

LINEAPELLE

CREATIVE EXPLORATION:

ARTISANAL ENGINEERING, ARTIFICIAL INTELLIGENCE, LINEAPELLE, THE SYNTHESIS

(23–25 SEPTEMBER 2025, FIERAMILANO RHO)

Creative exploration, design sharing, business networking. Models of artisanal engineering. New horizons of artificial intelligence.

From 23 to 25 September 2025, within the exhibition spaces of Fiera Milano Rho, LINEAPELLE will celebrate its 106th edition by offering an inspiring wealth of content and synergies. Elements that confirm it as the moment of **perfect stylistic and production synthesis** for the global fashion, luxury, and design supply chain. **A true laboratory of the future** which, for logistical reasons connected to the organization of the Milan-Cortina Winter Olympics (scheduled for February 2026), will, for two editions, always take place at Fiera Milano Rho, though moving to halls 1–3, 2–4, and 5–7.

LINEAPELLE: THE SYNTHESIS

1,150 exhibitors (tanneries, accessories and components, fabrics and synthetics) from **37 countries** will present their collections for the **Autumn/Winter 2026/2027 season**. Their creative and manufacturing excellence generates an annual turnover of around 11 billion dollars and gathers around itself a vast manufacturing universe — the one gravitating around LINEAPELLE — made up of **more than 50,000 companies** employing **over 1 million people**, with revenues of **around 170 billion dollars**, representing **over 40% of the global supply chain turnover**.

THE MARKET OUTLOOK

The **market scenario of the supply chains** converging at LINEAPELLE remains complex, with widespread difficulties recorded in the first half of the year at both sectoral and geographical levels. **The tanning industry** is struggling in Europe and worldwide, with very few exceptions at the level of individual producing countries, and with estimated average sales results slightly less negative for sheep and goat hides (-2%) compared to bovine (-5%). Among other products on display, the trend also remains downward for **accessories and components** (EU trade -5%), while the fabrics and synthetics sector appears more stable. Downstream in the supply chain, the situation is unfortunately no better. According to Eurostat, **European footwear** production dropped by 6% in the first half of the year compared to the same period in 2024, while **leather goods** declined by as much as 10%. The outlook is somewhat more dynamic for non-European fashion producers, with the exception of China. Half-year figures also fell for most major **luxury groups**. Apparel and furniture showed a slightly less negative performance, while the **automotive** sector continues to face challenges (registrations down in Europe, China, and India, but up in the USA and UK). It is a structural crisis that is reshaping the global manufacturing landscape and its paradigms. In this sense, LINEAPELLE becomes an essential moment of discussion, analysis, and wide-ranging networking.

ARTISANAL ENGINEERING, ARTIFICIAL INTELLIGENCE

Artisanal excellence will be the highlight of Pavilion 5, hosting the rich program of **In The Making workshops**, developed in collaboration with Giorgio Linea. The driving force of **Artificial Intelligence**, instead, will take center stage in Pavilion 2, with in-depth explorations launched by LINEAPELLE and projected into the immediate future. The **LINEAPELLE On The Road – Smart Textures: the weave between Fashion and AI project** will also make a stop at the fair, after being presented in recent months in several districts of the Italian leather supply chain. On this occasion, it will showcase a series of case histories and reflections on how the fashion industry is concretely approaching Artificial Intelligence.

LINEAPELLE

The **Ingenium – Made in Italy Innovation Platform** will also be presented, designed to accelerate the digital transformation of the fashion supply chain. At LINEAPELLE, this synergy will unfold in multiple forms: for example, through a high-profile talk dedicated to the future of fashion tech and the impact of Artificial Intelligence on production chains. Alongside this, an **AI Space** will offer an experiential area where some of the world's most innovative international startups will present groundbreaking solutions applied to lifestyle and the supply chain. Finally, LINEAPELLE's own AI virtual assistant, jointly developed by Ingenium and Hevolus, will make its debut at the fair.

A dedicated **Talk Area** will also host the renewed program of **Science Based Fashion Talks** (organized in collaboration with SPIN360); **a series of in-depth discussions** on pressing issues for the tanning sector (such as the new EU anti-deforestation regulation, EUDR); **seminars on the latest consumer trends**; and – in the run-up to the Winter Olympics in February 2026 – a round table on the present and future of the ongoing crossover between **fashion and sport**, featuring **Deborah Compagnoni**, Ambassador of the Milano-Cortina Winter Olympics and Paralympics. The agenda will also include a meeting on the development of the **Supply Chain Legality Protocol**, in collaboration with Confindustria Accessori Moda. In addition, an area dedicated to storytelling and networking will showcase LINEAPELLE Interiors, the interior design project promoted by LINEAPELLE, which will present its third edition in February 2026.

HERITAGE AND CULTURE

The upcoming edition of LINEAPELLE will host an **exhibition** based on the exclusive book “**The Tannery of Pompeii**”, which recounts the unique restoration of the tannery unearthed within the Archaeological Park of Pompeii, financed by UNIC – Italian Tanneries and LINEAPELLE. The book *La Conceria di Pompei* was presented in April at the Italy Pavilion of Expo 2025 Osaka, on July 10 at the Chamber of Deputies in Rome, and on July 15 at the Italian Cultural Institute in New York. LINEAPELLE will also feature **Is It Leather?**, the international educational campaign launched in 2021 aimed at educating consumers on the difference between genuine leather and synthetic materials. The project will be hosted within the editorial space of *La Conceria*, the leading news outlet for the leather and fashion supply chain.

JUST BEFORE: STYLE FOR WINTER 26/27

Autumn/Winter 2026–2027, according to the **LINEAPELLE Fashion Committee**, is a time marked by the need to “think outside the box” and “challenge one's own assumptions” to experiment with new creative freedom, inspired by a “philosophy of waiting” encapsulated in the concept **Just Before**. In material development, research moves between past and future, oscillating between minimalism and maximalism, blending opposing aesthetics with boldness and originality.

SYNERGIES

LINEAPELLE arrives at the September 2025 appointment strengthened not only by its global leadership but also by its exhibition synergies with **Simac Tanning Tech** (the leading event for machinery and technology for the footwear, leather goods, and tanning industries), which will be held in close conjunction in terms of dates and spaces, and **Filo** (the international B2B fair dedicated to high-end yarns and fibers for weaving, knitwear, furnishings, and technical textiles), scheduled for 23–24 September 2025, also at Fiera Milano Rho.

