

# LINEAPELLE

FASHION, LUXURY AND DESIGN:  
WELCOME TO WHERE THE INDUSTRY BUILDS ITS BEAUTY  
LINEAPELLE 105  
Fiera Milano Rho, February 25/27 2025

“Everything you need to make your creativity meaningful. All that you need to know about materials, accessories, components, style, sustainability and everything else. Everything you need to write your own fashion story. These are your days”.

The days of **LINEAPELLE** are here. At Fiera Milano Rho, from Tuesday 25th to Thursday 27th February 2025, LINEAPELLE celebrates its **edition number 105**, dedicated to the development of samples for the **Spring-Summer season of 2026**.

After the previews that took place in London and New York in January, Lineapelle returns to Milan, hosting **more than 1 100 exhibitors** from **40 countries**, proposing the highest quality expression of an industry - the one that concerns fashion, luxury, design, leather producers, fabrics, synthetic materials, accessories and components - that takes a stop in Milan in order to search for **market, style** and **project** indications, specifically aimed at creating accessories and products that are globally one of a kind. True **examples of handmade engineering**, that are born inside of an exhibiting event that has revolutionised the concept of “fair”, by transforming it into a “**beauty laboratory**”.

The **stylistic beauty**, conceived and displayed by the 7 runway shows of **Lineapelle Designer Edition** (the protagonists: Zenam, Demiurgo, AntonGiulioGrande, Disiman.Ling, Mario Dice Designer, LeonardoValentini, Giuglia.) and the 6 presentations that will take place in Spazio Lineapelle (Adrian Furstenberg, Auforia, 1932, Amato Daniele, Eibhlin, Actias, Zenam).

The **planning beauty** of **Lineapelle Interiors**, an event which aims to give value to the innovative charge of tanneries and material producers in terms of interior furnishing. 19 + 1 installations will show these never-seen creations, results of the collaboration between suppliers and specialized studies in interior design.

The **handmade beauty** proposed by the 17 workshops of **In The Making**, a leather laboratory realized by LINEAPELLE in partnership with Giorgio Linea, where the visitors can test themselves in the creation of small fashion accessories, with the possibility of concretely experimenting the significance and value of know-how.

The **innovative beauty** that characterizes the in-depth scientific studies of **Science Based Fashion Talks**. The futuristic beauty expressed by fashion schools and by other educational experiences with international scope, that at LINEAPELLE will present the results of their innovative didactic proposals (Kolding School of Design, Accademia Costume & moda, IED, Hongik University, Scuola del Mosaico, Tokyo Leather Fair Contest, ISGMD Design Academy).

The **cultural beauty** of the exhibition **Anna Piaggi Parole e Taffetà: Chapter II ANIMALIA**, a project promoted by MinervaHub and curated by Daniela Fedi. An initiative hosted by LINEAPELLE that explores and showcases the incredible work of fusion developed by Anna Piaggi between clothing, bags, shoes, hats, jewelry, and canes.

# LINEAPELLE

The contagious **artistic beauty** and vitality of Amici Per la Pelle, the contest organized by UNIC - Italian Tanneries that involves more than 1.000 students from the junior high schools of the Italian tanning districts. The theme of this edition is Circenses - Leather and Hide in Circus Games from Ancient Rome to the Present Day.

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

# LINEAPELLE

## THE TRENDS OF LINEAPELLE 105 THE SUMMER OF 2026 WILL BE “WITH THE HEAD IN THE CLOUDS”

**My Head In The Clouds** is the title of the trends developed by the Fashion Committee of LINEAPELLE for the **Spring-Summer of 2026**.

“Who lives with his head in the clouds is not necessarily distracted, but is also able to imagine, **dream big** and have creative ideas”. It is, in other words, “a particular way of recognizing the positive qualities that characterize a free and open mind, capable of overstepping the limits”. The clouds “are the place of **ReflAction**, a crisis between the words **Reflection and Action**: they represent the creative space, a privileged and safe place from which we can contemplate the frenetic future”.

In terms of **colours**, the summer of 2026 will experience a “symbiosis between tones that fade into each other as if in a chromatic hug. The colourful shades become touches even into manufacturing. (...) The ranges specifically come from the contrast between humans and technology. The darks play an active and important role in contrasts and serve as a counterpoint to the harmonies of the lights”.

Regarding **materials**, “two important trends move forward to” rich and luxurious solutions “that express their most natural and refined aspect, even when they interpret and represent an alternative current, much more vintage chic and related to sport. The techniques that could lead to multisensory results are the traditional ones that, combined with creative inspiration that characterizes the brave ones that live with the head in the clouds, will generate astonishment”.

A rich selection of the **creative developments** introduced by the exhibitors of LINEAPELLE 105 will be presented in the **Trend Areas** located in the pavilions 9, 13 and 22 and, after the exhibition, they are going to be transferred to the archive of Milan’s LP Fashion Studio, where they will be viewable, such as the ones of the previous editions.

In LINEAPELLE 105 the themes of the concept My Head in The Clouds will be in-depth studied during the **fashion presentations** scheduled at the Fashion Theatre situated in Pav. 13 on Tuesday 25th and Wednesday 26th February, at 11 am in Italian and at 2.30 pm in English.

