.00 pm > 1.30 pm

Meet the designers

#### **PEPITA STUDIO: REFLEXES**

Collectible pieces of furniture made combining steel and leather.

Owner > Valeria Bosca, Alessandra Scarfò, Barbara Ricchi

3.00 pm > 3.30 pm

Meet the designers

#### **IAMMI STUDIO: FRIENDLY MONSTER CABINET**

A piece of collectible design realized through EPS polyurethane modeling, then hand-sculpted and covered with pink leather.

Owner > Nicolau Dos Santos, Samuele Sodini, Barbara Ricchi

3.30 pm > 5.30 pm

#### **INNOVATION LAB. BY DESTEC: SCANNING APPLIED TO THE FASHION UNIVERSE**

"Live performing" and explaining the scanning techniques finalized to give birth to new fashion icons.

Owner > Marco Croci (CEO) & Team Destec

## 21/09 - Third day

### WORKSHOP

**10.00 am > 11.00 am**

#### **FEET IN THE DOUGH**

The historic Florentine shoemaker Leonardo Tozzi will teach the participants how to create a pair of personalized slippers.

*Owner > Leonardo Tozzi*

**11.00 am > 12.00 pm**

#### **ZEROLAB: ART AS A TOOL FOR SUSTAINABILITY LUXURY**

First hub for the creative recovery of waste. Together with Galleria Fonderia Firenze. They will hold a live performance named CHIMERA: union between leather and plastic. They will guide the public through the creative process of making extruded polystyrene slabs and boxes, using spray paint and leather: they will combine two different materials, plastic and leather, to create unique artistic works.

*Owner > Galleria Fonderia Firenze, Team Zerolab*

**1.00 pm > 2.00 pm**

#### **PRINTED SUNGLASSES CASE**

The bandaging of a 3D printed glasses case.

*Owner > Promel, Giorgio Linea*

**3.00 pm > 4.00 pm**

#### **BELT: SIZE & CUSTOMIZATION**

From a semi-finished belt to bespoke. With the possibility of choosing the buckle and finishing. A painter specialized in leather decoration will be available for any personalization.

*Owner > Promel, Giorgio Linea*

### TALK

**12.00 pm > 12.30 pm**

*Meet the start-up*

#### **ZEROLAB: CREATIVE RECOVERY HUB & B2B PLATFORM LAUNCH**

A talk about recycling and introduction to the startup business model, launching its B2B platform.

The aim is to reduce waste in the fashion industry through a B2B marketplace, where users can make exchanges.

*Owner > Zerolab team*

# LINEAPELLE

**THE EDUCATIONAL MISSION OF LINEAPELLE**  
STYLE AND SUSTAINABILITY: SHOWCASING PROJECTS DEVELOPED  
WITH SOME OF THE MOST RENOWNED INTERNATIONAL FASHION AND DESIGN INSTITUTES

LINEAPELLE 102 consolidates its training mission by presenting three projects developed in collaboration with many international fashion and design institutes at the fair.

Here they are:

**IED Florence - Fashion Design PROJECT Metamorphosis. Half**

Dynamic capsule collection composed of garments that can be combined with each other.

Hall. 9 A20

**IUAV University of Venice - Fashion Design Laboratory 4**

PROJECT: Integral design of a fashion collection consisting of six outfits

Halls 24 R11-13

Contest

**London College of Fashion, UAL - BA (Hons) Cordwainers Fashion Bags and Accessories Product Design and Innovation**

PROJECT: 15 students explored design ideas for mini bags and small leather goods using leather waste in a sustainable and innovative way

Hall. 24 R09

Lineapelle Press Office: [press@lineapelle-fair.it](mailto:press@lineapelle-fair.it)

# *la conceria*

Lineapelle 102

(Fiera Milano Rho, 19-21 September)

## **La Conceria enters the fair with a celebratory stand**

*La Conceria publishing platform, a reference point for the Italian and international leather industry, celebrates its 130 years of activity with a special space at the entrance to Hall 11*

La Conceria, that has always told the fair with punctual attention, this time enters it as a protagonist with a stand/editorial staff at the entrance of Hall 11. A special space to celebrate with the public of Lineapelle 102 (Fiera Milano Rho, 19-21 September) 130 years of activity.

