MACHINES, ACCESSORIES AND COMPONENTS FOR FOOTWEAR AND LEATHER GOODS

MARKETS
MERCA
to
Italy keeps being the leading world exporter of tannery and leather goods machinery
Primo esportatore mondiale di macchine per conceria e macchine per pelletteria resta l’Italia

MARKETS
MERCATO
Sales growing in China and South Korea
Wooden Spoonist USA
Crescono le vendite in Cina e in Corea del Sud. Maglia nera per USA

ACTUALITY
ATTUALITÀ
Trade associations give the alarm
Le associazioni di categoria lanciano l’allarme

FAIRS
FIERE
A decisive moment for Italian companies revival
Un momento decisivo per il rilancio delle imprese

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MATERIALI
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I più recenti

TECHNOLOGY
TECNOLGIA
The latest
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MARKETS

Italy keeps being a leading world exporter of tannery and leather goods machinery

Primo esportatore mondiale di macchine per conceria e macchine per pelletteria resta l’Italia

“The recovery is still far away, but we can see the light at the end of the tunnel”

“La ripresa è ancora distante, ma si intravede la luce in fondo al tunnel”

Sales growing in China and South Korea - Wooden Spoonist USA

Crescono le vendite in Cina e in Corea del Sud. Maglia nera per USA

2021: Beginning of the year in decline. A faint positive sign for exports

2021: Inizio anno in flessione. Timido segno positivo per l’esportazione

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Un’opportunità concreta per i giovani

Trade associations give the alarm

Le associazioni di categoria lanciano l’allarme

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Molti gli espositori e le nazioni rappresentate

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Un momento decisivo per il rilancio delle imprese

Siro Badon: “We start again with the traditional formula at long last”

Siro Badon: “Finalmente ripartiamo con la formula tradizionale”

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Italy keeps being the leading world exporter of tannery and leather goods machinery

The world’s footwear and leather industry machinery export data confirm that the sector was growing until 2019 (1,216.9 million euro). 2020 does not count, as trade has collapsed due to the pandemic (792 million euro). It will be interesting to see the final figures for 2021 which should mark a recovery, perhaps not at the levels of 2019 but in any case ‘positive signs’ as the operators say.

The 2019 data we report in the attached tables refers to the Customs heading which groups all the leather-footwear industrial chain machinery together; tannery machines, hide and leather traditional footwear machines, leather goods and spare parts machines. However, they do not include injection molding machines and other types of machinery which are classified under other customs headings. As observed by Assomac, the National Association of Italian Manufacturers of Footwear, Leather Goods and Tannery Machines, “the basket of machine categories listed in the statistical data is no longer sufficient to represent the entire sector of the leather supply chain instrumental goods, because the suppliers of industrial machines are increasingly interconnected and less and less compartmentalized.”

This is true, but the data in question still represent an indicator of the general trend underway. A

Mercato mondiale tecnologie: le macchine per calzature “spingono” la Cina

Primo esportatore mondiale di macchine per conceria e macchine per pelletteria resta l’Italia

I dati delle esportazioni mondiali delle macchine della filiera industriale della pelle e della calzatura confermano che il settore è stato in crescita sino al 2019 (1,216,9 milioni di Euro). Il 2020 non fa testo perché gli scambi commerciali sono crollati a causa della pandemia (792 milioni di Euro). Sarà interessante vedere i valori a consuntivo del 2021 che dovrebbero segnare una ripresa; forse non ai livelli del 2019 ma comunque "segnali positivi come dicono gli operatori". I dati nel 2019 che qui riportiamo nelle tabelle allegate sono riferiti alla Voce Doganale che raggruppa tutti i macchinari per la filiera industriale pelle-calzature: macchine per conceria, macchine per calzature tradizionali in pelle e cuoio, macchine per pelletteria e pezzi di ricambio. Non includono, però, le macchine ad iniezione, ed altri tipi di macchinari che sono classificati sotto altre voci doganali. Come fanno osservare all’Assomac, l’Associazione Nazionale dei Costruttori Italiani di Macchine per Calzature, Pelletteria e Conceria, “il paniere delle categorie di macchine elencate nei dati statistici non è più sufficiente a rappresentare per intero il settore dei Beni Strumentali della Filiere Pelle, perché i fornitori di macchine industriali sono sempre più interconnessi e sempre meno compartimentati.”
trend that proves a substantial "hold" of the Italian sector. In 2019, according to the statistics, China becomes the world's leading manufacturer of traditional footwear machinery by virtue of a doubling of its export turnover (from 180 million euro to 353 million euro) which, however, is not matched by the statistical data on the growth of world footwear production (in 2019 world footwear production was 24.3 billion pairs, in 2018 it was 24.2 billion pairs).

Italy, on the other hand, proves to be the world's leading exporter of tannery machinery, leather goods and spare parts machinery. In the sector of tannery machinery, Italy is the first world supplier in China (where it holds 85% of the market share); Mexico (53.9%); India (48.3%); the United States (66.6%); Turkey (75.4%); Thailand (49.6%); Indonesia (48.6%); Brazil (20%); and South Africa (77.1%).

In traditional footwear machinery, where the statistics are affected by the 'anomalous' data of abnormal growth in Chinese exports in the sector, Italy is in second place in India (China 57.7%, Italy 24.7%); Brazil (China 79.2%, Italy 20%); Turkey (China 58.3%, Italy 28.4%); Pakistan (46.2%, Italy 28.4%); Bangladesh (China 81.2%, Italy 6.8%); Mexico (China 44%, Italy 19.3%). In Vietnam, Italy holds 2.1% after China, South Korea, and Taiwan; in Indonesia, the import of machines from Italy is 2.2% after China, South Korea, and Taiwan. But in these last two countries, the figure is probably affected by the stakes of Chinese, South Korean and Taiwanese companies in the establishment of joint-ventures in the country.

In Vietnam, Italy – the leading importer of leather goods machinery – holds a 14.5% share, after Taiwan (68.4%) and China (15.7%). In Indonesia, where Taiwan accounts for 71.2% of total imports, Italy has a share of 13.7%. India – Taiwan share 53.7%, Italy share 30.6%, China share 12.1%. Cambodia – China share 65.3%, Taiwan share 28.5%, Italy share 5.7%. In Western countries, Italy is the first supplier, in France, where Italian companies supply the major fashion houses, with 95% of total imports of this type of machines; in the United States 51.5%; Spain 87.4%, and Portugal 92%.

**TANNING, FOOTWEAR, LEATHER GOODS MACHINES AND SPARE PARTS EXPORT**

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
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<tbody>
<tr>
<td>WORLD TOTAL</td>
<td>1,026,215</td>
<td>1,075,339</td>
<td>1,035,701</td>
<td>1,216,916</td>
<td>791,921</td>
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<td>CHINA</td>
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<td>268,469</td>
<td>272,281</td>
<td>471,325</td>
<td>303,978</td>
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<tr>
<td>ITALY</td>
<td>399,820</td>
<td>439,446</td>
<td>417,621</td>
<td>358,031</td>
<td>239,536</td>
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<tr>
<td>TAIWAN</td>
<td>96,604</td>
<td>91,432</td>
<td>81,355</td>
<td>114,439</td>
<td>67,425</td>
</tr>
<tr>
<td>GERMANY</td>
<td>38,749</td>
<td>43,413</td>
<td>50,461</td>
<td>48,881</td>
<td>40,519</td>
</tr>
<tr>
<td>SOUTH KOREA</td>
<td>66,485</td>
<td>67,747</td>
<td>74,018</td>
<td>78,353</td>
<td>40,352</td>
</tr>
</tbody>
</table>

Source: Data processing ITC (International Trade Center Geneva) UN COMTRADE and ITC Statistics
In exports of spare parts, Italy is firmly in first place followed by China, Germany, South Korea, and Taiwan. Italy is the leader in imports in the United States (where it covers 39.5% of all imports), Mexico (34%), China (54.3%), India (43.4%), France (65.9%), Tunisia (91.5%), and Portugal (67.1%). In Vietnam, the leading supplier of spare parts is South Korea (37.8%), followed by Taiwan (29.6%), China (20%), and Italy (9.1%). In Indonesia, South Korea is always the first supplier (54% of total imports), Taiwan (20.4%), Denmark 9.4%, and Italy (6.5%).

<table>
<thead>
<tr>
<th>EXPORT TANNERY MACHINES (EUR 000)</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITALY</td>
<td>155.896</td>
<td>176.291</td>
<td>159.458</td>
<td>132.835</td>
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<td>CHINA</td>
<td>37.361</td>
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<td>45.981</td>
<td>67.373</td>
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</table>

<table>
<thead>
<tr>
<th>EXPORT FOOTWARE MACHINES (EUR 000)</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITALY</td>
<td>109.489</td>
<td>123.347</td>
<td>105.947</td>
<td>85.994</td>
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<tr>
<td>CHINA</td>
<td>191.849</td>
<td>132.858</td>
<td>180.090</td>
<td>353.389</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPORT LEATHER GOODS MACHINES (EUR 000)</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITALY</td>
<td>45.242</td>
<td>44.944</td>
<td>53.704</td>
<td>45.248</td>
</tr>
<tr>
<td>TAIWAN</td>
<td>24.574</td>
<td>31.644</td>
<td>23.352</td>
<td>40.616</td>
</tr>
<tr>
<td>CHINA</td>
<td>12.082</td>
<td>11.916</td>
<td>12.165</td>
<td>18.074</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPORT SPARE PARTS (EUR 000)</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITALY</td>
<td>89.192</td>
<td>94.864</td>
<td>98.512</td>
<td>88.251</td>
</tr>
<tr>
<td>CHINA</td>
<td>31.451</td>
<td>75.743</td>
<td>34.043</td>
<td>32.489</td>
</tr>
</tbody>
</table>

Source: ASSOMAC
Skiving Machines for every need

MACCHINE SCARNITRICI PER OGNI ESIGENZA

Fratelli Alberti S.A.L.

siteinfo@fratellialberti.com - www.fratellialberti.com
The first quarter of this year recorded first hints of recovery for made in Italy footwear, which, once again, is driven by exports (+0.3% in quantity and +3% in value). The trend, however, keeps being far from the pre-covid performance.

"The recovery is still a long way off, although we can glimpse the light at the end of the tunnel", says Siro Badon, President of Assocalzaturifici, who goes on to underline "On the foreign front, the rebound in March was enough to bring the results of the quarter back to the values of first phase 2020, but this was not..."
the case for the domestic market, which had to pay for the closure of shops in shopping centers during the weekends. The recovery times will not be short and a heavy selection among companies - with the inevitable repercussions on the employment level - is expected." In the first quarter of 2021, production recorded a decline of 6.4% (compared to January-March 2020), and about -30% on the same period of 2019. Consumption on the domestic market is also not good, which fell by 3.5% in quantity and 6.9% in value.

For the first quarter of the current year, the ASSOCALZATURIFICI report also shows a decrease (-3.5%) in the average shopping price per pair of shoes by Italian families, who have purchased fewer formal items and more slippers and leisure footwear. Only sports shoes and sneakers experienced a recovery in consumption (+7.8% in volume), albeit definitely partial.