Lineapelle Press Office  
press@lineapelle-fair.it

# LINEAPELLE DESIGNERS EDITION

LEATHER FASHION WEEK • FW 25|26

## SHOWS

FIERA MILANO RHO  
*Pad. 24 • T29*

### TUESDAY, FEBRUARY 25

*11.30 am*  
Identité Plurielle  
**ZENAM**

*2.30 pm*  
Timeo  
**DEMIURGO**

*4.30 pm*  
AGG  
**ANTON GIULIO GRANDE**

### WEDNESDAY, FEBRUARY 26

*11.30 am*  
Time Journey  
**DISIMAN.LING**

*2.30 pm*  
Museo  
**GIUGLIA.**

*4.30 pm*  
Too Funky  
**MARIO DICE DESIGNER**

### THURSDAY, FEBRUARY 27

*2.00 pm*  
Crudelio Fabiola  
**LEONARDOVALENTINI**

*Hair Franco Curletto | Make Up Maurizio Calcagno*

## EVENTS

SPAZIO LINEAPELLE MILANO  
*Piazza Giuseppe Tomasi di Lampedusa*

### TUESDAY, FEBRUARY 25

*10.30 am / 8 pm*  
The Leopard, The Snake and The Star  
**ADRIAN FURSTENBURG**

### WEDNESDAY, FEBRUARY 26

*12.30 pm / 9 pm*  
Live in Art  
**EUFORIA**

### THURSDAY, FEBRUARY 27

*3 pm / 9 pm*  
Oltre il Tempo  
**1932**

### FRIDAY, FEBRUARY 28

*5 pm / 9 pm*  
Wunderkammer:  
racconto di un caos ordinato  
**AMATO DANIELE**

### SATURDAY, MARCH 1

*3 pm / 7.30 pm*  
Chrysalis  
**EIBHLIN ACTIAS**

### SUNDAY, MARCH 2

*3 pm / 8 pm*  
Identité Plurielle  
FW25/26 Presentation  
**ZENAM**

THESE ARE YOUR DAYS

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## WITH THE SECOND EDITION OF LINEAPELLE INTERIORS, LINEAPELLE CELEBRATES LEATHER AND ITALIAN MATERIALS AS INNOVATIVE PROTAGONISTS OF INTERIOR DESIGN

At Fiera Milano Rho, from February 25th to 27th, Lineapelle (the most important business experience in the world for the fashion, luxury and design industries) hosts the second edition of the exhibiting project dedicated to furniture, engaging 37 companies and presenting 19 + 1 never seen installations.

Scheduled from February 25th to 27th to take place at **Fiera Milano Rho**, LINEAPELLE (the most important business experience in the world for the fashion, luxury and design industries) presents the second edition of **LINEAPELLE INTERIORS**, its exhibiting project dedicated to the meeting of leathers and materials with furniture. Floors, walls, tables, chairs, room dividers, couches, bedrooms and bathrooms in order to promote, give value and implement the innovative excellence of the industry in the sector of interior design.

Lineapelle Interiors is a project that is born with the aim of starting, through styling and product development actions, collaborative connections with the world of planning ability and of Italian and international architecture. "Our appointment - as explained by **Gianni Russo, president of Lineapelle** - represents a model of Design Economy, designed and strongly desired to help the industry, but also in order to enhance the performance of design companies".

The outcome of the bond between leather-making Italian companies, innovative materials and design brands will be exhibited in a space of 1.000 square meters inside of Pavilion 24 of Lineapelle. Here **19 + 1 installations** will describe the development of a dialogue that breaks new ground in terms of interior furnishing. Starting from the "remarkable quality of Made in Italy leather, that with its value - as described by **Fulvia Bacchi, CEO of Lineapelle and General Manager of UNIC - Italian Tanneries** - represents an occasion in order to truly inspire architects and designers".

The installations that will be shown at Rho Fiera are the result of the meeting between **37 companies involved in 19 dialogues** that are based on the dialogue between an Italian manufacturer of leather surfaces and other materials, and a design studio, even international.

"The transformation of Made in Italy raw materials into design products - as stated by **Maurizio Molini, creative director** of Lineapelle Interiors, - contributes to the communication of their value, with the positive effect of amplifying their international attractiveness. From the conception of new products to the identification of new markets, research and creativity represent the intangible infrastructure of the Italian Design Economy: a system supported by a manufacturing business culture and a strong training network, both of which are able to internationally attract talents".

The result consists in a series of projects that highlight the **technological and practical innovations of leather** and materials, through a never seen path characterized by solutions in terms of interior design, that are all to be discovered.

From the vegetable leather flooring developed by **Oscarmaschera** with **Conceria Lo Stivale**, the wall all made of **Alcantara** presented by **Savio Interiors**, to the children's bedroom produced by **Notte Fatata** with the leathers of **Vincenza Pelli**, and to the sink of **Antonio Lupi Design**, that is enriched with leather by **Certaldese**. The elegant panels with horn inlays made by **Arcahorn** and the leather of **Industria Conciaria Arzignanese**; the wonderful wall of **Mistral Creative Vision** in combination with the charming metallic finishes of **De Castelli**; the sculptures of the artist **Guerrino Dirindin** that enrich the vegetable leather walls of Conceria Presot; the beautiful folding screen designed by **Ludovica Mascheroni** with the hide of **Conceria Bretagna**; the modular system introduced by **Mobi**, entirely covered with leather coming from **Conceria Cristina**; the iconic chair of **Poltronova** covered with the leather with tannery hair of **Conceria Tris**; the elements of furniture inspired by the tonal painting of the 15th century of **Oxilla**, masterfully enriched by **Manifattura di Domodossola**; the great and precious blanket of **TM Service** realized with leather of **Conceria Dani**; the wool carpets of **Tisca Italia** enriched by the leather of **Conceria Priante**; the wall with the door of **Barausse** decorated with the leather of **Conceria Leonica**; the sofa and the magnificent folding screen of **Dema** realized with **Faeda** leather; the moving wall of Door with the precious fabrics of **Limonta**; the enormous marble table of **Fuda** and the fantastic folding screens of **Materica**, which value is enhanced by the leather of the skilful manufacturer **Pro-fit**; the innovative material of **Raether** realized by recovering leather trimmings, presented by **Foglizzo Leather**.

