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SOLUZIONI TECNICHE INNOVATIVE PER PELLETTERIA
INNOVATIVE TECHNICAL SOLUTIONS FOR LEATHER GOODS

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1968 2018

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The brands we work with are the guarantee of the quality of our products.
Made in Italy Technology for tpu-pu direct injection
Our experience is your added value

Integrated production process with automated line: higher production rates, lower costs
Combined material production (rubber, TPU and compact PU for tread sole, PUR for midsole)
Custom-made solutions and proportional injection technology for a high quality final result
MARKETS

The giant growth slows down
Il gigante rallenta la crescita

The machines. From where?
Le macchine. Da dove vengono?

The sector is still in trouble
Il settore resta in affanno

The credit balance grew by 39%, but company mortality keeps being too high
Cresce del 39% il saldo attivo, ma resta troppo alta la mortalità delle aziende

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The giant growth slows down

The giant is a little suffering. In spite of still being the world’s fastest growing country (in 2018, its GDP had grown by 7.1%, in the last 5 years by an overall 44%), in 2019 there were signs of a slowdown with a growth of 5.8% mainly due to the contraction in manufacturing which represents around 75% of the Indian production fabric.

“The reduction in the growth rate – reads a note from the Delhi office of the Ice Agency - is due in particular to weak dynamics in investment, exports and sales of cars and motorcycles, a sector of crucial importance in the Indian macroeconomic context. What is analyzed with some degree of concern is certainly the low level of Indian exports to the rest of the world against 21.5% increase in imports, with a deficit in the trade balance exceeding 16 billion euro. In order to contain the persisting effects of this slowdown and to favor recovery, the Indian Minister of Finance recently announced a series of measures aimed at encouraging investments from abroad, consumption and demand in order to help boosting the economy.”

In the leather and footwear sector, India has a long tradition and is a great world power. Today, India, according to the “World Footwear Yearbook” published by APICAPS, the Portuguese footwear association, is the world’s second largest producer (2,579 million pairs), after China, and the sixth world exporter with 262 million pairs exported mainly.
in Europe and the United States. 48% of the exported shoes are made of leather at an average price of 9.50 USD.

The consumption of footwear in the country amounts to 2,606 million pairs. The import is equal to 289 million pairs. The main suppliers are China, 88% of the total imports, Vietnam, Indonesia, and Thailand. 73% of the shoes imported from India are made of plastic and rubber at an average price of 2.80 USD.

The complex economic momentum at the international level is also reflected at the level of the Indian leather and footwear industry. The Chairman of the Council for Leather Export, Aqeel Ahmed, while defining the general picture satisfactory, added that "the Indian export of the leather/footwear industrial chain has decreased in value while increasing in quantity for the benefit of those employed in the sector".

As for the Indian imports of tannery, footwear and leather goods machinery, China covers 38% of imports (increasing trend); Italy 34% (decreasing trend); Taiwan 14.5% (decreasing trend); South Korea 5% (decreasing trend); Germany 2.7% (rising trend), etc. The percentage values vary if only sub-sectors are analyzed. In the tannery machines, Italy is the leader, while in the footwear ones, the undisputed leader is China.

**INDIA IN PILLS**
(from "The World in figures 2020" The Economist/International)
- Inhabitants 1,339.2 million
- GDP 2,651 billion USD
- Origin of GDP: Agriculture 16%, Industry 26% (of which 15% from manufacturing); Services 58%
- Main Exports: engineering products, gems and jewels, oil and derivatives, agricultural products, etc.
- Main Imports: oil and derivatives, electronic items, gold and silver, machinery, etc.
- Main importers of "Made in India" products: United States, United Arab Emirates, Hong Kong, United Kingdom
- Main suppliers: China, the United States, the United Arab Emirates, Saudi Arabia, etc.

**L’INDIA IN PILLOLE**
(da "Il Mondo in cifre 2020" The Economist/Internazionale)
- Abitanti 1339,2 milioni
- PIL 2651 miliardi di Dollari Usa
- Origine del PIL: Agricoltura 16%, Industria 26% (di cui 15% dal manifatturiero); Servizi 58%
- Principali Esportazioni: prodotti per l’ingegneria, gemme e gioielli, petrolio e derivati, prodotti agricoli etc.
- Principali Importazioni: petrolio e derivati, articoli di elettronica, oro e argento, macchinari etc.
- Principali importatori di prodotti “made in India”: Stati Uniti, Emirati Arabi Uniti, Hong Kong, Regno Unito
- Principali fornitori: Cina, Stati Uniti, Emirati Arabi Uniti, Arabia Saudita etc.

Per quanto riguarda l’import indiano di macchinari per conceria, calzature e pelletteria la Cina copre il 38% delle importazioni (tendenza in aumento); l’Italia il 34% (tendenza in diminuzione); Taiwan 14,5% (tendenza in diminuzione); Corea del Sud 5% (tendenza in diminuzione); Germania 2,7% (tendenza in aumento) etc. Le percentuali variano se si analizzano solo i sub-settori. Nelle macchine per conceria l’Italia è leader, in quelle per calzature dominio incontra stato cinese.
What is the origin of the machines and technologies used by the top 5 footwear producing countries? We tried to find out by crossing the production data (source: World Footwear Yearbook 2019, published by Apiccaps) with that of machinery and technology imports (source: ITC, Trade World Map).

Interesting were the figures that came out, and they help to better understand the dynamics in progress. It should be noted that, of the top 5 world producing countries (in order of importance: China, India, Vietnam, Indonesia, and Brazil) – which cover 80% of the globe’s footwear production – only China and Brazil have a local production of machinery. The rest are all importing countries.

**CHINA** (annual footwear production 13,478 million pairs, of which 9,543 million destined to export). Local production covers almost all the demand for footwear, leather goods and tannery machines and technologies. However, in 2018, according to ITC data, China still imported 53.6 million USD of footwear, tannery and leather goods machinery.

Italy is the leading supplier with almost 68% of total imports, followed by Germany (11%), Taiwan (5.5%), South Korea (5.1%), France (4.1%), Turkey (2%), etc.

**INDIA** (annual footwear production 2,579 million pairs, of which 262 million destined to export). In 2018, Indian imports reached 83.499 million USD for tannery, footwear and leather goods machinery. First supplier was China with 38.2% of total imports, with a growing trend, followed by Italy (34.2%), Taiwan (14.6%), South Korea (4.8%), Germany (2.7%), Hong Kong (1.3%), and Spain (0.7%).

In the tannery machinery sub-sector, however, Italy far outstrips China, which is though growing strongly in the shoe machinery sub-sector.

**VIETNAM** (annual footwear production 1,300 million pairs, of which 1,272 million destined to export). In 2018, Vietnamese imports were over 155 million USD of machinery for tannery, footwear and leather goods. First supplier was China with 35.4% of total imports, followed by Vietnam (16.7%), Taiwan (9.8%), South Korea (8.4%), Germany (2.7%), Hong Kong (2.2%), China (0.6%), etc.
USD. First supplier was China (41.8%), followed by Taiwan (26.4%), South Korea (12.4%), Italy (11.5%), and Germany (6.5%). Vietnam is a predominantly subcontractor country. For years, China, Taiwan and South Korea have been making massive investments in the country.

**INDONESIA** (annual footwear production 1,271 million pairs, of which 406 million destined export). In 2018, Indonesia imports amounted to 115.5 million USD. Taiwan was the leading supplier (32% of total imports), followed by China (31.2%), South Korea (20%), Italy (9.3%), and Germany (0.9%). Indonesia is also a predominantly subcontractor country. For years, China, Taiwan and South Korea have been making massive investments in Indonesia.

**BRAZIL** (annual footwear production 944 million pairs, of which 113 million destined to export). The Brazilian annual machine imports are just a little over 10 million USD. The country has a protectionist regime when it comes to machinery imports. Italy is the leading supplier (90% of total imports), followed by China (4.4%), Germany (2.1%), and Taiwan (1.1%).

<table>
<thead>
<tr>
<th>IMPORT OF FOOTWEAR, LEATHER GOODS AND TANNERY MACHINES Top 5 World Producing Countries 2018 / customs heading 8453</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>VALUE USD (000)</strong></td>
</tr>
<tr>
<td>China</td>
</tr>
<tr>
<td>India</td>
</tr>
<tr>
<td>Vietnam</td>
</tr>
<tr>
<td>Indonesia</td>
</tr>
<tr>
<td>Brazil</td>
</tr>
</tbody>
</table>

Source: TRADE MAP of International Trade Center UNCTAD/WTO

N.B. Data on the value of the import of machinery into Vietnam and Indonesia probably also include part of the shareholdings of Chinese, Taiwanese and Korean investing companies.
The first 9 months of 2019 saw the gap between the label performances and that of small and medium-sized enterprises increase: the overall average production volume figure drops by 2.9%, while for smaller businesses the decrease is much more noticeable.

Globally, exports show a small decrease in quantity (−0.8% in the first 8 months of the year, but with a more relevant −4.2% for leather footwear), and +6.7% in value due to the work on big brands’ behalf, but the difficulties remain on several important outlet markets (Germany −8.7% in volume; Russia −18.5%; Middle East −14%, Japan −6.4%). Switzerland and France performed well; increases of around 10% in value for North America and the Far East. Imports remained stable, but the trend of China growing by 3.7% should be highlighted. The trade balance was good, with an asset close to 3.2 billion euro in the first 8 months of 2019 (+9.5% compared to January-August 2018).

On the domestic front, no improvement, household purchases recorded a reduction of −3.3% in quantity in the first 9 months, with −2.6% in value. The only sector in expansion is that of sports shoes and sneakers (+1.5% in volume, and +3.5% in spending).

**PRODUCTION**

The survey performed quarterly by Centro Studi di Confindustria Moda among the companies associated with Assocalzaturifìci, estimates, for the first 9 months of 2019, an average decrease in national production equal to −2.9%, accompanied by a weak increase in terms of value (+1%), due to the price dynamics. Among companies with annual turnover under 15 million euro, the extent of the reduction in volumes is even more noticeable (−5.6%).

**COMMERCIAL TRADE**

In the first 8 months of 2019, the official Istat figures recorded an increase in exports of 6.7% in value, accompanied, however, by a drop in quantities of −0.8%, with the average price growing by 7.5%. Between January and August – including pure marketing operations – 142.4 million pairs (1.2 million less compared to the same period of 2018) were sold abroad, for a value of 6.9 billion euro.
Euro [a record growth in absolute terms for the period considered]. This result was largely due to the increase in the work commissioned by the major international luxury brands, as evidenced by the significant increases in exports to France [which showed increases of more than 9%, both in volume and value], and Switzerland (+24.2% in value), logistic hub for many brands. Net of these two destinations, which together cover almost 1/3 of foreign sales in value, the increase in Italian footwear exports would in fact decrease to a more modest +2.4%, with a drop of -3.5% in quantity.

**EXPORT**

The analysis by target market underlines that the European Union - where 7 out of 10 exported shoes are directed - held on (+0.4% in volume, with +3.5% in value). The growth in orders from France was offset by the decline in Germany, which fell by -8.7% in quantity, and -2.5% in value in the first 8 months. The drop in purchases also affected Belgium and the Netherlands, while sales in the United Kingdom (+3.6%) and Spain (+4% in value) recovered. In the Eastern region, Poland and Romania performed well. Outside the EU, the trends fluctuated: non-EU markets showed overall positive results in value (+10%), but unsatisfactory in volumes purchased (-3.3%).

Alongside the growth in direct flows to Switzerland, the negative trend in Russia (down by a further -18.5% in quantity and -14.2% in value), Ukraine [-6.3% volume, is confirmed], and Kazakhstan [even -26%]. Disappointing performances also in the Middle East (-14% in quantity and -9% in value), with -12.8% in volume for the United Arab Emirates.

In North America, the US recorded a significant increase in sales in value (+11.6%), but suffered a drop of around 2% in quantity, sales in Canada were less satisfactory [approximately +2% in value, but -5% in volume], despite CETA. Growth also not negligible for the Far East [+3.9%] globally, stable in quantity (+0.1%). The “China +

<table>
<thead>
<tr>
<th>THE MAIN ECONOMIC INDICATORS OF THE FOOTWEAR INDUSTRY</th>
</tr>
</thead>
<tbody>
<tr>
<td>First nine months 2019</td>
</tr>
<tr>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Qty. Produced</strong></td>
</tr>
<tr>
<td>January/September ‘19</td>
</tr>
<tr>
<td>-2.9%</td>
</tr>
<tr>
<td><strong>Production value</strong></td>
</tr>
<tr>
<td>January/September ‘19</td>
</tr>
<tr>
<td>+1.0%</td>
</tr>
<tr>
<td><strong>Export (Qty.)</strong></td>
</tr>
<tr>
<td>January/August ‘19</td>
</tr>
<tr>
<td>-0.8%</td>
</tr>
<tr>
<td><strong>Export (Value)</strong></td>
</tr>
<tr>
<td>January/August ‘19</td>
</tr>
<tr>
<td>+6.7%</td>
</tr>
<tr>
<td><strong>Import (Qty.)</strong></td>
</tr>
<tr>
<td>January/August ‘19</td>
</tr>
<tr>
<td>+0.3%</td>
</tr>
<tr>
<td><strong>Import (Value)</strong></td>
</tr>
<tr>
<td>January/August ‘19</td>
</tr>
<tr>
<td>+4.3%</td>
</tr>
<tr>
<td><strong>Trade Balance (Value)</strong></td>
</tr>
<tr>
<td>January/August ‘19</td>
</tr>
<tr>
<td>+9.5%</td>
</tr>
<tr>
<td><strong>Household consumption (qty)</strong></td>
</tr>
<tr>
<td>January/September ‘19</td>
</tr>
<tr>
<td>-3.3%</td>
</tr>
<tr>
<td><strong>Household consumption (spend.)</strong></td>
</tr>
<tr>
<td>January/September ‘19</td>
</tr>
<tr>
<td>-2.6%</td>
</tr>
<tr>
<td><strong>Company/Employees</strong></td>
</tr>
<tr>
<td>(September 2019)</td>
</tr>
<tr>
<td>No. Companies</td>
</tr>
<tr>
<td>4,357</td>
</tr>
<tr>
<td>(-148 against Dec.’18, -3.3%)</td>
</tr>
<tr>
<td>No. Employees</td>
</tr>
<tr>
<td>75,474</td>
</tr>
<tr>
<td>(-206 against Dec.18, -0.3%)</td>
</tr>
<tr>
<td><strong>Authorized C.I.G. Leather Area</strong></td>
</tr>
<tr>
<td>of which:</td>
</tr>
<tr>
<td><strong>Ordinary C.I.G.</strong></td>
</tr>
<tr>
<td>+28.3%</td>
</tr>
<tr>
<td><strong>Total extraordinary C.I.G.</strong></td>
</tr>
<tr>
<td>+28.1%</td>
</tr>
<tr>
<td><strong>Extraordinary in strict sense</strong></td>
</tr>
<tr>
<td>+64.6%</td>
</tr>
<tr>
<td><strong>Extraordinary in derogation</strong></td>
</tr>
<tr>
<td>-98.8%</td>
</tr>
</tbody>
</table>

Processing and estimates Centro Studi Moda for Assocalzaturifci
Production trend = results of the sample survey carried out at the Associates

INTERSCAMBIO COMMERCIALE
Le cifre ufficiali Istat, ferme ai primi 8 mesi 2019, registrano un aumento dell’export in valore del 6,7%, accompagnato però da un calo nelle quantità del -0,8%, con prezzo medio in crescita del 7,5%. Tra gennaio e agosto sono stati venduti allestero, includendo le operazioni di pura commercializzazione, 142,4 milioni di paia (1,2 milioni in meno sull’analogo periodo 2018) per un valore di 6,9 miliardi di euro [crescita che rappresenta l’ennesimo record in termini assoluti per il periodo considerato]. Tale risultato è in gran parte dovuto all’aumento del lavoro commissionato dai grandi brand internazionali del lusso, come dimostrano gli aumenti rilevanti dell’export verso la Francia (che presenta incrementi superiori al 5%, sia in volume che in valore) e la Svizzera (+24,2% in valore), hub logistico di molte griffe. Al netto di queste due destinazioni, che totalizzano quasi 1/3 delle vendite estere, l’incremento dell’export calzaturiero italiano si ridurrebbe infatti ad un più modesto +2,4%, con una flessione del -3,5% in quantità.

