



Even more international. Even more strategic. Even more leading.  
An ideal opportunity to exchange ideas for a market seeking confirmation.  
LINEAPELLE is celebrating its 93rd edition in Milan,  
mapping the economic situation and style trends in the leather industry

### THE IDEAL TRADE FAIR EXPERIENCE

**Even more international. Even more strategic.**

**Able to organise the ideal trade fair experience for comparing and sharing ideas in a market that is observing signs of a promising recovery at a global level, and is seeking solid confirmation.**

**Exhibitors' figures close to 1,300 and an increase in the number of represented countries. LINEAPELLE is holding its 93rd edition from 4 to 6 October, launching the style for Winter 2018/19 and consolidating its trade fair importance, as it increasingly becomes a central hub for a fashion industry confident of finding the best commercial deals and stylistic range available from tanning companies, accessory and component makers and natural and synthetic fabrics, at Fieramilano Rho.**

### THE STRENGTH OF NUMBERS

**LINEAPELLE93** confirms and reinforces the growth trend of previous shows.

There will be a total of **1,285 exhibitors, 3.5% more** than the comparable seasonal show in September 2016. But it also shows an increase compared with the February 2017 show (+7%). There is an increase in exhibitors from Italy (+4.5%) as well in those from abroad (+1%), coming from **48 countries**, up from 44 a year ago. The exhibition area has expanded: over **47,500 square metres, +3.5%** compared to September 2016. The numbers speak for themselves, unambiguously revealing the strength and appeal of **LINEAPELLE** at a global level and making it a key event of international importance in the leather industry, in terms both of business and stylistic developments.

This leadership position has also been boosted by the development of its **international network**, in particular the previews: **LINEAPELLE New York** (next show: 31 January | 1 February 2018) and **LINEAPELLE London** (next show: 23 January), together with a presence at the main Asian fairs in Hong Kong, Tokyo, and Guangzhou.

### THE ROLE OF FASHION INFLUENCER

In an era when virtual networking and the social media determine the success of styles and brands, **LINEAPELLE93** has again taken on the role of a **genuine and concrete fashion influencer**, developing a **well-planned trends route** for the **Winter season 2018/2019**, perfectly summed up in the word **MAPS**. Creative stimuli interact together to weave classic visions with bold and inventive ideas. The emotional value of the material is enhanced. The chromatic harmonies are constantly evolving. There is a wealth of ideas that, as with every show, can be examined in depth in the **three Trend Areas**, located in pavilions 13, 9 and 22, and during the exclusive seminars scheduled for the afternoons of 4 and 5 October.

**LINEAPELLE93's** fashion imprint is also made explicit in the **video installation** on display here in the show (that sees leather as a leitmotif running through the expert craftsmanship that produces shoes, bags and other leather articles). The video also participated in **MILANO XL - La Festa della Creatività Italiana** (Milan XL - The Festival of Italian Creativity), which livened up

the centre of Milan during the recent Fashion Week.

#### THE VALUE OF THE CONTENT

**LINEAPELLE93** offers itself as a **content hub**, useful for stimulating awareness in the leather sector on some key topics. **Sustainability**, with the presentation (Thursday 5 October) of the latest edition of the Italian Leather Industry Sustainability Report in collaboration with ZDHC Foundation. **Design**, through a workshop (Wednesday 4 October) with Stefano Paiocchi, lead architect of the renowned Zaha Hadid Architects studio. **Legal protection of samples** at a session scheduled for Friday 6 October.

#### THE SOCIAL DIMENSION

**LINEAPELLE93** is also **digital** and can be found and shared on the show's **Facebook, Twitter, and Instagram** channels, with video and photo gallery content providing a smart version of what's happening at the fair in real time. The **mobile app** can be downloaded from Google Play and the Apple Store enabling users to gain entry to the fair (by downloading the e-ticket), view the catalogue and organize their visit. Finally, during the three days of **LINEAPELLE93**, the **laconceria.it** website will create a digital newspaper with updates, videointerviews and market analysis posted in a special edition of its Daily News, with special contributions shared on its Facebook and Twitter pages.