On the first quarter, an increase in flows to Switzerland (+13% in quantity) and France (+8% in quantity) – both linked to the work commissioned by international luxury brands – was registered. Outside Europe, China has grown (+44.4% in volume and +74.8% in value, over the first 3 months of 2020), affecting particularly the high-end range (the average price to this market grew by 21%), mainly rewarding all the big fashion brands. To favor such performances, the economic expansion of the country; consumers’ revenge spending after the restrictions suffered during the pandemic, and the direct entry of goods that previously passed through Hong-Kong (which in fact recorded a contraction of 11.4% of footwear arriving from Italy).

Current exports to China are well above 2019 levels (+11.2% in volume and +24% in value). "Such positive performances,” Badon stressed ‘are offset by the slow pace of some important traditional outlet markets, such as Germany (-0.8% in quantity), the USA (which, after losing 30% in 2020, recorded a modest +3.5% in volume, with -8.6% in value, in the first quarter), and Spain (-5.9% in value sui primi 3 mesi 2020), che ha interessato in particolare l’alto di gamma (il prezzo medio verso questo mercato è cresciuto del 21%) premiando quindi soprattutto i grandi marchi del fashion. A favorire queste performance, l’espansione economica del Paese, il revenge spending dei consumatori dopo le restrizioni subite durante l’emergenza sanitaria, e l’ingresso diretto di merci che in precedenza transitavano da Hong Kong (che infatti ha registrato una contrazione dell’11,4% delle calzature in arrivo dall’Italia). Le esportazioni attuali verso la Cina risultano ben al di sopra dei livelli 2019 (+11,2% in volume e +24% in valore). “A queste performance positive -ha sottolineato Badon- fanno da contraltare i ritmi blandi per alcuni importanti tradizionali mercati di sbocco, come Germania (-0.8% in quantità), USA (che dopo aver perso il 30% nel corso del 2020 segnano nel primo trimestre un modesto +3,5% in volume, con un -8,6% in valore) e Spagna (-5,9% in quantità), cui si aggiunge il crollo delle vendite nel Regno Unito (in caduta di oltre il 40% su gennaio-marzo dello scorso anno)." Il saldo commerciale dei primi 3 mesi risulta in attivo.
li down again, -16.5% and -22.7%, respectively, and a feeble +4.5% for Macerata) and Emilia Romagna (-32.1%, with the collapse of the flows of Piacenza linked to logistics, -80%, and Forlì-Cesena unchanged, +0.5%), on the other hand, show setbacks. Lombardy was almost stable (-0.7%). However, all of the regions, with the exception of Piedmont, are still below the 2019 pre-Covid export values. In the ranking by provinces, Florence performs a feat (+44%, with a +16% also on the first quarter of 2019), firmly in first place (with a share of 18.2% of the national total). While reading this data, however, the distortions produced in case of discrepancy between the production province/region and subsequent shipment must be considered. This explains the strong recent export growth (thanks to new logistic facilities, often linked to online sales or to luxury multinational depots) from territories where, traditionally, footwear production is not rooted; as well as sudden collapses. Finally, as regards the demographics of businesses, at the end of March there were 4,039 active shoe factories in Italy, including industry and crafts (55 less than December 2020, corresponding to -1.3%) and 71,644 employees [-238, equal to -0.3%]. Also considering footwear component manufacturers, the negative balances on the 2020 final balance rise to -123 companies and -587 employees. And this data arouses some fear for occupational stability. The 24 million hours of layoffs authorized by INPS in the first 4 months of the year for the leather sector companies is exceptionally high, despite the -6.8% on January-April last year. In the same period two years ago, before the outbreak of the pandemic, the hours were 2.8 million; and 10.3 million in 2010, in full global economic crisis. Campania (+53%), Emilia Romagna (+28.5%), and Umbria (+92%) the regions with a further increase over 2020. Tuscany (-2.2%) the one with the highest number of hours authorized in the quarter (6.1 million), followed by Campania (5.1 million) and Marche (3.7 million hours).
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IMAGINATION
AND RE-WONDER
The Italian men’s fashion 2020’s analysis was inevitably hit by the effects that the Covid-19 pandemic has had on world markets. After several years of consistent growth, in fact, the segment turnover suffered a decline of 19.5%, with a turnover down to 8,169 million euro, losing almost two billion. In January 2021, the forecast by Sita Ricerca on behalf of SMI estimated a negative trend of around 18.6%. A result that in the final balance turned out to be even heavier, due to the domestic market which recorded a more negative trend than expected. In terms of turnover, the different product categories that make up menswear have all experienced negative variations, even if different in “magnitude.” Clothing – the main segment with a share of 53.6% of the total sector, fell by 20.3%, while knitwear lost 14.6% resulting the least affected segment among those analyzed; men’s shirt recorded -25.6%; leather clothing -21.1%; the wooden spoonist is the tie with -44.6%. During 2020, the production value was characterized by a negative trend on rates similar to those of turnover, that is to the extent of -21.3%.

With reference to foreign trade, the export of men’s clothing, despite the health emergency, has maintained a strategic role; in fact, it represents 71.7% of turnover. On an annual basis, however, the sector’s exports fell by -16.7% to 5.8 billion euro (1,171 million less in a year). A heavy drop was also registered in the case of imports (-20.2%). In fact, imports of men’s fashion fell to 3.7 billion euro, losing approximately 940 million euro compared to the 2019 final balance.

So, in 2020, the dynamics of exports and imports produced a trade balance of 2.15 billion euro, down by 230 million euro.

In early 2021, no change of pace was seen for the sector: the first two months of the year recorded a -30.0% compared to January-February 2020.
**Trend on foreign market**

In 2020, men’s fashion lost 16.5%, reaching 6.3 billion euro, while imports dropped by -20.0% to 4.5 billion euro. The EU and non-EU areas had a rather similar sales contraction: intra-EU, -14.6%; extra-EU, -17.9%. The EU market, without the United Kingdom, is no longer the largest buyer, and switches to 41.9% of total exports. At the level of the single target market, Switzerland, which absorbs 12.0% of the sector’s total exports, is back in first position, thanks also to limited losses (-7.3%). The United Kingdom, which recorded a -21.3% of purchases, moved into second position. Germany and France, which reduced purchases by 9.6% and 13.1% respectively, follow. Remaining in Europe, the worst trend in sales of men’s fashion made in Italy was recorded in Spain (-27.2%).

In non-EU countries, the worst trend in sales was in the USA (-29.0%). About the Far East, exports to Hong Kong lost about 30.0%, while in China the decline was 5.5%. Japan recorded a -12.5%. Sales are growing in South Korea (+7.3%).

With reference to markets where exports are less than 200 million euro, negative performances were recorded in the Netherlands (-9.8%), Russia (-14.7%), Austria (-26.9%), and also Belgium (-15.2%). In contrast to Poland (+3.8%). Imports declined as well (-20.0%), with negative values for the top 15 suppliers. China keeps being the first supplier, despite a decline of -23.7%; in terms of incidence, however, it remains almost stable, from 15.7% in 2019 to 15.0% in 2020. Supplies from Bangladesh lost -20.3%. Thanks to a change (-75%), France gains the third position. Romania and Spain both lost about 20.0%, and Tunisia almost -22.0%. The other men’s fashion supply countries, with shares of the total below 4.0%, also lost in a range between -29.6% of Bulgaria and -12.1% of Turkey.

**The first months of 2021**

2021 began with some signs of a restart, in particular with regard to exports which, in the first quarter, slowed the decline to -3.9% (a turnover of 1,616 million euro in the three months). Compared to the first three months of 2019, foreign sales lost -9.7% (that is 173.5 million euro less).

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**ITALIAN MEN’S FASHION INDUSTRY (2015-2020)**

<table>
<thead>
<tr>
<th>Year</th>
<th>Turnover (Millions of euro)</th>
<th>Change %</th>
<th>Value of production (Millions of euro)</th>
<th>Change %</th>
<th>Exports (Millions of euro)</th>
<th>Change %</th>
<th>Imports (Millions of euro)</th>
<th>Change %</th>
<th>Trade balance (Millions of euro)</th>
<th>Change %</th>
<th>Final consumption (Millions of euro)</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>2015</td>
<td>8,881</td>
<td></td>
<td>4,656</td>
<td></td>
<td>5,660</td>
<td></td>
<td>4,009</td>
<td></td>
<td>1,651</td>
<td></td>
<td>7,145</td>
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<td>2016</td>
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<td>4,727</td>
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<td>5.2</td>
<td>2,123</td>
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<td>6,556</td>
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<td>4,648</td>
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<td>6,396</td>
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<td>4,317</td>
<td>4.9</td>
<td>2,079</td>
<td>-1.0</td>
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<td>4,661</td>
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<td>-2.1</td>
<td>4,652</td>
<td>9.9</td>
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<td>2020</td>
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<td>-30.1</td>
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<td>-25.9</td>
<td>4,158</td>
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<td>13,560</td>
<td>-19.5</td>
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<td>-30.1</td>
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**Structural indicators (%)**

<table>
<thead>
<tr>
<th>Export/Turnover</th>
<th>Turnover</th>
<th>Final consumption</th>
<th>Trade balance</th>
<th>Exports</th>
<th>Imports</th>
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<tr>
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<td>63.7</td>
<td>3.65</td>
<td>2.4</td>
<td>5.2</td>
<td>8.6</td>
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<tr>
<td>2016</td>
<td>64.5</td>
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<td>2.4</td>
<td>5.2</td>
<td>8.6</td>
</tr>
<tr>
<td>2017</td>
<td>65.7</td>
<td>3.65</td>
<td>2.4</td>
<td>5.2</td>
<td>8.6</td>
</tr>
<tr>
<td>2018</td>
<td>67.2</td>
<td>3.65</td>
<td>2.4</td>
<td>5.2</td>
<td>8.6</td>
</tr>
<tr>
<td>2019</td>
<td>69.3</td>
<td>3.65</td>
<td>2.4</td>
<td>5.2</td>
<td>8.6</td>
</tr>
</tbody>
</table>

Source: Confindustria Moda based on ISTAT, Sita Ricerche and Internal Research.
Imports, even if improving, are still affected by a double-digit decline (-15.2%). In January-February 2021, foreign sales recorded a -19.5%, while in March an important rebound was recorded (+45.4% and +183.7 million euro in absolute value). Compared to March 2019, the growth was +6.5% (corresponding to plus 36 million euro). Exports to EU countries recorded +4.3%, while to non-EU countries (52.0% of total exports) a decline of 10.4% - affected by UK purchases' drop – was recorded.

More specifically, analyzing the data by country, the first three destinations – which account for 35.1% of the total sector exports – show increases of more than +10.0%: Germany grows by +11.1%, Switzerland by +18.7%, France by +13.4%.

In fourth place was China: exports to the Asian giant recorded +110.2%, reaching 102 million euro (+53.6 million euro compared to January-March 2020).

Negative sign for Hong Kong which fell by 9.9%. Compared to 2019, direct men’s fashion exports to China grew by 32.9% (+25.3 million euro), while those destined for...
Hong Kong lost 32.1% (-29.2 million euro).