Lineapelle Press Office
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EVENTS @ LINEAPELLE

FIERA MILANO RHO

23 SEPTEMBER

TALKS & PERFORMANCE

| | | |
|----------------------|--|---------------------------------|
| 10.30 am 12.00 pm | LEATHER LEADERS A common ground for collaboration and sustainable innovation | TALK AREA HALL 2 U01/Z02 |
| 12.30 pm 2.00 pm | TANNER LEATHERSTEIN LIVE Bag Dissection & Communicating Leather's Value to the Consumer | |
| 2.30 pm 4.30 pm | PARTNERSHIPS FOR INNOVATION AND POLICY ACTION FOR SUSTAINABLE LEATHER – SMEP/UNCTAD EVENT | |
| 2.30 pm 4.00 pm | INNOVATION AND SUSTAINABILITY MANAGEMENT IN THE LEATHER SUPPLY CHAIN | LIBRA ROOM SERVICE CENTER |
| 3.00 pm 4.30 pm | FASHION & SPORT – CATALYSTS OF INNOVATION Awaiting the Milan-Cortina Olympics | RED LOUNGE SERVICE CENTER |

FASHION TREND PRESENTATION

| | | | |
|----------------------|----------------------------|------------------|---|
| 11.00 am 12.00 pm | LINEAPELLE FW 26-27 | Italian language | FASHION THEATRE HALL 1 AISLE U |
| 2.30 pm 3.30 pm | LINEAPELLE FW 26-27 | English language | |

WORKSHOPS

| | | | |
|----------------------|---------------|-------------------------------------|----------------------------|
| 10.15 am 10.30 am | IN THE MAKING | Welcome back to In the making act V | HALL 5 S27-29 T27-29 |
| 10.30 am 11.30 am | IN THE MAKING | Let's get creative | |
| 11.45 am 12.45 pm | IN THE MAKING | Making Shoes | |
| 1.00 pm 2.00 pm | IN THE MAKING | I am a wanderer | |
| 2.15 pm 3.15 pm | IN THE MAKING | The detail makes the difference | |
| 3.30 pm 4.30 pm | IN THE MAKING | Ribbons and their weaving magic | |
| 4.45 pm 5.45 pm | IN THE MAKING | Caring for your furry friend | |



TALKS & PERFORMANCE

| | | |
|----------------------|--|---|
| 10.00 am 11.00 am | LEATHER TRACEABILITY, DEFORESTATION AND ANIMAL WELFARE: EU REGULATIONS AND VOLUNTARY CERTIFICATION WHERE DO WE STAND? | LIBRA ROOM SERVICE CENTER |
| 10.30 am 11.30 am | PRESENTATION OF "CPMC - CUOIO, PELLI E MATERIE CONCIANTI" NO.2/2025 - Scientific journal edited by SSIP in collaboration with MICS - Made in Italy Circolare e Sostenibile | HALL 2 T01-03 U02-04 |
| 11.30 am 1.00 pm | DECARBONISATION THROUGH NATURE | LIBRA ROOM SERVICE CENTER |
| 12.00 pm 1.30 pm | FASHION AND LEGALITY State of the art and perspectives in the leather supply chain | TALK AREA HALL 2 U01/Z02 |
| 12.00 pm 1.30 pm | INNOVATION STARTING FROM THE INGREDIENTS: LEATHER AS A MODEL AND EXPERIENCE OF SUSTAINABILITY | CONFERENCE ROOM FIRST FLOOR BUILDING E08 |
| 2.30 pm 4.30 pm | EU REGULATION 1115/2023 ANTI-DEFORESTATION (EUDR) | LIBRA ROOM SERVICE CENTER |
| 2.30 pm 3.10 pm | CHEMOMETRIC METHODS AND NIR SPECTROSCOPY FOR LEATHER PRODUCTION CONTROL | HALL 2 T01-03 U02-04 |
| 3.00 pm 6.00 pm | AIMATERIALITY, INNOVATION, EXPERIENCE: The New Sensory Language | TALK AREA HALL 2 U01/Z02 |

FASHION TREND PRESENTATION

| | | |
|----------------------|---|---|
| 11.00 am 12.00 pm | LINEAPELLE FW 26-27 Italian language | FASHION THEATRE HALL 1 AISLE U |
| 2.30 pm 3.30 pm | LINEAPELLE FW 26-27 English language | |

WORKSHOPS

| | | |
|----------------------|--|----------------------------|
| 10.30 am 11.30 am | IN THE MAKING Vintage Reminds Us | HALL 5 S27-29 T27-29 |
| 11.45 am 12.45 pm | IN THE MAKING A color for everyone | |
| 1.00 pm 2.30 pm | IN THE MAKING Leather Memories | |
| 3.00 pm 4.00 pm | IN THE MAKING Ribbons and their weaving magic | |
| 4.15 pm 5.15 pm | IN THE MAKING Linked by an unusual fate | |



25 SEPTEMBER**TALKS & PERFORMANCE**

| | | |
|----------------------|---|--------------------------------|
| 10.30 am 11.10 am | PLASMA TECHNOLOGIES FOR LEATHER ENHANCEMENT AND TANNERY WASTEWATER TREATMENT | HALL 2 T01-03 U02-04 |
| 12.00 pm 1.00 pm | LINEAPELLE ON THE ROAD Smart Textures: The Weave Between Fashion and AI | TALK AREA HALL 2 U01/Z02 |
| 2.00 pm 3.30 pm | THE HOUSE OF NATURAL MATERIALS | |

WORKSHOPS

| | | |
|----------------------|---|----------------------------|
| 10.30 am 11.30 am | IN THE MAKING Jewelry comes closer | HALL 5 S27-29 T27-29 |
| 11.45 am 12.45 pm | IN THE MAKING Intertwining | |
| 1.00 pm 2.00 pm | IN THE MAKING Faithful friends | |
| 2.15 pm 3.15 pm | IN THE MAKING Caring for your furry friend | |

SEE YOU AT THE NEXT
EDITION OF LINEAPELLE
11–13 FEBRUARY 2026



LINEAPELLE

DISCOVER "JUST BEFORE"

THE LINEAPELLE TREND THEME FOR THE WINTER 2026/2027 SEASON

Think outside the box.

Challenge your own assumptions.

Experiment with new creative freedom.

These are the pillars of the "philosophy of waiting" that underpins Just Before, the trend mood for the Winter 2026/2027 season, developed by the LINEAPELLE Fashion Committee.

JUST BEFORE: STYLE FOR WINTER 26/27

According to the **LINEAPELLE Fashion Committee**, Autumn/Winter 2026–2027 is marked by the need to "think outside the box" and "challenge one's own assumptions" in order to experiment with new creative freedom, guided by a "philosophy of waiting" encapsulated in the concept of **Just Before**. In material development, research moves between past and future, oscillating between minimalism and maximalism, boldly blending opposite aesthetics with originality. A play of contrasts where neutral shades coexist with eccentric accents, and expression flows spontaneously.

MATERIALS

The tactile experience is of primary importance, both for **leather and textiles**. Thicknesses become more substantial (after a season of ultra-lightweight processes), giving a sense of richness and substance. Leather is enhanced in its natural features, with washed effects, highlighted wrinkles, and surface movement. The touch of leather is enriched: waxy and creamy hands reproduce a sense of voluptuous softness, also perceived visually. Fabrics too—such as knits and textured jacquards—feature thickness and relief.

INNOVATION, DETAILS, BRILLIANCE

Advanced techniques are closely tied to invention. Materials offer the chance to experiment, responding to **product use** requirements. Hence, the development of anti-crease treatments, leathers washable in water up to 40°C, and fabrics woven with metallic threads. Trimmings decisively shape the aesthetic and reclaim their starring role this season. **Accessories** form another universe of novelty and innovation: particular focus is given to pearlescence, discreet iridescence, reflections, delicate light variations on leather, and fluid, almost liquid shines. Metals, gelatinous varnishes, and ultra-soft naplak with liquid finishes and glossy coatings also stand out. Gold, silver, and platinum bring a vintage elegance, while chromed aluminum creates a cold, mirrored finish.

