

# LINEAPELLE

20 | 22 February - FIERAMILANO RHO  
Spring / Summer 2019

## THE FAIR OF FAIRS

*The most important fair event in the world for leather, accessories, components and alternative materials destined for clients of the fashion & luxury, furniture and automotive industries. The leading business experience for a large and specialized sector consisting of over 50,000 businesses that handle a total annual turnover of over 150 billion dollars.*

*A space for tapping into market flows and throwing light on its evolution: creative, production, technological, innovative and commercial.*

**LINEAPELLE** is back with edition number 94, to be held at Fieramilano Rho from 20 to 22 February.

## THE NUMBERS

**LINEAPELLE94** opens its doors to a higher number of exhibitors compared to the previous event in the same season (February 2017). It is an increase of 5%, making a total of 1,254 exhibitors from 45 countries. Attendance has grown from both Italy (+4%) and other countries (+6%). The exhibition area has also expanded and is now in excess of 47,000 square metres (+3%).

The three Trend Areas have been confirmed (Pavilions 13, 9 and 22), where visitors can explore the innovative approach of the exhibitors, with hands-on experience of 2,000 product samples developed under the mood theme of Empathy, for Spring/Summer 2019.

## THE MARKET

**LINEAPELLE94** has entered an economic phase of positive caution, with production segments (such as the leather goods and automotive segments) and with a significant proportion of our clientele showing reassuring growth trends. Some shadowy areas still remain, however: the difficulty being experienced by some fashion labels; the footwear sector, which is still proceeding at a slow pace; the United States, which is going through a period of slow-down; China, which is in recovery, but is continuing the process of transforming its manufacturing industries, with greater focus on its internal market. So the world of supply is here at **LINEAPELLE94** to define boundaries and share prospects for a business season that requires a lot of attention and flexibility in order to be interpreted and handled constructively and strategically.

## INNOVATION

**LINEAPELLE94** is a workshop of ideas and projects that will play a key role in a rich programme of events and workshops at this year's show.

The key word is: innovation.

On Tuesday 20 February we will be exploring the future. Modern Meadow is presenting the Zoa project, which is harnessing the power of design, biology and engineering to conceive the production development of the first "bioleather" material in the world. Next, the Lineapelle Innovation Square project will be unveiled: a 3-day event to be held at the next show (25/27 September) and will explore new and select technologies and business solutions considered particularly relevant for **LINEAPELLE's** key sectors.

On Wednesday 21 February the International Tanning and Chemicals Conference will take place. Organized by UNIC (Italian Tanners' Association) and COTANCE (the Confederation of National Associations of Tanners and Dressers of the European Union), it will present a series of highly topical reflections on the issue of tanning chemicals and aspects of risk and opportunity linked to the different types of processing. The working day will end with the presentation of projects and services from the Stazione Sperimentale Pelli (Italian Leather Research Institute). All the events will take place in the LEM at Ponte dei Mari, beside Pavilion 22.

Meanwhile, the Fashion Theatre in Pavilion 15 will see the usual fashion presentations (on Tuesday and Wednesday), as well as a seminar about protecting innovative design and company expertise organised by ICEC, the Institute of Quality Certification for the Leather Sector.

### THE COMPETITION

**LINEAPELLE94** is looking to the future, keeping a special eye on the new generations, and is hosting the seventh edition of Amici per la Pelle, a competition for second and third year students at middle schools in the Italian leather industry areas. This artistic/educational project will involve over 1,000 students, tasked with representing a symbolic monument of their local area using leather. It is possible to visit Museum Tan, the gallery where all the works will be on display, in Pavilion 9. Voting will be open at the fair and online. The awards ceremony will be held on the morning of Thursday 22, in the Auditorium of Fieramilano Rho.