For these two markets there is obviously a significant loss even compared to the levels of the first quarter of 2019: -102 million euro (-53.0%) for the United Kingdom; -61 million euro (-40.3%) for the US. Japan loses 14.4%; on the contrary, South Korea shows a positive variation of +14.5%. In January-March 2021, imports of men’s fashion always see Bangladesh and China among the main suppliers, with an incidence of 12.7% and 12.4% of the total, respectively. In the quarter in question, the first lost sales by 33.4% while the latter’s decline was 25.8%. In third place is France, up by +23.7%. On the other hand, menswear flows from Romania (-10.8%), the Netherlands (-10.7%), Tunisia (-12.9%), and Turkey (-6.5%) decreased. Spain [+1.0%] and Albania [+6.5%] are exceptions.

### Italian Men’s Fashion: Foreign Trade (January-March 2021)

<table>
<thead>
<tr>
<th>Countries of origin</th>
<th>Millions of Euro</th>
<th>Change %</th>
<th>Share %</th>
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<tbody>
<tr>
<td>Total of which</td>
<td>1,107</td>
<td>-15.2</td>
<td>100</td>
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<td>UE 27 post-Brexit</td>
<td>490</td>
<td>-2.0</td>
<td>44.3</td>
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<td>Ex. UE 27 post-Brexit</td>
<td>617</td>
<td>-23.4</td>
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<table>
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<th>Top 15: suppliers</th>
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</thead>
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<tr>
<td>Bangladesh</td>
</tr>
<tr>
<td>China</td>
</tr>
<tr>
<td>France</td>
</tr>
<tr>
<td>Romania</td>
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<tr>
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<tr>
<td>Portugal</td>
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</table>

<table>
<thead>
<tr>
<th>Top 15: customers</th>
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</thead>
<tbody>
<tr>
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<td>Switzerland *</td>
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<tr>
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<tr>
<td>Belgium</td>
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<tr>
<td>Austria</td>
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<tr>
<td>Poland</td>
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</tbody>
</table>

Source: Confindustria Moda on ISTAT data

(*) To be considered primarily logistic and commercial platform.

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**Shoe Machinery News**

**June/July 2021**

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**International Technology**

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**shoemachinery.com**

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**Import**

**Export**
2021: Beginning of the year in decline. A faint positive sign for exports

The pandemic that hit 2020 neither did it spare the Junior fashion segment, usually less exposed to economic fluctuations. According to the sectoral balance drawn up by ‘Centro Studi di Confindustria Moda’, last year childrenswear recorded a turnover down by -14.7%; in the twelve months, the sector lost about 450 million euro, reaching 2,640 million euro. Last January’s estimates showed a decline of 13.1%, therefore, in the final balance, they are slightly worse, also due to a decline in the domestic market which turned out to be more negative than expected. The production value remained in the negative area: -14.5%, worse than the previous year. Considering the trade with foreign countries (1.1 billion euro), the sector’s exports recorded a decline of -13.7% on an annual basis. Then the average incidence of cross-border sales on the overall turnover rises to 41.6%. Imports, with a total of around 1.8 billion euro, were also down and recorded -15.9%.

The sector trade balance remains in deficit for -679 million, but then earns over 160 million euro compared to 2019. In 2020, the newborn clothing exports alone, for which the relevant customs items – and, therefore, the trade flows with foreign countries by country – can be isolated, succeeded in confining the decrease to -7.8%, for a total of 143.3 million euro. This Made in Italy product recorded a negative trend on the first three outlet markets: Spain, -6.7%; Switzerland, -9.6%; and United Kingdom, -9.8%. France and Romania, on the other hand, went against the run of the

Italia: la moda junior nel 2020-2021

2021: Inizio anno in flessione. Timido segno positivo per l’export

La pandemia che ha penalizzato il 2020 non ha risparmiato nemmeno il segmento della moda Junior, solitamente meno esposto alle fluttuazioni congiunturali. Sulla base del bilancio settoriale elaborato dal Centro Studi di Confindustria Moda, il childrenswear, lo scorso anno, ha archiviato un turnover in calo del -14.7%; nei dodici mesi il settore ha perso circa 450 milioni di euro e si è portato a quota 2.640 milioni di euro.

Le stime rilasciate lo scorso gennaio parlavano di un calo del 13,1%, quindi, a consuntivo, risultano lievemente peggiori: complice un calo del mercato interno rivelatosi più negativo di quanto previsto. Il valore della produzione si è mantenuto in area negativa: -14,5%, peggio rispetto all’anno precedente. Considerando il trade con l’estero [1,1 miliardi di euro], l’export di comparto archivia una flessione del -13,7% su base annua. L’incidenza media delle vendite oltreconfine sul giro d’affari complessivo sale, pertanto, al 41,6%. In calo anche le importazioni, che con un totale di circa 1,8 miliardi di euro registrano un -15,9%.

La bilancia commerciale del settore resta in deficit per -679 milioni, ma guadagna così oltre 160 milioni di euro rispetto al 2019. Nel 2020 l’export del solo abbigliamento per neonati [per il quale si
market, growing by +7.2% and +28.0%, respectively. Sales destined for Germany fell by 14.8%; Portugal by -9.6%, while Russia lost 19.3%. Among the customer markets, however, there are positive signs: United Arab Emirates (+9.8%), Hong Kong (+6.3%), and above all, South Korea (+516.2%).

Still referring to baby clothing only, imports from abroad recorded -22.4%. China, the first supplier with an incidence on the total imported equal to 23.4%, saw a decline in sales to Italy for the third year in a row. The negative sign, though, is getting heavier and went from approximately -7% to -24.6%. Spain, confirmed in second place, succeeded in confining its dynamics to -7.9%. Bangladesh, still third supplier, showed a decrease of -9.7%. A non-marginal decline, to the extent of -51.7%, affects the baby clothing coming from France, as well as from India (-23.9%). In contrast, growth of imports from Turkey was recorded (+20.7%).

Analyzing the Italian market, during the calendar year 2020, the junior fashion sell-out – according to studies made by Sita Ricerca on behalf of SMI – recorded a particularly intense variation for the sector, i.e. -18.1%. From a product standpoint, the 'little girl' segment, structurally preponderant with an incidence of 46.4% on national children’s wear consumption, and the 'little boy' segment both decreased by -18.6%; the 'newborn' segment, which covers 16.9% of the market, dropped by -15.4%.

**Sell-out**

Despite a contraction of -22.4%, the large retail chains proved to be the first channel for intermediate sales, with an incidence of 46.2% on total purchases [compared to 48.0% in the 2019 Spring/Summer – 2020-21 Fall/Winter period]. Large-scale distribution as a whole covers 28.4% of the market and saw its three main ‘players’ hit by losses of a certain intensity: department stores (with a share...
of 14.5%] lost -21.6% of intermediate sales; large surfaces (with a share of 9.9%) lost -23.9%; and finally, the food channel (with a share of 4.0%) lost about -30%.

Whether in the 2019 Spring/Summer - 2019-20 Fall/Winter period the independent retail was finally rewarded as it grew by +3.8%, in the 2020 Spring/Summer – 2020-21 Fall/Winter period it got back to register losses, but less heavy than those experienced by the other formats; in fact, the independent retail recorded a variation of -14.6%, also due to the ‘little girl’ and ‘newborn’ segments,
both down by about -12%. The share held by independent stores thus settled at 12.3%, as in the previous period.

As with other non-textile/clothing product categories in other industries as well, the pandemic has vigorously boosted e-commerce. The digital channel, which already in the 2019 Spring/Summer – 2019-20 Fall/Winter period had increased by +50.6%, starting from the 2020 Spring/Summer through the whole 2020-21 Fall/Winter period, it experienced growth by +33.1%. Mini-boom for the ‘newborn’ segment (+97.3%), while the ‘little girl’ one saw an increase of +44.5%; the ‘little boy’ segment was less lively but recorded a positive sign (+14.9%).

Trend of the first months of 2021

The current year opened with the first two months down by -11.6%; the 2020-21 Fall/Winter period therefore closed with a decrease of -12.1%. At a segment level, in the autumn season, contrary to what emerged in the Spring/Summer period, there was a more negative change for the ‘little girl’ segment, i.e. -13.6%; the ‘little boy’ segment fell by -11.1%, while the ‘newborn’ one by -9.5%. According to the up-to-date ISTAT data referring to the baby segment only, from January through March 2021, exports showed an about turn, with a faint increase of +0.7%. Among the main markets, there is a return of positive dynamics in many cases: direct exports to Switzerland grew by +10.9%; those to France by +49.9%; and to Germany by +10.1%. Baby fashion sales destined for the United Arab Emirates showed good performances as well, recording +115.7%. On the other hand, Spain and the United Kingdom kept suffering a negative trend: Spain fell by -19.5% from January to March 2021, the United Kingdom by -36.3%. At the same time, 0-3 clothing imports showed a trend similar to that of exports: imports also changed pace and registered a +0.5% compared to the first quarter of 2020. The first two suppliers, China and Spain, grew by +5.2% and +24.7%, respectively; as a whole, they cover 43% of the sector’s total imports. Bangladesh, the third supplier with an incidence of 15.0%, still suffered a decline of -24.9%. Even though on much more confined values, also flows from India (-21.1%) and France (-8.3%) remained lackluster. Following were Turkey and the Netherlands: the former saw an increase by +57.6%, the latter by +28.3%.

bimestre in calo del -11,6%; l’A/I 2020-21 si chiude, pertanto, con un decremento pari al -12,1%. A livello di segmento, nella stagione autunnale, al contrario di quanto emerso nella P/E, si rileva una variazione maggiormente negativa per la ‘bambina’, ovvero -13,6%; il ‘bambino’ cala del -11,1%, mentre il ‘neonato’ del -9,5%.

Secondo i dati ISTAT ad oggi disponibili con riferimento al solo segmento bebè da gennaio a marzo 2021, l’export presenta un’inversione di tendenza, mostrando una timida variazione in aumento, pari al +0,7%. Tra i principali mercati, si assiste al ritorno di dinamiche positive in molti casi: l’export diretto in Svizzera cresce del +10,9%, quello in Francia del +49,9%, quello in Germania del +10,1%. Una buona performance interessa anche le vendite di moda bebè destinate agli Emirati Arabi Uniti, che segnano un +115,7%. Di contro, Spagna e Regno Unito si mantengono interessati da un trend negativo: la Spagna cede il -19,5% da gennaio a marzo 2021, il Regno Unito il -36,3%. Parallelamente, l’import di abbigliamento 0-3 anni presenta un andamento simile a quello delle esportazioni: anche l’import cambia passo e registra un +0,5% rispetto al primo trimestre 2020. I primi due supplier, Cina e Spagna, crescono rispettivamente del +5,2% e del +24,7%, complessivamente coprono il 43% delle importazioni totali di comparto. Il Bangladesh, terzo fornitore con un’incidenza del 15,0%, sconta ancora una flessione del -24,9%. Pur su valori decisamente più contenuti, si mantengono riflessivi anche i flussi provenienti da India (-21,1%) e Francia (-8,3%). Seguono poi Turchia e Paesi Bassi: la prima vede un aumento del +57,6%, i secondi del +28,3%.
The Italy of footwear, a reference also for training

**A concrete opportunity for young people**

Whether, on the one hand, these activities have allowed companies to consolidate their leadership all over the world, on the other they have facilitated the start of collaborations with major fashion brands. The meeting with the fashion houses, which in the Brenta Riviera have found an excellent productive system, encouraged the growth of the district until the current structure was reached. A turnover of 2.1 billion euro, almost 21 million pairs of shoes made, 92% destined for international markets and an employment that in 2019 exceeded 10,500 employees.