Milan, October 2017

# LINEAPELLE

4-6 OCTOBER 2017

FIERAMILANO RHO

#lineapelle93

## EXHIBITION DATA

<b>Date</b>	4-6 October 2017
<b>Venue</b>	FieraMilano, Rho
<b>Entrance</b>	East Gate - West Gate - South Gate
<b>Orario</b>	9.00 am – 6.30 pm 9.00 am – 5.00 pm (last day)
<b>Access</b>	On invitation
<b>Exhibitors</b>	1.285    Italians 801 Foreigners 484
<b>from 48 countries</b>	
	Tanneries <i>pav. 9-11-13-15</i> Accessories and components <i>pav. 22-24</i> Synthetics and fabrics <i>pav. 9</i> Chemicals, designers, schools, others <i>pav. 9</i>
<b>Net surface</b>	47.678 sqm.
<b>Trend Areas</b>	Pavilions 9-13-22
<b>Press Office</b>	Building O16 - Corso Italia, corner of pav. 22 – 1° floor e-mail: <a href="mailto:press@lineapelle-fair.it">press@lineapelle-fair.it</a>
<b>Secretary's Office</b>	Building O16 - Corso Italia, corner of pav. 22 – 2° floor tel. 02/36629345 - 02/36629344



*A path that explores bold equilibrium.  
Timeless story-telling, surprising directions.  
Eccentric evolutions that interweave classic, basic and creative folly.  
The style maps for Winter 18/19 are more stimulating than ever, ready to be checked out.*

### THE DIRECTION OF STYLE

A creative guide to the many sides of contemporaneity, in search of bold style equilibrium. These are the **LINEAPELLE93 MAPS** elaborated by its Fashion Committee to profile the fashion trends for the 18/19 Winter season.

Unexpected intersections generate surprising directions, timeless story-telling, bold experimentation. Classic and basic styles interweave. An unprecedented creative folly triggered, heads towards an amazing winter, characterised by harmonious colourways in constant evolution. Neutral, warm and natural

shades will become the new pastel, teamed with colour, dark shades and Winter white. "In a world of contrasts," explains the LINEAPELLE Fashion Committee, "where *provocation* seems to have become the buzzword, the real revolution apparently hides in normality. Basic, quality materials and traditional surfaces, which seem to support the clean-cut style that is back on the runways, will lead to bold, eccentric, opulent evolutions. Traditional grains to be made over with shine. Opaqueness and tactile experiences enhance the emotion.

### A KALEIDOSCOPE OF CREATIVE POSSIBILITY

For a truly close-up look at the rich variety of A/W 18/19 trends, **LINEAPELLE** offers the usual showcase of the Trend Areas, set up to present over 2,000 samples selected from the most innovative articles brought to the fair by the exhibitors. There are three:

- at the entrance to Pavilion 13
- along aisle U in Pavilion 9
- along aisle T in Pavilion 22

To find out about the style content of **MAPS** and pick up on the ideas they offer, you can watch the Fashion Presentations held in the Fashion Video Area along Lane Z in Pavilion 15:

- Wednesday 4 October at 2.30 pm in Italian and at 4.00 pm in English
- Thursday 5 October at 2.30 pm in Italian and at 4.00 pm in English.

Entry subject to payment.

Another necessary creative work tool is the **Trend Book**. It comes in two versions, full and pocket, and can be purchased from the Trend Area in Pavilion 13, the Video Fashion Area in Pavilion 15 or on line, from the [lineapelle-fair.com](http://lineapelle-fair.com) e-store.