### RECEPTION AND ORIENTATION

**LINEAPELLE94** is introducing some novelties designed to make the trade fair experience more welcoming and stimulating for buyers and visitors. The internal signage at the fair has undergone a substantial functional and aesthetic restyling, to improve ease of use and modernize its visual impact. The lounge areas will also be given a new life. **LINEAPELLE94** is renewing the concept, transforming them into spaces where visitors can discover the fine quality of Italian-made products. Three of these will house case histories that have played a part in the history of design: the Boat Lounge is dedicated to Riva boats; the Furniture Lounge will present the unique qualities of Poltrona Frau upholstery; the Automotive Lounge will bring the iconic Fiat 500 Topolino to the fair. A special case is the area reserved for the Pompei tannery and the restoration project led by UNIC and Lineapelle, which is entering its most important phase.

**#lineapelle94**

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

Seguici su



Lineapelle Srl - Via Brisa, 3 - 20123 - Milano

tel. +39 02.8807711 - fax +39 02.860032 - tax code no. and VAT no. 12629090155  
[milano@lineapelle-fair.it](mailto:milano@lineapelle-fair.it) - [www.lineapelle-fair.it](http://www.lineapelle-fair.it)

## LINEAPELLE

## EXHIBITION DATA

<b>Date</b>	20/21/22 February 2018
<b>Venue</b>	FieraMilano, Rho
<b>Entrance</b>	East Gate - West Gate - Souh 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>	1.254    Italians 799 Foreigners 455
<b>from 48 countries</b>	
	Tanneries <i>pav. 9-11-13-15</i> <i>Accessories and components</i> <i>pav. 22-24</i> <i>Synthetics and fabrics</i> <i>pav. 9</i> <i>Chemicals, designers, schools, others</i> <i>pav. 9</i>
<b>Net surface</b>	47.117 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> tel. 02/36629301
<b>Secretary's Office</b>	Building O16 - Corso Italia, corner of pav. 22 – 2° floor e-mail: <a href="mailto:milano@lineapelle-fair.it">milano@lineapelle-fair.it</a> tel. 02/36629345 - 02/36629342 – 02/36629347







Lineapelle Srl- Via Brisa, 3 - 20123 - Milano  
t +39 02.8807711 - f +39 02.860032 - C.F. e P.IVA 12629090155  
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# LINEAPELLE

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## EMPATHY S/S 19 FASHION TRENDS

*At Lineapelle94 future trends will be launched and you'll be able to touch creative innovation with your own hands with over 2,000 samples in the 3 Trend Areas.  
Under the spotlight for Spring/Summer 2019: naturalness and technology, elegance and athleisure, and a range of colours without borders*

### THE TREND AREAS

Everything that is admired **on the catwalk** during fashion shows and seen in the windows of **boutiques**, is launched long beforehand, right here. **The stylistic future** of materials, accessories and components destined for the fashion&luxury industry **is here at Lineapelle94**. A fashion experience that's waiting to be discovered and touched with your own hands in the **Trend Areas**. There are **3** of them, situated at the entrance to Pavilion 13 and inside Pavilions 9 and 22. About **2,000 samples**, chosen for their innovative energy and their ability to bring personality to the trends for the Lineapelle94 season: **Spring/Summer 2019**.

### NEXT SUMMER

According to the Lineapelle Fashion Committee, **Empathy** is **the stylistic common denominator** for summer 2019. A research journey exploring materials, colours and surfaces captures the creative necessity to **"dress nature in technology**, finding new dimensions in the desire to simplify, to emphasize softness, to accentuate shine, to succeed in building **a bridge between the naturalness of the product and the digital world**, between tactile emotions and technology, **elegance and athleisure**. Summer 2019 will be **colourful**, but **muted** by the alternation of bold and neutral tones, evolving into colour ranges without geographic or cultural borders.

### THE PRESENTATIONS

In Italian and English, exclusive and reserved (it is necessary to register and a fee is charged). **The fashion presentations** exploring the stylistic themes for the summer of next year will take place at the Fashion Theatre in Pavilion 15 (Aisle Z). They will begin on **Tuesday 20 February** at 15.00 with a seminar in Italian which will be repeated in English at 16.30. They will be held at the same times on **Wednesday 21 February**.