The first issue of La Conceria is dated 5 August 1893. The magazine was created at the instigation of entrepreneurs who wanted to provide the entire leather industry (from raw materials to their intended uses) with an up-to-date journalistic tool. In over a century, La Conceria has become an editorial platform that publishes monthly in paper format and online newspapers in Italian and English. Not only that, with a widespread presence on social networks and with its newsletters, it participates in the debate. It reaches its readers on all channels with news, interviews and in-depth analysis.

This is why La Conceria has chosen to physically celebrate its birthday at the fair: to embrace the public it has been working to serve for 130 years. The stand/edition is an opportunity to recount its century-long commitment and present the special issue of the monthly magazine La Conceria (9 - 2023) entitled 'Communication'.

# LINEAPELLE

THE STAR STORIES PROJECT ARRIVES AT LINEAPELLE:

A FOOTWEAR JOURNEY THROUGH TIME AND THE WORLD OF CINEMA

MORE THAN A PHOTOGRAPHIC EXHIBITION, **STAR STORIES** AIMS TO BE A JOURNEY, OR RATHER A WALK THROUGH TIME AND THE WORLD OF CINEMA THAT LINEAPELLE (FIERAMILANO RHO, 19/21 SEPTEMBER 2023) PROPOSES IN HALL 22, IN A SPACE CALLED MOVIE LOUNGE

It is a journey that responds to the need to give footwear and, in particular, the numerous components that give its life a **chance to shine**, just like a real star.

It is a game of memories and myths that intertwine to build the history of each of us, for the emotions linked to certain films or for the moments experienced with that particular model of footwear on our feet.

A game of images from the black and white of vintage films and photos of our grandmothers come to colour in a hypothetical future yet to be invented.

The iconic posters of the most famous cinema masterpieces are reinterpreted and graphically reworked according to a new point of view: the protagonists are no longer just the actors or actresses; the faces are loved and celebrated by the crowds. They are also the small details of style, with that sometimes silent and sometimes powerful elegance, which, in footwear, find the most perfect and effective meeting point.

What would **Barbarella** be without *those* boots?

Would Marilyn without heels have had the same confident and feminine gait, capable of bewitching entire generations?

How much of the magical Mediterranean atmosphere, luxurious yet rustic, do we find in the clogs worn by a future princess on the set of the film that would change her life?

Here, the real stars are at the feet of the stars themselves, with a success that often exceeds in duration and intensity that of the women - and men - who wear them.

STAR STORIES is a tribute to a magical and creative world that produces small masterpieces destined to become icons. Or, simply, faithful companions along the way.

Lineapelle Press Office: [press@lineapelle-fair.it](mailto:press@lineapelle-fair.it)

# LINEAPELLE

AT LINEAPELLE (FIERAMILANO RHO, 19/21 SEPTEMBER 2023)  
THE WONDER OF THE WANDERING KITCHEN ARRIVES  
BY CHEF CARMELO CHIARAMONTE

They call it 'wandering cuisine': it can be discovered and enjoyed at **LINEAPELLE** (Fieramilano Rho, 19-21 September 2023), which is dedicating the **4 TASTES** space to the gastronomic project of chef **Carmelo Chiaramonte**.

A choice that goes beyond the concepts of **seasonality**, **sustainability**, and **circularity**, which are not only typical of the supply chain context in which LINEAPELLE operates but are also popular in contemporary food and wine. 4 TASTES, located in Pavilion 24, is a project that aims to allow the LINEAPELLE community to open up to culinary wonder.

Carmelo Chiaramonte proposes **a journey** into the 'memories of territories crossed by migrations capable of rediscovering raw materials, defining **unexpected sensory short circuits**'. From the combination of clams and iblee almonds to iced spaghetti with oysters, robiola, strawberries, and mint leaves. From the pear cooked in dark spice water to the numerous ketchups that Carmelo invents according to the season with mangoes, apricots, peaches, and peppers. Taste counterpoints of great importance that stratify **the taste palette of the menu** presented at LINEAPELLE.