For its part and thanks to the high profile of its teachers, the Politecnico Calzaturiero has supported the process of repositioning the district, making it particularly attractive for big brands. In fact, 90% of the entrepreneurs in the Brenta district attended the model-making school; in the last seven years, 1,260 diplomas have been achieved. The facility trains 1000 employees and 300 young people on average, with a very high employment percentage. 95% of students, in fact, find a job before completing the two-year period. Always active in research and technology transfer, the Politecnico looks to the future. The Erasmus Feet in 4.0 project adapts the guidelines of Industry 4.0 to the footwear sector, also through educational materials that use augmented virtual reality to simulate daily activities.

**L’Italia della calzatura, un riferimento anche per la formazione**

Un’opportunità concreta per i giovani


Il Politecnico Calzaturiero, da parte sua, grazie all’alto profilo dei suoi insegnanti, ha supportato il processo di riposizionamento del distretto, rendendolo particolarmente attrattivo per i grandi brand. Il 90% degli imprenditori del distretto del Brenta, infatti, ha frequentato la scuola modellisti: negli ultimi sette anni sono stati assegnati 1260 diplomi. La struttura forma una media di 1000 occupati e 300 ragazzi, con un’elevatissima percentuale di inserimento nel mondo del lavoro. Il 95% degli studenti, infatti, trova impiego prima di terminare il biennio.
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TOE-PUFFS AND COUNTERS FOR SHOES.
REINFORCEMENT MATERIALS.
Since October 2020, the increase in the price of raw materials is a phenomenon that has affected all commodities and is due to various reasons. One of these is certainly the speculative component of a financial nature, but the physiological need to get out of a long depressive crisis, an enormous increase in transport and a misalignment between the Chinese economy and the rest of the world one is not unrelated. The People’s Republic exports a lot, but it doesn’t import with the same levels. One of the most destabilizing consequences is that containers remain empty in international ports.

Effects on the leather supply chain

Based on the price index prepared by Servizio Economico UNIC – Concerie Italiane, raw hide and chemicals have entered a phase of extremely high pressure. In recent months, raw hide has seen its price lists increase in a generalized and almost unreasonable way, against idle tanneries and manufacturing customers who have substantially reduced demand. Similarly, the producers of chemical auxiliaries have launched a generalized program of substantial price increases across the entire range of tanning auxiliaries. These tensions inevitably spill over into manufacturing and risk becoming a boomerang capable of inhibiting the tanneries, footwear and leather goods factories’ recovery opportunities, jeopardizing their ability to hold their markets, marginality, and propensity to invest.

Raw hides

As UNIC reports, medium-large bovine hides (calves, cows and bulls) have been growing non-stop for 8 months and since the beginning of 2021 their lists, on average, have increased by 13%. Compared to 6 months ago, however, the growth has tripled.
reaching +36%. Bull hides stand out: +23% between February and March 2021; +35% at the end of 2020 and +96% compared to six months ago.

Similar is the trend of cow hides, whose price lists, in the last six months, have grown by 70%. As regards veal hides, the increases are equally strong: +23% on average over six months; +9% from the beginning of 2021. The trend in sheep’s raw material is not consistent: whether a few origins do not show particular fluctuations (such as those in Australia and New Zealand), others have grown a lot.

This is the case of Spanish sheep hides (+70% compared to six months ago) and European ones in general.

La pelli grezze

Come segnala UNIC, le pelli bovine medio-grandi (vitellame, vacche e tori) crescono senza sosta da 8 mesi e da inizio 2021 i loro listini, in media, sono aumentati del 13%. A confronto con 6 mesi fa, però, la crescita è tripla e si spinge al +36%. Su tutti spicca il toro: +23% tra febbraio e marzo 2021; +35% su fine 2020 e +96% rispetto a un semestre fa.

Simile il trend delle vacche i cui listini, nell’ultimo semestre, sono cresciuti del 70%. Per quanto riguarda il vitellame, gli aumenti sono ugualmente sostenuti: +23% in media sui sei mesi; +9% da inizio 2021. Non generalizzabile la tendenza della materia prima ovina: se alcune origini non mostrano particolari oscillazioni (come quelle austroazziliane e neozelandesi), altre sono cresciute moltissimo.

È il caso delle ovine spagnole (+70% rispetto a sei mesi fa) e in generale di quelle europee.

Ci sono pelli, poi, che hanno raggiunto picchi ben maggiori, come il wet blue brasiliano: +122% rispetto alle quotazioni risalenti all’estate 2020.

Le dinamiche della domanda non giustificano questi aumenti, così come il trend delle macellazioni le quali, su alcune importanti piazze di approvvigionamento stanno affrontando un calo di produzione al macello, ma non così estremo.

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Gabriella
There are also leathers that have reached much higher peaks, such as the Brazilian wet blue: +122% compared to the prices dating back to summer 2020. The demand dynamics do not justify such increases, and neither does the slaughtering trend which, on some important supply markets, is facing a decline in production at the slaughterhouse, but not so extreme.

Chemicals
Furthermore, many tanneries report that, since April 2021, chemical suppliers have started an increase plan on all types of products between +5 and +40%. On average, the increase would be around +15%. Such increases would be largely due to the difficulties in the supply of chemical raw materials, which, among other things, are not decreasing in price. All this, made worse by greater difficulties in transport, which leads to a relative increase in logistics costs. In the balance sheet of the Italian tanning industry, the chemical supply is the third cost item. The surge in these price lists, therefore, translates into a further and very complex obstacle to manage as it comes, moreover, at a time of the year when sales negotiations with customers on samples have already begun.

The perspective
According to Confindustria, many increases will have medium-term effects. Other prices, driven by oil, will normalize in the course of 2021. Every forecast, though, given the current and persisting condition of global uncertainty, has enormous margins of uncertainty and is based on the need for widespread implementation of vaccination plans which, as UNIC, Assocalzaturifici, and Assopellettieri hope, would restart the global economy starting from end-consumers, rebalancing price dynamics that generates real concerns on the part of companies that, faced with such conditions, fear they won’t be able to intercept the recovery.

I prodotti chimici
Molte concerie segnalano, inoltre, la decisione dei fornitori chimici di aver avviato da aprile 2021 un programma di aumenti su tutte le tipologie di prodotto e compresi tra il +5 e il +40%. In media, si aggirerebbero attorno al +15%. Le ragioni di questi aumenti sarebbero da addurre, in gran parte, a difficoltà di approvvigionamento delle materie prime chimiche, le quali, tra l’altro, non sarebbero diminuendo di prezzo. Il tutto, aggravato da maggiori difficoltà nei trasporti, che porta al relativo aumento dei costi logistici.
Per l’industria conciaria italiana la fornitura chimica rappresenta, a bilancio, la terza voce di costo. L’impennata di questi listini, dunque, si traduce in un ostacolo ulteriore e molto complesso da gestire, poiché, inoltre, arriva in un momento dell’anno in cui è già stata avviata la trattativa di vendita con i clienti su campionature e campionari.

La prospettiva
Secondo Confindustria, molti rialzi avranno effetti di medio termine. Altri prezzi, trainati dal petrolio, si normalizzeranno nel corso del 2021. Ma ogni previsione, vista l’attuale e perdurante condizione di incertezza globale, sconta enormi margini di indeterminatezza e si basa sulla necessità di una diffusa messa in opera dei piani vaccinali che, come auspicano UNIC, Assocalzaturifici e Assopellettieri, possa rimettere in moto l’economia globale a partire dai consumi finali, riequilibrando una dinamica dei prezzi che genera reali preoccupazioni da parte di aziende che, di fronte a queste condizioni, temono di non riuscire a intercettare la ripresa.
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Back as an in-person event - LINEAPELLE opens its doors to new exhibition projects

A lot of exhibitors and nations represented

"We already have 600 exhibitors from 18 countries registered," says the event organizers. "We believe this is an important and very encouraging sign, but also a precise hint for developing an exhibition project, which is as close as possible to the traditional event model that has been upset badly by the Covid-19 pandemic. Like in the past September 2020, the next appointment will adopt a simplified formula, with unified stands and solutions that guarantee maximum safety. Inevitably, there will not be many foreign visitors, in particular there will be a lack of operators from the Asian area. However, we never broke off contact with them, thanks to a series of initiatives performed remotely." Digital paths that will remain in support of the physical offer of LINEAPELLE, the global reference point for the international fashion & luxury industry.

Projects and collaborations

The next edition of LINEAPELLE will also feature the synergy with Assopellettieri which will debut with the Mipel Lab exhibition format, taking place "simultaneously and in partnership with LINEAPELLE, with which it will also share the spaces". "After the terrible moment experienced," said Gianni Russo, President of LINEAPELLE, "I find the collaboration between organizations and associations in the same sector, and in other ones, fundamental. Upon this conviction,

LINEAPELLE torna in presenza e apre le porte ad alcuni nuovi progetti espositivi

Molti gli espositori e le nazioni rappresentate

LINEAPELLE, che torna in presenza dal 22 al 24 settembre 2021, all’interno dei padiglioni di Fieramilano Rho, si appresta a scendere in campo con nuovi progetti e tanti eventi che faranno da supporto alla manifestazione. "Siamo già a 600 adesioni di espositori provenienti da 18 Paesi - dice la Segreteria Organizzativa. Lo ri-teniamo un segnale importante e molto incoraggiante, ma anche un segnale preciso che ci spinge ad elaborare un progetto espositivo, il più vicino possibile al modello tradizionale della manifestazione, che è stato stravolto dalla situazione sanitaria mondiale. Come a settembre 2020, il prossimo appuntamento adotterà una formula semplificata, con stand unificati e soluzioni che garantiscono la massima sicurezza. Inevitabilmente, non ci saranno molti visitatori stranieri, in particolare mancheranno gli operatori provenienti dell’area asiatica. Con loro, però, non abbiamo mai interrotto i contatti, grazie a una serie di iniziative che si sono svolte in remoto". Percorsi digitali che rimarranno in supporto dell’offerta fisica di LINEAPELLE, il punto di riferimento globale per la fashion & luxury industry internazionale.

Progetti e collaborazioni

La prossima edizione di LINEAPELLE sarà caratterizzata anche
we enthusiastically joined this proposal and we will put all our efforts to ensure its success”.
LINEAPELLE stylistic exploration will address the theme of material innovations combined with technology within the ‘A New Point of Materials’ space, which involves ‘D-house laboratorio urbano’, a spin off of Dylan and C.L.A.S.S. ecohub.