### THE TREND BOOK

Every **colour**, every **mood**, every **possible creative evolution** with regard to leather, fabrics, synthetics, accessories and components for summer 2019 are brought together in this essential, must-have book: the **Lineapelle94 Trend Book**.

On sale in the Trend Area in Pavilion 13 and at the Fashion theatre in Pavilion 15, or online at the website: [lineapelle-fair.com](http://lineapelle-fair.com).

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

Seguici su



Lineapelle Srl - Via Brisa, 3 - 20123 - Milano  
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# LINEAPELLE

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## THE ITALIAN LEATHER INDUSTRY: EXCELLENCE AND SUSTAINABILITY, LEADERSHIP AND INNOVATION

*At Lineapelle94, the Italian leather industry is developing its sustainability mission, promoting its emphasis on continuous innovation and consolidating the strength of its leadership in Europe and abroad*

### THE NUMBERS

Over **1,200** companies employing more than **17,500** employees. An annual turnover of about **5** billion euros. Exports in excess of **3.8** billion euros. The Italian leather industry is a district-based model that creates value on the economic, social and cultural levels.

### FIRST PLACE

The Italian leather industry is the absolute leader in Europe. **65%** of the value of European leather production is from Italy, and Italy accounts for **68%** of total exports to countries outside the EU. It's a leadership that is reflected on a global level, with a **19%** share of the value of world production and **26%** as regards exports.

### SUSTAINABLE EXCELLENCE

For the Italian leather industry, sustainability is an integral part of our commitment to excellence and **continuous improvement**. In 2012 the impact of sustainability on annual turnover in the sector was 1.9%, while in 2016 (the latest available figure) it had risen to **4.4%**. **Environmental operational costs** account for **85%** of these investments: treatment of wastewater, energy efficiency, gaseous emissions and chemicals management.

### INNOVATION

The Italian leather industry is investing to innovate and, for all companies, **applied research** has become a **crucial strategic tool** for demonstrating and consolidating their leadership. Italian tanneries are equipped with **internal laboratories** and offer exemplary cases of innovative experimentation linked to the product, the process and to the **automation** promoted by the **Industry 4.0** Plan.

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

Seguici su



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tel. +39 02.8807711 - fax +39 02.860032 - tax code no. and VAT no. 12629090155  
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# EVENTS@LINEAPELLE FEBRUARY 2018

## Tuesday, 20 February

- H 11.00-12.00     **Innovative Design and Company Know-How Protection - seminar**  
ICEC (Institute of Quality Certification for the Leather Sector)  
Venue: Fashion Theatre (pav. 15, aisle Z)  
*Open event, free of charge, Italian language*
- H 13.00-13.45     **Zoa™ Modern Meadow**  
Venue: LEM Conference Room - Ponte dei Mari (beside pav. 22)  
*Open event, free of charge, Italian/English language*
- H 14.00-14.30     **Lineapelle Innovation Square 09/18**  
Venue: LEM Conference Room - Ponte dei Mari (beside pav. 22)  
*Open event, free of charge, Italian/English language*
- H 15.00             **Lineapelle S-S 19 Fashion Trends**  
Venue: Fashion Theatre (pav. 15, aisle Z)  
*Open event, with fee, Italian language*
- H 16.30             **Lineapelle S-S 19 Fashion Trends**  
Venue: Fashion Theatre (pav. 15, aisle Z)  
*Open event, with fee, English language*