Milan, October 2017



## IL CALENDARIO DEGLI EVENTI

### MERCOLEDÌ 4 OTTOBRE

#### 10.30 | 11.30

Fashion Video Area | pad. 15, corsia Z

Workshop

CODE-STRUCTURED SKIN

Architecture, Fashion and Digital Craft

Speaker: Arch. Stefano Paiocchi

Lead Architect Zaha Hadid Architects

Entry: free

#### 12.00 | 13.00

Fashion Video Area | pad. 15, corsia Z

Presentazione Progetto

EXPLORING ITALIAN LEATHER SUSTAINABILITY

UNIC | Accademia Costume & Moda | Gucci

#### 14.30

Fashion Video Area | pad. 15, corsia Z

Presentazione

TENDENZE MODA INVERNO 18/19 (Comitato Moda LINEAPELLE)

Ingresso: a pagamento

registrazione su [www.lineapelle-fair.com](http://www.lineapelle-fair.com)

#### 16.00

Fashion Video Area | pad. 15, corsia Z

Presentation

WINTER 18/19 FASHION TRENDS (LINEAPELLE Fashion Committee)

Entry: with fee

Registration on [www.lineapelle-fair.com](http://www.lineapelle-fair.com)

### GIOVEDÌ 5 OTTOBRE

#### 11.00 | 13.00

Fashion Video Area | pad. 15, corsia Z

Seminario

A NEW APPROACH TO LEATHER SUSTAINABILITY

MOVING FORWARD THE SUPPLY CHAIN

Speaker: UNIC | ZDHC Foundation

Lingua: inglese, con traduzione simultanea in italiano

Entry: free

**14.30**

Fashion Video Area | pad. 15, corsia Z

Presentazione

TENDENZE MODA INVERNO 18/19 (Comitato Moda LINEAPELLE)

Ingresso: a pagamento

registrazione su [www.lineapelle-fair.com](http://www.lineapelle-fair.com)

**14.30 | 15.30**

Sala Epsilon | pad. 13 (in fondo)

Press Conference

THE 20<sup>th</sup> INTERNATIONAL TECHNICAL FOOTWEAR CONGRESS

UITIC (International Union of Shoe Industry Technicians)

Speaker: APICCAPS

Entry: free

**16.00**

Fashion Video Area | pad. 15, corsia Z

Presentation

WINTER 18/19 FASHION TRENDS (LINEAPELLE Fashion Committee)

Entry: with fee

Registration on [www.lineapelle-fair.com](http://www.lineapelle-fair.com)

**VENERDÌ 6 OTTOBRE****11.00 | 12.30**

Fashion Video Area | pad. 15, corsia Z

Seminario

LA TUTELA DEI CAMPIONARI DELLE CONFERIE E DEGLI ALTRI FORNITORI DI PRODOTTI MODA  
TRA SEGRETO AZIENDALE E REGISTRAZIONE DI DESIGN. APPUNTI PER ORIENTARSI TRA  
TUTELE PUBBLICHE E PRIVATE

Speakers: Lawtelier | UNIC | ICEC

Ingresso: libero

Milano, ottobre 2017



CODE-STRUCTED SKIN.  
ARCHITECTURE, FASHION AND DIGITAL CRAFTSMANSHIP

Wednesday 4 October 2017  
10.30 | 11.30  
Fashion Video Area | pav. 15, aisle Z

How can fashion, leather and design co-exist with the only apparently contradictory idea of **digital craftsmanship**? How can these worlds dialogue and manage to produce leather accessories with high added value, stimulated by something that seems very different from the traditional creative idea of a designer? **Stefano Paiocchi**, lead architect of the renowned **Zaha Hadid Architects** firm, brings to Lineapelle93 the result of lengthy independent work that

explores the tangible possibilities of contamination between fashion design and digital design. The datum, algorithm, and formula are the input that triggers a process of digital design, which subsequently leads to the artisan production project. The level of complexity and innovativeness is translated into products thanks to a different creative approach, inside of which leather is the ideal material for linking tradition with modernity.

*Stefano Paiocchi, born in 1973, is lead architect at Zaha Hadid Architects. He has great international experience right across the board. The research he carries out explores the technical and formal impact of technology on cultural phenomena and architecture, through practice and teaching. He promotes research laboratories in advanced design techniques, complex geometries and digital fabrication.*

Milan, October 2017





## EXPLORING ITALIAN LEATHER SUSTAINABILITY

Wednesday, 4 October 2017

12.00 | 13.00

Fashion Video Area | pav 15, aisle Z

At **LINEAPELLE**, the main international fair of the leather industry, the Italian tanners' association will present the **"EXPLORING ITALIAN LEATHER SUSTAINABILITY"** project, developed in partnership with **Accademia Costume & Moda** and **Gucci**.