Press Office

[press@lineapelle-fair.it](mailto:press@lineapelle-fair.it)

# MARKET INSIGHTS

---

SEPTEMBER 2023



LINEAPELLE

**ITALY** – The Italian tanning industry closed the first half of the year showing significant **drops in turnover** [-9.5%] and **production volume** [-13.4%] if compared to the corresponding period last year.

The negative economic trend that had characterized the sector results throughout the second part of 2022 was therefore consolidated in the initial part of 2023, with widespread and generalized inflation, a decline in consumption and international geo-political tensions that continue to push customers and consumers to choose materials and manufacturing products with costs lower than leather.

Even the trend of **Italian leather exports**, which continue to have a primary weight on the overall turnover of the sector (over 60% of the total), shows generally negative variation, with a total drop of 9.3% in value in the first six months of the current year, compared with the 2022 equivalent.

The analysis of **single export flows by main country of destination** records a certain variability in performance depending on the individual market, although, considering the overall variation, a negative sign obviously prevails. Shipments to France,

which since last year has become the first foreign destination for Italian leather after a Chinese "domination" that lasted over twenty-five years, recorded another significant increase (+17%). Growing results also in the export to footwear relocations in Tunisia (+19%), Turkey (+52%), Mexico (+9%) and Czechia (+24%). The flows towards Spain, Serbia and Slovakia are substantially stable, while those directed to the other most important foreign destinations show decreases, even considerable ones: Romania (-11%), US (-19%), Portugal (-12%), Germany (-15%), China+HK (-23%), Vietnam (-16%), Poland (-13%), Albania (-9%), UK (-8%), India (-20%) and South Korea (-29%).

There are very few exceptions to the overall and widespread negative panorama of the sector if we analyse the **performance of the individual segments and production districts** of the Italian tanning industry. In terms of animal origin, sheep and goat leather showed, on average, less suffering in the half-year than bovine leather, both medium-large and small size (calves), while, in terms of destination sector, the difficulties are widespread, with the only (partial) exception of leather goods. Negative sign also for all the main national tanning districts.

It is **extremely complicated to make predictions** on how the current year will end for the tanning sector and for the whole leather supply chain in general. Unfortunately, from this point of view, no improvements, or changes in direction, even partial, have been seen in the second quarter of the year compared to the first. At the same time, there have been no positive reports up to now regarding the performance of the summer months and the reopening in September. Added to the exogenous difficulties, due to the overall economic context, the sector also suffers uncertainties driven by the attacks that the material paradoxically receives on sustainability. The tendency shown by some manufacturing customers to justify the renunciation of leather (regardless of whether this is declared as partial or total, temporary or prolonged) as a choice of greater sustainability, rather than as a strategy of a mere containment of material procurement costs, is nothing other than an example of how the phenomenon of "greenwashing", i.e. false sustainability, based solely on mere, unscrupulous and very opaque marketing purposes, is evolving in an extremely worrying manner.

**OTHER COUNTRIES** – The production panorama of **medium-large bovine leather** in the first half of 2023 is quite varied in the rest of Europe (with declines in Germany, Portugal and the UK and increases, albeit limited, in France, Spain and Austria) and widely negative outside (double-digit seasonal drops in Asia and Latin America). Average negative sign for **calf leather** in France and Spain, while for **sheep and goat**, stability prevails (India, Pakistan) or positive variation (France, China, Turkey), with Spain in contraction.





## ACCESSORIES, COMPONENTS, SYNTHETICS

**TEXTILES, SYNTHETICS AND LEATHER ALTERNATIVES** – The first six months of the year rewarded the overall sector with moderate and widespread increases in all the major EU manufacturing Countries with the sole exception of Germany (stalled compared to the same period last year). Very positive dynamics for synthetics, contrasting signals instead for synthetic and regenerated fiber fabrics.