## Wednesday, 21 February

- H 11.00-13.00     **International Conference “Tanning and Chemicals Products”**  
Organized by UNIC (Italian Tanners’ Association) and Cotance (EU Tanners’ Confederation)  
Speakers: ICLT Northampton, Politecnico Milano, SSIP Italian Leather Research Institute  
Panelists: chemical companies, tanneries, clients  
Venue: LEM Conference Room - Ponte dei Mari (beside pav. 22)  
*Open event, free of charge, Italian/English language, followed by a buffet lunch*
- H 14.00             **The Italian Leather Research Institute (SSIP): research projects and training programs**  
Venue: LEM Conference Room - Ponte dei Mari (beside pav. 22)  
*Open event, free of charge, Italian language*
- H 15.00             **Lineapelle S-S 19 Fashion Trends**  
Venue: Fashion Theatre (pav. 15, aisle Z)  
*Open event, with fee, Italian language*
- H 16.30             **Lineapelle S-S 19 Fashion Trends**  
Venue: Fashion Theatre (pav. 15, aisle Z)  
*Open event, with fee, English language*

## Thursday, 22 February

- H 11.00-13.00     **Award ceremony of the “Amici per la pelle” contest**  
UNIC (Italian Tanners’ Association)  
Venue: Auditorium Room, Centro Servizi (Service Centre)  
*Open event, free of charge, Italian language*

# LINEAPELLE

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**MODERN MEADOW**

**Tuesday 20 February 2018**

**13.00 - 13.45**

LEM conference room - Ponte dei Mari (beside pav. 22)

*Modern Meadow*

*is a pioneer in biologically advanced materials.*

*The company harnesses the power of design, biology, and engineering  
to produce the world's first bioleather materials, **Zoa™**.*

The Zoa™ brand represents a world of bioleather materials that are advanced materials grown from engineered, animal free collagen, which can be combined with other natural or manmade materials offering new aesthetic and performance properties.

By partnering with some of the world's most cherished and innovative consumer brands, Modern Meadow aims to bring new life to the material world.

The presentation will be made by **Susan Schofer**, Vice President, Business Development of Modern Meadow. Susan is an experienced product development leader with over a dozen years of industry experience in biotechnology and new materials development. Prior to joining Modern Meadow, she spent 10 years of her career in Silicon Valley, where she held roles both in Research and Development, as well as in product development, product management, and commercialization of new materials. Susan has experience in all aspects of strategic partnerships, including business development, alliance management, and cross-functional team leadership to deliver products from initial ideation to the market. Susan received her bachelor's degree in chemistry from Brown University and her Ph.D. in organometallic and inorganic chemistry from Caltech, and she was a National Science Foundation International Postdoctoral Fellow at Stockholm and Uppsala Universities.

The event:

- is free of charge
- is open to all exhibitors and visitors to the fair
- will be conducted in English and Italian, with simultaneous translation.

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

Seguici su



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# LINEAPELLE

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**Lineapelle Innovation Square**

**Tuesday 20 February 2018**

**14.00 - 14.30**

LEM conference room - Ponte dei Mari (beside pav. 22)

*In September 2018, during the LINEAPELLE show scheduled from Tuesday 25 to Thursday 27,  
an innovative window will open onto the future.*

*LINEAPELLE INNOVATION SQUARE: a 3-day event within the fair,  
aimed at collecting and displaying new and select technologies and business solutions of particular  
relevance for the key sectors in the global leather industry.*

To ensure the success of LINEAPELLE INNOVATION SQUARE we are carefully evaluating promising novelties in the field of materials science, biotechnologies, human-material interactions, innovative business models and skills and expertise of the future.

A highly select group of international universities, research institutes and highly innovative companies will present case studies, reveal the results of analyses, assess opportunities for cooperation, develop new materials, study new properties and functions, and propose new business models for the future development of the high-end and luxury sectors of the industry.

Lineapelle Innovation Square 2018: an event to mark in your diary right away.