The production chain teams up with education providers and, with support from **Gucci**, supports new talents to develop awareness of future design.

**Sustainability, product culture and experimentation** are the linchpins on which third-year students on the 1<sup>st</sup> Level Academic Diploma course in Costume & Fashion will be working **to create a capsule collection according to a brief by the Florentine brand**, using only materials from the tanners undersigning the UNIC sustainability manifesto.

The **one-year project** runs from October 2017 to October 2018, with a **calendar of case histories, meetings with professionals, specific workshops** on the theme of **sustainability** and **visits to UNIC member companies**, and also, in 2018, to the new **Gucci centre of excellence for leather goods and footwear**, which will allow students to further improve their knowledge about the subject. At the same time, the **Academy and companies will work alongside the students** in laboratory activities for **creative conception, development and prototyping** of the capsule collections. The **prototypes made will be showcased** at the **LINEAPELLE** autumn collection edition.

**Italian tanneries** see sustainability as the natural expression of an innovative vision that champions excellence and continual improvement, a guarantee of quality for the entire reference production chain.







**A NEW APPROACH TO LEATHER SUSTAINABILITY  
MOVING FORWARD THE SUPPLY CHAIN**

**Thursday 5 October 2017**

**11.00 | 13.00**

Fashion Video Area | hall 15, aisle Z

UNIC, the Italian tanners' association, and ZDHC, the forefront multi-stakeholder collaboration for chemicals management in the sector, will jointly present their latest activities and future plans for environmental sustainability.

The UNIC Sustainability Report, which is now in its 15<sup>th</sup> edition, is a compendium of the commitment of the Italian tanning industry to responsible business as well as product and process sustainability. Subject of the presentation will be the Seven Tales describing the reasons why Italian leather is worldwide

considered as a synonym of sustainable excellence for the whole value chain.

The Zero Discharge of Hazardous Chemicals (ZDHC) is a programme that takes a holistic approach to tackling the issue of hazardous chemicals in the global textile, leather and footwear value chain. A cutting-edge approach for sustainable chemistry and provide insights into its guidelines and innovative tools. ZDHC will also share learnings from its training Academy and implementation pilots and talk about upcoming scaling of best practices for the industry in Italy.

**Program**

11.00	Welcome
11.10	UNIC Sustainability Report 2017 – 7 Tales of Italian Leather
11.40	The ZDHC Programme – An holistic approach for sustainable chemistry
12.30	Q&A

The event is free of charge, open to all supply chain partners (from brands and retailers, to tanneries, manufacturers, chemicals formulators and other interested stakeholders) and will be held in English. Simultaneous translation into Italian will be available.





**THE PROTECTION OF SAMPLES OF TANNERIES  
AND OTHER FASHION PRODUCTS SUPPLIERS  
BETWEEN BUSINESS SECRET AND DESIGN REGISTRATION.  
GUIDELINES BETWEEN PUBLIC AND PRIVATE SYSTEMS OF PROTECTION**

**Friday 6 October 2017**

**11.00 | 13.00**

**Fashion Video Area | hall 15, aisle Z**

The seminar will describe the means that the legal order and the sectoral certification schemes developed by ICEC, the Institute of Quality Certification for the Leather Sector, provide to companies (tanneries, producers of accessories, components, textiles and synthetic materials for fashion) to protect their samples,

with a focus on the protection of business secrets and on registration of designs.

Practical advice will be provided to guide the company through the various available forms of protection and to choose the one that best suits company's strategies.

**Program**

11.00	Welcome and introduction   by UNIC
11.10	The protection granted by the public legislation   by Studio Legale Lawtelier
11.40	ICEC registration service for fashion samples
12.30	Q&A

The event is free of charge, open to all supply chain partners (tanneries, producers of accessories, components, textiles and synthetic materials, manufacturing companies, brands and other interested stakeholders) and will be held in Italian.