**The economic situation**
The organizational work in progress of the next edition of LINEAPELLE is part of an economic situation, which remains extremely complex and uncertain. There are signs of recovery for all sectors which keep going on, albeit in fits and starts. The pre-Covid volumes are still very far from being reached and the price increases in raw materials are of concern. Substantial stability of employment, which is a positive factor.

**The LINEAPELLE network**
The Secretariat announces that LINEAPELLE New York will take place on the 1st and 2nd of September, in the usual location of the Metropolitan Pavilion, for which 85 companies have already registered. At an organizational level, more precise indications on how to enter the United States are pending.

dalla sinergia con Assopellettieri che debutterà con il format espositivo Mipel Lab, che si svolgerà “in contemporanea e in partnership con LINEAPELLE, con la quale condividerà anche gli spazi”. "Dopo il terribile momento vissuto – ha detto, Gianni Russo, Presidente di LINEAPELLE – trovo fondamentale la collaborazione tra enti e associazioni dello stesso settore e non. Partendo da questa convinzione, abbiamo aderito con entusiasmo a questa proposta e proponeremo tutti i nostri sforzi per assicurarne il successo". L’esplorazione stilistica di LINEAPELLE affronterà il tema delle innovazioni materiche abbinate alla tecnologia all’interno dello spazio A New Point of Materials, che coinvolge D-house laboratorio urbano, spin off di Dylan e C.L.A.S.S. ecohub.

**La situazione congiunturale**
Il work in progress organizzativo della prossima edizione di LINEAPELLE si inserisce in una situazione congiunturale, che resta estremamente complessa e incerta. Si avvertono segnali di ripresa per tutti i settori che procedono, però, a singhiozzo. I volumi pre-Covid sono ancora molto distanti dall’essere raggiunti e destano preoccupazione gli aumenti delle materie prime. Stabilità sostanziale dell’occupazione, il che rappresenta un fattore positivo.

**Il network LINEAPELLE**
La Segreteria annuncia che l’1 e il 2 settembre si svolgerà, nella consueta location del Metropolitan Pavilion, LINEAPELLE New York, alla quale hanno già aderito 85 aziende. A livello organizzativo, si è in attesa di indicazioni più precise sulle modalità di ingresso negli Stati Uniti.
A decisive moment for Italian companies revival

With the slogan ‘Back to The Fair’, the Simac Tanning Tech organizers prove to be eager to take up a demanding but fundamental challenge for the ‘leather area’ sector. In other words, to offer a business, but also a meeting moment in total safety for all the sector’s players. “The exhibition space reservations for Simac Tanning Tech, which will open its doors on the 22nd through 24th of September, 2021, proved to be in line with our expectations”, said Maria Vittoria Brustia, President of Assomac, who underlined “The sector of Made in Italy mechanical industry is eager to restart and does so also through this event that best represents it on an international level.” “The physical meeting with customers remains a difficult element to replace, despite the fact that a fair structured presence was also built on the Net”, added Roberto Vago, Director of Assomac, who continued by saying, “Next September event aims to be able to meet with the entire fashion, design and automotive manufacturing industrial supply chain” concluded Brustia.

Simac Tanning Tech 2021 “Back to the fair”

Un momento decisivo per il rilancio delle imprese italiane

Gli organizzatori di Simac Tanning Tech, con lo slogan “Back to The Fair”, confermano di voler raccolgere una sfida impegnativa ma fondamentale per il settore dell’“area pelle”. Vale a dire offrire un momento di business ma anche di confronto in totale sicurezza per tutti i player del settore. “Le prenotazioni degli spazi esppositivi per Simac Tanning Tech, che aprirà i battenti dal 22 al 24 settembre 2021, si sono confermate in linea con le nostre aspettative”, ha affermato Maria Vittoria Brustia, Presidente di Assomac, che ha sottolineato “Il comparto dell’industria meccanica made in Italy ha voglia di ripartire e lo fa anche attraverso la manifestazione che meglio lo rappresenta sul piano internazionale”. “L’incontro fisico con i clienti rimane un elemento difficile da sostituire, nonostante in questo periodo si sia costruita una presenza strutturata della fiera anche sulla rete”, ha aggiunto Roberto Vago, Direttore di Assomac, che ha proseguito dicendo: “L’appuntamento del prossimo settembre vuole essere l’occasione per confermare il ruolo centrale delle imprese italiane del settore meccanico, che da anni mettono in primo piano, attraverso la loro presenza, l’importanza della qualità, della sostenibilità, della sicurezza e della capacità produttiva”. “Simac Tanning Tech sarà certamente un momento decisivo di rilancio per le imprese italiane, che potranno confrontarsi con l’intera filiera industriale della manifattura della moda, del design e del automotive”, ha concluso Brustia.
Micam returns ‘in person’

Siro Badon: "We start again with the traditional formula at long last"

Micam, the footwear sector’s leading international exhibition, is back at Fiera Milano Rho (19-21 September, 2021). Intended to showcase the spring-summer 2022 collections and industry trends, the event will aim at concentrating the operators’ visit in the stands in three days, instead of four.

“We start again with the traditional formula at long last,” says Siro Badon, President of Assocalzaturifici and MICAM – “companies need to get back and meet buyers and work on public relations with retail operators”.

The emergency and the related health restrictions, which did not allow people to travel, have taught everyone how it is necessary to speed up also on the digitalization front. For this reason, the MICAM Milano Digital Show platform will support the physical event from 15 September to 15 November, 2021 allowing brands to schedule visits and meetings with buyers before, during and after the fair.

The September exhibition will be integrated with the 4th edition of the EMERGING DESIGNERS project, an event area dedicated to 12 international footwear designers selected through an innovative concept; MICAM START-UP BOOT CAMP, a concept dedicated to the best start-ups in the footwear sector; ITALIAN ARTISAN HEROES, a new area dedicated to the best Italian private label productions, which will bring the success stories of the digital platform dedicated to crafts to the fair.

Micam ritorna in presenza

Siro Badon: “Finalmente ripartiamo con la formula tradizionale”

Micam, il salone internazionale leader del settore calzaturiero torna in presenza a Fiera Milano Rho (19-21 settembre 2021). La manifestazione, destinata a mettere in mostra le collezioni primavera-estate 2022 e i trend del settore, si presenterà con l’obiettivo di concentrare in tre giorni, invece di quattro, la visita degli operatori negli stand. “Finalmente ripartiamo con la formula tradizionale -dice Siro Badon, Presidente di Assocalzaturifici e MICAM— le aziende hanno la necessità di tornare ad incontrare i buyer di lavorare sulle pubbliche relazioni con gli operatori del retail”.

L’emergenza e le relative restrizioni sanitarie, che non hanno permesso di farviaggiare, hanno insegnato a tutti che è necessario spingere sull’acceleratore anche sul fronte della digitalizzazione. Per questo motivo, la piattaforma MICAM Milano Digital Show affiancherà l’evento fisico dal 15 settembre al 15 novembre 2021, permettendo ai brand di programmare le visite e gli incontri con i buyer prima, durante e dopo la fiera.

Completeranno la rassegna di settembre la quarta edizione del progetto EMERGING DESIGNERS, l’area evento dedicata a 12 designer internazionali di calzature, selezionati attraverso un concept innovativo; MICAM START-UP BOOT CAMP, un concept dedicato alle migliori start-up del settore calzaturiero; ITALIAN ARTISAN HEROES, la nuova area dedicata alle migliori produzioni italiane in private label, che porterà in fiera i casi di successo della piattaforma digitale dedicata all’artigianato.
Sustainable and 100% Recycled Sewing Threads

CT POINT
100% FILATI MADE IN ITALY

www.ctpoint.it  info@ctpoint.it
The most recent

had to trade-off in terms of color choice. Thanks to G SIDE, this limit has been removed. In fact, it is now possible to choose a recycled material even in the monochromatic version. Selasti laboratory research efforts and consistent experimentation enabled to obtain the quality standards of the other items, creating a recycled material completely monochromatic, not only on its surface but also inside.

G SIDE can be used for the production of both heel and wedge-heel sheets, or in the injection version of the ELITE line (G SIDE-E). The company’s goal of decreasing the amount of waste material and reducing the volumes of processing waste has led to optimizing the production cycle and giving a concrete response in terms of environmental sustainability.

SELASTI

Sports shoes should be functional, comfortable, and support and soften feet and joint impacts. If recycled correctly, even a material like microporous E.V.A. is a resource from which new items – featuring resistance, softness, lightness and an even higher flexibility than the original material – can come to life. Until now, shoes made with recycled materials aimed at reducing the environmental impact, but...
PIDIGI
The company aims at helping the textile, footwear, and leather industries to develop an eco-sustainable, circular-economy process. Pidigi Recycle System fits in precisely with this perspective. This is a project aimed at developing eco-friendly materials, capable of offering the customer the technical standards necessary to maintain the desired quality. The development of these items is done in close collaboration with the fashion sector players and meets the "Fashion Industry Charter for Climate Action", signed in Katowice in December 2018 in conjunction with the United Nations Conference on Climate Change (COP24). Pidigi’s proposal of eco-sustainable materials involves several fashion segments, and is extensive and constantly evolving.

For the insole
• Cellulosic material: 30-80% recycled
• Bonded leather: 75-90% recycled
• Fibreboard materials: 95-100% recycled
• PU agglomerate for removable insoles: 100% recycled and recyclable

Footwear and Leather Goods Fabrics
• Post-consumer recycling 3D liners: 50-100% recycled
• Dinamica® microfiber from post-consumer recycling

• Materials: 3D liners: 50-100% recycled
• Dinamica® microfiber: 48% recycled
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• PU agglomerate: 100% recycled and recyclable
The company 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.

A certified commitment - On June 1st this year, in fact, in addition to the certifications already achieved, the company will get the one by ICEA Institute; in addition to certifying the ethical/environmental compliance, this certification - with the ‘Global Recycled Standard (GRS) Version 4.0: 2017’ - ensures the compliance of the recycled yarns line with international standards. The certificate will be valid until May 2021.

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: 10/3, 20/3, 30/3, 40/3, 60/3.

The high tenacity braided sewing thread in the line Platinum Braid EcoGreen is available with the following counts: 0.4 mm, 0.6 mm, 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.

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La produzione C.T. Point si distingue da sempre sul mercato per le elevate caratteristiche tecniche che assicurano il più alto grado di precisione e una lunga durata nel tempo. Gli articoli EcoGreen, prodotti al 100% con materiale riciclati, comprendono sia i filati ritorti sia quelli trecciati: questi ultimi realizzabili nelle finiture semi-cerato, cerato o lubrificato. Il ritorto ad alta tenacità nella linea Platinum EcoGreen è disponibile con i seguenti titoli: 20/3, 30/3, 40/3.

Mentre il trecciato ad alta tenacità nella linea Platinum Braid EcoGreen è disponibile con titolo: 0.8 mm, 1.0 mm, 1.2 mm

La linea EcoGreen, inoltre, affianca i precedenti prodotti già realizzati dall’azienda con l’obiettivo di dare una risposta efficace sul tema della sostenibilità ambientale: PFC FREE (Perfluorocarboni) nella versione WATER PROOF; sia nel filato poliestere che poliammide, e Solvent FREE nella linea BONDING, sia nel filato monocabo che nei tre capi.