**EXPORT**
L’analisi per mercato di destinazione sottolinea una tenuta dell’Unione Europea [+0,4% in volume, con un +3,5% in valore], dove sono dirette 7 scarpe su 10 esportate. Alla cresciuta degli ordini dalla Francia si contrappone la flessione della Germania, scesa nei primi 8 mesi del -8,7% in quantità e del -2,5% in valore. Il calo degli acquisti internazionali ha determinato una marginale frenata in Spagna [+3,4%] e in Italia (+5,6%). Tra le etichette europee, la Svizzera (+24,2% in valore), logistic hub per molte griffe. Al netto di queste due destinazioni, che totalizzano quasi 1/3 delle vendite estere, l’incremento dell’export calzaturiero italiano si ridurrebbe infatti ad un più modesto +2,4%, con una flessione del -3,5% in quantità.
### Analysis by Geographical Areas of Destination

<table>
<thead>
<tr>
<th>ITALY – EXPORT</th>
<th>January – August 2019</th>
<th>Variation % 19/18</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Value [MEUR]</td>
<td>Quantity</td>
</tr>
<tr>
<td>European Union (UE28)</td>
<td>3,424.02</td>
<td>97,121</td>
</tr>
<tr>
<td>Other European Countries</td>
<td>1,223.52</td>
<td>12,353</td>
</tr>
<tr>
<td>Eastern Europe and CIS* countries</td>
<td>294.55</td>
<td>6,264</td>
</tr>
<tr>
<td>North Africa</td>
<td>19.89</td>
<td>1,150</td>
</tr>
<tr>
<td>Other countries of Africa</td>
<td>33.08</td>
<td>1,460</td>
</tr>
<tr>
<td>North America</td>
<td>772.32</td>
<td>12,005</td>
</tr>
<tr>
<td>Central and South America</td>
<td>79.81</td>
<td>1,377</td>
</tr>
<tr>
<td>Middle East</td>
<td>176.46</td>
<td>2,807</td>
</tr>
<tr>
<td>Other countries of Asia</td>
<td>848.28</td>
<td>7,055</td>
</tr>
<tr>
<td>Oceania</td>
<td>45.67</td>
<td>839</td>
</tr>
<tr>
<td>Others</td>
<td>3.02</td>
<td>18</td>
</tr>
<tr>
<td>Total Export</td>
<td>6,920.64</td>
<td>142,449</td>
</tr>
</tbody>
</table>

(“CIS area markets: countries Eastern Europe and CIS, European Union (UE28), Middle East, America, Central and South Other countries of Africa, and recorded an overall decrease of -3.3% in quantity, and -2.6% in value, with a slight increase in average prices (+0.7%). Among the sectors, the only positive signs, once again, are for “sports shoes and sneakers” (+1.5% in pairs, and +3.5% in spending). Men and women Polonia e Romania. Andamenti altalenanti fuori dai confini comunitari: i mercati extra-UE evidenziano globalmente risultati positivi in valore (+10%, ma insoddisfacenti per i volumi acquistati (-3,3%). Accanto alla crescita dei flussi diretti in Svizzera, trova conferma il trend negativo in Russia (scesa nei primi 8 mesi di un ulteriore -18,5% in quantità e -14,2% in valore), Ucraina (-6,3% volume) e Kazakhstan [addirittura -26%]. Performance deludenti anche in Medio Oriente (-14% in quantità e -9% in valore nell’insieme), con un -12,8% in volume per gli Emirati Arabi.

In Nord America aumento significativo delle vendite in valore negli USA (+11,6%), che però segnano un calo attorno al 2% in qualità: meno soddisfacenti le vendite in Canada (+2% circa in valore ma -5% in volume). Crescita non trascurabile anche per il Far East (+9,2% globalmente), stabile in quantità (+0,1%). L’aggregato “Cina+Hong Kong”, divenuto il 5° mercato di sbocco, mostra aumenti del 3,1% in volume e dell’8,5% in valore. Incremento del 14% circa per la Suda Corea (con un timido +1,5% in paia). Ancora poco fluido il trend delle vendite in Giappone (+7,8% in valore a fronte di una riduzione del 6,4% nelle quantità), dove si è appena avviato l’accordo di libero scambio con la UE che si complicherà progressivamente in 10 anni. L’analisi dell’esport di scarpe con taura in pelle presenta trend peggiori rispetto alla media (-4,2% volume e +3,2% valore): all’interno del comparto pelle tutte le principali voci mostrano flessioni in quantità, anche se spesso accompagnate da incrementi in valore.

**IMPORT**

I primi 8 mesi del 2019 presentano una sostanziale stabilità per i volumi acquistati (+0,3%), con un...
A printing innovation that is revolutionizing the footwear and leather goods sector. Tampolamina® creates relief customizations with a laminated effect, both for full surfaces and for very thin sections. This patent created by GTO combines Pad printing versatility with the brilliance of hot stamping. The prints are clearly recognizable to the touch with a mirror/shine effect never achieved before.

Nuovo concetto di stampa che sta rivoluzionando il mondo della calzatura e della pelletteria. Tampolamina® realizza personalizzazioni a rilievo con effetto laminato sia per fondi pieni che per tratti molto sottili. Questo brevetto realizzato da GTO unisce la versatilità della Tampografia alla brillantezza della stampa a caldo. Le stampe sono in evidenza riconoscibili al tatto con un risultato effetto specchio / lucentezza mai ottenuta prima.
women’s ‘classic’ shoes, instead, registered a setback (respectively, 10% in volume and -6%, despite laced ankle boots and high boots held on). The contraction in the children/teenagers’ segment was more modest [although equally characterized by negative variations in all types] (-1.6%).

BUSINESS MORTALITY AND EMPLOYMENT

The complex economic scenario, characterized by yet another failure to restart demand, had further repercussions on corporate mortality and employment levels in the sector. In the first 9 months of 2019, the number of active shoe factories decreased by 148 units, 3.3% less than the final 2018, with a drop of 206 employees (-0.3%): at the end of September 2019 the sector had 4,357 industrial and craft companies and 75,474 direct employees.

INTRA AND EXTRA UE EXPORT: 8 MONTHS 2019

<table>
<thead>
<tr>
<th>Month</th>
<th>Quantity</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan.</td>
<td>+0.4</td>
<td>+9.9</td>
</tr>
<tr>
<td>Feb.</td>
<td>+3.5</td>
<td></td>
</tr>
<tr>
<td>March</td>
<td>-3.3</td>
<td></td>
</tr>
</tbody>
</table>

Source: Processing Centro Studi Moda on ISTAT data

ITALIAN MARKET

Performance in the first 9 months 2019 compared to the same 2018 period

<table>
<thead>
<tr>
<th>CURRENT EXPENSE (retail prices)</th>
<th>January-September 2018</th>
<th>January-September 2019</th>
<th>Variation % 19/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAN (sneakers excluded)</td>
<td>712.06</td>
<td>636.30</td>
<td>-10.6%</td>
</tr>
<tr>
<td>WOMAN (sneakers excluded)</td>
<td>1,436.98</td>
<td>1,352.67</td>
<td>-5.9%</td>
</tr>
<tr>
<td>CHILDREN/TEENAGERS</td>
<td>251.82</td>
<td>247.71</td>
<td>-1.6%</td>
</tr>
<tr>
<td>SPORTS AND SNEAKERS</td>
<td>1,636.81</td>
<td>1,693.77</td>
<td>+3.5%</td>
</tr>
<tr>
<td>Slippers/Clogs/Sneakers - of which for men</td>
<td>376.94</td>
<td>371.07</td>
<td>-1.6%</td>
</tr>
<tr>
<td>Slippers/Clogs/Sneakers - of which for women</td>
<td>101.04</td>
<td>103.85</td>
<td>+2.8%</td>
</tr>
<tr>
<td>Slippers/Clogs/Sneakers - of which children/teenagers</td>
<td>238.06</td>
<td>230.15</td>
<td>-3.3%</td>
</tr>
<tr>
<td>Total spending (Million Euros)</td>
<td>4,414.61</td>
<td>4,301.52</td>
<td>-2.6%</td>
</tr>
</tbody>
</table>

Source: SITA RICERCA - Fashion Consumer Panel service for Assocalzaturifici

CONSUMPTION OF ITALIAN FAMILIES

INTRA AND EXTRA UE EXPORT: 8 MONTHS 2019

Source: Processing Centro Studi Moda on ISTAT data

MORTALità AZIENDALE E OCCUPAZIONE

Il complesso quadro economico, caratterizzato dall’ennesima mancata ripartenza della domanda, ha avuto ulteriori ripercussioni su mortalità aziendale e livelli occupazionali del settore. Nei primi 9 mesi 2019 il numero di calzaturifici attivi è sceso di 148 unità, il 3,3% in meno sul consuntivo 2018, con un calo di 206 addetti [-0,3%]: a fine settembre 2019 il settore contava 4,357 aziende e 75,474 addetti diretti, tra industria e artigianato.

CONSUMI INTERNI

Secondo il Fashion consumer panel di Sita Ricerca per Assocalzaturifici, il terzo trimestre 2019 ha evidenziato, come i due precedenti, cali tendenziali negli acquisti delle famiglie italiane, sia in volume che in spesa [-2,5% e -1,3% rispettivamente]. La situazione dei primi 9 mesi dell’anno, pertanto, non ha subito apprezzabili miglioramenti, facendo segnare nell’insieme un arretramento del -3,3% in quantità e del -2,6% in valore, con un lieve aumento dei prezzi medi [+0,7%]. Tra i comparti, gli unici segni positivi emergono ancora una volta, per le ‘sportive e sneakers’ [+1,5% nelle paia e +3,5% in spesa]. Battuta d’arresto invece per le scarpe “classiche” per uomo (nell’ordine del 10% in volume) e donna [-6%, nonostante una tenuta nei polacchetti e negli stivali alti].
The credit balance grew by 39%, but company mortality keeps being too high

ITALY - FOREIGN TRADE
The foreign sales double-digit growth average data, released by ISTAT, hide “two speeds”. In fact, the analysis presented highlights how this favorable trend is exclusively due to flows towards Switzerland, i.e. a logistics and distribution platform of the major international fashion brands [+105.6% in the first 9 months of the year]; so, this market keeps its first place for the purchase value, with a share of 37.5% of the total exported, and ranks second behind Germany for the volumes imported from Italy.

EXPORT ANALYSIS BY COUNTRY
The first 9 months of 2019 are characterized by a further slowdown in Russia and by stagnant dynamics in various Community markets (primarily Germany, where the economy cooling seems to have induced distribution to be more prudent in purchases: -5.7% in KG, with a shy +1% in value). Overall, flows towards the members of the European Union recorded very modest growth (+0.5% in value, and +1.2% in KG). Positive trends in France (+14% in value, and +8.3% in quantity) and, although less intense, in the United Kingdom (which, despite the uncertainty linked to a possible no-deal Brexit, recorded, in the first 9 months, an increase of almost 4.4% in volume and strength in value, +0.6%). Negative trends were registered, among others, for Spain [-11.8% in value], the Netherlands [-2.7%], Austria [-4.9%], Romania [-43.5%], and Poland [-6.3%].

In Russia, after the partial recovery of the two-year period 2016-2017 and the abrupt interruption of 2018, 2019 was also characterized - as happened for the contiguous footwear sector - by unfavorable dynamics: -16.7% in value, and -20.7% in KG in the first 9 months. Unsatisfactory trends also for Ukraine and Kazakhstan (-10.1% and -11.2% in value, respectively), as well as for the Middle East (-2.1% in value overall), above all...
affected by the drop in Saudi Arabia (-11%).

The USA, on the other hand, performed well (+4.9% in value, and +11% in KG, despite fears that protectionist winds may also affect trade with the EU), as well as South Korea and China, both of which show significant growth (+17.7% and +10.5% in value, with increases also in KG).

As for the Chinese market, it should be said that the increase was accompanied by a simultaneous slowdown in flows to Hong Kong (considered statistically still distinct from mainland China), which fell by -13.5% in value and -26% in KG.

The aggregate “Mainland China + Hong Kong”, which is the second destination in terms of exports of leather goods, a drop of 4% in value and a drop of more than 14% in KG were registered.

Remaining in the Far East, Japan shows positive variations (+10.9% in value, and +4.4% in KG). This is an important market, which can find new impetuses from the recent trade agreement signed by the EU, which provides for the gradual, albeit slow, liberalization of heavy duties. On the other hand, exports decreased to around 30% to Singapore, where the negative streak triggered in 2016 continued. Thailand did well.

With reference to the average unit sales values, the Far East markets (together with Switzerland) are the destinations with the highest average price per KG, far higher than the average of the total Italian export. The analysis by material highlights strong increases in value both for goods made of leather (+22%, which cover three quarters of the export national value) and for those made of substitute (+40%).

But the leather goods sector – the typical one for Made in Italy products - shows a little comforting contraction in quantity (-4.9%), with negative signs for bags (-4.1%) and small leather goods (i.e. wallets, purses, key rings, cases and the like), dropped by -5.8% in KG. The export of non-leather products consolidated also in the KG, instead (+7%), with +11.2% for bags.