The event:

- is free of charge
- is open to all exhibitors and visitors to the fair
- will be conducted in English and Italian, with simultaneous translation

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# LINEAPELLE

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## INTERNATIONAL CONFERENCE "TANNING AND CHEMICALS PRODUCTS"

Wednesday 21 February 2018

11.00 - 13.00

conference room LEM - Ponte dei Mari (beside pav. 22)

*UNIC (Italian Tanners' Association)*

*and COTANCE (EU Tanners' Confederation) organize an event for reflection, discussion and sharing on the topic of tanning chemicals and aspects of risk and opportunity linked to the different types of processing.*

Partial and misleading information often continues to circulate on the market causing confusion among supply chain operators and consumers.

There is an urgent need of clarity.

The objective of the event is to promote the technical and scientific understanding of some key elements in the chemical and tanning process that are particularly discussed at the sector level nowadays. The results of recent studies carried out in Europe will be presented, in order to evaluate how these activities can satisfy the industry's requirements, trends and expectations.

The conference will be divided into two sessions. The first session will feature technical reports by some of the principal tanning research centres and European universities. The speakers will be: Will Wise (Senior Lecturer in Leather Technology, ICLT, University of Northampton), Maurizio Masi (Director of the Department of Chemistry, Politecnico di Milano) and Biagio Naviglio (Head of R&D, SSIP Italiana Leather Research Institute - President, Ordine Chimici Campania).

The second part of the event will consist of a panel discussion, involving industrial representatives from the leather industry, from chemical producers to tanneries and brands.

The event:

- is free of charge
- is open to all operators in the supply chain: brands, retailers, tanneries, manufacturers, chemical producers and other interested parties
- will be conducted in English and Italian, with simultaneous interpretation
- will end with a buffet lunch

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

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# LINEAPELLE

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Spring / Summer 2019

## AMICI PER LA PELLE CONTEST

Pav. 9 stand R29 S30

### AWARDS CEREMONY

Thursday 22 February 11.00-13.00 Auditorium, Service Centre

*The enthusiasm and creativity of over 1,000 students. An artistic and educational project involving middle schools in the Italian leather industry areas.  
A contest full of important novelties. At Lineapelle94, the leather is youthful.*

## THE PARTICIPANTS

A thousand youngsters, aged **12 and 13**, are coming to **Lineapelle94** on Thursday 22 February to visit the fair and attend the awards ceremony for a long-awaited event that has gone viral. They are students in the second and third years of middle schools in the Italian leather industry areas.

**Amici per la Pelle** is back for the seventh time at Fieramilano Rho, packed as always with enthusiasm, stimulating creativity and a series of novelties that promise to make it even more exciting.

## THE THEME

For this edition, the students were invited to reflect on the **artistic heritage of their own local area**, identifying the most representative work of art and reproducing it using skins and leather. A historical-artistic theme for a gallery of applied art called **Museum Tan**, that can be admired at Lineapelle94. All the participating works will be on display in the Pavilion, but they can also be found online, by accessing the UNIC Facebook page, where works will be posted one by one.

## THE PRIZES

This is the most important novelty. The awards to be won at this edition of Amici per la Pelle include **money prizes**, tied to the requirement that the schools invest the money in **educational tools and equipment**. Total prize money: **4,000 euros**. The top three works with the most votes from visitors to the fair will receive prizes of 1500, 1000 and 500 euros respectively. The work with the most Likes on the Facebook page will be awarded 500 euros. Another novelty: the first "**Agostino Russo Award**", established by UNIC in memory of their historic collaborator who recently passed away. 500 euros will be awarded to the work chosen by **a jury of experts**. There will also be some non-competing participants: for example, students from the **Istituto Ronca in Solofra**, who were invited by Amici per la Pelle together with their peers from the **Istituto Tecnico Superiore per le Nuove Tecnologie per il Made in Italy** in Porto Sant'Elpidio (Fermo) and from the **Istituto Galilei** in Arzignano (Vicenza).

## 8,000 IN 7 YEARS

The Amici per la Pelle competition has been held by UNIC/Lineapelle since **2012**. Each year, the competition involves students from the second and third years of middle schools in the Italian leather industry areas: there have been **about 8,000** of them from 2012 to today.