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Luigi Carnevali s.a.s.
We know the secret to keep them in shape.

www.carnevali.it
Two novelties have been introduced by the Tuscan company specializing in the development and production of high-performance materials, for the production of work shoes, and more generally safety and military footwear.

The first of these items is FUS, a knitted fabric based on synthetic yarns with also steel yarns inside. This product has been studied for the production of the ‘fussbett’. A film applied on the reverse side of the fabric blocks the passage of the polyurethane during the injection phase, and is also conductive in the presence of 12% relative humidity, according to the CEI EN 61340-5-1:2016 standard regarding footwear with Electrostatics Discharge (ESD) features.

The conductivity of the fabric remains unchanged over time, and this feature makes it particularly suitable for the electronics industry, where even slightest imperceptible electrostatic discharge could damage the devices.

Generally, to convert an injected fussbett insole from insulating to conductive, a seam with conductive yarn in the base of the insole is applied. This type of processing has some drawbacks, especially when using “anti-perforation” fabrics as a lasting midsole. Furthermore, over time, the stitching could compromise the comfort of the shoe and its very conductive capacity.

The second novelty presented by Pranem is the article STEP 2500: this is a conductive fabric based on polyamide (Global Recycle Standard-GRS) with a carbon yarn inside. This material, like the previous FUS, meets the requirements of footwear complying with the ESD regulations. The main feature of STEP is that it is made with recycled yarns, in line with the needs of an environmental-friendly production. Thanks to its high resistance to abrasion, STEP can be used both as lining and insole. Always for ESD type work footwear.

Incluse quelle militari. Il primo di questi articoli è FUS, un tessuto a maglia a base di filati sintetici con al suo interno anche filati in acciaio. Questo prodotto è stato studiato per la produzione del fussbett. Il film che viene applicato sul rovescio del tessuto blocca il passaggio del poliuretano durante la fase di iniezione, ed inoltre è conduttivo in presenza del 12% di umidità relativa, secondo la norma CEI EN 61340-5-1:2016 che riguarda la calzatura con caratteristiche Electrostatics Discharge (ESD).

La conduttività del tessuto si mantiene inalterata nel tempo, una caratteristica che lo rende particolarmente indicato nell’industria elettronica, dove ogni minima impercettibile scarica elettrostatica può danneggiare i devices. Solitamente per trasformare un soletto iniettato fussbett da isolante a conduttivo, si applica una cucitura con filato conduttivo nella pianta del solletto. Questo tipo di lavorazione presenta alcuni inconvenienti, soprattutto quando si utilizzano come intersuola di montaggio i tessuti “antiperforazione”. La cucitura, inoltre, nel tempo, potrebbe compromettere il comfort della scarpa e la sua stessa capacità conduttiva. L’altra novità presentata da Pranem e l’articolo STEP 2500: tessuto conduttivo a base di poliammide (Global Recycle Standard-GRS) con al suo interno un filato in carbonio. Questo materiale, come il precedente FUS, risponde alle esigenze richieste per una calzatura in linea alla normativa ESD. La caratteristica principale di STEP è quella di essere realizzata con filati riciclati, in linea con le esigenze di chi si adopera per una produzione che rispetta l’ambiente. Grazie alla elevata resistenza alla abrasione, STEP può essere utilizzato come fodera e come soletto. Sempre per calzature da lavoro di tipo ESD.
Footwear **hot melt** adhesives
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 ones - anti-stain treatment, velvet 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.
less water

more fluid thinking

We’re going above and beyond to limit the water we use. And to make sure that when we do use it, we return it back to nature even cleaner than when it came out.

www.texon.com/zerofootprint
The magnetic snaps are an accessory increasingly in use in the production of bags. They are available in an infinite number of variations which include the many different finishes and thicknesses to the different customizations requested by the clients. The most recent proposals of magnetic snaps are intended for a high-end range: these accessories are renewed both from a technical standpoint and the styling. The new magnetic snaps branded MLM MAZZOLA are available in many different sizes and are constructed with a double magnet that allows self-centering; very strong magnets are used and stand out by the thickness that can be really reduced compared to the traditional standards. The transparent lacquer ensures the highest protection from scratches and weather aggression. It should also be remembered that MLM has long been a licensee of the American ROMAG®, which holds a particular International patent right for magnetic snaps. In collaboration with the prestigious American brand, the Italian company, has recently created a line of magnetic snaps designed specifically for the European market, on which it has the exclusive mandate for the distribution.
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Technology showcase 2021

The latest

The very latest product technologies that stand out for innovation, production flexibility and simplicity.

WINTECH

The company’s latest proposals include the WLX line of machines for the production of boots in thermoplastic materials. These machines combine high productivity with lower energy consumption, and this was achieved thanks to the use of new electrical/hydraulic systems.

In fact, the use of variable speed servomotors controlled by inverters, combined with other solutions, allow reducing the energy consumption by 60%. In addition, the new servomotors ensure a number of benefits, including the following: the elimination of proportional valves and variable displacement pumps, as well as the reduction of the oil tank volume by 50%. Thanks to the lower temperature of the oil in circulation, a longer life of pumps, hydraulic cylinders, and seals is achieved. And a lower environmental heating is also achieved. Efficiency, noiselessness, and work optimization are other aspects featuring the WLX line machines, which are particularly suitable for work boots production. “The servomotor high efficiency – specifies the company - is the result of the hardware chosen, a careful evaluation of how to implement it, and a precise study of the hydraulic flows dynamics. Failing to perform a specific study on the optimal parameters, would have made impossible to get the desired results. Including the quality of the finished product.”

WINTECH

Le più recenti

Tra le proposte più attuali dell’azienda figurano le macchine per la produzione di stivali in materiali termoplastici della linea WLX. Si tratta di impianti che coniugano l’alta produttività con il minore consumo energetico: un risultato reso possibile grazie ai nuovi sistemi elettrici/oleodinamici adottati. L’impiego di servomotori a velocità variabile, controllati tramite inverter, infatti, insieme ad altre soluzioni adottate, permettono l’abbattimento del 60% dei consumi energetici. I nuovi servomotori adottati, inoltre, garantiscono molti altri benefici, quali ad esempio: l’eliminazione delle valvole proporzionali e delle pompe a portata variabile, la riduzione del volume del serbatoio olio del 50%. Grazie alla minor temperatura dell’olio in circolo si ottiene una maggior durata delle pompe stesse, dei cilindri idraulici e delle guarnizioni. Unitamente al minor riscaldamento ambientale. Efficienza, silenziosità e ottimizzazione del lavoro sono altri aspetti che caratterizzano le macchine della linea WLX, particolarmente indicate per la produzione di stivali da lavoro.

“L’alta efficienza data dai servomotori – precisa l’azienda – è frutto dell’hardware adottato, di un’attenta valutazione su come applicarlo e da un preciso studio delle dinamiche dei flussi idraulici. In assenza di uno studio specifico che tenga conto di quali siano i parametri ottimali, non sarebbe stato possibile ottenere i risultati desiderati. Inclusa la qualità del prodotto finito”.

Rassegna tecnologica 2021

Le più recenti
CIUCANI MOCASSINO MACHINERY

The company based in the Marche region has launched a new system for making glue-free shoes; the result is an extremely flexible, comfortable, sustainable shoe produced with lower labor and machinery costs.

The glue-free sneaker production project involves the construction of a 5-operator work island with a throughput of 230/250 pairs in 8 hours.

The island consists of two CIUCANI sewing machines, one to sew the upper to the insole and the other to sew the sole; an ARP (a puff-curling machine which crimps the upper) and other machines normally used in shoe factories. The two sewing phases enable to avoid using glues, and all the related processing phases. According to laboratory tests, after 80,000 flexes, the sole did not show any alterations.

A similar work island setting exists for the production of Goodyear footwear; thanks to the project carried out by CIUCANI, the use of glue and nails is reduced to a minimum, that is to the welt and the application of the heel – the time saved and the ease of execution are remarkable.

The glue-free assembly performed with the work islands designed by CIUCANI MOCASSINO MACHINERY makes the footwear extremely flexible and comfortable. The savings in terms of machinery, time and personnel are equally remarkable.

The shoe is made with a reduced environmental impact - an eco-sustainable product, which supports the ever-increasing environmental awareness of consumers and big brands.
Recently, a new version of technologies already widely implemented in the sector have been introduced by FALAN, a company specialized in the design and construction of machines for the production of footwear, leather goods, bags, etc. Among these is the FL1 TS model, an evolution of the machines designed to perform Blake sewing.

The main features of the FL1 TS are the working speed, 1100 SPM; the ability of sewing materials with high thickness, up to 33 mm; using yarns with a thickness of 0.6 to 1.2 mm; and a system function to quickly release the cover, which enables faster maintenance.

A new generation brushless motor ensures a high accuracy of the FL1 TS work, while a color 4.3" TOUCHSCREEN PANEL makes it easier to set up all the job functions and control the sewing SPEED, LUBRICATION, temperatures, ENGINE functionality, EMERGENCY situations, etc. Like other FALAN machines for Blake processing, the FL1 TS model allows getting pdf, photos, videos and to perform service directly on the machine.
22–24 SEPTEMBER 2021
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INTERNATIONAL EXHIBITIONS OF MACHINES AND TECHNOLOGIES FOR FOOTWEAR, LEATHERGOODS AND TANNING INDUSTRY

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Used in both the leather goods and footwear industries, the stitch-flattenning machine allows pressing both after sewing and after gluing the parts. The self-adapting hammer is adjustable in height and pressing force. Thanks to the telescopic column, the working position can also be adjusted in height. Using this machine reduces manual intervention with the hammer by 80%. 4 are the models available that differ in the working area, adjustment capabilities, and pedal ‘stop-and-go’.

**MONET**

This is a machine for coloring the edges of semi-finished or finished products made of many materials, including leather. The coloring head is interchangeable to allow vertical or horizontal processing; in both cases, many types of complex shapes can be processed, such as the very concave ones [maximum diameter 12 mm]. MONET stands out for its ease of use and the ability to perform all the necessary adjustments to optimize the work, including color dosing.
In recent years, reducing and optimizing energy consumption has become crucial not only to protect our planet, but also to achieve economic savings.

A leading brand specializing in injection molding machinery for major footwear productions, Main Group Technologies has developed a new sophisticated technology applied to DELT-UP, i.e. latest generation rotary machines for the injection of up to three color thermoplastic material boots, with the aim of guaranteeing significant energy savings.

With the integration of special independent pumps, controlled by brushless motors, they managed to achieve a high level of efficiency of the whole production process; the energy consumption on the production of three-color boots was reduced by 30%, and the noise decreased by 70%.

In addition, the refrigerator power used to cool the oil in the hydraulic system has been reduced by 80% and even the oil cycle has been tripled, as well. In fact, the oil can be changed every 30,000 hours instead of 10,000 hours. These new technological solutions also ensure an economic competitive advantage, reducing ordinary maintenance costs by 50% on valves and electronic boards.