**IMPORT MARKETS**

Affected by a lackluster domestic market, imports are stable in terms of volume (+0.6% in KG in the first 9 months of 2018), with a growth of 5.1% in value (and average price per KG increased by 4.5%, which however remains very far [7 times less] from the 

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**COMMERCIAL EXCHANGE OF ITALIAN LEATHER GOODS**

**FIRST 9 MONTHS OF 2019**

<table>
<thead>
<tr>
<th>EXPORT:</th>
<th>Value (Millions of euros)</th>
<th>Quantity (Millions of KG)</th>
<th>Average price EUR/KG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year 2018</td>
<td>6,038.54</td>
<td>46.7</td>
<td>129.24</td>
</tr>
<tr>
<td>Year 2019</td>
<td>7,592.17</td>
<td>42.3</td>
<td>160.44</td>
</tr>
<tr>
<td>Var %</td>
<td>25.7%</td>
<td>1.3%</td>
<td>24.1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IMPORT:</th>
<th>Value (Millions of euros)</th>
<th>Quantity (Millions of KG)</th>
<th>Average price EUR/KG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year 2018</td>
<td>2,376.88</td>
<td>110.4</td>
<td>21.53</td>
</tr>
<tr>
<td>Year 2019</td>
<td>2,498.03</td>
<td>111.1</td>
<td>22.49</td>
</tr>
<tr>
<td>Var %</td>
<td>5.1%</td>
<td>0.6%</td>
<td>4.5%</td>
</tr>
</tbody>
</table>

Source: Centro Studi Confindustria Moda on ISTAT data

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Valore e +1,2% in KG). Andamenti positivi in Francia (+14% valore e +8,3% in quantità) e, sebbene di minore intensità, nel Regno Unito [che, nonostante l’incertezza legata ad una possibile Brexit no deal, ha registrato nei primi 9 mesi un incremento prossimo al 4,4% in valore e una tenuta in valore, +0,6%].

Trend negativi si rilevano invece, tra gli altri, per Spagna (-11,8% valore), Glianda (-2,7%), Austria (-4,9%), Romania (-43,5%) e Polonia (-6,3%).

In Russia, dopo la brusca interruzione del 2016-2017 e la brusca interruzione del 2018, anche il 2019 è stato caratterizzato – come avvenuto per il comparto contiguo delle calzature – da dinamiche sfavorevoli: -16,7% in valore e -20,7% nei KG nei primi 9 mesi. Trend insoddisfacenti anche per Ucraina e Kazakhstan (-10,1% e -11,2% in valore rispettivamente), come pure per il Medio Oriente (-2,1% in valore nel complesso), penalizzato soprattutto dalla recessione in Arabia Saudita (-11%).

Bene invece gli USA (+4,9% valore e +11% KG), malgrado i timori che i venti protezionistici possano intaccare anche i commerci con la UE, come pure la Corea del Sud e la Cina, che presentano entrambe crescite non trascurabili (+17,7% e +10,5% in valore, con aumenti anche nei KG).

Quanto al mercato cinese, va detto che l’incremento è stato accompagnato da una contemporanea frenata dei flussi verso Hong Kong (considerato statisticamente ancora distinto dalla Cina continentale), scesi del -13,5% in valore e del -26% in KG.

L’aggregato “Cina continentale + Hong Kong”, che costituisce la seconda destinazione in valore dell’export di beni di pelletteria, segna un calo del 4% in valore e un arretramento di oltre il 14% nei KG. Restando in Far East, il Giappone evidenzia variazioni positive.
ITALIAN LEATHER GOODS EXPORT FIRST 9 MONTHS 2019: INCIDENCE OF SWITZERLAND ON THE TOTAL

<table>
<thead>
<tr>
<th>Value (Millions of euros)</th>
<th>Quantity (Millions of KG)</th>
<th>Average price EUR/KG</th>
<th>% Var. on previous year</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL EXPORT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>of which towards:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Switzerland</td>
<td>7,592.17</td>
<td>473</td>
<td>160.44</td>
</tr>
<tr>
<td>Others</td>
<td>2,847.57</td>
<td>6.1</td>
<td>468.34</td>
</tr>
<tr>
<td>Others</td>
<td>4,744.60</td>
<td>41.2</td>
<td>115.04</td>
</tr>
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average value exports. Mild increase in KG (+1.5%) for substitute products, which account for 90% of the total quantity, while the imported KG of leather items fell by about 6.1%, with growth in value for both sectors. China, the leading supplier, recorded increases of +9% in KG (+5.6% in value, with prices per KG further decreasing by 3%); considerable increases for Vietnam (+24.5% in quantity, and +42.4% in value), which is third in the ranking for volume sold. The average prices of the products arriving from these two countries are 10 and 7.80 euro/KG, respectively, by far the lowest among the main suppliers. Imports from France and Switzerland grew by double-digit; considerably, by far the lowest among the main suppliers. The export trend is that allowing “chapter 42”, i.e. the one related to leather goods, to confirm its fifth ranks in Italy in terms of trade balance among the 99 commodity chapters that comprise the customs nomenclature.

THIRD QUARTER 2019
In the period July-September there was a substantial hold compared to the same period of 2018 (far from brilliant); timid positive variations (+0.2% in quantity, and +1.8% in spending) which are certainly not enough to make up for

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A NEW GENERATION OF METAL ITEMS
LEATHER GOODS + UMBRELLAS

Productos

<table>
<thead>
<tr>
<th>Quant.</th>
<th>Exp (000 €)</th>
<th>Aver. price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belts</td>
<td>4,24</td>
<td>83,095</td>
</tr>
<tr>
<td>Handbags</td>
<td>11,796</td>
<td>62,160</td>
</tr>
<tr>
<td>Suitcases</td>
<td>1,370</td>
<td>89,063</td>
</tr>
<tr>
<td>Backpacks</td>
<td>2,259</td>
<td>76,057</td>
</tr>
<tr>
<td>Bags (travel/sports)</td>
<td>1,280</td>
<td>49,000</td>
</tr>
<tr>
<td>Work items</td>
<td>1,026</td>
<td>75,576</td>
</tr>
<tr>
<td>Wallets</td>
<td>3,444</td>
<td>79,017</td>
</tr>
<tr>
<td>Saddles</td>
<td>4,171</td>
<td>62,858</td>
</tr>
<tr>
<td>TOTAL LEATHER GOODS</td>
<td>26,013</td>
<td>1,088,029</td>
</tr>
<tr>
<td>Umbrellas</td>
<td>2,777</td>
<td>32,944</td>
</tr>
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<tr>
<td>TOTAL LEATHER GOODS + UMBRELLAS</td>
<td>31,190</td>
<td>1,182,965</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quant.</th>
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The drop recorded in the first two fractions. The first 9 months' figures show a contraction in household's purchases of leather goods of about -3% in volume, with -1.4% in spending. Unfavorable trends also decreased slightly [-1.5% in volume, but stable in spending], and above all, -1.7% in quantity, and -3.1% in value. Purchases of portfolios also decreased slightly [-1.5% in volume, but stable in spending], and bags and Moroccan items (with modest increases in spending). Backpacks bucked the trend, recovering compared to 2018.

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A major growth on the US market

A positive trend for Made in Italy men’s fashion which closed 2019 with a growth of 4% and a total turnover of 9.9 billion euro (SMI was commissioned these preliminary figures by Centro Studi di Confindustria Moda). The sector was still driven by the exports (+7.8%), thanks to which production also started to increase again (+1.9%). The overall level of foreign sales was 6.9 billion euro. A positive sign for imports too (+7.3%) which should be over 4.6 billion euro. Given the trend of foreign trade, the sector’s trade balance, in the 12 months of the year, is estimated at around 2.2 billion euro, with a surplus of around 185 million compared to 2018.

**Foreign trade in the first nine months of 2019**
Based on ISTAT data, from January to September, exports reached 5.6 billion euro, recording a growth of +9.9%. Imports also performed well, which - with 4.3 billion euro – increased by +9.3%.

The first 9 months’ trade balance was around 1.3 billion euro showing an increase of 137 million euro compared to the figure for the first nine months of 2018. The positive trend involved both the EU (+14.7% import, +9.5% export) and non-EU countries (+5.8% import, +10.4% export). Growth was widespread among the different countries: the only exception within the "top 20" was Russia – which was in decline. The United Kingdom, towards which exports grew by +23.3% compared to the corresponding nine months of 2019, got the first place. Switzerland follows in second place, still increasing at a similar pace registered in 2018, i.e. +20.6%, a result due to Switzerland role as a logistic-commercial platform for many international operators in the fashion sector. Satisfactory performances were registered for both Germany and France: sales of menswear grew by +5.5% and +9.3%, respectively. Spain, on the other hand, recorded a more moderate +1.7%.

With reference to non-European markets, the United States recorded significant growth in men’s fashion purchases: 471 million euro (+10.2%). Looking at the Far East, Hong Kong and China grew by +8.5% and +13.9% respectively, overall, exports to these countries reached 523 million euro, thus effectively exceeding sales in France. Significant increase in exports also to Japan (+18.2%), the country to which 4.4% of the sector’s product was directed.

Similar double-digit growth of

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**Bilancio preconsuntivo 2019 per la moda maschile made in Italy**

**Importante crescita sul mercato USA**

Trend positivo per la moda maschile made in Italy che archivia il 2019 con una crescita del 4% e un fatturato complessivo di 9,9 miliardi di euro [dati a preconsuntivo commissionati dal Centro Studi di Confindustria Moda a SMI]. Traino per il settore resta ancora l’export (+7.8%), grazie al quale è tornata ad aumentare anche la produzione (+1.9%). Il livello complessivo delle vendite estere è stato di 6,9 miliardi di euro. Segno positivo anche per l’import (+7.3%) che si dovrebbe attestare oltre i 4,6 miliardi. Visto il trend degli scambi con l’estero, la bilancia commerciale del settore, nei 12 mesi dell’anno, si stima di circa 2,2 miliardi di euro, con un surplus rispetto al 2018 di circa 185 milioni.

Il commercio con l’estero nei primi nove mesi del 2019
Sulla base dei dati ISTAT da gennaio a settembre le esportazioni che si sono attestate a quota 5,6 miliardi di euro, facendo registrare un +9.9%. Bene anche l’import, che con 4,3 miliardi è aumentato del +9.3%.

Il saldo commerciale dei primi 9 mesi risulta quindi pari a circa 1,3 miliardi di euro e mostra un incremento di 137 milioni rispetto al dato dei primi nove mesi del 2018. Il trend positivo ha interessato sia le aree UE (+14,7% import, +9,5% export) sia i Paesi extra-UE (+5,8% import, +10,4% export). Le crescite risultano generalizzate per i diversi stati: tra i “top 20” fa eccezione solo la Russia, che risulta in flessione. Al primo posto passa il Regno Unito, paese verso il quale...
Con riferimento ai mercati extra-europei, gli Stati Uniti fanno registrare una crescita importante degli acquisti di moda maschile: 4/71 milioni di euro (+10,2%). Se si guarda al Far East, Hong Kong e Cina crescono rispettivamente del +8,5% e del +13,9%; complessivamente l'export verso questi Paesi raggiunge i 523 milioni di euro, superando così di fatto le vendite di moda in Francia. Aumento importante anche della quota del prodotto stabilita direttamente da 4,4% del prodotto del settore. Altra variazione double-digit, pari al +15,7%, interessa la Corea del Sud. La Russia, unico mercato in controtendenza, cede il -5,4%. Da ultimo, Austria e Belgio crescono l'una del +19,5% e l'altra del +6,1%. Il Canada, nel periodo gennaio-settembre 2019, fa registrare un aumento degli acquisti pari al +8,8%.

Il trend negativo per il settore moda è confermato. L'acquisto di modo a prezzo ridotto nell'ultimo periodo è aumentato del 3,7%. Con rispetto alla distribuzione, a seguito di un notevole aumento del +4,5%. Le impresa di prodotti antiscivolo, che hanno registrato un aumento del +20,6%, sono state di notevole importanza per il settore moda. Inoltre, il mercato dei prodotti di moda a basso costo ha registrato un aumento del +3,7% nell'ultimo periodo. Con riferimento ai mercati extra-europei, gli Stati Uniti fanno registrare una crescita importante degli acquisti di moda maschile: 4/71 milioni di euro (+10,2%). Se si guarda al Far East, Hong Kong e Cina crescono rispettivamente del +8,5% e del +13,9%; complessivamente l'export verso questi Paesi raggiunge i 523 milioni di euro, superando così di fatto le vendite di moda in Francia. Aumento importante anche della quota del prodotto stabilita direttamente da 4,4% del prodotto del settore. Altra variazione double-digit, pari al +15,7%, interessa la Corea del Sud. La Russia, unico mercato in controtendenza, cede il -5,4%. Da ultimo, Austria e Belgio crescono l'una del +19,5% e l'altra del +6,1%. Il Canada, nel periodo gennaio-settembre 2019, fa registrare un aumento degli acquisti pari al +8,8%.

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### Primo piano mercati

**Paesi Bassi e Belgio, rispettivamente in crescita del +29,7% e del +11,4%, paesi che rappresentano una porta di ingresso privilegiata per le produzioni asiatiche.**

Terzo fornitore di moda maschile risulta la Romania, in aumento del +6,2%, seguita dalla Francia, che dopo la crescita molto sostenuta dello scorso anno, cede il -2,4%. Importante il trend degli acquisti dalla Spagna (+78,1%) anche se sul totale dell’import l’incidenza è del 5,2%. Di contro, calano gli acquisti dalla Tunisia (-3,1%).

Sempre con riferimento all’import crescono non solo Turchia (+8,0%) e Bulgaria (+5,0%), ma anche Vietnam (32,1%), Cambogia (+20,0%) ed India (+5,1%).

### Consumi e distribuzione in Italia

Le aspettative a consuntivo per il consumo sul mercato interno (anno solare 2019) sono di un calo del 3,5% in valore.

Nel complesso il comparto accusa una flessione piuttosto accentuata (-5,3%) rispetto alla precedente stagione Autunno/Inverno (chiusa, invece, a -2,2%). La flessione riguarda sia gli acquisti in valore sia in volume. Relativamente alla distribuzione si conferma il trend negativo per il dettaglio indipendente (-5,7%), mediatamente sell-out erano anche noti in large-scale distribution, for both large surfaces, which recorded -20,6%, and department stores, down -4,1%; on the other hand, the food channel increased (+37,6%).

After the slowdown of the 2017/18 A/W season (-1,4%), e-commerce experienced a deterioration in intermediate sales, losing -9,6%. Basically, online sales contraction affected all the various men’s lines, with the only exception of light knitwear and leather clothing. Online purchases, however, had a market share of 6,7%, which was slightly lower than Textile-Clothing as a whole, i.e. 7,3% in the same period.

According to estimates released last October by IMF analysts, in 2020 the world economy should grow by +3,4% (with advanced economies increasing by +1,7% and emerging ones by +4,6%).

### ITALIAN MEN’S FASHION: FOREIGN TRADE*

*January-September 2019*

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<th>Import</th>
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**Top 15: suppliers**

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<thead>
<tr>
<th>Countries of origin</th>
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<th>Share %</th>
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<td>Bangladesh</td>
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<td>France</td>
<td>276</td>
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<td>Tunisia</td>
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<td>Netherlands</td>
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<td>Germany</td>
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<tr>
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**Top 15: customers**

<table>
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<tr>
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<th>Change %</th>
<th>Share %</th>
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<td>Switzerland **</td>
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<td>9.3</td>
<td>9.3</td>
</tr>
<tr>
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<tr>
<td>China</td>
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<td>13.9</td>
<td>4.5</td>
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<tr>
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<td>18.2</td>
<td>4.4</td>
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<tr>
<td>Netherlands</td>
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<td>3.3</td>
<td>3.0</td>
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<td>South Korea</td>
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<td>2.6</td>
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<tr>
<td>Russia</td>
<td>130</td>
<td>-5.4</td>
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<td>Austria</td>
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<td>1.7</td>
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<tr>
<td>Canada</td>
<td>77</td>
<td>8.8</td>
<td>1.4</td>
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</table>

Source: Confindustria Moda on ISTAT data

(*) Unlike the data shown in Table 1, this aggregate includes Junior products.