## THE ORIENTATION

The Amici per la Pelle project has set itself **the mission** of creating an awareness in youngsters of the economic, artisan and cultural wealth linked to the leading industry in the area in which they live: the leather industry. Every year the project follows an educational path that, over the course of **6 months**, takes the students on visits to tanneries, cleaning plants and research centres. The artistic objective to create a work in leather thus becomes a vehicle for communicating to the new generations the professional value of the tanning industry. So it's no coincidence that the Amici per la Pelle has made possible **a rise of about 20% in enrolments** at professional institutions specializing in tanning in the Italian leather industry areas.

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

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# LINEAPELLE

## POLIMODA

20 | 22 FEBRUARY - FIERAMILANO RHO  
Spring / Summer 2019

### PICTURES & IMAGES AT AN EXHIBITION

*An educational creative project, the fruit of collaboration  
between Lineapelle and the students of Polimoda.*

*A new and invigorating way of capturing the world's largest leather exhibition: through the eyes and  
emotions of a group of students*

### THE PROJECT

An innovative educational project is due to take place during the three-day **LINEAPELLE94** exposition, entitled "**Pictures and Images at an Exhibition**".

Lineapelle is supporting the project, in a fruitful collaboration with the Polimoda of Florence, involving students at the 2<sup>nd</sup> year of Fashion Product Management and Fashion Art Direction of the institute. The aim? To promote deeper study and new ideas, all centred on creative and innovative aspects able to drive progress in the world of art and design. At Lineapelle, students will take pictures in search of a new way to capture the products and style that characterise the uniqueness of such a large exhibition, the choice trade fair in the global leather production industry. The showcase and all its stands, audiences and participants will be the Polimoda students' focus, as they use their education in fashion and design to put forward their progressive vision of the fair. The best shots will be published on Lineapelle's website and social media. In this way, participants will be offered the opportunity to meet an important player of the sector and to test their abilities and creative vision.

### POLIMODA

Polimoda Firenze offers a high-quality educational experience grounded in the industry, making it an international centre of excellence. In 2017 it was listed in the top 10 fashion schools worldwide (and the best in Italy) for Business of Fashion, and this for the third year running. It was also named in the top five institutes for Fashion Business. It welcomes around 2000 students every year, 70% of which are international. In 2017 Polimoda launched a series of important partnerships, including work with LVMH (to open an *Institut des Métiers d'Excellence* in Italy), Gucci (Master in Fashion Retail Management), Richemont (Master in Luxury Business), WGSN (Master in International Fashion Business) and Central St. Martins (Summer Courses).

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

Polimoda Press Office  
e-mail: [press@polimoda.com](mailto:press@polimoda.com)

Seguici su



Lineapelle Srl - Via Brisa, 3 - 20123 - Milano  
t +39 02.8807711 - f +39 02.860032 - C.F. e P.IVA 12629090155  
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# LINEAPELLE

MILANO | 20-22 FEBRUARY 2018



## *Riva* **BOAT LOUNGE**

Cocktail sponsored by



## **FURNITURE LOUNGE**



## **AUTOMOTIVE LOUNGE**



## **THE ANCIENT POMPEI TANNERY**

### **BOAT LOUNGE**

**HALL 9 | AISLE A**

Riva's legend dates back to 1842 in Sarnico, on the Iseo lake. Since then, passion, craftsmanship and manufacturing perfection are condensed in a totally "made in Italy" product, a symbol of excellence world-wide.

### **THE ANCIENT POMPEI TANNERY**

**HALL 11 | AISLE A**

The Pompei tannery is the restoration project of one of the most ancient tanning complexes in the world, the history of our roots and the proof of a high-quality know-how passing through centuries.