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

Lineapelle Interiors Press Office – [lineapelleinteriors@guitar.it](mailto:lineapelleinteriors@guitar.it)

# LINEAPELLE INTERIORS

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## AT LINEAPELLE 105 ACT IV OF THE CRAFTSMANSHIP LABORATORIES OF IN THE MAKING

Act IV of **In The Making** is titled **Loves The Way You Are**, and it consists of a laboratory, promoted by **LINEAPELLE**, dedicated to craftsmanship of excellence, with the art direction of **Barbara Ricchi** for **Giorgio Linea** and the planning support of the creative company **3DD Factory**.

The fourth edition of the project presents itself at LINEAPELLE 105 as a stage where it will be possible to create connections to the rhythm of music. "In an everyday life in which socialization and manual skills sadly fade behind virtual platforms, In The Making offers the opportunity of a return to authenticity, as an important educational and entertaining moment, capable of promoting inclusiveness and connections between young people.

The space, characterized by 130 square meters and situated in Pav. 24, **truly represents a creative workshop** where the savoir-fare of craftsmanship, in connection with the **digital** and with **music**, will offer an **immersive experience** to visitors. At the centre, a great circular table hosts a programme consisting of 17 technical and creative workshops of 60 minutes each, managed by experts of the sector and partner companies of the project. The participants will have the opportunity to learn how to create objects and decorative elements, personalize accessories, have a straight to the point experience with raw materials from production waste such as leather and to appreciate its versatility, with the aim of bringing, through circularity, new products to life, encouraging collaboration and dialogue.

Hand-to-hand contact, materials and participants will weave **a web of unfiltered socialization** and, as a result, they will be able to discover again the significance of that sense of belonging that brings us together with others. The digital, a familiar language for young people, transforms itself into a creative instrument. In addition, a ledwall proposes dynamic images and background music, to enrich the stage with energy, vitality and shared rhythm. **The proposed sonorities will be the jazz ones**, a kind of music "born with the aim of breaking down barriers and building, together, a new and inclusive society".

IN THE MAKING ACT IV is an experience in which **craftsmanship represents the access key** to feel free to be ourselves.

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press@lineapelle-fair.it

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## CREATIVITY AND FUTURE SEVEN INTERNATIONAL AND EDUCATIONAL EXPERIENCES AT LINEAPELLE 105

The respect that **LINEAPELLE** guarantees for its **educational and cultural responsibility** towards young people can be seen as an historical constant. This edition is not an exception, with the presence of **seven fashion schools and international and educational experiences** that will exhibit at the fair the results of their didactic partnership with LINEAPELLE and with various exhibiting companies.

### **KOLDING SCHOOL OF DESIGN - Pav. 11 A1-3 / B2-4 DSKD & LINEAPELLE**

(Re)sources/(Hi)story/Project(ed) is the title of the educational and creative design project developed by Designskolen Kolding (DSKD) in collaboration with LINEAPELLE, as an interdepartmental conclusion of the academic degree pathway. The transnational and trans-historical laboratory has linked the technology and the design innovation of the Danish University with the know-how that characterizes the opera and the craftsmanship of the Italian tradition (recognized as a UNESCO Heritage). Starting from archival research on historical sources and materials as a creative input, the students of DSKD designed theatrical costumes, reimagined in a contemporary and sustainable way, that portray the characters of the famous opera of the 18th century Alessandro nell'Indie. Silvano Arnoldo (designer and professor of design at the university) was at the head of the planning phase of the course, while the historical and theoretical lessons have been led by the experts of the research group WoVen ("Women, Opera and the Public Stage in Eighteenth-Century Venice"): Christine Jeanneret of the University of Copenhagen, and Brad Carlton Sisk of the Norwegian University of Science and Technology (NTNU, Trondheim). With the aim of generating creative and collaborative synergies inside the laboratory, every costume has been assigned to an interdisciplinary working group that relied on the technological support and on the expertise of the representatives of four DSKD departments of design: Helle Graabæ (Textile Design), Christel Arnevik (Fashion Design), Liv Johanne Eskholm and Solveig Gubser (Accessories Design), Per Voss Nielsen (Industrial Design), and Laila Grøn Truelsen and Barnabas Wetton (Communications Design). The results of the collaboration "(Re)sources/(Hi)story/project(ed)" show how a methodological and free, but conscious, approach in terms of use and combination of materials could lead to an identity redefinition of the techniques that are traditionally linked to leather goods and to theatrical costume design. Under the patronage of LINEAPELLE, in collaboration with DSKD (Designskolen Kolding), UNIFOR (Foundation of the University of Oslo), Orsoni Venezia 1888 and the following companies associated with Lineapelle that offered the materials for the course:

Bonaudo, Conceria Brotini Mario, Limonta 1893 and Conceria Nuova Leon.

### **ACCADEMIA COSTUME & MODA - Pav. 9 A17-19 / B18-20 ACADEMIC MASTER IN ACCESSORIES DESIGN**

The Master in Accessories Design is aimed at a cultural and professional in-depth analysis of the design of handbags, shoes and small leather goods, through the creation and realization of a product. Starting from the paper pattern to the finished product, passing by the prototype, the path includes Industry Project developed in collaboration with the most important Maisons of the sector (Fendi, Ferragamo, Santoni, Rodò). A complete path that, through tours of the archives, of the production sites and meetings with style departments, leads to a conscious planning that ends with the prototypes developed by the students in the accessories laboratory of Accademia Costume & Moda.



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**IED - Pav. 9 A11-13**

**LEATHER SHAPES: The art of Dressing the body or a space**

Throughout the centuries, real leather has left a significant mark on the world of fashion. Originally appreciated for its functionality, it evolved as a symbol of style and of personal expression. From ancient times to Renaissance, passing by the Industrial Age and the 20th Century rebellions, leather has constantly represented an icon of style, quality and individuality. IED students have been given the opportunity to experience materials at several levels: creating accessories and leather objects is not only related to giving value to craftsmanship, but it even involves a responsibility towards the future. Young creatives have been encouraged to think about the origin of materials and to the whole product lifecycle in a more critical way, with the aim of contributing to a more conscious kind of fashion. In this way, every single piece is not just a design object, but it represents a symbol of commitment towards sustainability and fashion innovation. Various presented works have been realized in collaboration with tanneries Bonaudo and Rino Mastrotto.