(**) To be considered primarily logistic and commercial platform.
le molteplici linee maschili, con la sola eccezione della maglieria leggera e della confezione in pel- le. Gli acquisti in rete presentano, comunque, uno share del 6,7% del mercato; tale quota risulta, peral- tro, lievemente inferiore a quella del Tessile-Abbigliamento nel suo complesso, quantificata al 7,3% nel medesimo periodo. Secondo le proiezioni diffuse lo scorso ottobre dagli analisti dell’IMF, nel 2020 l’economia mondiale dovrebbe crescere del +3,4% (con le economie avanzate in au- mento del +1,7% e le economie emergenti del +4,6%).

Source: Confindustria Moda on ISTAT data
(*) Unlike the data shown in Table 1, this aggregate includes Junior products.
The tannery sector in Italy in 2019

According to current estimates, the Italian tanning industry will close 2019 with an overall drop of 7.8% in value of production and 12.5% in terms of volume of square meters of finished leather produced (for the sole leather segment the drop in kg is -8.1%). The negative situation seems mostly linked to the international situation of economic uncertainty, apparently urging some important customer groups (especially footwear and automotive) towards a greater use of cheaper alternative materials, to boost margins and consumption recovery. Leather goods tanning products are generally more satisfactory, while furniture is stagnant.

Whether the trend during the year has shown a progressive worsening of general demand dynamics, in geographical detail, the average sales data drop on the domestic market (-4.4% in value) appear slightly less strong than that recorded on foreign markets (which keep absorbing over 75% of Italian leather production). Exportsof the sector, destined every year to about 120 countries, in fact, decreased overall by 8.8% in value in the period analyzed. The results on the main foreign countries of destination show rare exceptions to the general negative picture. The Chinese region [China plus Hong Kong] proves to be the first international landing place for Italian hides, with a share of 11% of total exports, but the value of these flows during the past year has decreased by more than 23%. Double digit decreases also for Romania (-16%), Spain (-12%), Germany (-11%), Portugal (-13%), Poland (-17%), Bulgaria (-11%),...
and Hungary (-21%). Less dramatic drops for France (-1%), USA (-8%), United Kingdom (-7%), South Korea (-2%), and Tunisia (-3%). The above-mentioned exceptions are Vietnam (stable), Serbia (+13%), Albania (+1%), Czech Republic (+24%), and India (+18%).

The economic downturn involved all the main production segments by animal origin. The production of cowhides (both small – calves – and medium-large) showed slightly lesser falls compared to the overall sectoral data on the volume front, but lost a few percentage points more in the reference values. On the other hand, the situation is diametrically opposite for sheep and goats.

Since 1969...

Courage, Reliability in work, Respect of rules and Curiosity for innovation

Respect for colleagues, for suppliers and for Customers

The awareness that a cohesive team works better for itself and for the company

Respect towards Customers to build a long-term partnership

Never stop dreaming, letting dreams come true

Enrico and Rita founded Lamebo on these values and...

...this will be our belief forever!

Gabriella
TECNOGI S.p.A., established by Giardini family in 1979, a leading manufacturer of technical fabrics for footwear and already a minority shareholder of SIPOL S.p.A., has completed the extraordinary transaction for the purchase of the majority of the latter’s share capital. TECNOGI and SIPOL – which develops and polymerizes copolyesters and copolymides for hot melt adhesives, high-performance technopolymers and biopolymers – had already been working closely together for some time, effectively combining their technological know-how and making the most of their position on the international footwear market.

The acquisition by the company from Borgolavezzaro, as TECNOGI turns forty, is a further step in the strategic project for development in areas close to TECNOGI’s core business by moving into the biodegradable polymers, technopolymers, automotive, packaging and textile sectors. In the last of these segments, a historic partnership has been established with the company CEPAT AG from Chur, Switzerland, which owns the CEPATEX brand.

Gianni Zanetti, CEO of TECNOGI, commented: “Both the ownership and the management are very satisfied with this transaction, which we were extremely determined to complete. It offers an extraordinary opportunity for growth for the Group in this year of its 40th anniversary”. The CEO of SIPOL, Massimo Cattaneo, said: “Of the various options on the table, this one was the most welcome, and the best from every point of view. The business plan developed along with the acquisition project is ambitious, but I believe that with the support of TECNOGI we will be able to achieve all our objectives within the deadlines set.”
“DETAILS MAKE PERFECTION AND PERFECTION IS NOT A DETAIL.”

“I DETTAGLI FANNO LA PERFEZIONE E LA PERFEZIONE NON È UN DETTAGLIO.”

Leonardo Da Vinci

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LINEA SOTTOPIEDI
insoles line

A/3E
GARBATRICE
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LINEA CONTRAFFORTI
counters line

SPM/15
GARBATRICE
moulding machine
LINEA SOTTOPIEDI
insoles line

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"If your splitting band knife does not exist, we will make it to measure for you!"

Lamebo: the will to innovate and always take new challenges never stops

After reaching 50 years in the business, Lamebo looks at the future by investing in a new production line to expand its product range. In 1969, Enrico and Rita Bocca founded Lamebo s.r.l., “the Italian alternative to splitting band knives made abroad.” Having become the most important Italian splitting band knife manufacturer, Lamebo began climbing to international markets, thanks to a new expansion phase entrusted to Gabriella Marchioni Bocca. Since then, Lamebo keeps being one of the leading companies at an international level, thanks to continuous research of increasingly performing steels, constant technological innovation and, last but not least, the pre- and post- service, increasingly requested by customers in the 90 countries to which it exports.

A few days after the ‘50-year-in-the-business’ celebrations ended, it was Gabriella Marchioni Bocca herself to define the immediate future projects by investing in a new production line that will allow Lamebo to expand into other sectors, in particular that of expanded products, but not only.

Proud of its 50 years of experience in the production of splitting band knives in the leather and rubber sector, today Lamebo is able to offer the best 100% Made in Italy splitting band knives also for splitting, cutting, profiling, peeling and rubber finishing, caoutchouc, latex, cork, foam rubber, polyurethane, polyethylene, polypropylene, neoprene, and all the products and derivatives of the same families, which can be processed using splitting band knives.

Dopo aver tagliato il traguardo dei 50 anni di attività, Lamebo guarda al futuro investendo in una nuova linea produttiva per ampliare la gamma dei suoi prodotti. Nel 1969 Enrico e Rita Bocca fondarono la Lamebo s.r.l., “l’alternativa italiana alle lame a spaccare di produzione estera”.

Divenuto il più importante produttore di lame a spaccare italiano, Lamebo cominciò la scalata ai mercati internazionali, grazie a una nuova fase di espansione affidata a Gabriella Marchioni Bocca, e da allora Lamebo continua ad essere una delle aziende leader a livello internazionale grazie alla continua ricerca di acciai sempre più performanti, grazie alla costante innovazione tecnologica e, ultimo ma non meno importante, grazie al servizio pre e post vendita sempre più richiesto dai clienti dei 90 paesi in cui esporta.

Conclusi da pochi giorni i festeggiamenti per i 50 anni di attività, è proprio Gabriella Marchioni Bocca a definire i progetti per l’immediato futuro investendo in una nuova linea produttiva che permetterà alla Lamebo di espandersi anche in altri settori, in particolare quello degli espansi, ma non solo. Fiera dei suoi 50 anni di esperienza nella produzione di lame a spaccare nel settore della pelle e della gomma, oggi Lamebo è in grado di offrire le migliori lame a nastro 100% Made in Italy anche per la spaccatura, il taglio, la profilatura, il peeling e la finitura di gomma, caucciù, lattice, sughero, gommapiuma, poliuretano, polietilene, polipropilene, neoprene e tutti i prodotti derivati, delle medesime famiglie, che possano essere lavorati tramite lame a nastro.
Una promessa. Una responsabilità. Una missione, a favore del pianeta. Protagonisti di una rigenerazione che ha a cuore l’ambiente, che non spreca...che rispetta. In un circolo virtuoso di saperi e pratica, la nostra materia si rinova e prende forme inedite per calzare nuovi piedi e compiere nuovi passi. capaci di lasciare un’impronta “green” sulla Terra.

A promise. A responsibility. A mission, in favour of the planet. Protagonists of a regeneration that has the environment at heart, that never wastes...that respects. In a virtuous cycle of knowledge and practice, our matter renovates and takes on new, unprecedented shapes to fit onto new feet and take new steps, able to leave a “green” mark on the Earth.
The strengths of the synergy between Omac and Robot System Automation

Robotics enters low added value processes

Omac srl, specialized in the design and construction of technologies for the leather goods sector, and Robot System Automation srl have entered a collaboration agreement that optimizes their experiences in the “leather area” sectors. The owners of the two companies explain the objectives and the various operational aspects of this new synergy.

We guess that the partnership operation launched by Omac srl with Robot System Automation srl has the purpose of responding more adequately to the requests of a technologically evolving market: what are the strengths of this agreement? Is it correct that its core is the automation of production processes?

“The strengths of the agreement are the knowledge shared by our companies - says Alberto Paccagnella of Omac. On the one hand the automation of Robot System Automation, on the other Omac’s knowledge of the manufacturing processes in the leather goods sector make the partnership between the two companies an important step for the introduction of the most advanced technologies, in a sector where the simplification of work is however essential during the whole operating cycle. Furthermore, both companies have a deep knowledge of the foreign market, an aspect that allows to study the most appropriate solutions for the different countries.”

I punti di forza della sinergia tra Omac e Robot System Automation

La robotica entra nei processi a basso valore aggiunto

La Omac srl, specializzata nella progettazione e costruzione di tecnologie per il settore della pelletteria e Robot System Automation srl hanno dato vita ad un accordo di collaborazione che ottimizza le proprie esperienze nei settori dell’"area pelle". A spiegare gli obiettivi e i vari aspetti operativi di questa nuova sinergia sono gli stessi titolari delle due aziende.

Immaginiamo che l’operazione di partnership avviata da Omac srl con Robot System Automation srl abbia lo scopo di rispondere in maniera più adeguata alle richieste di un mercato tecnologicamente in evoluzione: quali sono i punti di forza dell’accordo? È corretto mettere al centro l’automazione di processi produttivi?

“I punti di forza dell’accordo sono le conoscenze che accomunano le nostre aziende - dice Alberto Paccagnella della Omac. Da un lato l’automatizzazione di Robot System Automation, dall’altro le conoscenze dei processi di lavorazione nel settore della pelletteria di Omac, fanno sì che la partnership tra le due aziende sia un passo importante per l’introduzione delle tecnologie più evolute, in un settore dove la semplificazione del lavoro è comunque essenziale durante tutto il ciclo operativo. Inoltre, entrambe le aziende hanno una profonda conoscenza del mercato estero, aspetto che permette di studiare le soluzioni più opportune per i diversi Paesi.”
"In all production sectors, for years, the trend has been to automate low value-added steps and complicated or dangerous processes, so as to improve the overall efficiency of the work cycle and reduce the intervention of the workforce - adds Enrico Sestini of Robot System Automation. In this sense, the collaboration between the two companies opens up the possibility of offering a full package: combining robotics with Omac’s semi-automatic and automatic machines, allows automating manual operations, giving greater profitability to the work cycle that normally has low added value."

Omac and Robot System are two leading companies, one with 60 years of history, the other more recent; is it correct to think that from this partnership also the respective companies have gained in terms of knowledge, exchange of experiences for a new and more complete approach to the market?

"Absolutely, whenever different realities manage to team up, the process leads to a mutual enrichment that allows the resolution of the more complicated technical aspects;" this is the vision of Robot System Automation which is echoed by Omac: "In this moment, the leather goods and footwear sectors are experiencing an important phase of change. In fact, both sectors are mature to face a radical change: in this perspective, the synergy between Omac and Robot System therefore becomes an important opportunity for the customer, as thanks to the experience gained over the years, the two companies will be able to quickly intercept customer problems and find the most suitable solution - says Cristiano Paccagnella, manager of Omac."

Robotics adds forcefully to the footwear and leather goods technology (as far as we are concerned); what are the latest goals achieved and what are the next challenges?"
“Certainly, the next challenges are the interconnection of all the machines in such a way as to have a high degree of control on business processes by our customers,” says Cristiano Paccagnella. The products already exist, what is missing is the possibility of interconnecting even low added value processes. All this is required because in our sector the supply of specialized labor is increasingly lower, so the leather goods manufacturers are forced to resort to advanced technology.” According to Sestini of Robot System Automation, robotics is a frontier that has long already been crossed; “For decades now, we have been working with robots in the production of technical, sports and safety footwear. Now we are aiming at the introduction in the ‘ready-to-wear’ and classic sectors, which require a very high flexibility and where the robot has to be given that typical sensitivity of handicraft productions. In leather goods, these requests add to the need of searching for solutions at relatively low costs, which allow introduction even in small companies.”

Do you think that even in this innovative area, Made in Italy technology can continue to make the difference?

“Made in Italy helps us because, thanks to our way of working, we can create quality products with fundamental characteristics, such as flexibility,” says Alberto Paccagnella.

“Even the inventiveness - typical of the Italian mentality - is an important strength. An advantage that is recognized by customers and competitors,” Sestini concludes.
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Organizers are not concerned about the drop in visitors

Overall satisfaction with the latest edition of Pitti Uomo, which in the 4 days of the event made Florence the international reference point for men’s fashion. “The most influential boutiques, large department stores, high-end e-commerce platforms – no one was missing. Having said that, there has been a decrease of about 10% in total attendance compared to last January; this was a physiological and expected drop, though, where the Italian visitors’ turnout weighs above all. We are talking of about 21,400 real buyers, of which more than 8,300 from abroad, figures that only Pitti Uomo can boast worldwide. After all, if the growth of the most solid economies is weak, if European and especially Italian consumption is stationary, if social tensions increase and the global geopolitical scenario is tense, how can we think that all this did not translate into greater prudence from buyers?” said Agostino Poletto, general manager of Pitti Immagine.

“The international calendar forced us to start immediately after the Christmas holidays, moreover coinciding with the start of the sales, which are vital for the vast majority of retailers. And this was penalizing. Next year we will postpone until the following week, and it will be good for the whole system. Anyway, all quality shows must realistically deal with the very numbers without fear. First of all, Pitti Uomo is an exhibtion of high-end men’s fashion and in this space, all over the world, distribution...”

Il calo dei visitatori non preoccupa gli organizzatori

Soddisfazione generale per l’ultima edizione di Pitti Uomo, che nei 4 giorni di manifestazione ha fatto di Firenze il punto di riferimento internazionale della moda maschile. “Le boutique più influenti, i grandi department store, le piattaforme e-commerce di fascia alta - ci sono stati tutti. Detto questo, c’è stato un calo di circa il 10% delle presenze totali rispetto allo scorso gennaio, ma è un calo fisiologico e atteso, dove pesa soprattutto l’affluenza dei visitatori italiani. Si parla di circa 21.400 veri compratori, di cui più di 8.300 esteri, dimensioni che solo Pitti Uomo può vantare a livello mondiale. D’altra parte se la crescita delle economie più solide è debole, se i consumi europei e soprattutto italiani sono stazionari, se le tensioni sociali aumentano e lo scenario geopolitico globale è teso, come possiamo pensare che tutto ciò non si traduca in una maggiore prudenza da parte dei compratori?” ha detto Agostino Poletto, direttore generale di Pitti Immagine.