JUST BEFORE AT THE FAIR

Around 2,000 samples of leathers, accessories and components, fabrics, and synthetics developed by exhibitors will be the protagonists of the Trend Areas, which are the beating heart of every LINEAPELLE edition.

There are three areas, located in Halls 1, 4, and 7. During the first two days of the exhibition, the much-awaited (and always well-attended) Trend Presentations will take place. The appointment is at Hall 1, at the Fashion Theatre, at the following times: 11:00 a.m. in Italian and 2:30 p.m. in English.

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LINEAPELLE

FOR A SUPPLY CHAIN THAT IS EVER SMARTER, MORE CONNECTED, AND INNOVATIVE: LINEAPELLE ENTERS THE WORLD OF ARTIFICIAL INTELLIGENCE

LINEAPELLE takes a decisive step forward in evolving into a true platform of services and innovation, exploring the digital transformation of the fashion supply chain. It enters the world of Artificial Intelligence with two dedicated events – hosted at the Talk Area, Hall 2 – that explore and define its boundaries, horizons, and contents.

The first will take place on **Wednesday, September 24, at 3:00 p.m.**, when LINEAPELLE will host **Ingenium – Made in Italy Innovation Platform** with a program divided into three distinct moments of sharing and discussion.

• Executive Talk

A high-level conference featuring managers and industry leaders, dedicated to the future of fashion tech and the impact of Artificial Intelligence on production supply chains.

Speakers include:

- Stefano Galassi, CEO & Co-founder, Limitless
- Gionata Tedeschi, General Director of Innovation and Technology, *Il Sole 24 Ore*
- Enrico Dessi, Former Innovation Director, Armani
- Gianluigi Zarantonello, Former Innovation Director, Valentino
- Cris Nulli, Market Lead, X

• AI Space

An experiential hub where some of the most innovative international tech startups will present cutting-edge solutions applied to the lifestyle and fashion supply chain.

Exhibitors include:

- **Patternfast** (Silicon Valley), with generative AI applications revolutionizing rapid prototyping and product personalization
- **Ephoto**, specialized in AI-driven tools for visual communication and digital content optimization
- **Temera**, a leader in traceability and digital product passports, essential to ensuring transparency, authenticity, and sustainability in fashion and luxury

• AI Advisor

The official debut of **LENA**, the Lineapelle AI virtual assistant, jointly developed by Ingenium and Hevolus. Tailored to the specific needs of the Lineapelle world, LENA is designed to guide participants both throughout the fair and in their future online experiences.

LINEAPELLE

This project marks a concrete step toward building an increasingly connected, sustainable, and digital fashion supply chain—where Italian innovation and tradition interact and strengthen each other.

The second initiative is part of the **Lineapelle on the Road** project, a roadshow that toured Italy's leather manufacturing districts. At LINEAPELLE, it will provide an additional in-depth focus on the relationship between production supply chains and Artificial Intelligence.

Smart Weaves: The Intertwining of Fashion and AI

Thursday, September 25, at 12:00 p.m.

Speakers include:

- Emanuele Frontoni – Co-director of the VRAI Vision Robotics & Artificial Intelligence Lab and Professor of Computer Science, University of Macerata
- Stefano da Empoli – President of I-Com, Institute for Competitiveness
- Valter Fraccaro – President, Saihub Foundation
- Elisabetta Pieragostini – CEO, Dami
- Alberto Masenadore – CEO, Peron Shoes

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IN THE MAKING – ACT V WHERE TRADITION, INNOVATION, AND MADE IN ITALY MEET

In The Making – Act V, presented by **LINEAPELLE** and curated by Barbara Ricchi for Giorgio Linea, is an experiential space celebrating the excellence of Italian craftsmanship. The new feature of this edition is the **Riciclando** format. Not just an exhibition, but a true shared atelier, where tradition, innovation, and Made in Italy converge.

In The Making – Act V is a place where the value of “handmade” reveals itself through attention to every detail, the hidden beauty of precision, and the constant balance between tradition and contemporaneity. The stand takes shape as a lively, **dynamic workshop** in which the public is not a mere spectator, but an active protagonist of a creative journey.

Over the three days of LINEAPELLE, the area will host a rich calendar of rotating thematic workshops, ranging from leather goods to footwear, weaving to fashion details, and even accessories for four-legged friends. Each session offers a practical, engaging story of Italian know-how, where raw materials interact with the skilled hands of master artisans and the curiosity of visitors.

Alongside the main workshops, this year introduces **Riciclando**, a special project evolving from the previous Juice Bar format. Riciclando offers a concrete reflection on the theme of circularity: the creative reuse of raw materials sourced from old warehouses is transformed into new opportunities, unique objects, and small narratives of sustainability. Through short 15-minute workshops—accessible and immediate—even those unable to attend the longer sessions will have the chance to experiment, create, and take home a fragment of this experience.

In The Making – Act V is not just an exhibition stand, but a shared atelier, a place of encounter and identity: a bridge between past and future, between artisanal mastery and sustainable innovation, between Made in Italy and contemporary design visions.

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LINEAPELLE

LINEAPELLE TALENT & TRAINING HUB:

LINEAPELLE CONFIRMS ITS ROLE AS A PLATFORM FOR EDUCATION AND INNOVATION, OPENING DEDICATED SPACES TO UNIVERSITIES AND FASHION SCHOOLS FROM AROUND THE WORLD

These are projects renewed at every edition, consolidating LINEAPELLE's role as a training and promotional driver for the fashion of the near future. Always raising the bar, this edition too sees LINEAPELLE opening a dedicated space inside Pavilion 5 for some of the world's most important fashion institutes, supporting their activities and engaging students and young creatives in contests aimed at discovering new stylistic uses of leather.

Participating institutions include:

- **IED – Istituto Europeo di Design** presents the extra-curricular project *Tactile Future: a living laboratory where leather interacts with technology, AI, and multisensory design*. Students will organize workshops on biomaterials and leathers;
- **IUAV – Università Iuav di Venezia** showcases at LINEAPELLE a selection of results from the Degree Course in Fashion Design and Multimedia Arts and from the Design program in Vicenza. The projects were developed in collaboration with some of the most renowned Italian tanneries;
- **MODARTECH** brings to LINEAPELLE the creative projects of Fashion Design students. Research and experimentation tell the story of Made in Italy between tradition and innovation, through projects where creativity, materials, and craftsmanship merge to enhance a material and sensory dimension. Lambskin, calfskin, and cowhide take center stage, alongside the reuse of regenerated scraps;
- **POLIMODA** presents the works of students from the Master's in Bag Design, a high-level training course for future designers of luxury accessories;
- **BIFT – Beijing Institute of Fashion Technology** joins LINEAPELLE with an exhibition of accessories developed in collaboration between teachers and students, as well as the results of its own leather trend presentation.