**HONGIK UNIVERSITY - Pav. 9 B12**

The **Kollective Leather Innovation** project, designed by the students of the Hongik University, reinvents the future of leather by completing cutting edge technologies with the Korean creativity. This venture, supported by Lineapelle with the proposal of training seminars, encourages the designers to expand the limits of design and functionality, by creating leather goods that perfectly blend together innovation and tradition.

**SCUOLA MOSAICISTI DEL FRIULI - Leather & Mosaic, Tiles of Colors 2025 – 2<sup>nd</sup> edition**

by **dudubags** in partnership with Conceria Pietro Presot

Pav. 9 Pav. 9 B14

The leather of the iconic Smile bag reworked by the creativity of young mosaicists, according to the ancient arts of leather goods and mosaic: the projects that were voted online during December 2024 are previewed here in Lineapelle with laboratories open to visitors and live manufacturing with a mosaicist.

**TLF LEATHER DESIGN COMPETITION - Pav. 9 A16**

A contest open to Japanese students and designers aimed at showing how far you can go with the leather material. The categories are two: product and creativity.

**ISGMD DESIGN ACADEMY - Pav. 9 A20**

**“Balanced contrasts”** is the theme chosen and interpreted by the students of the Third year for the bags project. The young designers have combined the graphic projects with different materials with various finishes and structures as soft paints, laser-cut hair calf leather and smooth calf often matched with handles in different materials, plexiglass, hide or PVC. The aim was to generate contrasts in terms of volume, colour and proportion to reach new balances between the components of the product.

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press@lineapelle-fair.it

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## BETWEEN INSPIRATION AND INNOVATION: THE SCIENCE-BASED FASHION TALKS PROJECT COMES BACK TO LINEAPELLE 105

Restorative practices, ecodesign, management of supply chains. These are some of the themes that will be analysed at **LINEAPELLE 105**, during the new edition of the project **Science-Based Fashion Talks**, organised in collaboration with **SPIN360**.

Six meetings with high-level speakers, conceived to inspire change and deepen the new trajectories of sustainability.

At the heart of the programme, the **main challenges** that the industry is experiencing: ecodesign and durability, restorative practices, natural fibers, reduction of facilities, stopping deforestation and data sharing.

To confirm the significance of these themes, **United Nations Industrial Development Organization (UNIDO)**, **Stockholm University**, **Camera Nazionale della Moda Italiana (CNMI)**, **IWTO** and **WWF** will contribute to the debate.

“The aim of the Science-Based Fashion Talks project is to encourage a discussion on essential and ambitious themes, by giving importance to experiences and various points of view - as underlined by **Federico Brugnoli**, CEO of SPIN360 - Innovation comes from knowledge and sharing. Bringing these themes at LINEAPELLE means helping the supply chain to focalize actions and priorities that can realize their sustainability strategies”.

“Hosting one more time the Science-Based Fashion Talks project - as stated by **Fulvia Bacchi**, CEO of Lineapelle - confirms our effort and commitment into supporting companies in all of the aspects of their activities that necessarily involve the ones linked to sustainability”.

The talks will take place at LEM 3, on Ponte dei Mari, in front of hall 11.

### THE PROGRAMME

#### **Tuesday, February 25th**

- 11.00 > 13.00

#### NATURAL (MATERIALS) COMMUNITIES

What is the transformative potential in the industry of natural renewable materials like cotton, wool, mohair and silk? It will be analysed how these materials not only support sustainability and decarbonization, but are even contributing to inspiring the idea of natural communities of farmers, producers and innovators, connected by a shared vision towards the future.

- 14.00 > 16.00

#### DURABILITY & ECODESIGN IN FASHION

How can the luxury industry define and quantify the durability of products in order to establish new standards of sustainability? What will be the implications for the industry of the next PEFCR (Product Environmental Footprint Category Rules) and of ESPR (Ecodesign for Sustainable Products Regulation)? This session will in-depth analyse the themes of durability and of ecodesign, by presenting a possible unified approach for future evolutions.

# LINEAPELLE

## **Wednesday, February 26th**

- 11.00 > 13.00

### REGENERATIVE PRACTICES AND FASHION REGENERATION

What role is played by the regenerative practices into the definition of the future of the luxury industry? This session will deepen the themes of the transformative potential of regenerations, of soil health and of biodiversity in terms of impact on design and on the supply chain. A dialogue on how the adoption of regenerative approaches could restore ecosystems, inspire innovation and redefine sustainability strategies in the sector.

- 14.00 > 16.00

### LEATHER: INNOVATION AND IMPACT REDUCTION

How can the leather industry effectively reduce its carbon footprint while still advancing in terms of decarbonization efforts? This session gathers experts of the sector to discuss innovative practices, sustainable provision, and progress in terms of methods of low-emission manufacturing. We will explore strategies that align leather production to the global objectives of sustainability and climate.

## **Thursday, February 27th**

- 9.30 > 10.30

### GUIDANCE FOR DOWNSTREAM LEATHER BUYERS: IMPLEMENTING AND ASSESSING DEFORESTATION AND CONVERSION FREE SUPPLY CHAINS IN THE BRAZILIAN AMAZON AND CERRADO

During this session, the lecturers will discuss the importance of collaboration between sectors and of collective stakeholder actions to implement industries free from deforestation and conversion. The event will in-depth explore how leather buyers can adopt approaches that are essentially previously developed and used by food companies and retailers to communicate their commitments, monitor the progress of suppliers towards sustainable supply chains and to create synergies with these sectors.

- 11.00 > 13.00

### DATA SHARING AND VALUE CHAIN COLLABORATION

This session will explore the impact and significance of data sharing and of collaboration in the value chain, by highlighting the benefits of traceability, transparency and cooperation. The debate will then take on the main normative considerations, and the attention will be focused on the legal aspects of data exchange and on the frameworks that companies need to manage to guarantee a safe and responsible collaboration.