**BT**

La macchina batticoste, utilizzata indifferentemente nell’industria della pelletteria e della calzaturiera, consente la pressatura sia dopo la cucitura sia dopo l’incollaggio delle parti. Il martello battitore, autoadattante, è regolabile in altezza e forza di pressione. Grazie alla colonna telescopica è possibile regolare in altezza anche la posizione di lavoro. L’impiego di questa macchina riduce dell’80% l’intervento manuale con il martello. 4 i modelli disponibili che si differenziano per area di lavoro, possibilità di regolazioni, ‘stop-and-go’ a pedale.

**MAINGROUP TECHNOLOGIES**

Negli ultimi anni ridurre e ottimizzare il consumo di energia è divenuto fondamentale non solo come forma di tutela per il pianeta, ma anche per ottenere un risparmio economico.

Main Group Technologies – marchio di riferimento per i macchinari per stampaggio a iniezione delle principali produzioni calzaturiere – ha sviluppato una nuova sofisticata tecnologia applicata alle DELT-UP, macchine rotative di ultima generazione per l’iniezione di stivali fino a tre colori in materiali termoplastici, con l’obiettivo di garantire un significativo risparmio energetico.
At Simac 2020, the company introduced a new version of thermo-ironing machine that allows to remove wrinkles and manufacturing defects on footwear and leather goods items. This is the SO 2200 model, a machine designed to meet the need for production flexibility and energy consumption reduction.

The machine **POWER FLOW SYSTEM** generates a jet of hot air which is adjustable both in speed and temperature. This feature allows to multiply the working pressure and adjust the temperature up to 500° Celsius. The steam distributor is independent and can be used in sequence or simultaneously, with adjustable temperature up to 200° Celsius. The processing can be performed separately (steam only, or only modulated hot air); in sequence (steam/modulated hot air); simultaneously (a mixture of modulated hot air with steam), and with a proper ironing roller. The system allows the operator to adjust production without interrupting the processing cycle, even with frequent material changes.

The **STAND-BY** system allows to pause steam production and quickly start processing at the first daily power-up. The recovery of hot air, which is put back into circulation, allows a significant reduction in electricity consumption (energy -20%).

The machine features a next-generation digital panel, which allows the setting-up of up to 100 processing programs that can be stored and modified, if necessary. Furthermore, the panel enables monitoring both set and detected parameters, and quickly check all the functions and diagnostics of the machine.
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. In highly productive machines, this operation may be critical, often becoming the bottleneck in the process or requiring a large number of operators. 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 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.

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
Adapting to market needs has always been the strength of FAV (Fratelli Alberti Varese), and a recent rethink of their most advanced machines – which are now also offered in 4.0 mode - confirms this. This is the path that future companies will take, and for those who have decided to accept the challenge, the company in Varese is one of the main reference points.

Among the machines that can be shipped as Industry 4.0 upon request, the splitting machine. And the know-how acquired to achieve this goal will soon enable to get the 300 and 620 mm models as Industry 4.0, as well. Along with the splitting machine line, the company offers also the most advanced skiving machines, with the top models AV 2 TEV and AV 12 TEV.

As with all the products realized by FAV, the splitting machines - among which the one with a 520 mm working bench is the most popular - are built using materials and components of the highest quality. The main features that make these machines leaders in our sector are: maximum work precision, keeping of quality standards and ease of use. 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 pro-

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.

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la recente rivisitazione delle sue macchine più evolute, che ora vengono proposte anche nella modalità 4.0. Le imprese del futuro vanno in questa direzione e, per chi ha deciso di affrontare questa sfida, l’azienda di Varese resta uno degli interlocutori di riferimento. Tra le macchine che su richiesta possono essere predisposte per l’industria di quarta generazione figurano la linea delle spaccapelli e quella delle scarnitrici più evolute [modello AV 2 TEV e modello AV 12 TEV].

Le spaccapelli, costruite come tutte le macchine della FAV, impiegando materiali e componenti di altissima qualità, si impongono sul mercato per la massima precisione del lavoro, il mantenimento degli standard qualitativi e la facilità di gestione. Aspetti, questi, resi possibili dai nuovi accorgimenti tecnici adottati, tra i quali il sistema di affilatura della lama e quello di autoregolazione della piastra. La potenza degli aspiratori, il basso livello dei decibel prodotti e il fattore ergonomico, invece, tutelano l’ambiente e il lavoratore. Per facilitare la manutenzione ordinaria e straordinaria, le macchine sono state progettate per permettere un facile accesso ad ogni loro parte.

La customizzazione, inoltre, è un’altra caratteristica delle spaccapelli Alberti, che vengono costruite per rispondere alle diverse esigenze del cliente, costretto sempre più frequentemente a lavorare con materiali molto diversi tra loro. La scarnitrice AV2 TEV, già molto conosciuta ed apprezzata dal mercato, è stata ulteriormente perfezionata per essere sempre più funzionale e flessibile. Infatti, al pannello touchscreen che assicura semplicità e immediatezza nell’utilizzo della macchina è stato affiancato un lettore di codice a barre che ottimizza il lavoro dell’operatore che non dovrà più impostare i settaggi di scarnitura: la lettura del barcode, generato dall’ufficio progettazione/programmazione tramite uno specifico software, infatti, consentirà alla macchina di apprendere automaticamente tutti i parametri delle lavorazioni da eseguire. Caratteristica dell’AV2 TEV è anche l’intercambiabilità dei particolari di maggior consumo con quelli delle scarnitrici tradizionali prodotte dall’azienda. La facile accessibilità alla mola, al rullo e
Any chamfering operation is characterized by 4 parameters: angle (0° to 4°), thickness (0 to 2 cm), width (0 to 45 mm), and workpiece feeding speed (0 to 42 m per minute). Moreover, depending on the type of foot or roller installed (emery, steel, vulkollan, and rubber), thousands of skivings can be programmed. The positioning of the foot, grinding wheel, the adjustment of the blade can be automatic or manual. The operator can also perform central skivings and splits to the workpiece.

The AV 12 TEV is the latest of the newly developed machines introduced by FAV, and is the synthesis of the expertise gained in this type of technology; as for the AV 2 TEV, the electronic components used are among the most advanced and functional. The intuitive and easy-to-use touchscreen control panel optimizes their presence. Among the features that make the AV 12 TEV a unique machine, the feeding speed - doubled compared to traditional skiving machines (up to 70 m 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.
The acronym VAR [Video Assisted Report] is now commonly used in sport, especially in soccer, indicating a system that supports the referees in case of disputes or doubts, and allows analyzing the videos of actions that are difficult to interpret. And this is an opportunity that STEMMA has decided to offer its customers, who produce polyurethane sole footwear. As in football matches, STEMMA’s VAR enables the molding plant technician to review every single injection operation and, using specific software, immediately identify any deviations from the production process standard values that can cause system malfunctions or maintenance needs. Everything that happens during the injection phase is monitored and each operating parameter is recorded, archived and analyzed by the embedded software. Thanks to this technological support, whenever an anomaly in the injection process occurs, the operator will have a precise procedure to follow. VAR is just the latest of the monitoring systems that are integrated into STEMMA’s new generation machines. Together, they enable a more efficient production and work organization activity, and allow to meet the very characteristics of Industry 4.0 – connection with the company information system, data analysis and archiving.
THE FERRAGAMO GROUP INCREASES SALES

A positive first quarter of 2021 for Salvatore Ferragamo, after the troubled year 2020. The signal is very significant: consolidated revenues of 245 million euro, 10.3% more than in the same period last year.

Asia, an area that accounts for 51% of the brand’s total sales, was the continent that gave the Florentine Maison the most satisfaction, with sales up 50.6%. In mainland China, sales in creased by as much as 105% compared to the first quarter of 2020 and by 6.1% compared to 2019.

In South Korea, on the other hand, sales growth was 33.7% over 2020 and 25.4% over 2019. Japan performed less well with a decline of 9.3%.

Overall, all of Salvatore Ferragamo’s production types are growing compared to last year: leather goods (+18.2%), footwear (+8%), perfumes (+5.3%), clothing (+3.9%), and accessories (+0.9%).

Salvatore Ferragamo counts on 638 stores worldwide, including 391 direct sales points.

A GROWING FIRST QUARTER FOR THE TOD’S GROUP

The company performed well in the first quarter of 2021, in which it achieved sales of 76.7 million euro, with an increase of 5.5% over 2020. Among the brands of the Group, the one that grew the most was Roger Vivier which registered +59%. Hogan also grew (+11%), while Fay fell by -6.9%.

The increase of Roger Vivier is linked to the greater presence on the Asian market, an area in which the Tod’s Group achieved the best results (+136%). Europe and the Americas keep marking the time, with declines over 2020 of 13.1% and 20.4%, respectively.

According to Diego Della Valle, Tod’s owner, positive results were recorded where it was possible to keep the stores open, while in Western countries the prolonged closure affected sales deeply.

IL GRUPPO FERRAGAMO AUMENTA LE VENDITE

Un primo trimestre 2021 positivo per Salvatore Ferragamo, dopo il tribolato anno 2020. Il segnale è molto significativo: ricavi consolidati a 245 milioni di Euro, il 10,3% in più rispetto allo stesso periodo dello scorso anno.

L’Asia, area che rappresenta il 51% del totale delle vendite del marchio, è stato il Continente che ha dato maggiori soddisfa-zioni alla Maison fiorentina, con vendite in aumento del 50,6%. Nella Cina continentale le vendite sono aumentate addirittura del 105% rispetto al primo Trimestre 2020 e del 6,1% rispetto al 2019.

In Corea del Sud, invece, la crescita delle vendite è stata del 33,7% sul 2020 e del 25,4% sul 2019. Meno bene in Giappone con una flessione del 9,3%.

Complessivamente tutte le tipologie di produzione di Salvatore Ferragamo sono in crescita rispetto allo scorso anno: pelletteria (+18,2%), calzature (+8%), profumi (+5,3%), abbigliamento (+3,9%) e accessori (+0,9%). Sono 638, tra cui 391 punti di vendita diretti, i negozi Salvatore Ferragamo nel mondo.

PRIMO TRIMESTRE IN CRESCITA PER IL GRUPPO TOD’S

Buona la performance della società nel primo trimestre 2021, nel quale ha realizzato vendite pari a 76,7 milioni di Euro, con un incremento del 5,5% sul 2020. Tra i marchi del Gruppo quello che è cresciuto di più è stato Roger Vivier che ha registrato +59%. In crescita anche Hogan (+11%) mentre ha perso terreno Fay (-6,9%).

L’incremento di Roger Vivier è legato alla maggiore presenza sul mercato asiatico, area nella quale il Gruppo Tod’s ha raggiunto i risultati migliori (+136%). Per quanto concerne Europa e Americhe si continua a segnare il passo, con flessioni sul 2020, rispettivamente, del 13,1% e del 20,4%.

Secondo Diego Della Valle, Patron di Tod’s, i risultati positivi si sono registrati laddove è stato possibile tenere i negozi aperti, mentre nei Paesi occidentali la chiusura prolungata ha pesato molto sulle vendite.