Alongside the fashion institutes, the exhibition space will also host the international competition **MITTELMODA**, one of the most prestigious and recognized fashion contests worldwide. Now in its 32nd edition, it has built a global network involving over 680 fashion design schools across 71 countries. Thanks to its collaboration with LINEAPELLE, Mittelmoda has placed special emphasis on the value of leather within the competing collections, establishing the **Italian Leather Award**.

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LINEAPELLE

A UNIQUE RESTORATION:

UNIC – ITALIAN TANNERIES AND LINEAPELLE PRESENT THE EXHIBITION “THE TANNERY OF POMPEII”

The story of a unique and evocative journey into the past of a manufacturing sector as old as humanity itself—yet one that has continuously renewed itself and remained timelessly modern.

UNIC – Italian Tanneries and LINEAPELLE present the exhibition “**The Tannery of Pompeii – Regio I, Insula 5**”, based on the images and research contained in the recently published volume of the same name. In recent months, the book has been presented at the Chamber of Deputies in Rome, at the Italy Pavilion of Expo 2025 Osaka, and at the Italian Cultural Institute in New York.

The exhibition will be staged within the spaces of LINEAPELLE, at the entrance to Pavilion 1, giving exhibitors and visitors the chance to discover every detail of the collaborative sponsorship project carried out by UNIC and LINEAPELLE with the Archaeological Park of Pompeii. The initiative made it possible to restore and open to the public—under the concept of a “widespread museum”—the tannery unearthed in 1873 during the excavations of the ancient city, buried by the eruption of Mount Vesuvius in 79 A.D.

Reopened to the public in 2023, the Pompeii tannery was the subject of a restoration project launched in 2008. Italian tanners regard it as an initiative of **profound symbolic value**: “An industry association—a group of private companies—that does not simply provide financial support for a restoration, but follows every stage of the process year after year, becoming its custodian, represents a true example for the business and cultural community alike.”

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LINEAPELLE DESIGNERS EDITION

SPRING | SUMMER 2026

23 | 29 September 2025

Piazza Giuseppe Tomasi di Lampedusa - Milano

FASHION SHOW Leather Fashion HUB

THURSDAY, SEPTEMBER 25

10.00 am

Double Skin

MARAGNO

2.30 pm

Deco-n-struct

ALBERTO ZAMBELLI

6.30 pm

Frida

AGG ANTON GIULIO GRANDE

FRIDAY, SEPTEMBER 26

10.30 am

Gioia Radicale

MARCO RAMBALDI

2.30 pm

Interludio

LORENZO SEGHEZZI

6.00 pm

Tulips of Hope

1972 DESA

SATURDAY, SEPTEMBER 27

10.00 am

Gidiré

MASTEWAL

2.00 pm

Scorie

CHRONOS CORPS

6.30 pm

Specters of the Sunset Boulevard

LEONARDO VALENTINI

LABORATORIO RICICLO PELLE

Hair Franco Curletto | Make Up Maurizio Calcagno

PRESENTATIONS Spazio Lineapelle

TUESDAY, SEPTEMBER 23

11.00 am/9.00 pm

Movimento

DIENÈE

Live Set 6.00/9.00 pm

WEDNESDAY, SEPTEMBER 24

11.00 am/8.30 pm

New Sound Practice - Melodic Apartment

PABEPABE*

Performance 4.00/7.00 pm

THURSDAY, SEPTEMBER 25

10.00 am/6.00 pm

Insulo Biagini

BIAGINI

FRIDAY, SEPTEMBER 26

6.00/9.00 pm

Ricordi - Pagine di un diario nomade

AMATO DANIELE

SATURDAY, SEPTEMBER 27

2.00/7.00 pm

Dentro l'anima, oltre la forma

TVL | TheVerticaLine

SUNDAY, SEPTEMBER 28

11.00 am/8.30 pm

The State of The Ball

DOYS*

Performance 4.00/7.00 pm

The journey of Dúběň

DÚBĚŇ*

MONDAY, SEPTEMBER 29

12.00/6.00 pm

Early to the Party

ABSENT FINDINGS

*Powered by Meliastage

LINEAPELLE DESIGNERS EDITION

SPRING | SUMMER 2026

CELEBRATING AN ICONIC AND INIMITABLE MATERIAL: LEATHER

The event, promoted by UNIC – Italian Tanneries and the international fair Lineapelle, kicks off on 23 September in the heart of Milan.

Lineapelle Designers Edition gets a new look. Now in its eighth edition, the event continues its mission of promoting the image and excellence of leather through the collections of designers from all over the world. After the success of previous seasons, Lineapelle Designers Edition reinvents itself, moving its fashion shows from the Rho exhibition center to the vibrant heart of Milan, in Piazza Giuseppe Tomasi di Lampedusa.

Alongside, in the prestigious **Spazio Lineapelle**, accessory brands will present their collections in an urban setting that amplifies its cultural impact. From **23 to 29 September 2025**, the event will support 17 designers and brands who will bring to life fashion shows, installations, and artistic crossovers in what is not just a showcase but also a laboratory of ideas and a manifesto of style and innovation.

Lineapelle Designers Edition will host **9 runway shows** inside the specially designed “**Leather Fashion Hub**”, a greenhouse-like tensile structure. The brands showcasing their Spring/Summer 2026 collections include: **1972 DESA, AGG Anton Giulio Grande, Alberto Zambelli, Chronos Corps, LEONARDOVALENTINI | Laboratorio Riciclo Pelle, Lorenzo Seghezzi, Maragno, Marco Rambaldi, Mastewal.**

At **Spazio Lineapelle**, **8**, accessory presentations will feature: **Absent Findings, Amato Daniele, Biagini, Dienè, DOYS, Dúběn, PabePabe, TVL | TheVerticaline.**

Since its inception, the event has hosted over **50 fashion shows and presentations**, attracting more than **9,000 guests**, including industry professionals, fashion schools, and the general public. It is the result of a strong commitment to showcasing the creativity of leather and supporting all designers who use it.

Over the years, numerous partnerships have been established. In addition to the constant support of the **City of Milan** (under the patronage of the Department of Economic Development and Labor Policies – Urban Economy, Fashion, and Design), UNIC – Italian Tanneries and Lineapelle have signed collaboration agreements with key fashion institutions: Afro Fashion Association, leading fashion schools, and universities in Japan, Korea, and China, helping bring international talent into the spotlight.

In particular, Lineapelle has chosen to support **Camera Moda Fashion Trust** and the young designers it represents, who embody the avant-garde of *Made in Italy*.

*“Lineapelle Designers Edition celebrates leather,” says **Fulvia Bacchi**. “It tells the story of its beauty and versatility. It shows its ability to evoke emotions, to be disruptive, and to stand, always, as a fundamental material for the worlds of fashion, luxury, and design. This is why we want to support the creativity of those who use leather in exemplary ways. We hope these initiatives will inspire all creatives.”*

Alongside supporting designers during **Milan Fashion Week**, where visibility is key, UNIC – Italian Tanneries and Lineapelle carry out cultural and educational activities throughout the year, collaborating with institutes and schools worldwide.