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

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## 1100 STUDENTS AT THE FAIR “AMICI PER LA PELLE” RETURNS TO LINEAPELLE 105

The yearly artistic contest **AMICI PER LA PELLE** comes back to **LINEAPELLE 105**. In this 14th edition, it was attended by 16 scholastic institutes of the junior high schools of the Italian tanning districts. It involved **more than 1100 students** and **20 works were presented**.

The young students, taking advantage of leather as a creative instrument, took on the challenge, and the theme was **CIRCENSES: Leather and Hide in Circus Games from Ancient Rome to the Present Day**.

“There has always been a **strict relationship** between the world of circus and the one of handcrafted manufacturing on leather and hide. During the circus games of ancient Rome, participants performed on hide saddled horses and wore leather costumes. In the medieval representations, actors wore hide costumes and masks. Even today, in the world of circus, leather and hide can be considered as protagonists: the costumes, the equipment and the instruments of the artists (gloves, boots, ropes, whips, drums) and the animals’ gear (bridles, reins and collars). These accessories are realized with leather to guarantee durability, ensure protection e, at the same time, offer breathability, softness and wearability, becoming, with the advantage of colours and unique shapes, an essential part of the show”.

The students were asked to realize a work that could be inspired by the **connection between leather and the circus**, two clearly different worlds that meet each other thanks to the creativity of the artists and the astonishment of viewers.

The works will be exhibited at LINEAPELLE 105 in a dedicated area situated in hall 9, where visitors and exhibitors will be able to vote. Their preference will be considered, as well as the ones expressed by a Special Jury and by the online votes. On February 25-26th, a Facebook page with the gallery of every presented work will be activated: every like will be considered as a vote.

The winners will be rewarded at LINEAPELLE on Thursday, February 27th, precisely at the Auditorium of Fiera Milano Rho, during a ceremony that will host various special guests.

Lineapelle Press Office  
press@lineapelle-fair.it

# MARKET INSIGHTS

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FEBRUARY 2025



LINEAPELLE

**ITALY** – The Italian tanning industry, based on the latest ISTAT data available (11 months of the year), is estimated to end 2024 with an **overall annual decline** of 4.3 percent in turnover and 7.6 percent in production volumes.

If the evidence of these changes were confirmed in the final analysis, this would be the second consecutive year of overall declines for the sector, reflecting persistent generalized suffering in the fashion, furniture and automotive supply chains.

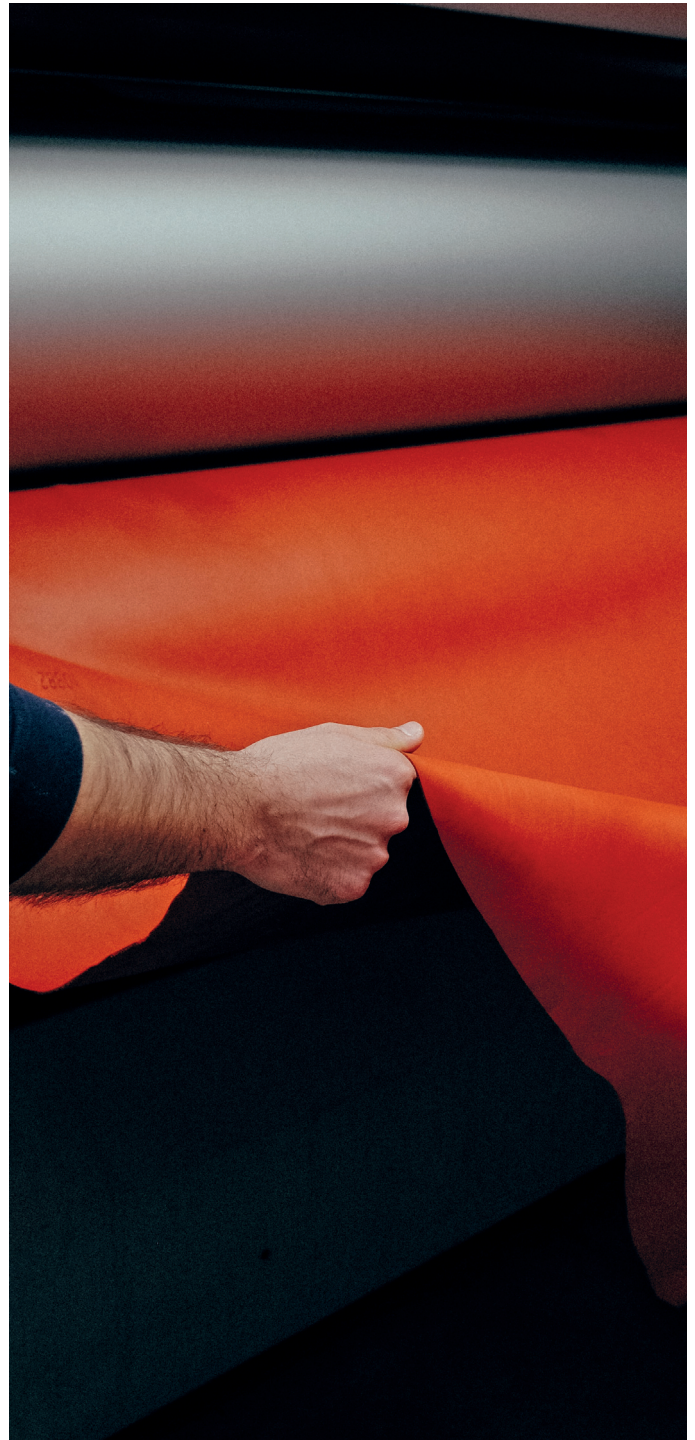
The ongoing international political tensions that have been a feature of the last few years, and their severe consequences at the economic level, have intensified an economic slowdown that affects consumer products in the aforementioned supply chains most strongly, upon which the need to rethink development strategies at the global level is clear. While on the global political level there have recently been signs of possible relaxation of existing conflicts, the prospects for trade still appear difficult and uncertain, with the risk of further exacerbation and effects unfortunately difficult to fully discern at the global level.