“Il calendario internazionale ci ha imposto di partire immediatamente a ridosso delle vacanze natalizie, oltretutto in coincidenza con l’avvio dei saldi, che per la stragrande maggioranza dei dettaglianti sono vitali. E questo è stato penalizzante. Il prossimo anno slitteremo alla settimana successiva e sarà un bene per l’intero sistema. Ma quello dei numeri nudi e crudi è un fatto con il quale tutti i saloni di qualità devono confrontarsi con realismo e senza paura. Anzitutto Pitti Uomo è una rassegna della moda maschile di fascia alta e in...”
DISTRIBUTION IS FOCUSING AT AN ACCELERATED PACE, NOT TO MENTION THE GROWING SALES SHARES ON QUALITY ONLINE PLATFORMS. FOR US ITALIANS IT WOULD BE ENOUGH TO WALK THE STREETS TO REALIZE HOW MANY STORES HAVE CLOSED IN RECENT YEARS. ALSO THE BIG BRANDS ARE MAKING A SELECTION AND ARE REVIEWING THE DISTRIBUTION POLICY, DRASTICALLY REDUCING THE TRADITIONAL FORMULA THAT DOES NOT GIVE ANY GUARANTEE OF DURABILITY,” SAID RAFFAELLO NAPOLEONE, CEO OF PITTI IMMAGINE.


The 20 most important markets of Pitti Uomo were: Germany, Japan, the Netherlands, the United Kingdom, Spain, Turkey, France, Switzerland, Belgium, the United States, Russia, Korea, China, Austria, Greece, Portugal, Sweden, Denmark, Canada, and China-Hong Kong.
Expo Riva Schuh and Gardabags: A fixed stage for large buyers

Expectations met!
The event holds!

The 93rd edition of Expo Riva Schuh and the fourth edition of Gardabags — events dedicated to volume footwear and leather goods — closed with stable results and in line with the organizers’ expectations.

“The strength of the two events is their high international connotation: in over 40 years of Expo Riva Schuh’s history, we have in fact developed a policy of alliances and relationships with various market players, managing to involve companies and buyers from all over the world,” said Roberto Pellegrini, President of Riva del Garda Fierecongressi.

The ever-growing network of relationships with the main players in the footwear and accessory sector was witnessed by the participation, during the last edition, of about twenty collectives, associations, and groups of exhibitors from countries of strategic importance for the sector such as Italy, China, India, Brazil, Turkey, Portugal, Great Britain, Bulgaria, Spain, Hong Kong, and Pakistan.

With this in mind, the presence of buyer delegations from Peru, Colombia, Romania, Croatia, Poland, Sweden, Russia, Ukraine, and Kazakhstan has also been enhanced and promoted.

The 1,310 brands represented at the 93rd edition of Expo Riva Schuh (of which 266 Italian and 1,044 foreigners), and the 78 companies of the 4th edition of Gardabags (of which 36 Italian and 42 foreigners), showcased their sample on a total area of over 33,000 mq.

Expo Riva Schuh e Gardabags: tappa obbligata per i grandi buyer

Aspettative rispettate! La manifestazione tiene!

Si chiudono con risultati stabili e in linea con le aspettative degli organizzatori la 93esima edizione di Expo Riva Schuh e la quarta edizione di Gardabags, appuntamenti dedicati a calzatura di volume e pelletteria.

“Punto di forza delle due manifestazioni si conferma la forte connotazione internazionale: in oltre 40 anni di storia di Expo Riva Schuh abbiamo infatti sviluppato una politica di alleanze e relazioni con diversi attori del mercato, arrivando a coinvolgere aziende e buyer provenienti da ogni parte del mondo”, ha detto il presidente di Riva del Garda Fierecongressi Roberto Pellegrini.

La sempre più ricca rete di rapporti con i principali protagonisti del settore della calzatura e dell’accessorio è stata testimoniata dalla partecipazione, durante l’ultima edizione, di una ventina di collettive, associazioni e gruppi di espositori provenienti da Paesi di importanza strategica per il settore come Italia, Cina, India, Brasile, Turchia, Portogallo, Gran Bretagna, Bulgaria, Spagna, Hong Kong e Pakistan.

In quest’ottica è stata potenziata e promossa la presenza anche di delegazioni di buyer provenienti da Perù, Colombia, Romania, Croazia, Polonia, Svezia, Russia, Ucraina e Kazakistan.

1.310 brand rappresentati alla 93a edizione di Expo Riva Schuh [di cui 266 italiani e 1.044 stranieri], e le 78 aziende della quarta Gardabags, di cui 36 italiane e 42 estere, hanno presentato il loro campionario su una superficie complessiva di oltre 33.000 mq.

Significativa anche per questa edi-
33,000 square meters. Also important in this edition was the presence of fidelized companies, which represented 95% of the exhibitors attending the fair. Expo Riva Schuh and Gardabags do not lose exhibitors, and keep being considered ideal venues to ensure the planning of business meetings, also thanks to their strategic location in relation to the sector trade fair calendar, in which they are placed as the first international event at the beginning of the year for the fashion accessory.

A perfect balance between supply and demand help strengthening the event’s reputation. “In line with the market dynamics, as regards production and consumption, the most important protagonists of Expo Riva Schuh and Gardabags were China, Italy, and India, with an attendance of 398, 302 and 112 exhibitors, respectively” says Carla Costa, Fair Area Manager of Riva del Garda Fierecongressi. “Today we notice that the price range of the showcased and sought-after products within the fair is rising slightly, reaching between 16 and 30 euro. Another significant fact is the presence, among buyers, of the large distribution chains (50+ stores), responsible of 20% of the footwear orders globally. The training proposal of Expo Riva Schuh and Gardabags was also highly appreciated by companies and buyers. With its list of events dedicated to sustainability in fashion, circular economy, design and new purchasing habits, the fair has in fact once again highlighted its fundamental role as a laboratory of ideas, creativity, knowledge, and skills for the footwear and leather goods market.

The next appointment with the 94th edition of Expo Riva Schuh and the 5th edition of Gardabags is schedule on 13 to 16 June, 2020.
Pitti bimbo (16-18 January, 2020 - Florence)

High attendance of international buyers

"Pitti Bimbo is the spokesperson for a sector that wants to respond to a complex economic phase with creativity, innovation and the highest quality in children’s fashion and lifestyle proposals - says Raffaello Napoleone, CEO of Pitti Immagine. The first thing that was noticed when entering the pavilions and the different sections was the great work done by the over 550 exhibitors who participated in this edition, and the creativity expressed by their new collections, which denote an increasing attention not only to research and the most innovative fashion trends, but also to the hottest topics of the contemporary world, where the environmental respect and sustainable production processes are the foremost."

The first data on this edition’s final turnout shows a presence of around 5,900 buyers - slightly down compared to a year ago due, above all, to the drop in Italian buyers. Foreign buyers’ attendance was steady and registered over 2,300 people representing 80 countries. Among foreign markets, important numbers from Russia (which got back being the show main reference market) and from France were registered; positive performances were also recorded for buyers from the United States, China, and the United Arab Emirates. The total number of visitors to the event reached 10,000.

“Kidswear is undoubtedly going through a complex evolution phase, which all operators are aware of - said Agostino Poletto, general manager of Pitti Immagine. A critical phase characterized by difficulties of Italian domestic consumption, still quite accentuated, and that of some international markets and scenarios, and above all a paradigm shift in the market, re oltre 2.300 presenze in rappresentanza di 80 paesi. Tra i mercati esteri si stanno registrando conferme importanti nei numeri dalla Russia (che torna a essere il primo mercato di riferimento del salone) e dalla Francia, e performance positive per i buyer da Stati Uniti, Cina ed Emirati Arabi. I visitatori complessivi della manifestazione hanno raggiunto le 10.000 presenze. "Il kidswear sta indubbiamente vivendo una fase di evoluzione complessa, di cui tutti gli operatori sono consapevoli – ha detto Ago.
which causes the more traditional product segments to suffer particularly. In light of this, Pitti Bimbo proves once again its strategic role at a commercial level, its experimental vocation, which moves in the name of research extended to all areas of the children's universe, and its high profile as an international fair both as regards exhibitors and buyers."

The ranking of the top 15 markets of Pitti Bimbo sees Russia come back in the lead, followed by Spain, the United Kingdom, Germany, Turkey, Ukraine, France, China, Holland, Belgium, Greece, the United States, Korea, Poland and Japan.
FUTURMODA, a growing fair

Optimism for the 43rd edition of the fair

The organizational machine of FUTURMODA – international fair of leather goods, components and footwear and leather goods machinery – warms up its engines and is preparing to stage the first of the two annual editions which will be held on 11 to 12 March of this year in Elche (Spain).

The organizers’ expectations are more than fair, as the past edition of the fair (October 2019) was positive both for the many exhibitors who hit their target and for visitors who had the opportunity to see a wide range of products, able to meet the needs of a different target of sector operators. The exhibition, which covers over 13,000 square meters, in the October edition hosted 311 exhibitors representing 430 brands, with a percentage of foreign visitors of 34%; Italy in the lead with 23% of companies, followed by Portugal (5%), France, Brazil, China, Turkey, and India which together made up the remaining 6%. Especially high in the two days of the fair was the turnout of visitors, which registered 7,000 operators from Spain, France, Italy, Portugal, Germany, Turkey, United Kingdom, Algeria, Argentina, Belgium, China, Chile, Peru, Colombia, Cuba, the Dominican Republic, the Netherlands, Poland, Romania, Russia, Serbia, Sierra Leone, Sweden, Switzerland, Egypt, Morocco, Nigeria, Pakistan, Palestine, India, the United States, and Japan.

The next edition of FUTURMODA will include areas dedicated to the stylistic themes that will dominate the spring-summer 2021 season, and events on environmental sustainability and the circular economy. One of the most representative projects will be FUTURMODAGREENPLANET, an event that will involve experts on these issues and the companies as well.

FUTURMODA, una fiera in progressiva crescita

Ottimismo per la 43° edizione della fiera

La macchina organizzativa di FUTURMODA, fiera internazionale di pelletteria, componenti e macchinari per calzature e pelletteria, scalda i motori e si prepara a mandare in scena la prima delle due edizioni annuali che si terrà dall’11 al 12 di marzo di quest’anno ad Elche (Spagna).

Le aspettative degli organizzatori sono più che buone, in quanto l’ultimo appuntamento della fiera (ottobre 2019) è stato positivo sia per i molti espositori che hanno centrato il loro obiettivo, sia per i visitatori che hanno avuto modo di vedere un’ampia gamma di prodotti, in grado di soddisfare le esigenze di un target differente di operatori del settore.

La fiera, che si estende su oltre 13.000 metri quadrati, nell’edizione di ottobre ha ospitato 311 espositori in rappresentanza di 430 marchi, con una percentuale di presenze straniere che ha toccato il 34%. Italia in testa con il 23% delle aziende, seguita da Portogallo (5%), Francia, Brasile, Cina, Turchia e India che complessivamente hanno costituito il restante 6%. Particolarmente elevata nei due giorni di fiera, l’affluenza dei visitatori che ha fatto registrare 7000 operatori provenienti da Spagna, Francia, Italia, Portogallo, Germania, Turchia, Regno Unito, Algeria, Argentina, Belgio, Cina, Cile, Perù, Colombia, Cuba, Repubblica Dominicana, Paesi Bassi, Polonia, Romania, Russia, Serbia, Sierra Leone, Svezia, Svizzera, Egitto, Marocco, Nigeria, Pakistan, Palestina, India, Stati Uniti e Giappone.

La prossima edizione di FUTURMODA prevede aree dedicate ai temi stilistici che domineranno la stagione primavera-estate 2021 ed eventi sulla sostenibilità ambientale e l’economia circolare.
TOE PUFFS, COUNTERS
WATER AND SOLVENT BASED ADHESIVES
MADE IN ITALY SINCE 1918.
ELITE is the name of the latest proposal by Selasti, which with this E.V.A. sole line expands its offer in the footwear sector. The collection, full of models with stylish and highly attractive designs, will be present at Lineapelle in a wide range of colors and finishes. The entire sole production cycle, i.e. from the compound formulation to the injection process, is carried out inside the Pontassieve plant (Florence); just as it has been done for more than 50 years for microporous and foam rubber sheets, items for which the Tuscan company is among the market leaders worldwide. As far as the stylistic research and mold design work is concerned, the most qualified professionals in the sector are constantly supported by the internal staff of Selasti, who boasts a long experience both in the management of the specific material and in the production process. From this collaboration, a product which reflects the fashion trend - but also the technical characteristics of a light and flexible material – was realized. The customer’s idea is “transformed” into reality, summarizing in a sole the concept of quality that distinguishes Selasti and its experience in creating ad hoc compounds. This is the key formula that the Tuscan company has decided to
introduce in a market increasingly demanding and looking for personalized products. For this reason, ELITE was assigned more meanings, creating a story that reflects the spirit with which the company faces this commitment to the market.

E as ELITE:
- E as Evolution of the project, process, and product development;
- E as an Expression of ideas, modern concepts, and relationships;
- E as the Elegance of forms, behaviors, and thoughts;
- E as EVA - LITE, the most refined part of a group, environment, activity and a product;
- E as ELITE: modern version of an ancient but always very current concept, such as that of "Customized product".

ELITE si sono voluti attribuire più significati, creando una storia che rispecchia lo spirito con il quale l’azienda affronta questo impegno con il mercato.

E come ELITE:
- E come Evoluzione del progetto, del processo e dello sviluppo del prodotto;
- E come Espressione di idee, di concetti moderni e di rapporti;
- E come Eleganza di forme, di comportamenti e di pensiero;
- E come EVA – LITE, la parte più raffinata di un gruppo, di un ambiente, di un’attività, di un prodotto;
- E come ELITE: versione moderna di un concetto antico ma sempre molto attuale come quello del “Prodotto su misura”.

SOLLINI ACCESORIOS
PARA CALCADO UNIP. LDA
Rue das Pedras Agudas L2 Fr B
Revilhade 4550-372 Freguesias
+351-295-330111
susaera@sollini.pt

SOLLINI GINO Srl
Via Sant'Iaodoro, 53
63813 Monte Urano (FM)
+39 0734 84791
sollini@sollini.com

S.C. ETG SOLLINI S.R.L.
Str. Ruderia nr 25
Timisoara - Jud. TIMIS
Romania
+40 256472212
sollini@sollini.ro

SOLLINI ALBANIA Sh.p.k
Lagja 3 Rruga e Re Porti
Kompleksi i Pelletave
Bihore, Kamez
Albania
eduardo@sollini.al

www.sollini.com
The most recent

Review of materials 2020

out the different manufacturing processes - extrusion, coating and the most recent DOTS system, which allows point distribution of the adhesive. The DOTS technology, recently introduced in the company, also gives its name to the new articles that enrich the GUPER line with the same criterion used for the different reinforcement fabrics that take their name from the glue used for their production, such as: TAG, TAG Special and TMS. These types of adhesives have high technical characteristics and ensure the finished product a soft hand and a high hold of the lamination on a wide range of leathers (even the greasiest), and different kind of synthetic materials. Among the new generation reinforcements there is the double body jersey, a support that ensures high mechanical strength and perfect crimping. Innovation also within the BIOREL line - biodegradable and compostable material. The latest offering in this product family is BIOREL 72G/61, which is made with a pure cotton cloth, free of any impurities, including additives used for processing and the very wax used in spinning.