Milano, October 2017

# MARKET INSIGHTS

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2017 • 1<sup>st</sup> SEMESTER



**LINEAPELLE**  
ECONOMIC DEPARTMENT

## RAW MATERIAL

**PRICES** – The second quarter 2017 recorded a partial trend reversal with respect to the **growing dynamic observed at the beginning of the year**. After the increases across all the main categories of the **bovine** segment in April, in May the large and medium sizes (steers/heifers, cows, bulls) registered declines in many markets. Calfskins are the exception. Volatility for the average index of **sheepskins** mainly due to the Middle Eastern sources' variations, stable the European ones instead. **Bovine wet-blue index** loses ground after the slight increase at the beginning of the quarter. Decreases in all the main markets of reference, more consistent drops in Brazil and Australia.

**SLAUGHTERING** – The general picture of the **adult cattle** slaughtering slows down but remains positive with respect to the beginning of the year in the main areas monitored: +4% the overall increase in the first semester. Total EU figure is unchanged with respect to last year, although with various results: the Netherlands, Poland and Ireland go up, France is stable, Germany, the UK, Italy and Spain go down. The American continent increases (US +7%, Argentina +5%, Brazil +1%); Oceanic area decreases (Australia -8%, New Zealand -5%). **Calves** gain ground, closing the first semester substantially stable: total EU +1% (drops only in France and Poland), the Oceanian go down, the US goes up. Drops are confirmed for **sheep** slaughtering (-2%), with a positive sign in Europe (+1%), a negative one in New Zealand (-2%) and Australia (-7%).



## TANNING SECTOR

**ITALY** – The Italian tanning industry, **international leader** of the sector for turnover (65% of the total EU, 19% at global level) and quality, closes the first semester 2017 with an overall **increase in production** equal to 2.7% in volume and to 0.2% in value. Among the main **Italian districts**, Veneto records an increase of almost 3% in turnover (pushed by the export +5%); “positive stability” in Tuscany instead (+0.2%). More delicate situation in Campania and Lombardy because of the sheepskins difficulties.

The **national sales data** (in value) move on the edge of stability both in the **domestic** (-0.8%) and export market.

In the first part of the year, the overall **Italian export** of tanned leather has increased by 0.8% in value and by 12.3% in volume. Among the main **foreign countries destination** of Italian leather, the most remarkable signs come from China, where the value of Italian shipments has returned to grow strongly (+10%) after a tricky biennium. Still good results in the US (+8%). Exports toward Vietnam (+11%) and the UK (+14%) post double-digit growth. The EU continental market does not look so bright: drops in France (-6%), Spain (-9%), Germany (-5%), Poland (-3%) and Portugal (-2%). Among the traditional European manufacturing offshoring, shipments toward Romania and Albania look stable, the ones toward Tunisia, Serbia and Bulgaria go down. Czech Republic and Hungary go up.

As far as the **main production categories** are concerned, the improving trend is basically due to the positive signs recorded by the large and medium sizes bovine, increasing by 2% in value and by 3% in volume. The rise is mainly due to the good persistence of the automotive demand and the partial recovery of the fashion costumers' purchases. The small sizes have shown weakness.

**OTHER COUNTRIES** – In the **EU** the medium-large bovine ended the first part of the year with an increasing turnover for Spain, the UK, Austria, Portugal and Poland. Falls in Germany, France and the Netherlands. In the small skins, the Spanish suffer; better trend for the French although with a slight step back in calves. Little signs of improvement coming from **Asia**, where bovine skins sales gather pace in China, Turkey and Pakistan. Declines for India and main **Latin American** producers. Negative trend for sheepskins (drops in China, India and Pakistan) with the exception of Turkey.



## ACCESSORIES, COMPONENTS, SYNTHETICS

**RAW MATERIALS** – The upward trend of the commodity prices for the sector strengthens by showing growing results among all the quotations in the first semester of 2017. **Oil** quotations (in USD) are the exception with a slight dip (-4%). Continued increases for **cotton** (+24%) and **wool** (between +5% and +32%) instead. **Natural rubber** is experiencing strong acceleration. Exceptional performance for **metals**, all posting double-digit growth.