The performance of **Italian leather exports** also shows overall negative fluctuations in the period January-November 2024, with a total decline of 3 percent in value compared to the previous year's figure.

Despite the negative sign of total exports, the analysis of individual shipments by main destination country shows, once again, varied trends, even of remarkable intensity. Among our top 20 export countries, Spain (+11 %), Vietnam (+23 %), Germany (+6 %) and India (+2 %) are growing, against substantially unchanged flows to France (first foreign destination of Italian leathers), China (including Hong Kong) and South Korea. Shipments to the U.S. (-4%), Serbia (-3%) and the U.K. (-4%) declined slightly, while more intense declines were seen in Romania (-11%), Tunisia (-10%), Portugal (-6%), Albania (-11%), Poland (-12%), Slovakia (-15%), Mexico (-10%), Turkey (as much as -30%) Czech Republic (-20%) and Hungary (-7%).

The analysis of the sector-specific performance of the **individual segments and production districts** of the Italian tannery unfortunately shows no exceptions to the adverse landscape mentioned above. In the detail of production by animal origin, bovine leathers show, on average, less negative variations than sheep and goat leathers, both in production and in turnover, while, in terms of destination sector, difficulties appear widespread across all client segments. Turnover in all major national manufacturing districts is declining.

**OTHER COUNTRIES** – The current global picture concerning the sector's performance in 2024 shows, for **bovine leather**, declining sales results in all the main producing countries, both in Europe and in Asia and South America,



with the only slight exception of Brazil (which shows a substantially unchanged export in value). In the **sheep and goat leather segment**, Spain and France are the only players to show less difficulty than the other players, with some signs of slight recovery in the last months of the year from India, Pakistan and Turkey.

## ACCESSORIES, COMPONENTS, SYNTHETICS

### TEXTILES, SYNTHETICS AND LEATHER ALTERNATIVES –

There is no sign of stopping in the cooling of the sector, which shows signs of uncertainty even in the last quarter of the year and in the annual comparison confirms the weakness of the sector as a whole, with widespread declines at the EU level (-2% on average). Particularly bad are the Italians and Germans, while the French and Spanish remain stable over the corresponding 2023. Regenerated leather fibers and synthetics hold up fairly well, greater criticality on the contrary for synthetic fabric materials.

## MANUFACTURING SECTORS

**FOOTWEAR** – With the impact of the post-Covid rebound over and after a 2023 of substantial stability (in value), 2024 closes with negative signs in all the main parameters for the **Italian footwear sector**. The adverse performance of many major international economies and an unfavourable geopolitical context, which saw the inclusion, in addition to the Russian Ukrainian conflict, of another front of instability in the Middle East, severely penalized Italian footwear exports in 2024. After so many difficult quarters, the annual comparison also confirms a critical picture for the EU sector as a whole, with average declines of 6 percent. Non-European players are up and down, where Asians remain competitive with the exception of Indian manufacturers, declining.

**LEATHER GOODS** – The much-desired turnaround was not observed in the last quarter of the year, which confirms the difficulties of **Italian leather goods**, down double digits in the period, distressed by international instability, the slowdown of strategic markets such as China and Germany, and the difficulties of access to credit for domestic companies. The EU picture is also negative, showing the EU average at -7 percent over the corresponding 2023 level. The non-European landscape is contrasted: China and Pakistan are doing badly, while India is growing. Turkey is stable.

**GARMENTS** – European packers are cheering, as they end the year on the back of positive results already seen in previous quarters. The 2024 performance of the sector at the EU level, in fact shows decisive and widespread upturns for all major EU producers. Also joining the positive annual picture are the results of the sector's major non-EU players, all of which are on the rise in the 2023 comparison.

**UPHOLSTERY** – The slowdown observed during 2023 drags on into 2024 as well, with the European **upholstered furniture** sector wrapping up with signs of persistent weakness, which did not fade even in the latter part of the year (-3 % the EU ave-

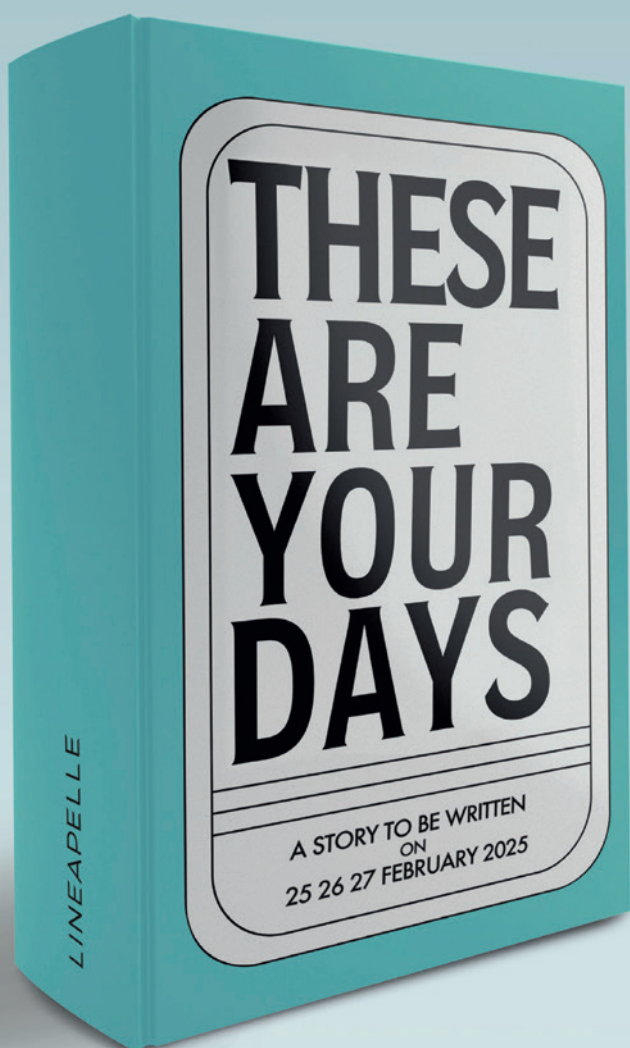
**ACCESSORIES AND COMPONENTS** – Accessories and components end 2024 painting a sharply negative picture in comparison with the corresponding 2023, further dampened by the bearish trend during the fourth quarter of the year. Widespread declines between -2% and -11% affect all major EU manufacturers. Breakdown by sector shows other footwear parts and small metal parts sinking, declines also for other accessories.