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RECORD SALES IN THE USA: THE NIKE BRAND FLIES HIGH
At Nike’s headquarters in Beaverton, Oregon, managers are very satisfied with the results of the fourth fiscal quarter, ended May 31st, which recorded revenues of $12.3 billion dollars, with a growth of 96% over the same period 2020. Compared to 2019, the performance is +21%.
Jhon Donahoe, President and CEO of Nike, said: “The excellent results prove NIKE’s competitive ability and deep connection with consumers. Driven by our momentum, we keep investing in innovation and our digital leadership, to lay the foundations for our brand’s long-term growth.”
In a press release, Nike points out that North America has achieved record revenues, up 141% for the fourth quarter of fiscal 2020 and +29% compared to the same period in 2019. The fourth fiscal quarter in the EMEA region (Europe, Middle East, and Africa) recorded an increase in revenues of 124%, up by 21% compared to the same period of 2019. Digital sales are growing very strongly, both in North America (+177%) and in the EMEA area (+170%).
The forecasts for fiscal year 2022 – in which Nike aims for double-digit growth and a turnover exceeding $50 billion dollars – are optimistic.

GUESS ON THE UPSWING, BACK TO PROFIT
Guess announced that it had recorded a net profit of approximately $10 million euro in the quarter ended May 1st, 2021. A good sign if compared with the same period of 2020, where a loss of $157.7 million euro was recorded; but also compared to the same period in 2019, for which a loss of $17 million euro was suffered.
Guess CEO, Carlos Alberini, said “Our satisfaction leads us to thank the choices made by our teams present globally, who have worked together in every respect”.
Paul Marciano, co-founder and creative director, added: “We firmly believe that this performance is also the result of the corporate transformation work we have done promptly and carefully on all fronts. This transformation has affected every area of our business, including initiatives to elevate our brand and product; acceleration of our e-commerce business; optimization of our global foot-
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with the results achieved in the first quarter of 2021, which significantly exceeded our expectations and reflect our desire to accelerate the recovery process globally. Looking to the future, we keep focusing on our pluses that make us stand out, and our attention to the customer.”

Guess operates directly with 1041 stores in the Americas, Europe, and Asia. Another 539 stores are operating in collaboration with company partners. Overall, Guess operates in 100 countries around the world.

CALVIN KLEIN AND TOMMY HILFIGER IN STRONG RECOVERY

The PVH Group, owner of brands such as Calvin Klein and Tommy Hilfiger, reported that revenue in the first quarter of 2021 increased by 55%, to 2.079 billion dollars, compared to the same period of the previous year. A result that went beyond the forecasts and was also achieved thanks to the e-commerce trend, which accounted for about 25% of total turnover.

Stefan Larsson, Chief Executive Officer, commented: “We are very satisfied with the results achieved in the first quarter of 2021, which significantly exceeded our expectations and reflect our desire to accelerate the recovery process globally. Looking to the future, we keep focusing on our pluses that make us stand out, and our attention to the customer.”

CALVIN KLEIN E TOMMY HILFIGER IN FORTE RECUPERO

PVH, il Gruppo a cui fanno capo marchi quali Calvin Klein e Tommy Hilfiger, ha comunicato che il fatturato del primo trimestre 2021 è aumentato del 55%, a 2,079 miliardi di dollari, rispetto allo stesso periodo dell’anno precedente. Risultato che è andato oltre le previsioni fatte ed è stato ottenuto anche grazie al trend dell’e-commerce, che ha rappresentato circa il 25% del fatturato totale.

Stefan Larsson, amministratore delegato, ha commentato: ‘Siamo molto soddisfatti dei risultati raggiunti nel primo trimestre 2021, che hanno superato significativamente le nostre previsioni.'
Fosun Fashion Group (FFG) has acquired the world-famous Italian brand of stylish and quality women’s footwear. An unexpected outcome, since the auction seemed to mainly involve international brands such as Bally, Piquadro and Marquee Brands. FFG is the Fashion Division of Fosun International Limited, a company with assets of around 100 billion euro that operates in various sectors: tourism, sports, insurance, pharmaceutical products etc. In the fashion world, the FFG division already controls important brands such as Lanvin, Wolford, St. John, Tom Tailor, and Caruso. At the helm of Sergio Rossi, with a history that dates back to 1951 and a turnover of 60 million euro, the CEO Riccardo Sciutto – who in recent years has completely reorganized the company – has been confirmed. The aim of the brand, which achieves 50% of its turnover in China and Japan, is to strengthen its presence in the Far East.

Fosun Fashion Group (FFG) ha acquistato il brand italiano famoso nel mondo per stile e qualità della calzatura da donna. Un risultato sorprencente, dal momento che l’asta sembrava interessare principalmente brand internazionali quali Bally, Piquadro e Marquee Brands. FFG è la Divisione Moda di Fosun International Limited, società con un patrimonio di circa 100 miliardi di Euro che opera in diversi settori: turismo, sport, assicurazioni, prodotti farmaceutici etc. Nel mondo del fashion la divisione FFG controlla già marchi importanti quali marchi Lanvin, Wolford, St. John, Tom Tailor e Caruso. Alla guida di Sergio Rossi, con una storia che parte dal 1951 e un fatturato di 60 milioni di Euro è stato confermato il CEO Riccardo Sciutto che in questi anni ha riorganizzato completamente l’azienda. Obiettivo del brand, che realizza il 50% del suo fatturato in Cina e Giappone, è quello di rafforzare la sua presenza in Estremo Oriente.

The strategies of industrial groups operating in the fashion world are making room for the control of all production, from the upstream to the finished product. Within this logic lies the initiative involving the Prada Group and the Ermenegildo Zegna textile group, which are interested in acquiring the majority of “Fi-
EXOR ENTERS THE WORLD OF CONSUMER GOODS

In the recent past, sporadic had been the interventions in the consumer goods sector (the acquisition of a 24% stake in Loboutin, the red-soled shoe, and the majority of the Chinese brand Shang Sia, in whose capital Hermes is present as well), but now the commitment of Exor, a holding company headed by the Agnelli family, seems to have become strategic in this business. So much so as to set up an "ad hoc" company, "Nuo Capital", in partnership with The World-Wide Investment Company Limited (Wwic) of Hong Kong, in order to make investments in medium-sized companies that represent excellence in the consumer goods sector; the rumors indicate a particular interest in Italian companies.

The new company, Exor represents, in partnership with The World-Wide Investment Company Limited (Wwic) of Hong Kong, not only at deriving profits from the medium-sized companies in which it will participate, but also at helping them offer their wealth of skills and creativity to consumers from all over the world – starting with Asian markets – while "preserving the culture and the distinctive features that make each of them unique."

Tomaso Paoli, former manager of the major Italian bank, Intesa San Paolo, was called to lead the new company. The project seems perfectly "fit" for the Italian reality of the consumer goods industry, in particular that of footwear and clothing.

EXOR ENTRA NEL MONDO DEI BENI DI CONSUMO

Nel recente passato c'erano stati sporadici interventi nel settore dei beni di consumo (l'acquisizione di una quota del 24% in Loboutin, la scarpa dalla suola rossa, e la maggioranza del brand cinese Shang Sia, nel cui capitale c'è anche Hermes), ora però l'impegno di Exor, holding che fa capo alla famiglia Agnelli, sembra essere diventato strategico in questo campo d'attività. Tanto da costituire una società ad hoc, "Nuo Capital", in partnership con la The World-Wide Investment Company Limited (Wwic) di Hong Kong, allo scopo di fare investimenti in imprese di medie dimensioni che rappresentano l'eccellenza nel settore dei beni di consumo; i rumors indicano un particolare interesse per le aziende italiane.

La nuova società, precisano alla Exor, non vuole trarre solo utili dalle medie imprese in cui entrerà in partecipazione, ma ha come obiettivo anche quello di aiutarle a offrire, "preservandone la cultura e i tratti distintivi che rendono unica ciascuna di esse", il loro patrimonio di capacità e creatività ai consumatori di tutto il mondo, a partire dai mercati asiatici. A guidare la nuova Società è stato chiamato Tommaso Paoli, ex manager di Intesa San Paolo, principale banca italiana.

Il progetto sembra "calzare" perfettamente alla realtà italiana dell'industria dei beni di consumo, in particolare calzature e abbigliamento.

BENI DI LUSSO: CINA E USA TIRANO LA RIPRESA

In una conferenza on line dedicata alle tendenze dei mercati mondiali per l'acquisto di beni
LUXURY GOODS – RECOVERY DRIVEN BY CHINA AND US

In an online conference dedicated to luxury goods purchase world markets’ trends, Altagamma organization, which brings together the most important Italian luxury brands, took stock of the situation.

The Conference summary is that the global market is gradually recovering and a return to pre-pandemic levels is expected by 2022.

In a press release, Altagamma says that “The boost comes from US consumers, who restarted their luxury purchases faster than expected, and Chinese ones, who buy more in their home country due to the persisting international travel restrictions. Millennials and Gen. Z are the other growth drivers and will represent 60% of total consumption by 2025. The main consolidation trends include: the increasing luxury virtualization (new digital tools to involve the consumer); the polarization of values between Western and Eastern styles; a distribution system centered on omnichannel; and a growing attention to brand values, in terms of environmental sustainability and inclusiveness.”

Growing Sales Trend for Luxury Bags

Sales of luxury fashion products are booming; in fact, it just suffices to look at the results of the international Maisons whose balance sheets are positive despite the disruption caused by the pandemic worldwide.

To provide a further optimistic look at this market segment near future are the results of a survey conducted by Million Insights Inc.

This survey, which was focused on the consumption of luxury handbags worldwide, stated that for this market segment - valued $1.22 billion in 2020 - a compound annual growth rate (CAGR) of 5.3% up to 2028 is expected.

GROWING SALES TREND FOR LUXURY BAGS

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Alongside the growth in demand, however, an increase in the price lists by all the major brands, including Gucci, Louis Vuitton, Chanel, and Salvatore Ferragamo has been applied. An interesting fact concerns the distribution of such items: 89% of the luxury bags sold worldwide are purchased in stores. Online e-commerce, although growing, is still limited.

Among the luxury bags, the most coveted are the “tote bags”, which represent a 36% share of the market demand. Leather is still one of the most popular materials for consumers, with 47% of the world market.
CHINA – SHOES & BAGS IMPORTS DOUBLED IN FIVE-YEAR TIME

The Chinese consumers seem to have gone wild with shopping from home also because of the impossibility to travel abroad due to the pandemic. This is demonstrated by statistical data from the International Trade Center (ITC) of Geneva – an organization headed by the United Nations and the WTO – on imports of leather goods and footwear in 2020.

As for leather goods, in 2020, Chinese imports were 4.2 billion euro (1.9 billion euro just five years ago) of which 1.8 billion euro from Italy and 1 billion euro from France. Indeed, Italy and France account for 66% of all the country’s imports of leather goods.

About footwear purchases, on the other hand, in 2020 China spent 5.2 billion euro (2.8 billion euro in 2016), of which 2.5 billion euro from Vietnam, 849 million euro from Indonesia, and 847 million euro from Italy.
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