At its headquarters in **Via Brisa 3, Milan**, Lineapelle runs the **LP Fashion Studio**, a unique creative and educational hub that regularly hosts hundreds of students, both Italian and international. With more than **20,000 samples of leathers and accessories**, the Studio offers an unparalleled panorama of past and future trends, serving as a living resource for designers and researchers in the leather sector. Continuously evolving, it updates season by season while maintaining its solid historical archive, creating an ongoing exchange between the creativity of designers and their experimentation.

LINEAPELLE DESIGNERS EDITION

About Us

UNIC – Italian Tanneries is the national non-profit association, part of Confindustria, that brings together Italian tanneries. Its mission is to promote and spread, both nationally and internationally, the culture and the absolute excellence of Italian leather.

Over the years, in an exemplary and pioneering way, the Italian tanning industry—European and global leader in terms of value and quality of production—has been among the first to develop a virtuous industrial ecosystem, basing its production process on the concept of circular economy. Leather itself represents a prime example of this model, as it is a recovered material from the food industry, with further waste recovery processes reaching almost 100%. Today, this circular approach is at the core of European and global sustainable development strategies.

The Italian tanning industry is a strategic sector for the national economy, serving as an essential supplier to fashion, design, and automotive supply chains. It comprises 1,100 companies, employs 17,000 people, and generates over €4 billion in turnover, 70% of which comes from exports. Italy's four tanning districts—Turbigo, Arzignano, Santa Croce sull'Arno, and Solofra—are home to companies renowned worldwide.

LINEAPELLE is the leading international trade fair dedicated to leather, accessories, components, materials for footwear, leather goods, clothing, and furniture. Held twice a year at Fieramilano Rho, it is the key meeting point for a B2B market of over 50,000 companies employing more than 1 million people. With around 1,150 exhibitors from 37 countries and 25,000 visitors from over 100 nations, each edition showcases the state of the art and the latest innovations in the industry.

The exhibition has expanded its reach through niche events abroad, such as **Lineapelle New York** and **Lineapelle London**, both held twice a year. It also organizes extensive networking initiatives across the Far East and Europe to promote the excellence of Italian production and to reach new market targets.

LINEAPELLE DESIGNERS EDITION

SPRING | SUMMER 2026 – RUNWAY CALENDAR

Leather Fashion Hub – Piazza Giuseppe Tomasi di Lampedusa

Thursday 25 September

- 10:00 a.m. – *“Double Skin”* – **MARAGNO**
A rebirth. A thin line between what we show and what we are. We are called to rediscover ourselves. Our bodies do not define our identity, but they preserve it. Each person has a soul that can be seen and recognized through a look, with the eyes as its guardians. In the Spring/Summer 2026 collection, every detail reflects a clear intention: lines and cuts embrace, giving freedom to feel oneself. The fabrics are fluid and soft, accompanying shapes that convey confidence and strength, in warm and neutral tones. *“Double Skin”* is about gentle strength and positivity. It is an invitation to feel before defining oneself. A moment of freedom, where identity is not imposed but revealed.
- 2:30 p.m. – *“Deco-n-struct”* – **ALBERTO ZAMBELLI**
Alberto Zambelli presents a reflection on form as a universal language, inspired by L’angle droit by Le Corbusier. The right angle becomes a symbol of balance and integration between opposites: vertical and horizontal, light and darkness, masculine and feminine, earth and water. The collection unfolds as a poetic synthesis of architecture and the plastic arts, where geometric rigor and organic fluidity coexist in a constant dialogue. Sharp lines blend with wide and dynamic volumes, while macro-ruffles transform linearity into curves, creating rhythm and sculptural movement. Light leathers, in neutral shades or brighter tones, are worked with moulage techniques into soft lines reminiscent of slip dresses and tunics, or into more structured shapes such as sleeveless pieces with bold lapels or new tuxedo-style shirts to be paired with macro bermuda shorts. Each garment is part of a broader project, where craftsmanship and manual work are not just tools but poetic and creative elements.
- 6:30 p.m. – *“Frida”* – **ANTON GIULIO GRANDE**
Anton Giulio Grande’s inspiration for his new Spring/Summer 2026 collection draws on Frida Kahlo, the globally renowned artist who found in painting her anchor of salvation in the face of a difficult life. The famous Mexican painter expressed, through her art, the suffering of her nonconformist and bold soul. On the runway, 22 looks showcase a triumph of leathers: asymmetrical suede, pony skin, and nappa tops, richly embroidered and paired with long gypsy-style skirts adorned with leather fringes. The show opens with a distinctive leather jacket featuring the image of Kahlo, followed by lace ruffles, leather fringes, and crystal embellishments. Completing the looks are unique hairstyles and headpieces inspired by flowers, a theme dear to Frida Kahlo, who once said: “I paint flowers so they will not die.”

Friday 26 September

- 10:30 a.m. – *“Radical Joy”* – **MARCO RAMBALDI**
Radical joy is a desire for life and rebellion. As always, we sing a hymn to old things: the curtains of a country house, our grandmother’s tablecloths, the legacies of a past that has much to be forgiven for, but also many lessons that today must serve as our compass. This season is guided by the resistance born from the innocence of a child trying to learn how to live a life that feels bigger than them, and by the need for fairy tales that overwhelms us when life feels too heavy. Radical joy is a wish never to lose the need to be surrounded by people, to feel humanity skin to skin. To run into the square out of a desire for human contact, even when inhumanity dominates the day. It is the poetry of bodies celebrating together, rolling in the sand in the hope that summer will soften the pain. To remember to buy a bouquet of flowers for the person who wronged you, because anger is justified, but it must be fuel for rebellion, for uncomfortable embraces. For this Spring/Summer 2026, our garments carry the marks of battles, yet shine with the longing for lightness that only the innocence of childhood can bring.
- 2:30 p.m. – *“Interlude – Stories of a Dawn Burning on the Skin”* – **LORENZO SEGHEZZI**
Lorenzo Seghezzi makes his debut at Milan Fashion Week with a new collection created in collaboration with Lineapelle. For the first time, the designer’s pieces feature the creative use of leather, sourced from company sample archives and reinterpreted through the brand’s unique language. Other fabrics also come from warehouse stocks provided by partner companies, while each garment is handcrafted by the designer and his small team.

LINEAPELLE DESIGNERS EDITION

This project reflects the brand's artisanal and sustainable approach, enhancing innovative and high-quality materials thanks to the support of Lineapelle and the technical expertise that the collaboration brings, resulting in unique and surprising details.

- 6:00 p.m. – *"Tulips of Hope"* – **1972 DESA**

Tulips of Hope is the name of the new Spring/Summer 2026 collection by 1972 DESA. A name that is both poetic and concrete: it speaks of roots and belonging, but also of union and universality. Tulips, with their thousand colors and countless variations, defy winter and adversity, breaking through the soil and blooming even when cold and frost still linger—as if to say that even in difficult times, beauty and hope can flourish. The 1972 DESA Spring/Summer collection embraces the colors of these splendid flowers and takes inspiration from their shapes, the lightness of their petals, and even their silky texture, which is reflected in the choice of materials. The result is a minimalist elegance, yet one that is highly distinctive, built through refined tailoring and the exceptional quality of the fabrics.