rage). Beyond European borders China is growing while the US appears weak, with stable results over last year. Rather sluggish in 2024 also the **automotive sector**, which settles on stable results on 2023 numbers. The trend remains weak, particularly for the Italian and French markets, with significant shortfalls compared to the units needed for a market approaching standard inflows of new car registrations. More reassuring is the non-European landscape, where registrations in the UK (+3%), the US (+2%), China (+5%) and India (+8.5%) are growing.

**LUXURY BRANDS** – The 2024 conclusion of the major EU luxury fashion brands shows mixed results, with mostly negative or slightly stable signals, with very rare exceptions. The Asian market slowdown and global macroeconomic and geopolitical uncertainty weigh heavily. Overall unfavourable in the reporting period is also the impact of currency fluctuations. Organic sales 2024 stable at +1% (constant rates) for French luxury giant **LVMH**, despite signs of weakness experienced by the Fashion & Leather Goods division (-1%) on the corresponding 2023. Double-digit sales increases in Japan, moderate rises in the US (+2%) and Europe (+3%). Criticality for the Asian market (-11%). In trouble **Kering Group**, which closes 2024 with a 12% revenue loss (constant rates). **Gucci** sinks (-21% revenue in 2024). Significant losses also for **YSL** (-9%). Encouraging, on the other hand, is the performance of **Bottega Veneta** (+6%). Overall in decline the group's minor brands (-7%) in the period. Further validation for **Hermès**, which closes 2024 with +13% in revenues (constant rates) when comparing with 2023 and growing sales in all geographies. Buoyant demand and an increase in production capacity drives especially leather goods and saddlery: +18% sales in 2024. In contrast, **Ferragamo** struggles, with a 7% loss in revenues in 2024 (constant rates), in a complex consumer environment, and despite encouraging operating trends in the fourth quarter of last year, particularly in Europe and the United States. Sales in all destination markets declined. Back 7% in leather goods, negative trend also in footwear, down -9%.

# LINEAPELLE

INTERNATIONAL LEATHER FAIR



SUMMER 26  
FIERA MILANO RHO

[WWW.LINEAPELLE-FAIR.IT](http://WWW.LINEAPELLE-FAIR.IT)

## EVENTS @ LINEAPELLE

FIERA MILANO RHO



### 25 FEBRUARY 2025

10.15 am - 10.30 am

**WORKSHOP IN THE MAKING** - Welcome back to In the making  
HALL 24 • N1-7 / P2-8

10.30 am - 11.30 am

**WORKSHOP IN THE MAKING** - Let's unleash our creativity  
HALL 24 • N1-7 / P2-8

11.00 am - 12.00 pm

**LINEAPELLE SS 26 FASHION CONFERENCE** (in Italian)  
FASHION THEATRE • HALL 13 aisle V

11.00 am - 1.00 pm

**SCIENCE BASED FASHION TALKS** - Natural (materials) communities  
LEM 3 (Ponte dei Mari, opposite hall 11)

11.30 am

**LINEAPELLE DESIGNERS EDITION** - ZENAM  
"Identité Plurielle"  
HALL 24 • T29

11.45 am - 12.45 pm

**WORKSHOP IN THE MAKING** - Pulsations and emotions  
HALL 24 • N1-7 / P2-8

1.00 pm - 2.00 pm

**WORKSHOP IN THE MAKING** - Unity makes the... bag  
HALL 24 • N1-7 / P2-8

2.00 pm - 4.00 pm

**SCIENCE BASED FASHION TALKS** - Durability & Ecodesign in Fashion  
LEM 3 (Ponte dei Mari, opposite hall 11)

2.15 pm - 3.15 pm

**WORKSHOP IN THE MAKING** - The jewelry approaches  
HALL 24 • N1-7 / P2-8

2.30 pm - 3.30 pm

**TENDENZE MODA LINEAPELLE SS 26** (in English)  
FASHION THEATRE • HALL13 aisle V

2.30 pm

**LINEAPELLE DESIGNERS EDITION** - DEMIURGO  
"Timeo"  
HALL 24 • T29

3.30 pm - 4.30 pm

**WORKSHOP IN THE MAKING** - Vintage reminds us  
HALL 24 • N1-7 / P2-8

4.30 pm

**LINEAPELLE DESIGNERS EDITION** - ANTON GIULIO GRANDE  
"AGG"  
HALL 24 • T29

4.45 pm - 5.45 pm

**WORKSHOP IN THE MAKING** - Loyal friends  
HALL 24 • N1-7 / P2-8



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## EVENTS @ LINEAPELLE

FIERA MILANO RHO



### 26 FEBRUARY 2025

10.30 am - 11.30 am

**WORKSHOP IN THE MAKING** - *The handcuff*  
HALL 24 • N1-7 / P2-8

11.00 am - 12.00 pm

**LINEAPELLE SS 26 FASHION CONFERENCE** (in Italian)  
FASHION THEATRE • HALL 13 aisle V

11.00 am - 1.00 pm

**SCIENCE BASED FASHION TALKS** - *Regenerative practices and fashion regeneration*  
LEM 3 (Ponte dei Mari, opposite hall 11)