TECNOGI

Tecnogi – an Italian brand that certainly needs no introduction – has put together, for several years now, the well-known line of materials for the production of toe-puffs and counters with the GUPER family of fabrics for reinforcing footwear and boots. The evolution of these items kept pace with the numerous investments made by the company to move freely, both in the formulation of the adhesives to be applied to the fabric, and in the technologies necessary to carry

Tecnogi – un italiano che non ha certo bisogno di presentazioni, la Tecnogi ha affiancato ormai da diversi anni alla conosciuta linea di materiali per la produzione di puntali e contrafforti, la famiglia dei tessuti GUPER per il rinforzo di calzature e stivali. L’evoluzione di questi articoli è andata di pari passo con i numerosi investimenti sostenuti dall’azienda per muoversi in piena autonomia, sia nella formulazione dei collanti da applicare al tessuto, sia nelle tecnologie necessarie per realizzare i differenti processi di lavorazione: estrusione, spalmatura e il più recente sistema DOTS che permette la distribuzione a punti del collante. La tecnologia DOTS, introdotta da poco in azienda, dà anche il nome ai nuovi articoli che arricchiscono la linea GUPER. Lo stesso criterio è impiegato per i diversi tessuti di rinforzo GUPER che prendono il nome dal collante impiegato per la loro produzione, quali: TAG, TAG Special e TSM. Questi tipi di collanti hanno elevate caratteristiche tecniche e assicurano al prodotto finito una mano morbida e una elevata tenuta dell’accoppiatura su una vasta tipologia di pellami (anche i più grassi) e materiali sintetici di diverso tipo. Tra i rinforzi di nuova generazione figura il jersey a doppio corpo, un supporto che assicura una elevata resistenza meccanica e una cambratura perfetta. Novità anche nella linea BIOREL: materiale biodegradabile e compostabile studiato per la produzione

primo piano materiali

Rassegna materiali 2020

I più recenti

TECNOGI

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CT POINT

C.T. POINT has eventually got the new EcoGreen ready: high tenacity polyester sewing threads that are produced using post-consumption plastic waste recycling. This investment, which required major commitment on several fronts, allowed the company in the Abruzzo region to confirm its focus on the environment, which has always been accompanied by that on workers’ safety.

"Over the years - said Vanessa Elisii, CEO of the company – we have invested in different kind of certifications, so that customers and collaborators could be assured on how essential for C.T. POINT S.P.A. specific social values are.

"For this reason we all have worked together - continued Vanessa Elisii - in order to obtain the recognition of the Environmental Management System according to the UNI EN ISO 14001:2015 standard, of Quality according to UNI EN ISO 9001:2015 standard, and STANDARD 100 of OEKO-TEX for meeting the human-ecological requirements of its products."

C.T. Point production has always stood up on the market for its high technical characteristics that ensure the highest precision level and long-life span. Made from 100% recycled material, the EcoGreen items include both twisted and braided sewing threads; the latter can be made in semi waxed, waxed, or lubricated finishes.

The high tenacity twisted sewing thread in the line Platinum EcoGreen is available with the following counts: 20/3, 30/3, 40/3. The high tenacity braided sewing thread in the line Platinum Braid EcoGreen is available with the following counts: 0.8 mm, 1.0 mm, 1.2 mm. The EcoGreen line also supports the previous products already made by the company, with the aim of giving an effective response on the issue of environmental sustainability: PFC FREE (Perfluorocarbons) in the WATER PROOF version, both in polyester and polyamide sewing threads, and Solvent FREE in the BONDING line, both in monofilament and three-filament versions. "C.T. Point for the environment" is the active commitment of this company to provide customers with more sustainable products, in such a way as to ensure the life and recovery of the environment.

The main sectors of reference for C.T. POINT products are footwear, leather goods, furniture, and some technical segments. The company’s research and development laboratory is always very busy. It is thanks to its work that the most diverse needs are met, in both the most performing and technical sectors and in those dedicated to fashion.
Bonded leather has entered for good on the “top ten” list of the most used materials in the leather sector, and not only. It could not be otherwise, given the increasing attention of the market to the environment and its health. Today, environmental sustainability involves everyone, from the consumer to the producer, and among the first being called to contribute to this issue are the most relevant companies. Founded in 1958, Prodotti Alfa has become a point of reference for the various sectors in which this material is naturally used; leather goods, footwear, bookbinding, furniture, and packaging. Thanks to its commitment to quality research and refinement techniques, the company operates on the international market and is also a privileged partner of many fashion brands.

Recently, Prodotti Alfa has introduced a new line of bonded leather branded Corium® - a material with unique technical characteristics, and the items produced with it have higher performances compared to the traditional bonded leather. Ductile and very elastic, Corium® ensures a high mechanical strength [tearing and strain], a soft hand to the touch and an easiness of working typical of classic leather; as the latter, in fact, it can be subjected to different finishes [cutting, seaming, edge coloring, surface retouching], and printing. The company’s novelties also include new finishes and technical features concerning both the traditional line and the branded one - anti-stain treatment, velvety coat, high resistance to rubbing, full and saturated colors.

A step forward in belts and bookbinding sectors

In these sectors, the bonded leather is no longer used just as lining or reinforcement, but also for the production of external parts. This was possible thanks to a line of items with thicknesses from 0.3 to 3 mm and an unlimited color choice.
Leading company in the production of reinforcing materials for the footwear and leather goods sector, Luigi Carnevali keeps being committed to the virtuous path of environmental sustainability. For several years, in fact, chemical products considered particularly harmful to the environment have been excluded from the production cycle of the supply chain, a choice that over time has become increasingly restrictive and has involved all its suppliers.

From packaging to shipping
Indeed, the sustainability process does not end with the product. Special attention is also paid to the packaging and materials, which, in addition to ensuring a low-impact, must be recyclable. Furthermore, the choice of suppliers relatively close to their operational headquarters allows optimizing the logistics, traceability, and timing of the production cycle steps.

New products
Carnevali’s ‘green’ aspect is also reflected in a new sample collection, which includes families of fabrics produced with recycled materials. These are high-performance items, which are consistent with the company’s policy aimed at the circular industry logic.
A leader in the manufacturing of high performance polymers intended for the adhesives and engineering plastics domains, Sipol® (Società Italiana Polimeri, Italian Polymer Company) has been present for many years in various industrial sectors, including the ones in the "leather area", for which it produces a line of materials that stand out for their quality and technical performances, perfectly aligned with the needs of the operating cycle.

The company located in Mortara (Italy) operates also in other sectors besides that of footwear, namely the automotive, packaging and industrial goods ones, for which it produces a complete range of co-polyesters and co-poliamides.

The main Sipol® products dedicated to the footwear sector are: Technipol® 170 polyester-based rod, Technipol® PA 167 polyamide-based rod for shoe lasting, and Technipol® PA/G polyamide-based granules for folding operations, which is normally used in the production of leather goods.

Sipol’s continuous research has led to the development of innovative items that stand out for their performances. These include Technipol® 170 N, an adhesive polyester rod with a higher crystallization rate compared to the standard Technipol® 170. A feature that offers a number of advantages: a reduction of the closing time of the blades, fewer strings formation and less consumption, as a lower quantity needs to be dispensed.

The company’s new products also include Technipol® PA 162, a polyamide-based adhesive rod developed to be used with the new toe lasting machines equipped with tracers, besides traditional side&seat lasting machines. Its higher rigidity and setting speed ensure excellent performances even at high production cycles. The product, as for Technipol® PA 167, is available in 3.9 mm and 4.2 mm versions.

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With its latest proposals, Texon proves to be an innovative company constantly committed to finding new solutions, in line with the market and the environment needs.

The most recent is Texon Vulcan, a counter suitable for vulcanized footwear. 15% of the material comes from a recycled source. Durable, thin and comfortable, Vulcan delivers superior performance.

With "Tomaia PRO-WEAVE", the English company gives a practical and quick answer to both the designers and manufacturing industry. In fact, the upper, made to customer design needs, can be customized using and combining threads of different consistency and color. This solution enables to optimize the different phases of the work, starting from the creative aspect up to that of the shoe construction cycle.

Careful interpreter of environmental sustainability, Texon also introduces Ecosole, a cellulosic material specifically designed for the production of insoles. To make Ecosole, the scraps from the insole factories and other industries in the paper sector are reused; on the whole, these scraps account for 60% of the fibers that make up the material. The remaining 40% consists of raw cellulose.

The product innovations are followed by commercial ones: for some months now, Texon has been the exclusive worldwide distributor of Jacroki products. These are items made with Texon cellulosic, a unique eco-friendly material for use in various sectors: clothing, manufacturers of paper products, leather goods, gifts and fancy goods.
Among the new items introduced by the company, there is a line of reinforcing fabrics made of recycled material fibers. These materials, which are part of the production cycles that characterize the circular industry, are accompanied by next-generation tapes and fabrics featuring particularly high-quality standards. The first are produced using materials such as: cotton, nylon (light or heavy), cotton-blend nylon, polyester (light or high-tenacity), paper (crepe or smooth), glass wool, and nonwoven fabrics of different kinds. Double-sided tapes, on the other hand, are made of traditional nonwoven materials, polyester, and PVC. The kind of adhesive used on tapes are: hot melt, water based, simple or modified acrylic, natural or synthetic rubber latex ones.

In recent years, the range of reinforcing fabrics has also been expanded, and now it spans from Jersey to very light cotton, backbrushed articles and nylon items. The latter, much in demand for the processing of bags and other leather goods products, are produced in different thicknesses, including high mechanical stress ones. The line of nylon fabrics also includes tear-resistant materials. The reinforcing fabrics can be customized with logos or various designs, and the adhesive—in both normal and thermo-adhesive versions—can be spread on one side or both. A product specifically designed for the production of bags is also available among the offerings of the company. This is a nylon fabric coupled to the bonded leather, or used as a core between two layers of bonded leather. Besides all of this, there is Tak-seal®, an adhesive tape that used with the dispenser projected by themselves, facilitates the temporary bonding of small components before sewing, avoiding the use of mastics or double-sided tapes. The special formulation of the micro-dot glue makes the placement or any replacement easier in case of any errors, and avoids waste of time due to the leakage or filaments of more liquid glues.

**AB ITALIA**

**primo piano materiali**

A tra i nuovi articoli presentati dall’azienda figura una linea di tessuti di rinforzo realizzata con fibre in materiale riciclato. A questi materiali, che si inseriscono nei cicli di produzione che caratterizzano l’industria circolare, si affiancano nastri e tessuti di ultima generazione che presentano standard dalla qualità particolarmente elevate. La tipologia dei nastri prevede la linea con adesivo su una sola superficie e quella dei biadesivi. La prima è prodotta impiegando materiali quali: cotone, nylon (leggero o pesante), nylon misto cotone, poliestere (leggero o ad alta tenacità), carta (crepata o liscia),
The continuous work of Industrie Chimiche Forestali, aimed at improving the mechanical and applicative features of its products, and attentive to the production process along the entire supply chain, allowed introducing in the footwear market a new line of fabrics, THEO PLUS, made of extruded thermoplastic material. This is a composite material that is produced using a multi-layer co-extrusion technology with state-of-the-art equipment, which allows a steady weight and thickness control of the article being processed, thus ensuring the desired quality standard throughout the production. THEO PLUS features excellent stiffness, resilience and elasticity; usually applied to the back of the insole, made of cellulosic cardboard, it has the dual purpose of reinforcing the material, facilitating the insole preforming, and better supporting the closure and nailing phase of the shoe seat. THEO PLUS is available with a spe-

The advantages offered by THEO PLUS fabric:
• No emissions;
• Elimination of issues arising from solvent retention;
• Reduction of processing times;
• Reduction of energy consumption and production costs.

I vantaggi offerti dal tessuto THEO PLUS:
• Assenza di emissioni;
• Eliminazione di problemi derivanti dalla ritenzione di solvente;
• Abbattimento dei tempi di lavorazione;
• Riduzione dei consumi energetici e del costo di produzione.
cial polyurethane coating spread on one side. Through proper reactivation, this allows gluing upon the insole without using solvent-based adhesives.

The use of solvent-free, thermoplastic polyurethane material enabled the making of another operator-safe product. Attention to the environment is one of the cornerstones of Industrie Chimiche Forestali research, and it is proved by the fact that all the raw materials used for the production of this new line come from recycling sources. Industrie Chimiche Forestali is committed to replace the normal solvent-based adhesives with alternatives with a lower environmental impact, therefore it has developed a line of watery dispersion polyurethane adhesives with an initial fast-setting, the Echo PU serie 29. This is a family of PU adhesives designed for be used as a single component where the addition of isocyanate cross-linking is not necessary. The specific formula of the used material allows the acceleration of the crystallization properties and the self-crosslinking, simply by heating the adhesive film to a temperature of about 70°C.

In this way, fast crosslinking reactions are triggered, which bring the adhesion force to a noticeable increase already after 5-10 minutes from the bonding. Sealing increments of more than 50% were evaluated compared to a normal polyurethane formulation. The different formulations and viscosities make this family of articles versatile and suitable for any type of application.

The primary objective of investing hard on the research and development of solvent-free, water-based adhesives is the safety and health of people all along the entire production chain. We cannot but consider advantages as:

- Absence of solvent emissions in the workplace and in the atmosphere.
- Elimination of problems arising from solvent retention.
- Reduction of plant and production costs.

Aver deciso di investire in maniera decisa sulla ricerca e sviluppo di adesivi base acqua, esenti quindi da solventi, ha come primo obiettivo la tutela della Sicurezza e della Salute lungo l’intera filiera produttiva. Non possiamo non considerare vantaggi quali:

- Assenza di emissioni di solventi nell’ambiente di lavoro e in atmosfera.
- Eliminazione di problemi derivanti dalla ritenzione di solvente.
- Riduzione dei costi di impianto e produzione.
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Davos looks at fashion thinking of the environment

"Mirage Green", a sheet produced with 50% recycled material

A careful interpreter of the circular economy, Davos keeps searching for stylistic proposals that interpret and often anticipate the needs of the most demanding manufacturers. As an example, the recent collections of thunit and rubber sole sheets, offered in different finishes. All these items have in common the possibility of being recycled, therefore responding to the 'Vegan' shoe manufacturers' needs.