Saturday 27 September

- 10:00 a.m. – *"Gidiré"* – **MASTEVAL**

"Gidiré" represents resilience and cultural heritage. Just as the walls of Harar have protected and defined its people for centuries, this collection celebrates the strength and identity of women—rooted in history yet rising into modernity. Rooted in Harari culture, the collection reinterprets its beautiful traditional female garments, intricate mural artworks, and the kaleidoscopic colors of Harar's historic walls. Architectural lines convey protection and strength, while fluid layers whisper freedom within boundaries. Proudly crafted in Ethiopia, Gidiré blends Ethiopian leather with eco-sustainable fabrics, elevating traditional craftsmanship into modern luxury. Marking a milestone, the brand launches its first leather line—an ambitious expansion into accessories and unique statement pieces. With 25 looks on the runway, Gidiré positions Ethiopian fashion within the global conversation: sophisticated, bold, unforgettable.

- 2:00 p.m. – *"Scorie"* – **CHRONOS CORPS**

The vision of **Scorie** is a vision of transcendence. Humanity is no longer the master of its destiny, but a humble follower of nature. In a world where it has ultimately destroyed itself and the land it inhabits, clothing becomes an icon of a cult of matter—a reminder that the future is the consequence of the waste of the past, shaped by a new awareness.

- 6:30 p.m. – *"Specters of the Sunset Boulevard"* – **LEONARDOVALENTINI | Laboratorio Riciclo Pelle**

A dialogue between luxury, craftsmanship, and sustainability. The collaboration between LEONARDOVALENTINI and Laboratorio Riciclo Pelle was born from the encounter of two complementary visions: on one side, aesthetic experimentation with fine leathers, impalpable silks, and jewel-like metalwork with a bold, sensual spirit; on the other, a commitment to circular, ethical fashion, deeply rooted in the values of recycling, expressed through entirely handmade garments and meticulous attention to detail, enriched by the Rock style—a musical culture central to both brands. Together, they give life to a project that merges Italian artisanal excellence with a sustainable approach, without sacrificing the refinement of materials or the narrative strength of design. The leathers used come from production waste, carefully selected and regenerated into unique pieces. This union tells the story of a new aesthetic where 40% Glam, 30% Wild, and 30% Punk of LEONARDOVALENTINI blends with the daring style of Laboratorio Riciclo Pelle: a narrative of introspection, materiality, and awareness, where every creation carries the beauty of imperfection and craftsmanship.

SPRING | SUMMER 2026 – ACCESSORY PRESENTATIONS

Spazio Lineapelle 8

Tuesday 23 September

- **DIENÈE – "Movimento"** (11:00 a.m.–6:00 p.m., cocktail & live set 6:00–9:00 p.m.)

Dienèe continues its evolution in the refinement of forms and their dynamism. The late-90s aesthetic and the influence of architecture remain intact, as do its clean, linear shapes, which in this collection soften, focusing on the movement of silhouettes and the textures of the selected leathers. This collection evolves around the details of structure: handles, sides, and stitching become central elements, as does the chosen color palette. The brand's signature cool tones are enriched with sky blue and shades of chocolate and butter. The event will be open to the public and buyers from 11:00 a.m. to 6:00 p.m., followed by an invitation-only cocktail from 6:00 to 9:00 p.m., featuring a live set by Paolo Gaudio, whose sound design will accompany the story of Dienèe.

LINEAPELLE DESIGNERS EDITION

Wednesday 24 September

- *PabePabe – “New Sound Practice – Melodic Apartment”* (11:00 a.m.–8:30 p.m., performance 4:00–7:00 p.m.)
A collection that stands as a testament to passion, determination, inspiration, and love—an invitation to explore the emotional depth woven into every piece. An interactive presentation will showcase exclusive instrumental bags and the new season’s models. An event designed to offer participants deeper insight into the brand’s distinctive aesthetic, its innovative approach, and the artistic expression behind its bag design. Powered by Meliastage

Thursday 25 September

- *Biagini – “Insulo Biagini”* (10:00 a.m.–6:00 p.m.)
The Spring/Summer 2026 collection by Biagini is inspired by the principle “Become what you are,” blending craftsmanship, innovation, and creative freedom. Founded in Modena in 1968, the brand reinterprets fine leathers with a unique, rule-free style. For this season, Biagini pays tribute to Romagna and Giorgio Rosa’s utopian Isola delle Rose, a symbol of independence and dreams. The collection is infused with cherry red, navy blue, pink, and pistachio green, evoking Sixties and Seventies atmospheres. Stripes—an iconic Biagini signature—take on new value with handworked python inlays. The Panier debuts in extra-large men’s and mini women’s versions. New this season is also a denim capsule bearing the message “We Are Made by Hands and Dreams.” Materials such as canvas and hand-painted patinated leather enrich the line. Original accessories—including boat-shaped eyeglass holders and summer bow ties—complete the collection. Insulo Biagini thus becomes an ideal, timeless place where fashion celebrates authenticity and craftsmanship.

Friday 26 September

- *Amato Daniele – “Memories – Pages from a Nomadic Diary”* (6:00–9:00 p.m.)

An ancient journey, from another time. Long, demanding, exotic. Not a modern itinerary, but a nineteenth-century experience, where every departure was discovery and every return carried back objects, memories, and details. This season does not collect relics, but sensations: the scent of earth after rain, the sand lingering between the fingers, the golden light warming the skin. It is not a collection about one place. It is a collection about all possible places. A nomadic diary of fragments, evocations, and wonder.

Saturday 27 September

- *TVL | TheVerticaline – “Inside the Soul, Beyond the Form”* (2:00–7:00 p.m., exhibition & DJ set)
Founded by Veronica Brevi, the brand presents its new Spring/Summer 2026 collection—a sensory journey between Mediterranean craftsmanship and digital input. Alongside the presentation, the audience will experience the photo exhibition “Dentro l’Anima Oltre la Forma” (“Inside the Soul Beyond the Form”), a project conceived by Veronica Brevi with photographs by Stefano Facca: 10 canvas prints that transform the microscopic details of sneakers into artistic visions, celebrating the precision of craftsmanship and the excellence of Made in Italy. A narrative that unveils the soul of the product, engaging with authentic materials, integrated technologies, and a genderless aesthetic exploration. The event will feature a DJ set by WhyAmelie and an exclusive cocktail, creating an atmosphere where music, style, and conviviality come together—turning the presentation into a true moment of encounter and creative celebration.

Sunday 28 September

- *DOYS – “The State of the Ball – Collective Shoe Polishing Meditation”* (11:00 a.m.–8:30 p.m., performance 4:00–7:00 p.m.)
Founded in 2023, the artisanal footwear and film atelier DOYS (Dig Out of Your Sole/Soul) explores the boundary between craftsmanship and contemporary art. The maison will present its fourth project, “The State of Ball,” a study on the form and movement of the ball as a means to deconstruct footwear. Alongside the event, DOYS introduces “Polishing the Soul,” a live meditation performance. From 4:00 p.m. to 7:00 p.m., dancers will move with the ball, tracing an intimate dialogue between matter and spirit. Through 2,000 repetitions of friction, we ask ourselves: what stories do our leathers carry with them?