11.30 am

**LINEAPELLE DESIGNERS EDITION** - DISIMAN.LING  
*"Time Journey"*  
HALL 24 • T29

11.45 am - 12.45 pm

**WORKSHOP IN THE MAKING** - *Making shoes*  
HALL 24 • N1-7 / P2-8

1.00 pm - 2.00 pm

**WORKSHOP IN THE MAKING** - *Even Celebrities pass through here*  
HALL 24 • N1-7 / P2-8

2.00 pm - 4.00 pm

**SCIENCE BASED FASHION TALKS** - *Leather: Innovation and Impact Reduction*  
LEM 3 (Ponte dei Mari, opposite hall 11)

2.15 pm - 3.15 pm

**WORKSHOP IN THE MAKING** - *Braiding, vibration and music*  
HALL 24 • N1-7 / P2-8

2.30 pm - 3.30 pm

**LINEAPELLE SS 26 FASHION CONFERENCE** (in English)  
FASHION THEATRE • HALL 13 aisle V

2.30 pm

**LINEAPELLE DESIGNERS EDITION** - GIUGLIA.  
*"Museo"*  
HALL 24 • T29

3.30 pm - 4.30 pm

**WORKSHOP IN THE MAKING** - *A color for everyone*  
HALL 24 • N1-7 / P2-8

4.00 pm - 5.00 pm

**THE SUSTAINABILITY OF THE REPTILE LEATHER INDUSTRY. REAL FACTS, NEW CHALLENGES, AND FUTURE STRATEGIES**  
LINEAPELLE SECRETARY OFFICE BUILDING O16 (conference room, first floor)

4.30 pm

**LINEAPELLE DESIGNERS EDITION** - MARIO DICE DESIGNER  
*"Too Funky"*  
HALL 24 • T29

4.30 pm

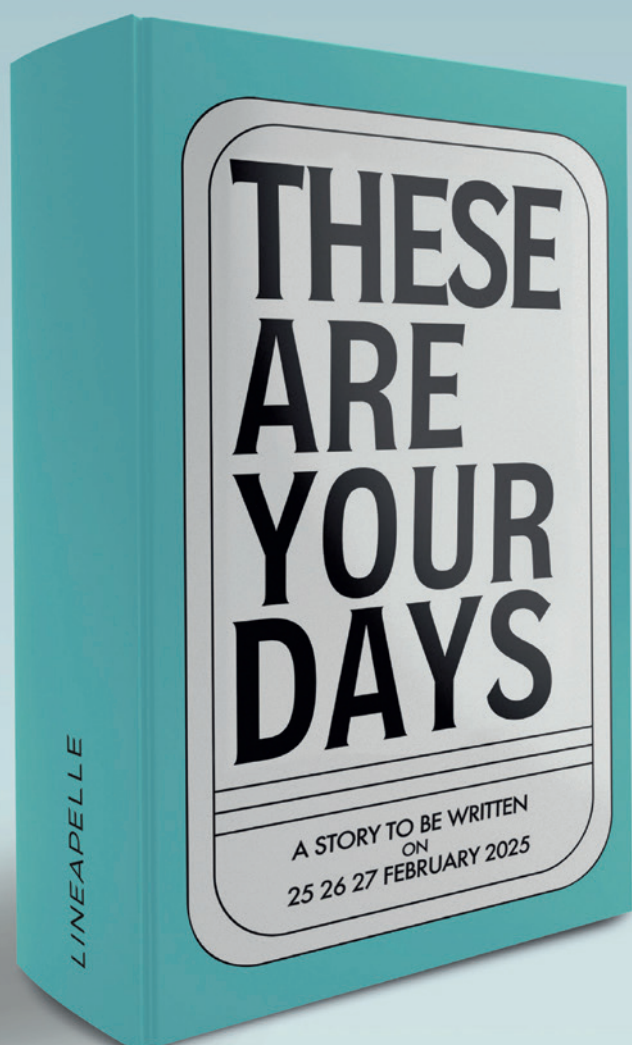
**SOLES, NEW TECHNOLOGIES AND NEW MATERIALS**  
LEM 3 (Ponte dei Mari, opposite hall 11)

4.45 pm - 5.45 pm

**WORKSHOP IN THE MAKING** - *Cat eyes*  
HALL 24 • N1-7 / P2-8

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## EVENTS @ LINEAPELLE

FIERA MILANO RHO



### 27 FEBRUARY 2025

9.30 am - 10.30 am

**SCIENCE BASED FASHION TALKS** - *Guidance for Downstream Leather Buyers: implementing and assessing Deforestation and conversion free supply chains in the Brazilian Amazon and Cerrado*  
LEM 3 (Ponte dei Mari, opposite hall 11)

10.30 am - 11.30 am

**WORKSHOP IN THE MAKING** - *Toasting together*  
HALL 24 • N1-7 / P2-8

11.00 am - 1.00 pm

**SCIENCE BASED FASHION TALKS** - *Data sharing and value chain collaboration*  
LEM 3 (Ponte dei Mari, opposite hall 11)

11.45 am - 12.45 pm

**WORKSHOP IN THE MAKING** - *Thousand kisses*  
HALL 24 • N1-7 / P2-8

1.00 pm - 2.00 pm

**WORKSHOP IN THE MAKING** - *Chained by an unusual destiny*  
HALL 24 • N1-7 / P2-8

2.00 pm

**LINEAPELLE DESIGNERS EDITION** - *LEONARDOVALENTINI*  
"Crudelio Fabiola"  
HALL 24 • T29

2.15 pm - 3.15 pm

**WORKSHOP IN THE MAKING** - *Step by Step*  
HALL 24 • N1-7 / P2-8

3.30 pm - 4.00 pm

**WORKSHOP IN THE MAKING** - *Roll up your sleeves*  
HALL 24 • N1-7 / P2-8