### **AUTOMOTIVE LOUNGE**

**HALL 22 | AISLE A**

In 1936, Dante Giacosa and FIAT gave birth to what was going to become the icon of automotive design: the first 500 (Topolino/Mickey Mouse), a champion of style world-wide. A *longseller*, the result of constant research and a meticulous care for details.



### **FURNITURE LOUNGE**

**HALL 24 | AISLE A**

Since 1912, leather for armchairs is Pelle Frau®, the basic ingredient of a unique story world-wide, including traditional values and contemporary mood, elegance and comfort, an example of the prestige of Italian design.

# MARKET INSIGHTS

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2017



LINEAPELLE  
ECONOMIC DEPARTMENT





## TANNING SECTOR

**ITALY** – The Italian tanning industry is estimated to have closed Y2017 with a growth in total **production** volumes (+3.1%), against a stability (positive, + 0.7%) in value.

The trend during the second half of the year recorded only a partial improvement compared to the first half and the overall picture still shows some uncertainties.

As far as the **main production segments** are concerned, the overall positive sign seemed to be linked to the good sales results of medium-large bovine and goat leathers (+2% both); while the total turnover of calf leather (-3%), sheep leather (-5%) and the residual category of "other animals" (-8%) declined. From the analysis on the **destination use**, the good trend of the demand for car interiors leather and the substantial positivity of the furnishings material persisted. Fashion customers work patchy, with sales to leather goods manufacturers generally confirmed as brighter than footwear, with a persistent attention to price.

Italian leather **export**, which has a total value of about 4 billion euros and reaches 125 countries averagely every year, recorded an increase of around 1% in value (2017 estimates, based on the first ten months official data). Among the main foreign destination countries, the upward return of Italian leather shipments to the Chinese area stands out (+6% of growth after a difficult two-year period). After seven years of continuous increases, the US market appears slightly slowing (-2%). Still positive results on the United Kingdom (+6%) and Vietnam (+12%). The EU continental market was not very bright. With the only positive exception of France (+5%), exports to Spain (-6%), Germany (-3%), Poland (-8%) and Portugal (-1%) decreased. Among the EU manufacturing customers' delocalizations, shipments to Romania, Tunisia, Bulgaria and Serbia fall; Albania, Czech Republic and Hungary on the rise. The trend in exports, which, if confirmed by final official data, interrupts the slightly negative trend observed in 2015-2016, is a confirmation of the major and growing importance of the contribution of foreign markets to Italian tanning industry turnover. Nowadays it represents 75% on total, while in 1992 the share was 35%.

Italy remains world leader in the tanning and leather sector, both in terms of production value (65% of EU total turnover, 19% globally) and international trade (26% of world trade concerns leather coming from Italy).

**OTHER COUNTRIES** – The last year panorama was substantially positive for all the other main countries producing **medium-large bovine leather**, with the exception of France and the most important Latin American producers (Brazil, Argentina and Mexico), on a decrease. The Asian players also recovered, including China. For what concerns the **calf leathers segment**, the French producers have grown, while the Spanish have shown a decline. Similar situation for the **sheep and goat leathers** too, despite a difficult year-end also for France. Outside Europe, the results on sheep and goats leathers are positive only for the Chinese industry; average disappointing results for the remaining Asians.



## ACCESSORIES, COMPONENTS, SYNTHETICS

### TEXTILES, SYNTHETICS AND LEATHER ALTERNATIVES –

The growth in the last quarter (+5%) confirmed the positive trend recorded by these material along the whole year, which closed with an overall +4%. Favorable situation for Germans and French producers, generally bearish dynamics for Italians and English. The details on single products performance reflects the good dynamics of the synthetics, while the scenario for the regenerated leather fibers and fabric materials appears less brilliant.