LINEAPELLE DESIGNERS EDITION

- *Dúběň – “The Journey of Dúběň”* (11:00 a.m.–8:30 p.m.)
Those who feel fulfilled walk alone, yet feel accompanied by many. Embracing the journey of self-discovery and return, we neither strive nor seek to please, but instead allow everything to return to its natural state. Dúběň embarks on a journey under the theme “The Journey of Dúběň” to uncover the timeless wisdom of Eastern philosophies within contemporary contexts. It is a path of exploration and sharing, delving into the dedicated practice of creators immersed in the urban jungle. Powered by Meliastage

Monday 29 September

- *Absent Findings – “Early to the Party”* (2:00–6:00 p.m.)
Absent Findings presents Early to the Party, its Spring/Summer 2026 collection, continuing the dialogue begun with its debut season SS25, My Personal References. While the first chapter introduced personal stories and foundations, SS26 develops them with psychological depth, surrealist nuances, and sharper architectural precision. References to Le Corbusier’s Palace of Assembly in Chandigarh ground the collection’s geometry and structure, while Giorgio de Chirico’s Il Ritornante informs the color palette, pleats, and shadow-like detailing. The garments are defined by elongated silhouettes that resolve into subtle flares, hybridizing tailoring with fluid draping and layered constructions. Alongside these pieces, bags emerge as central protagonists of the narrative. Far from being mere accessories, they intertwine with the clothing as containers of memory, movement, and intimacy. Together, Early to the Party presents a mature vision of Absent Findings, where garments and bags speak in unison, blending architecture, surrealism, and lived experience.

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LINK/TAG

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| <p>@lineapellefair @unicitalia</p> <p>#lineapellefair #lineapelledesignersedition</p> <p>@italents_</p> | <p>SFILATE</p> <p>@1972desa @albertozambelli @anton_giulio_grande @chronos.corps @laboratorioriciclopelle @leonardvalentini @lorenzoseghezzi @maragnostudio @marcorambaldi_ @mastewalalemu_</p> <p>Hair&Makeup @maurizio_calcagno @franco_curletto</p> | <p>PRESENTAZIONI</p> <p>@absentfindings @amatodanieleofficial @biagini_1968 @dienee_official @doys_official @pabepabeofficial @tv1_theverticaline</p> |
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LINEAPELLE

FASHION & SPORT: CATALYSTS OF INNOVATION AT LINEAPELLE 106, A ROUND TABLE ON THE CREATIVE CROSSOVER THAT IS CHANGING THE CODES OF FASHION

The important thing is to take part—to win. The essence of sporting competition has perhaps never been so relevant in activating links, connections, and constant crossovers with the world of fashion and style. Just think of tennis: Jannik Sinner regularly steps onto the court carrying a Gucci-branded bag; Lorenzo Musetti wears a Bottega Veneta leather jacket; while Coco Gauff becomes the on-court ambassador of a collaboration between New Balance and Miu Miu.

Examples that demonstrate how sport today is reshaping the codes of fashion, style, and consumption.

Always at the forefront in analyzing global fashion trends, LINEAPELLE joins the debate by proposing a stimulating round table to explore how sport and fashion are mutually influencing each other—and to what extent this phenomenon is not only the result of innovative drive but also generates new creative, production, and commercial horizons.

Fashion & Sport: Catalysts of Innovation will take place at **3:00 p.m. on Wednesday, September 23**, at the **Red Lounge, Service Center – Fiera Milano Rho**.

Speakers:

- **Orietta Pelizzari** – Global Trend Advisor
- **Deborah Compagnoni** – Professional Athlete and Fashion Entrepreneur
- **Arianna Colombari** – Group Communication and Sustainability Director, Tecnica Group
- **Anilkumar Dave** – Space Economy and Open Innovation Expert
- **Diego Stecchi** – Managing Partner, Luxury Retail Partners | Senior Executive, Luxury Business Americas
- **Jacob Bjerregaard** – Faherty Inc / Bjerregaard International, Global Strategy Market for Fashion Brands

Moderator:

- **Fabiana Giacomotti** – Fashion Historian, Editor-in-Chief of *Il Foglio della Moda*

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MARKET INSIGHTS

SEPTEMBER 2025



LINEAPELLE

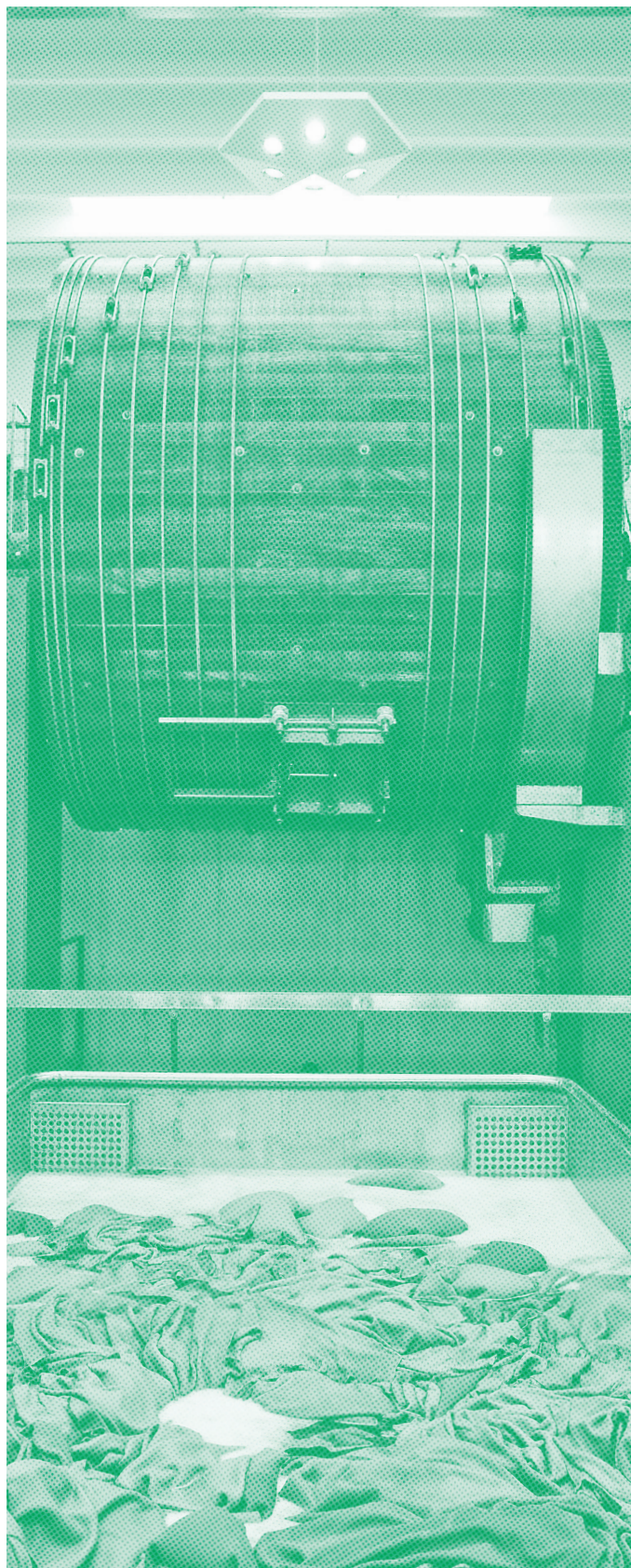
ITALY – The current estimates on the performance of the Italian tanning industry in the first half of 2025 mark an overall **decrease** of 4.6% in terms of **turnover** and 2.3% in **production** volumes compared to the corresponding period last year.