Davos’s latest innovation in terms of sustainability is "MIRAGE GREEN", a RECYCLING line made with 50% recycled material, thanks to a careful and organized collection of the scraps generated in the different internal production phases. This item can be supplied with different colors both in the matt and super-glossy version. The technical features of "MIRAGE GREEN" reflect the standards of normal production and ensure the IPAH values, which are essential to get the Reach and Cads certifications, as well as the California Convention. Davos’ commitment to a greener world begins with its production facility in Cavaso del Tomba. Perfectly inserted in the environmental and landscape context, this industrial site is subject to continuous structural checks and technical renovations; within it, modern production systems are included, such as the water painting plant - where no kind of solvent is used - equipped with a computer raw-material dosing system and cooling water recirculation.

Davos guarda alla moda pensando all’ambiente

“Mirage Green”, una lastra prodotta con il 50% di materiale riciclato

Attenta interprete dell’economia circolare, Davos non rinuncia alla ricerca di proposte stilistiche che interpretano e spesso anticipano le esigenze dei produttori più esigenti. Un esempio sono le recenti collezioni di lastre per suole in thunit e in gomma, presentate nelle svariate rifi niture. Si tratta di articoli che hanno tutti come denominatore comune la possibilità di essere riciclati e di rispondere alle esigenze dei produttori di calzature "Vegan".

L’ultima novità Davos in fatto di sostenibilità è "MIRAGE GREEN", una linea RECYCLING realizzata con il 50% di materiale riciclato: grazie ad un’attenta organizzazione di raccolta degli sfridi generati nelle varie fasi produttive interne. Questo articolo può essere fornito con diverse verniciature sia nella versione opaca sia superlucida. Le caratteristiche tecniche di "MIRAGE GREEN" rispecchiano gli standard della normale produzione e garantiscono gli stessi valori IPAH determinanti alle certificazioni Reach, Cads e per la Convenzione della California. L’impegno di Davos per un mondo più green, comincia dalla sua struttura produttiva a Cavaso del Tomba. Inserito perfettamente nel contesto ambientale e paesaggistico, il sito industriale è soggetto a continui controlli strutturali e rinnovamenti tecnici: al suo interno, inoltre, sono in funzione moderni sistemi di produzione, come ad esempio l’impianto di verniciatura ad acqua – dove non è utilizzato alcun tipo di solvente – dotato di un sistema di dosaggio computerizzato delle materie prime e di un ricicolo delle acque di raffreddamento.
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The latest shoes GARSPORT "ARROW-Soles By Michelin" – with three-density sole injected on the upper – proves it.

PLUS2 technology (STEMMA Srl patent) and the use of a Michelin rubber tread are undoubtedly among the main authors of that success.

In fact, thanks to the combination of 3-different density materials, the sole delivers high slip resistance, a higher comfort, and absolute stability.

Supplied as standard on the new STEMMA direct injection machines, the PLUS2 system for direct 3-density molding is becoming popular on the market for the following reasons:

- the great production versatility that allows expanding the range of products that can be realized by direct injection, with ever new technical product solutions;
- the high efficiency that allows producing footwear with a 3-density sole, while keeping the same throughput as a traditional bi-density process;
- The absolute flexibility that allows combining traditional bi-density production with that of the new 3-density models, with no need to change the system configuration.

The "ARROW-Soles By Michelin" line will be produced starting from February 2020 in the GARSPORT plant in Husi (Vaslui, Romania), with a new fully automated 30-station STEMMA plant.

STEMMA

The Venetian company is increasingly establishing itself in the world of the major footwear brands which find in their proposals the opportunity to innovate the finished product both from a technical and stylistic perspective.

The success gathered at the last edition of "A+A" in Dusseldorf by the new line of work...
A company specialized in the production of pad printing machines, i.e. such technologies capable of printing the surface of many different objects. In our sector, it has caught on since several years and is used for the “multicolor” decoration of heels, wedges, mono-blocks, leathers and finished shoes.

The latest proposal from GTO is TAMPOLAMINA, a machine that uses an innovative decoration technique, that is why it has been protected by a patent. This system is the result of the constant research of the company, which in recent years has always designed and developed special processing techniques.

“TAMPOLAMINA – explains the engineer Davide Dallari, creator and project manager – has been developed from the need to combine the advantages of multiple printing techniques: Pad printing, for obtaining a high-definition design on solid and 3D objects, and unique characteristics of hot printing that allows golden or prismatic effects.”

Among the many advantages of this technique there is also the thickness effect that can also be felt with a simple touch. And indeed, this is a unique technique of its kind. TAMPOLAMINA can be used on different types of material: glass, plastic and even already painted items.
The research and innovation division of Atom Group started, a few years ago, a series of research work focused on the application of new technological components that might complete and enhance the performance of the company cutting machinery. For this enhancement project, two were the technologies considered: robotics and augmented/mixed reality.

The first was used to address the problem of automation/efficiency of cut piece collection and grouping phases; it is known that cutting, especially of leather, produces a large number of pieces of different shapes and sizes that must be carefully (and quickly) collected and grouped, so as to smooth the operations that follow in the manufacturing process. ATOMLab addressed these needs by developing an automated appendix to the cutting machine, based on two Mitsubishi anthropomorphic robots equipped with an innovative, specially designed gripper. The gripper is capable of handling pieces of different shapes and sizes, even in the presence of particular or extreme shapes, as some women's shoe tips could be. 4.0 also means remote connection via network or cable - a useful feature for both monitoring the production cycle and enabling the remote technical assistance. Moreover, the scanning of "RFID Tag", allows the automatic setup of the machine according to the shoe being worked (model, size, right or left, etc.).

Like other machines by RECES, the Nova 4 IP Master 4.0 is produced in-house, using electrical, hydraulic, pneumatic and mechanical parts realised by Italian or European companies.

The Nova 4 IP Master, widely tested technology for shoe lasting, is now available in version 4.0. The last frontier of technology was achieved with the development of new software and hardware characterised by new features and the power necessary to support them.
Footwear hot melt adhesives
per uses a matrix of 30 suction cups, each independently controlled, driven by a special software that determines how many and which suction cups must be activated in relation to the piece geometry and position in the cutting layout, where the robot must position itself, and how it must orient itself to pick it up. The presence of two robots ensures an adequate collection rate, balanced with the machine productivity; anti-collision algorithms that allow the two robots to operate simultaneously in the unloading area have also been developed; the operation of the two robotic arms is completely integrated in the machine workflow and can be programmed to follow different collection criteria (by size or by pair) and with different storage positions of the cut pieces. Initially developed for a machine of the Flashcut AIO family, the system will be progressively extended to other machines in the ATOM range, both for cutting footwear materials and for industrial ones. The prototype is currently in the final phase, and will undergo operational testing on early 2020 at some clients premises.

Augmented Reality/Mixed Reality is a technology that, through the use of wearable devices (special types of glasses), allows to superimpose a series of digital data and information to the real-world view that enrich the content and increase the perception. For some years, ATOMlab has been studying the use of this technology as a new human-machine interface for the cutting systems of the ATOM range. In this scenario, computer displays, keyboards and mouse will be replaced by holograms that the user will see directly projected by the device (in this case the Microsoft Hololens) in front of him/her, and by gestural and voice commands given by the operator. A first application to support the unloading operations will shortly undergo operational tests, and others are scheduled for the next few months.

componenti tecnologiche che potessero completare e potenziare le prestazioni dei macchinari di taglio del gruppo. Due sono state le tecnologie prese in considerazione per questo progetto di ammodernamento: la robotica e la realtà aumentata/mista. Con la prima si è affrontato il problema della automatizzazione/efficienza della fase di raccolta e raggruppamento dei pezzi tagliati; com’è nota, il taglio, soprattutto della pelle, produce un gran numero di pezzi di forma e taglia differenti che vanno accuratamente [e velocemente] raccolti e raggruppati in modo da facilitare le operazioni che seguono nel processo di fabbricazione. In macchine ad elevata produttività questa operazione può risultare critica, diventando spesso il collo di bottiglia nel processo o richiedendo un numero elevato di addetti. A queste esigenze ATOMLab ha dato risposta sviluppando una appendice automatizzata della macchina di taglio, basata su due robot antropomorfi Mitsubishi equipaggiati con un gripper innovativo appositamente progettato. Il gripper utilizza una matrice di 30 ventose, ciascuna comandata autonomamente, pilotata da uno speciale software che determina quante e quali ventose devono essere attivate in relazione alla geometria e posizione del pezzo nel layout di taglio, dove il robot deve posizionarsi e come deve orientarsi per raccoglierlo. La presenza di due robot garantisce un rateo di raccolta adeguato, bilanciato con la produttività della macchina; sono stati anche sviluppati algoritmi anticolisione che consentono ai due robot di operare simultaneamente nell’area di scarico, il funzionamento delle due braccia robotiche è completamente integrato nel flusso di lavoro della macchina e può essere programmati per seguire diversi criteri di raccolta [per taglia
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The automatic punch GL13SC has been revised adding an electronic component that ensures high surplus at production level to a mechanical project that has been widely accepted in the market for years. The machine is now able to carry out very special operations due to particular software. It's no longer drilling and socket punch notchings but also designs obtained with a cutting blade, a process that allows to achieve the more and more in demand reptile effect.

New detail that will make the die-cutters holder replacement quick and easy. In fact, the casing has been designed for an easy access of the fixtures to the swing head.

Thanks to its latest proposal, the company remains one of the leaders in technology design and options that significantly increase the Overall Equipment Efficiency (OEE) of the plants. With this in mind, the company’s internal research and development division has developed NTME (No Touch Molds Exchange), a new automatic mold change system, designed and built for next-generation direct-injection PU machines. This system enables an extraordinary

primopiano
tecnologia

La foratrice automatica GL13SC è stata rivisitata, aggiungendo, ad un progetto meccanico che da anni trova ampi consensi sul mercato, una componente elettronica che le garantisce un elevato plus valore a livello di produzione. La macchina, infatti, grazie ad un particolare software, oggi, è in grado di compiere operazioni assolutamente speciali. Non più solo forature e intagli da fustella, ma anche di-segni ottenuti con incisione a
gain in terms of plant productivity. In a context that requires shorter production cycles, with a reduced number of pieces per item, the plants need repeated and frequent mold changes; with the new NTME system it is possible to manage them automatically and to program the change operation during the work cycle, zeroing down the machine stops and increasing the OEE up to 15%. This is a fundamental result in the current production context, where the measurement of the efficiency of the plant is a strategic element for the sustainability of any type of production, from the large structured company to small family businesses. For this reason, Main Group continues the research and development of new tools and technologies that contribute to making the plants increasingly productive and performing.

Visual OEE Breakdown

<table>
<thead>
<tr>
<th>Availability</th>
<th>Performance</th>
<th>Quality</th>
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<tr>
<td>% OEE</td>
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For this reason, Main Group continues the research and development of new tools and technologies that contribute to making the plants increasingly productive and performing.

Main Group Technologies

Grazie alla sua ultima proposta, l’azienda si conferma uno dei leader nella progettazione di tecnologie e optional che aumentano in maniera significativa l’indice di efficienza generale degli impianti (OEE – Overall Equipment Effectiveness). In quest’ottica, la divisione interna di ricerca e sviluppo dell’azienda ha messo a punto il nuovo NTME (No Touch Molds Exchange), un sistema di cambio stampi automatico, studiato e realizzato per macchine a iniezione diretta PU di nuova generazione, che permette uno straordinario guadagno in termini di produttività dell’impianto. In un contesto che richiede cicli di produzione sempre più brevi, con un numero ridotto di pezzi per articolo, gli impianti necessitano di cambi stampi ripetuti e frequenti: con il nuovo sistema NTME è possibile gestirli in maniera automatica e programmare l’operazione di cambio durante il ciclo di lavoro, azzerando i fermi macchina e aumentando l’OEE fino al 15%. Si tratta di un risultato fondamentale nel contesto produttivo attuale, in cui la misurazione dell’efficienza dell’impianto è un elemento strategico per la sostenibilità di qualunque tipo di produzione, dalla grande azienda strutturata alle piccole realtà familiari. Per questo, Main Group prosegue il lavoro di ricerca e sviluppo di nuovi tools e tecnologie che contribuiscono a rendere gli impianti sempre più produttivi e performanti.

Tego

Tra le diverse proposte dell’officina meccanica figurano due tecnologie che per le loro caratteristiche sono destinate ai cicli di produzione più avanzati nel settore della pelletteria. La prima è un vero...
TEGO
Among the different products of the company there are two technologies specifically designed for the most advanced production processes in the leather goods sector. The first is a real automatic centre that allows the realization (by punching) of any design on leather, synthetic materials and cartons. The second is a sewing machine designed for the assembly of the bag - from the simplest to the more complex model, which would be difficult to manufacture with traditional sewing systems.

TE-2-GO Numerical control automatic centre
A real cutting-edge system equipped with 6 tools and capable of punching 1,500 holes per minute, realising any type of decoration on a 900 x 1000 mm working worktop. The Built-in PC, which enables the operating cycle programming, is capable of reading DXF files, which are easily made on computers running CAD software; the DXF files can be imported through a USB stick or cable. The optional TEGOCAM, when installed, allows the operator to choose the best solution before performing the production.

TE-1-GO-DX sewing machine
The most popular model within the sewing machine line is the TE-1-GO-DX. With a small head placed on the right side of the needle and a 40 cm high post on Adler mechanics, it’s main features are: a small hook at horizontal axis, needle guard, triple feed, and stitch length 0 to 8 mm. Ideal for processing bags, allows to stitch in particularly narrow corners, an operation that is impossible with other machines. The usable thread ranges from 80/3 to 10/3, and the post can be moved left to right of needle in a simple and fast way.
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Built like any other FAV machine using top-quality materials and components, the splitting machines are successful in the market for the extreme working accuracy, the quality standard consistency, and easy operation. And these are aspects made possible by the new technical features adopted, including the blade sharpening system and the plate self-regulation system. In addition, other features, such as the powerful extractor fans, low noise level, and ergonomic factor enable to protect both the environment and the operators. In order to facilitate regular and extraordi-
SOFT | BREATHABLE

DOTS ADHESIVE HAS BEEN DEVELOPED TO REACH A VERY HIGH LEVEL OF SOFTNESS INSIDE THE SHOE
nary maintenance, the machines have been designed with an easy access to all of their parts. Moreover, customization is another feature of the Alberti splitting machines, which are built to meet the different needs of the customers, who are increasingly obliged to work with very different materials.

Besides featuring a touchscreen panel that ensures simplicity and immediacy in the use of the machine, the next-generation AV2 TEV skiving machine is equipped with a barcode reader, so the operator will no longer need to adjust the skiving machine settings – by reading the barcode generated by software from the planning/programming office, the machine will automatically learn the processing parameters.

Another feature of the AV2 TEV is the interchangeability of the most common components with those of the classical skiving machines produced by the company. Easy access to the grinding wheel, roller and knife simplifies adjustments and maintenance, while a wider space under the worktop improves it from an ergonomic point of view.

Among the features that make the AV 12 TEV a unique machine, the feeding speed - doubled compared to traditional skiving machines (up to 70m per minute without skiving precision loss) – and (immediate) foot position switch should be highlighted. The blade sharpening system is also unique and revolutionary: in fact, the grinding wheel operation has been studied to deliver a consistent thickness of the bevel. The blade cleaning is programmable for both the inside and the outside; for the latter, a diamond nose ensures the best result even in the processing of synthetic materials, regenerated leather, etc. The automatic calculation of the skiving angle is another specific AV 12 feature.