## MANUFACTURING SECTORS

**FOOTWEAR** – Despite the rising trend observed in the last quarter of the year, the recovery of the Italian footwear turnover stops at +1% in 2017. The overall European dynamics looks livelier (+4% compared to 2016). Among the other main EU manufacturers, the good trend of the Germans stands out (with double-digit increases) together with the positivity of the Portuguese (+4%) and the French (+1%); the Spanish go down (-2%) as do the British (-4%), despite the sprint recorded at the end of 2017. Positive performance for the Eastern-European manufacturers (Polish above all). Persistent difficulties for the Asian players, all of them posting losses except Vietnam (+10%). Still strong increases for the Brazilian footwear (+13%), critic scenario for Mexico instead. The favourable moment of the Turkish footwear goes on.

**LEATHER GOODS** – Brilliant moment for the Italian leather goods, which confirms sales results with over 20% increases even at the end of the year. In the rest of Europe, France remains in negative stability (despite the recovery recorded in the last months of 2017), while the UK, Germany and Spain go up (increases between +7% and +8%). Negative performance for the Portuguese and the Eastern-European manufacturing offshoring, except Poland. Continuous uncertainty for the Asian partners, with the exclusion of Vietnam (growing double-digit still) India and Turkey.

**GARMENTS** – The turnover of the Italian manufacturers of leather garments regain ground in the last quarter of 2017, although this rising trend was not enough to change the negative dynamics started at the beginning of the year, with overall sales decreasing by -4% over 2016. Weak dynamics in the rest of Europe, with widespread negative results among all the main manufacturers (very bad trend for the Iberian in particular), excluded the Germans (slightly recovering). Quite critic the extra-European manufacturers' overview, where Vietnam confirms, as usually, the only positive exception.

**ACCESSORIES AND COMPONENTS** – The whole industry performance was remarkably positive, both in the last quarter of 2017 and in the annual total balance (EU average +8%). All the major European producers (Italy, Germany, France, Eastern countries) registered a rise, with the only exception of the United Kingdom, in a persistent decline. In detail, the segment of small metal parts is growing at two-digits, and also the results of footwear components and "other accessories" are satisfactory.

**UPHOLSTERY** – It confirms lively the Italian **upholstered furniture** annual trend: +6% the closing results in 2017, favoured by the acceleration in the last three months of the year. Renewed dynamism even at European level, where the sector recorded a total increase equal to 4%. US orders still on the rise (+5%). Good trend for the **automotive** sector also, where the Italian demand confirms tonic (+8% of new car registrations in 2017), decent European dynamics too (+3%, showing a growing dynamics for the fourth year in a row). Weak the US demand for new cars sales instead (-2% of car registrations in 2017).

**BRAND LUSO** – Lively the personal luxury goods market trend in 2017, with turnovers on the rise for all the major high-end fashion brands at a global level. **LVMH** doubles the growth in revenues already recorded in 2016, by closing the year 2017 with an increase in turnover of 12%. Good performance of Louis Vuitton; strengthening performance of Dior, Fendi, Loro Piana, Céline, Loewe, Kenzo e Berluti instead. The **Kering** group growing trend went on even in 2017, posting a +27% of revenues in the period. Brilliant the luxury division (with total sales up by 30%) still driven by Gucci (+45%) and Yves Saint Laurent (+25%); Bottega Veneta stable (+2%). Turnover up by 9% for **Hermès**, thanks to the good results of the leather goods division (+10%). Downturn in **Tod's** Group revenues are confirmed even for the closure 2017, despite the improvement in the last quarter the year: -3.1% in revenues. The losses of the footwear division weigh, since the good performance of Roger Vivier (+9.7%) is unable to offset the liabilities of Tod's (-6,6%) and Hogan (-4,5%). The downturn in sales of **Salvatore Ferragamo** also continued in 2017: -1.4%. Looking at the different production segments, leather goods limited the losses (-0.8%); whilst the decline in footwear was more marked (-1.7%). Despite a losses **reduction**, Prada Group's results for the year 2017 were still negative (-6% revenues). Prada recovers ground although remaining passive (-5%), Miu Miu (-10%) and Church's (-11%) mark the step instead.

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