The negative trend that has characterized the tanning sector and, more generally, the entire international leather supply chain for approximately three years has not stopped. The reasons for the crisis have persisted for some time and include a geopolitical situation that is always highly critical and uncertain in future developments, an inflationary trend that has severely undermined the purchasing capabilities of an important part of consumers at a global level and a generalized slowdown in the consumption of fashion, furniture and automotive goods, combined with the marked cooling of purchases of luxury products in some of the above mentioned sectors by Chinese consumers (a strong growth driver in the pre-pandemic period).

Italian **export** of tanned leather also recorded a negative sign, with a decrease of 4.7% in value in the first six months of the year, compared to the same period last year. Despite the decline in total exports, the analysis of individual shipments by main country of destination still shows different trends, even of a non-secondary intensity. Among the top 20 foreign destination countries for Italian leather, France (+3%, confirmed as the first foreign destination), Germany (+6%), Portugal (+2%), India (+25%), South Korea (+14%), Hungary (+29%), Cambodia (+20%) are on the rise, while Spain (-6%), Romania (-8%), US (-11%), China (-29%, including Hong Kong), Serbia (-15%), Albania (-11%), Poland (-9%), UK (-7%), Slovakia (-15%), Mexico (-22%) are decreasing. Vietnam, Tunisia and Türkiye are stable.

The performance of the **single segments and production districts** of the Italian tanning industry appears substantially homogeneous and broadly declining. In terms of production by animal origin, sheep and goat leathers show, on average, only slightly less negative variations than bovine leathers, while, in terms of destination sectors, the difficulties appear to be widespread across all types of customers. The turnover of all the main national tanning districts is decreasing.

OTHER COUNTRIES – The picture of **medium-large bovine leather** production in the first part of 2025 offers an almost exclusively downward picture, both as regards the rest of Europe (with even double-digit drops in Austria, Germany, Spain, France and the UK) and the other world areas (also in this case significant drops everywhere, except apparently in Argentina). The small leathers segment appears more varied in terms of results, with **calf leather** going against the trend, with a slight positive sign, both in France and Spain, and **sheep and goat leathers** recording increases not only in the aforementioned European players but also in India and Pakistan (China and Türkiye most suffering).



ACCESSORIES, COMPONENTS, SYNTHETICS

TEXTILES, SYNTHETICS AND LEATHER ALTERNATIVES –

There were mixed results for the sector in the first six months of this year. The slowdown among major European producers had a negative impact, despite the resilience of Italian and Portuguese manufacturers. The trend in the various segments reflects the overall performance, with declines in synthetic fabric materials accompanied by stagnant results for synthetics. Regenerated leather fibers performed well, showing an increase.

MANUFACTURING SECTORS

FOOTWEAR – After a dull 2024, deeply affected by an unfavourable geopolitical context that negatively impacted exports, the **Italian footwear sector** also recorded weak performance in the first half of 2025: uncertainty linked to US tariffs, ongoing conflicts, market volatility, and low consumer confidence are the factors weighing on the sector's performance. Six-month comparisons show mixed results for the European footwear industry (-3%). France is struggling, while Spain is limiting the damage. Turkey is facing difficulties. Results in China and Mexico remain stable. Brazil has regained momentum. India and Vietnam are on the rise.

LEATHER GOODS – The **Italian leather goods industry** continues to experience the difficulties observed between the end of last year and the first part of 2025, with declining results in terms of exports, domestic sales, and industrial production. At the EU level, the partial cumulative figure for 2025 confirms the signs seen in previous quarters, with all major European producers deep in the red. On the other hand, Turkish leather goods manufacturers are expanding, as are their Indian counterparts. Uncertainty surrounds China and Pakistan, with the latter experiencing negative stability.

GARMENTS – The performance of EU manufacturers in the first six months of this year was positive (+7%), benefiting above all from strong growth in Italy and Spain. On the global picture, India and Pakistan slowed down, while Turkey and China remained bullish.

UPHOLSTERY – The semester comparison shows encouraging signs for European **upholstered furniture** manufacturers, with German manufacturers also gaining ground. However, the six-months figures for 2025 compared to 2024 in China and the US are cause for concern, showing declines of between 3% and 4%. The half-year trend of the **automotive sector** closely mirrors that of the previous two quarters, with significant declines in sales and new car registrations in Germany, Italy, and France, among the largest EU countries. Spain bucks the trend. The international outlook shows

ACCESSORIES AND COMPONENTS – The half-yearly performance of accessories and components was rather gloomy compared to the same period in 2024. The collapse of Italian and German production dragged down the EU average (-5%), with all major EU producers in decline except for Romania. All sectors of the industry suffered, with no remarkable exceptions.

growth in US registrations (+4%). However, China (-6%) and India (-12%) are slowing down. UK registrations are doing well: +4% over the period.

LUXURY BRANDS – The unstable geopolitical and economic context is weighing on the financial reports and performance of major European luxury fashion brands, with a few notable exceptions. The medium/long-term outlook remains cautious and rather conservative. Revenues declining by 4% in the first half of 2025 for **LVMH** (in terms of organic growth). Meanwhile, the performance of the fashion and leather goods segment is worsening: -7% compared to the first six months of 2024 and -9% compared to the second quarter of last year. **Kering's** performance in the first six months of 2025 remains very negative, with revenues down 15% (at constant rates). Gucci sank (-25% in revenues in the first half at constant exchange rates), Yves Saint Laurent fell 10%, and the group's smaller brands also declined (-14%). The only certainty is Bottega Veneta, which closed the half-year with a moderate +2%. **Hermès** confirms its resilience, reporting 7% growth in revenues in the first half of 2025 (at constant rates). At the end of June, all major markets were up: Asia (excluding Japan) +3%, Japan +16%, Americas +12%, Europe (excluding France) +13%, Middle East +17%. Solid growth in the leather goods and saddlery division: +12%. **Ferragamo** was weak in the first half of 2025 (-7% at constant exchange rates). Net sales declined in the EMEA countries (-9% at constant exchange rates), North America (-2%), Central and South America (-3.5%), Asia Pacific (-16%), and Europe (-9%). Sales in the leather goods sector remained stable in the half-year comparison (-0.2% at constant exchange rates), while footwear sales declined (-13%). Positive first six months for **Prada group**: net revenues up 9% (at constant exchange rates). Prada demonstrated stability against a challenging basis of comparison, with retail sales down 2% year-on-year in the first half 2025 and down 4% in the second quarter. Miu Miu continued on its growth path, with retail sales up 49% in the first half and +40% in the second quarter. Retail sales trended positively across all key markets (+10%).