**ACCESSORIES AND COMPONENTS** – Half-year situation of lights and shadows, where the EU average appears stable on the 2022 equivalent. Positive confirmations for Romania and France, while Italy and Germany are struggling. Good sales of small metal parts. Some difficulties however for the other segments of the sector.



## MANUFACTURING SECTORS

**FOOTWEAR** – The first half of the year in the **Italian footwear sector** resulted to be rather uncertain, with turnover equal to last year's levels, despite the decline recorded in the second quarter. Similar dynamics for rest of the European footwear manufacturers where, however, the recovery of the Germans and French pushes the European average up by 3% in the period, despite the disappointing results of the recent months. Critical issues for non-EU producers.

**LEATHER GOODS** – After a somewhat sluggish start of the year, the seasonal comparison has overall shown signs of recovery for European producers (+4% the EU total), despite Italy's stalemate and Germany's persistent difficulty (-6%). The decline in **Italian leather goods** was mainly observed in the second quarter of the year, balancing the positive results of the previous quarter. Gloomy scenarios for non-European producers, except for Turkey and Pakistan.

**GARMENTS** – The partial 2023 recorded some improvement for the European sector (+2%), although the stumble of **Italian garment manufacturers** is noted (down by 9%). Beyond the EU borders, Turkey was growing, while Asian producers are suffering.

**UPHOLSTERY** – The six-months comparison record for **upholstered furniture** is severe, as the difficulties of Italian producers (-7%) are added to the decline in Poland (-6%), which sinks the EU average (-8%). China is struggling and so does the US, which marks significant declines (-8%). In the **automotive sector**, EU registrations are growing: +18% in the semester. The improvement in recent months seems to indicate that the European sector is recovering from the supply disruptions caused by the pandemic. However, cumulative volumes still remain lower than 2019. Beyond European borders, registrations are rising in the US (+13%), China (+11%) and in India (+19%).

**LUXURY BRANDS** – In an uncertain geopolitical and economic framework, the major luxury fashion brands showed **heteroge-**

**neous** in the first six months of the year.

**LVMH** confirms its solidity, with an organic turnover growth of 17%. The dynamics of fashion and leather goods were very positive, up 20% compared to the 2022 equivalent. Excellent performance for **Louis Vuitton, Dior, Loro Piana** and **Loewe**. The other minor brands of the group also performed well.

On the other hand, however, the **Kering** group closed the first half of the current year with modest growth of 2% (constant rates). **Gucci** slowed down, achieving a timid +1%, while the trend for **Yves Saint Laurent** remained expansive (+7%) even if at a minor speed as compared to before; **Bottega Veneta** grew moderately (+2%). However, the other brands of the group performed quite poorly, down by 5%. Brilliant performance for **Hermès**, with double-digit growth in partial 2023: +22% in revenues (constant rates). All markets experienced growth of 20% or more. Very positive moment for leather goods and saddlery products (+21%, thanks above all to the demand from mainland China).

The **Tod's** group is also smiling, as the reported results in the period were excellent (+23% in revenues at constant rates). Big jump forward for **Tod's** (+23%) and **Roger Vivier** (+30%), followed by **Fay** (+20%) and **Hogan** (+14%). The growth of leather goods and accessories was notable, up by 35% in the period, while footwear also performed well (+20%). The response was excellent on all markets, especially China.

However, there was a sharp slowdown for **Ferragamo**, which lost 7% of revenues in the first half of the year. Uncertainties weigh heavily in Asia and the Americas, despite the good dynamics in Europe, the Middle East and Africa. Overall sales down for leather goods (-13%) and footwear (-4%).

Net revenues up 20% for **Prada** (at constant exchange rates), with double-digit increases for leather goods (+12%) and footwear (+20%). Solid growth of the **Prada** brand (+18), further acceleration of **Miu Miu** (+50%), **Church's** suffers (-21%). Demand recovers in Asia Pacific, well in Japan, the Middle East and Europe. The Americas are weak.