Using the next-generation skiving machines by Alberti enables to centrally control each workstation with all the ensuing advantages.

Caratteristica dell’AV2 TEV è anche l’intercambiabilità dei particolari di maggior consumo con quelli delle scarnitrice tradizionali prodotte dall’azienda. La facile accessibilità alla mola, al rullo e al coltello semplificano regolazioni e manutenzione, mentre, un più ampio spazio sotto il piano di lavoro, migliora anche l’aspetto ergonomico.

Tra gli aspetti che fanno dell’AV12 TEV una macchina unica, figurano la velocità di trasporto, raddoppiata rispetto alle scarnitrice tradizionali (fino a 70 mt/min senza perdita di precisione nella scarnitura), e di cambio di posizione del piedino (immediato). Unico e rivoluzionario è anche il sistema di affilatura della lama: infatti il lavoro della mola è stato studiato per assicurare uno spessore costante del bisello. La pulizia della lama è programmabile sia per la parte interna sia per quella esterna: per quest’ultima una punta di diamante assicura il risultato migliore anche in fase di lavorazione di materiali sintetici, rigenerato di cuoio, ecc. Il calcolo automatico dell’angolo di scarnitura è un’altra delle caratteristiche proprie dell’AV 12.

L’impiego delle scarnitrice di ultima generazione, firmate Alberti, permette il controllo centralizzato di ogni singola stazione di lavoro, con tutti i vantaggi che ne conseguono.
An endless search for improvement, increasingly complex global market needs, and a passion for major challenges were the reasons why our companies – already leaders in their own sector – have united their strengths and expertise in a synergy that will result in technological innovations, flexibility, and reliability.

Together to lead the future of the leather goods, footwear, and automotive industries.

Insieme per essere sempre più protagonisti del futuro nei settori pelletteria, calzatura e automotive.

La continua ricerca del miglioramento, le richieste sempre più impegnative dal mercato globale e la passione per le sfide importanti, sono i motivi che portano le nostre aziende, già leader nei loro settori, ad unire risorse e conoscenze. Da questa sinergia naceranno innovazioni tecnologiche e sistemi di processo produttivo più flessibili e affidabili.
GROWING TREND FOR RALPH LAUREN
In the third fiscal quarter which ended at the end of January, the American brand reported revenues of 1.75 billion dollars (+1.4%), exceeding analysts’ forecasts which indicated a turnover of 1.72 billion dollars. The result is ascribed to the sale at higher prices during the holiday season, thanks to a targeted marketing operation on social media that led to the recruitment of supermodels and famous actors for the advertising campaign. Sales grew in Europe (+3%) and Asia (+5.4%), while they remained stable on the domestic market. Growth of between 2 and 3% is expected for the entire fiscal year, considering the decline resulting from the issues created by the unrest in Hong Kong. And this projection did not take into account the effects deriving from the Coronavirus.

LVMH: RECORD TURNOVER IN 2019
A record 2019 for the Parisian luxury giant which, with revenues rose to 53.7 billion euro, recorded a growth of 15%. Profits from recurring transactions reached 11.5 billion euro, while the operating margin remained at 21.4 percent, in line with the previous year. Net profit increased by 13% to 7.17 billion euro. In the fourth quarter alone, LVMH recorded revenues up by +12% compared to the same period of 2018 (+8% on the whole). Geographically, Europe and the US experienced “good growth”, as did Asia, despite the instability of Hong Kong. The business driving the growth was the Fashion and Leather Goods division, whose 2019 sales rose 17% to 22.2 billion euro. The Wines & Spirits division (5.5 billion euro) grew by 6%, while that of Watches and Jewelry (4.4 billion euro) by 3%. Exceptional performances were recorded in fashion for the Louis Vuitton and Christian Dior brands. Also positive were the performances of Fendi, Celine,
can count on the power of our brands and the ability of our managerial teams, to aim at strengthening our high-quality products also in the course of 2020’.

**POSITIVE 2019 FOR FERRAGAMO**

Consolidated revenues were 1.37 billion euro (+2.3% at current exchange rates; +1.3% at constant exchange rates). The trend of the retail channel - whose revenues grew by 2.4% - was good, in particular that of the fourth quarter which registered +2.0%. Also good were the revenues of the wholesale channel, up 3.1%; in the fourth quarter the growth in sales was 2.6%. The group’s first market keeps being Asia Pacific (+1.1%); the best performances were made by China, where directly operated stores recorded a strong increase in sales (+13.8%).

Tensions in Hong Kong had a negative impact on retail sales in the fourth quarter, which fell by 50% compared to the same period of 2018. The EMEA area recorded +5.3% of revenues; the fourth quarter was particularly positive (+9.4%), above all thanks to the trend of the retail channel. The fourth quarter trend (+2.2%) had a positive impact on revenues in North America (+0.7%). The Japanese market, on the other hand, fell (-0.5%), which in the last quarter of with revenues of around 1.3 billion euro (1.349 in 2018). “In 2020, the total recovery of turnover in China, which was worth 250-260 million euro, is expected,” said Alfonso Dolce, CEO of the brand, who also affirmed that 2019 will close with revenues of around 1.3 billion euro (1.349 in 2018). “In 2020, the total recovery of turnover in China, which was worth 250-260 million euro, is expected,” said Alfonso Dolce, CEO of the brand, who also affirmed that 2019 will close (+7.1%). The best performing items were footwear (+3.0%), bags and accessories (+2.8%), while clothing and perfumes recorded a decrease (-3.9% and -7.9%, respectively).

**TURNOVER RECOVERY IN CHINA FOR DOLCE & GABANNA**

Last year the brand recovered 50% of sales on the Chinese market, which collapsed after the statements made during the Shanghai #DGTheGreatShow event (October 2018). The return to normal should occur within the current year said to Corriere della Sera, Alfonso Dolce, CEO of the brand, who also affirmed that 2019 will close +0.7%). The Japanese market, on the other hand, fell (-0.5%), which in the last quarter of
DOUBLE DIGIT GROWTH FOR SIMONETTA

The historic childrenswear firm will close 2019 with a turnover of over 30 million euro, recording a growth of 19%. This is what the CEO, Niccolò Monicelli, told Pambianconews.

Simonetta is also a licensee of the children’s lines by Emilio Pucci, Balmain and Fay, and is responsible for product development and production for the Fendi and Brunello Cucinelli brands as well. “The 2019 turnover will only include one season of the Fay and Brunello Cucinelli collections, given the recent signing of the partnerships”, stressed Monicelli, who also anticipated that negotiations are underway with an important brand to acquire a new license. The Marche-based company is present both in Italy and on foreign markets, in particular in the Middle East, Russia, and England. Simonetta’s goals also include landing in particularly lively markets, such as the United States and Korea. In Italy, the company has its own stores in Milan, in via Manzoni, in the Serravalle Scrivia outlet and Jesi. “In our plans - says Monicelli - there is also a new opening in a strategic Italian regional capital.”

A DRASTIC DECISION BY NIKE IN CHINA

The sportswear giant reveals the economic damage created by Coronavirus. A brand’s press release, in fact, reads: “In line with what other players are doing on the market, about half of Nike’s owned stores have been temporarily closed, with similar dynamics among the store partners. Moreover, we operate at shorter hours, and in the stores that remain open, we notice retail traffic lower than expected. In the short term, we expect an actual impact on our Greater China operations. However, the brand’s strength and Nike’s commercial momentum towards the Chinese consumer remain strong, as evidenced by the continued strength of our e-commerce business.” This initiative follows that already implemented by giants such as Ikea, Apple, McDonald’s, and Starbucks.

DOLCE & GABANNA RECUPERA FATURATO IN CINA

Lo scorso anno il brand ha recuperato il 50% delle vendite sul mercato cinese, collocate dopo le dichiarazioni fatte nel corso dell’evento di Shanghai #DGTheGreatShow (ottobre 2018). Il ritorno a regime dovrebbe avere entro l’anno in corso, ha detto al Corriere della Sera Alfonso Dolce, CEO del marchio, che ha dichiarato Alfonso Dolce e un’accelerazione delle vendite in generale, grazie al trend positivo delle vendite su alcuni mercati emergenti, come ad esempio il Sud America che è cresciuto del 50%”. Buone le performance del marchio in Nord America, dove ha registrato una crescita del 10%.

CRESCITA A DUE CIFRE PER SIMONETTA

La storica azienda childrenswear chiuderà il 2019 con un fatturato di oltre 30 milioni di euro, registrando una crescita del 19%. Lo ha detto l’AD Niccolò Monicelli, a Pambianconews. Simonetta è licenziataria anche delle linee bambino di Emilio Pucci, Balmain e Fay, e inoltre è responsabile del sviluppo del prodotto e della produzione per i marchi Fendi e Brunello Cucinelli. “Il fatturato 2019 comprenderà solo una stagione delle collezioni Fay e Brunello Cucinelli, data la recente stipula delle partnership”, ha sottolineato Monicelli, che ha anche anticipato che sono in corso trattative con un importante brand per accrescere una nuova licenza. L’azienda marchigiana è presente sia in Italia che sui mercati esteri, in particolare in Germania, Russia e Inghilterra. Tra gli obiettivi di Simonetta figura anche lo sbarco in mercati particolarmente vivaci quali gli Stati Uniti e la Corea. In Italia l’azienda è ha dei propri punti vendita a Milano, in via Manzoni, nell’outlet di Serravalle Scrivia e a Jesi. “Nei nostri programmi - dice Monicelli - è prevista anche una nuova aperture in un capoluogo strategico”.

DRASTICA DECISIONE DI NIKE IN CINA

Il colosso dello sportswear acco
ADIDAS CHOOSES CURVY FOR LARGE SIZES

A women’s no-size-limit capsule collection is already on sale on the website of the German giant and in some selected Adidas stores. Sportswear items, with sizes ranging from XXS to XXXXL, are made in partnership with a well-known curvy brand and include: leggings, crop tops, t-shirts, and sweatshirts sold under 80 euro.

“We have created – one reads on the Adidas website - a collection of basic garments for the gym in collaboration with Universal Standard, the brand focused on the comfort and style of all sizes for an inclusive fashion. Our sporting tradition and commitment to making sport accessible to all women has led us to collaborate with Universal Standard, the brand symbol of inclusiveness. We share the same vision - to celebrate femininity in all its forms with a collection of products designed to perfectly adapt to every silhouette.”

Recently, the brand has teamed-up with Rodarte, a brand founded by sisters Kate and Laura Mulleavy and belonging to the luxury brands’ world.

‘CERTIFIED GREEN’ FOR SUSTAINABLE E-COMMERCE

Sustainable fashion lands on the Web with the specialized e-commerce platform Slow Nature - a site dedicated exclusively to sustainable fashion and beauty products, established in Italy in 2019 on the initiative of the entrepreneur Olga Yanovska Bianchi.

To access the platform, the products must meet a high-quality standard, they must be made with fabrics such as cotton, linen, hemp, etc. or recycled material. Furthermore, the production cycle must be traceable and the product must be accompanied by a certificate attesting respect for environmental sustainability for the entire

ADIDAS SCEGLIE CURVY PER LE TAGLIE FORTI

La capsule collection femminile senza limiti di taglie è già in vendita sul sito del colosso tedesco e in alcuni store selezionati Adidas. I capi d’abbigliamento sportivo, con taglie che vanno dalla XXS alla XXXXL, sono realizzati in partnership con il noto marchio curvy e prevedono: leggings, crop top, t-shirt e felpe vendute al di sotto degli 80 euro.

‘Abbiamo creato - si legge sul sito di Adidas - una collezione di capi basic per la palestra in collaborazione con Universal Standard, il marchio che pensa al comfort e allo stile di tutte le taglie nel segno di una moda inclusiva. La nostra tradizione sportiva e l’impegno a renderlo sport accessibile a tutte le donne ci ha portato a collaborare con Universal Standard, il brand simbolo dell’inclusività. Condividiamo la stessa visione: celebrare la femminilità sa i danni economici creati dal Coronavirus. Infatti in un comunicato stampa diffuso dal brand si legge: “In linea con quello che stanno facendo altri player sul mercato, circa la metà dei negozi di proprietà di Nike sono stati momentaneamente chiusi, con dinamiche simili tra gli store partner. Inoltre, operiamo con orari ridotti e riscontriamo, nei negozi che restano aperti, un traffico al dettaglio inferiore alle previsioni. Nel breve termine, ci aspettiamo un impatto concreto sulla nostra attività nella Greater China. Tuttavia, la forza del marchio e lo slancio commerciale di Nike nei confronti del consumatore cinese rimangono forti, come dimostra la continua forza della nostra attività di e-commerce”. Questa iniziativa segue quella già messa in atto da colossi come Ikea, Apple, McDonald’s e Starbucks.
The designer won the “best new designer prize” award at the Mainichi Fashion Grand Prix Shiseido Sponsorship Awards in 2014 and at the Fashion Prize of Tokyo in 2017. The new collaboration will be available in Japan and in some selected flagship stores worldwide starting from the month of March.

A JAPANESE DESIGNER CHOSEN BY TOD’S
Tod’s women’s accessories and ready-to-wear will be interpreted by Maiko Kurogouchi, the Japanese stylist whose brand was chosen for the third capsule of products made with 4 hands with external representatives of fashion luxury.

Maiko Kurogouchi

Il rispetto etico delle condizioni di lavoro è un altro degli aspetti essenziali per la commercializzazione attraverso Slow Nature. La piattaforma opera in tutta Europa, non possiede un proprio magazzino in quanto i prodotti vengono consegnati direttamente dalle stesse aziende, che devono rispettare precise regole anche per il packaging che deve anch’esso rispettare obbligatorientemente le norme di sostenibilità.

TOD’S SCEGLIE UNA STILISTA GIAPPONESE
Sarà Kurogouchi ad interpretare i canoni creativi degli accessori e del ready-to-wear femminile di Tod’s. Infatti per la terza capsuline di prodotti realizzata a 4 mani con esponenti esterni del fashion luxury è stato scelto il brand creato dalla stilista giapponese Maiko Kurogouchi. La designer ha ottenuto il riconoscimento “best new designer prize” al Mainichi Fashion Grand Prix Shiseido Sponsorship Awards del 2014 e al Fashion Prize of Tokyo nel 2017. La nuova collaborazione sarà disponibile in Giappone e in alcuni selezionati flagship stores nel mondo a partire dal mese di marzo.

GREEN CERTIFICATO PER L’E-COMMERCE SOSTENIBILE
La moda sostenibile sbarca sul web con la piattaforma e-commerce specializzata Slow Nature: sito dedicato esclusivamente a prodotti sostenibili della moda e del beauty, nato in Italia nel 2019 su iniziativa dell'imprenditrice Olga Y anovska Bianchi. Per essere ammessi alla piattaforma i prodotti devono rispondere a un elevato standard di qualità, devono essere realizzati con tessuti quali il cotone, il lino, la canapa, ecc. o materiale ricicliato. Inoltre il ciclo di produzione deve essere tracciabile e il prodotto deve essere accompagnato da un certificato che attesta il rispetto della sostenibilità ambientale per tutta la filiera che ha concorso alla sua realizzazione.
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