**TEXTILES, SYNTHETICS AND ALTERNATIVES** – Moderate growth for **textiles, synthetics and alternatives** (+2% the average at European level). Germany (+6%) and Spain (+5%) go up; slight dip in the UK instead (-1%). France negatively stable. Italy suffers (-7%). Among the segments, the good performance of the synthetic stands out (+6% at EU level). Italy's weak dynamic affects the EU average negatively, dragging down the bonded leather (-9%) and the textiles and synthetic fibers segment (-6%).

**ACCESSORIES AND COMPONENTS** – The first half of 2017 pushes up the results of the segment, which confirm very positive both in Italy (+6%) and in the rest of Europe (+8% the European average). Germany gains ground (+2%) while France accelerates. Good performance for Spain (+7%). Double-digit growth for the main European offshoring. The United Kingdom moves backwards (-4%). Quite dynamic the various product categories: **footwear components** return to show positive figures (+5% the EU average), also the **other accessories** go up (+9%). **Small metal parts** record double-digit increases.



## MANUFACTURING SECTORS

**FOOTWEAR** – Positive first half-year results for the **Italian footwear**, which returns to show a positive sign after the uncertainty of the first months 2017 (+2%). Uprising trend even for the **EU average** (+5%), which follows the good dynamic of Germany and Poland (both posting double-digit growth). Good trend for Iberian, French and Eastern-European offshoring. The United Kingdom steps back (-5%). Overall positive trend for the **Asian manufacturers**, except China (-3%) and Pakistan (-5%). Increases for Brazil (+16%) and Turkey (+5%).

**LEATHER GOODS** – Leap of the **Italian leather goods manufacturers**, which record an overall increase of over 20% in the semester. Positive trend even at **European level** (+12%). English, Polish and Spanish go up (all of them double-digit growing); the French keep looking weak (-1%). **Beyond Europe**, increases for India and Vietnam. Drops in China and Turkey.

**GARMENTS** – First semester 2017 in contraction for the **Italian leather garments manufacturers** (-2%). Widespread uncertainty even at **European level**, with the main European manufacturers losing ground in the semester. The **extra-EU manufacturers** look weak too, Vietnam excluded.

**UPHOLSTERY** – Encouraging half-year comparison for both the Italian and the European **upholstered furniture** (+6% and +3% respectively). Decreases only for the German (-1%) and Romanian (-3%). US orders accelerate (+6%). In the Old World, the **automotive sector** keeps growing in the first semester 2017, where the Italian new car registrations grow much more than the European ones (+9% and +5% respectively). Weak trend for the US market (-2%).

**LUXURY** – In the first half of 2017, the luxury market has returned firmly to positive territory. Following Gucci (+43% of revenues), the **Kering group**, ended the semester with revenues and profits rising by 26% and 78%. Good also the sales of the other major luxury brands of the group: Yves Saint Laurent (+28%), Bottega Veneta (+2%). Organic revenue and profits double-digit growing for the fashion and leather division of **LVMH** too, with increases of +14% and +34% respectively in the first half 2017. Raising above all, the brands Louis Vuitton, Fendi, Loro Piana, Céline, Kenzo, Loewe and Berluti. Total turnover rising by 10% for **Hermès** in the first half of 2017, thanks to the good dynamic of the leather goods (+12%). **Ferragamo** group's revenues were stable, with footwear at +0.4% and leather goods at +0.6%. Downturn in **Tod's** group's revenues (-3%), where the trend of leather goods does not offset the uncertainty of footwear. Declines for Hogan (-7%) and Tod's (-6%). Roger Vivier (+11%) and Fay (+4%) go up. Negative signs for **Prada** group's total sales (-6% in the semester). Weak trend for the leather goods (-8%) and footwear (-9%) divisions. All the brands belonging to the maison go down: Prada (-5%), Miu Miu (-10%), Church's (-11%).

**ARRIVEDERCI  
SEE YOU SOON**

**LINEAPELLE**

**SUMMER 2019**

**20|21|22 FEBRUARY 2018**

**INTERNATIONAL  
LEATHER FAIR**

**MILANO**