

# Fair winds

Inspiration, sustainability, emotional intelligence, future innovations – just some of the themes of the 97th edition of the ever-popular **Lineapelle** trade fair, which attracted more than 19,000 unique visitors representing 10,500 companies to Fieramilano Rho in Milan on 2–4 October.

**N**o matter what state the global leather industry is in – and it has certainly seen better times – Lineapelle continues to be one of the top fairs in the calendar and a great barometer, and sometimes resuscitator, for the global fashion and luxury supply chain.

This event was no different. For its 97th edition, encompassing the autumn and winter 2020–21 collections, the show hosted 1,271 exhibitors from 46 countries, and welcomed more than 19,000 unique visitors representing 10,500 companies in 107 countries.

While these figures were mostly stable compared with the previous edition in February, there was slight concern about a drop in foreign visiting companies. However, an increase in Italian companies shows the country's fortitude in terms of being a manufacturing hub for brands, labels and start-ups.

Set against a challenging and unpredictable economic backdrop, especially in Europe, the general consensus among organisers and exhibitors was that there is reason for optimism as we close the door on another decade, provided the industry works hard to deliver clear, realistic yet inspired ideas, well-defined programmes, and a very solid vision in spite of overarching market and geopolitical shifts. One theme at the forefront, of course, is making leather more sustainable, and getting that message out loud and clear in the face of alternate materials and erroneous claims against leather. It was evident walking the halls of Lineapelle that this was of paramount importance and the investment on show proved that the supply chain is pushing the boundaries of sustainability.

In line with the sentiment of longevity, this show explored the theme of emotional quotient (or EQ), how instinct and emotion inform fashion choices, and how the finished product can bounce back and influence us in turn, creating a perpetual cycle of inspiration.

In the Trend Areas, the rich red backdrop amplified the latest innovations in leather and materials, which were also in shades of red to enhance the emotional reaction. There was a lot of puffed-up padding as leather gives a nod to the voluminous winter puffa, and classic animal prints are being reworked for the digital age with broken and pixellated reptile patterns.

## New horizons

This edition had a very specific if ambitious objective: to explore the horizon of the fashion and luxury industry in all of its possible forms. Leadership and internationality were key pillars, and if there was one thing that the nine international delegations were impressed with, it was the fair's ability to think big. ▶

**Lineapelle hosted 1,271 global fashion and luxury supply chain exhibitors from 46 countries.**



Buyers from China, France, Japan, Korea, Russia, Spain, Sweden, the UK and the US were all on board with the EQ vision and the concept of emotional intelligence – that meeting point between rationality and pure instinct. It was also the spark that students from prestigious international fashion institutes like Polimoda, Marangoni Institute, Parsons New School for Fashion Design and Hongik University will be encouraged to grasp as they embark on their respective collections in conjunction with Lineapelle.

The second edition of Innovation Square was also on show, inspiring visitors with presentations, applicative cases, and by showcasing opportunities worth seizing to meet future market needs, said organisers.

“Our intention is not just to show our market what is happening in the world, but to anticipate change, and create a network of connections and an operating system that allows us to maintain international leadership also in the medium-long term,” says Fulvia Bacchi, CEO of Lineapelle.

As a hub of inspiration, the Square brought together more than 30 speakers, R&D institutes and companies with a high innovation profile from all over the world, and projected leather and materials into the near technological and disruptive future. Six thematic areas showcased products in terms of New Aesthetics, Nanotechnology, Biotech, Customisation, Wearable Devices and Product Intelligence. The Square closed with a special panel entitled ‘What’s next?’, moderated by the project curator Federico Brugnoli. Several highly qualified operators spoke about the most critical aspects of innovation for the future of the luxury sector, and of materials for the fashion industry, design and automotive supply chains.

### Circular logic

However, the concept of circularity was what truly summed up the show’s most important developments, with space dedicated to the identifiable characteristics of the leather manufacturing cycle. The Leather (Re)Cycling Exhibition detailed various narrative levels, and offered a thorough and stimulating analysis of the circularity of the manufacturing process, presenting case studies on recovering leather scrap and waste, and transforming them into new products and raw materials.

Lineapelle 97, as it was referred to, also coincided with the launch of the worldwide communications campaign backed by UNIC to promote Italian leather’s qualitative, environmental and progressive identity, and counteract sustained attacks on the industry. Lineapelle’s international network is a project that is constantly evolving and developing, and there are already industry events scheduled for 2020.

UNIC, in collaboration with Cotance and Lineapelle, also provided an overview of the main issues characterising sustainability of raw materials, taking an objective and scientific look at aspects linked to

### Market overview: Italy

The Italian tanning industry is the international leader in the sector in terms of quality and turnover (incidence equal to 65% of the EU total and 22% globally). However, in the first half of 2019, it has registered an overall seasonal drop of 7.3% in the value of production and 11.9% in volume of square metres of finished leather (-6% for sole leather).

The negative results appear to be mainly linked to the current uncertain situation concerning the global economy, which seems to be pushing some traditional client sectors (especially footwear and automotive) to reduce costs and order volumes. There is greater dynamism, by comparison, for the materials destined for leather goods. Furniture and garments work in market niches. The trend through the year showed a gradual worsening of the demand with the passing of the months, while in geographical detail the variation of domestic sales data (approximately -2% in value) appears to be less intense compared with what was recorded on the foreign markets (which continue to absorb over 75% of Italian leather production). In this regard, it is worth pointing out that the sector’s exports, destined every year for around 120 countries, have decreased by 8.7% in value overall during the period concerned.

The results on the main foreign destinations are diversified. The Chinese area (China plus Hong Kong) continues to represent the first international landing place for Italian leathers, with a share of 11% of total export, but the value of these flows fell by over 22% in the first semester. Decreasing data also occurred in Bulgaria (-8%), Germany (-8%), Poland (-1.8%), Portugal (-1.3%), Romania (-1.5%), South Korea (-2%), Spain (-1.1%), Tunisia (-4%), the UK (-4%) and the US (-9%).

On the other hand, shipments value was on the rise in Albania (+2%), Czech Republic (+22%), France (+1%), India (+17%), Serbia (+15%), Slovenia (+20%) and Vietnam (+1%).

The market decline involved all of the main production segments by animal origin. The production of bovine leather (both small calves, and medium-to-large ones) revealed slightly lower reductions compared with the overall sectorial data in terms of volumes, but lost a few percentage points more in terms of reference values. The situation is diametrically the opposite for sheep and goats.

Source: Lineapelle



The rich red backdrop in the Trend Areas amplified the latest innovations in leather and materials.

the production of untreated skins. The many topics on the agenda started with traceability, and the presentation of several case studies and the main certifications. The issue of animal welfare was also at centre stage, analysed through international legislation and standards, and specific situations in some key markets. Sector initiatives regarding land use change, like deforestation, were also presented as well as improvements in the quality of raw materials.

Organised as part of the Social & Environmental Reporting 2020 project, with support from the European Commission (Social Dialogue Programme), this event summed up a lot of the priorities that leather will continue to face in the coming years. On a similar level of urgency, the Italian Patents and Trademark Office of the Ministry of Economic Development made a clear and strong signal against the unwelcome spread of fakes, and in support of the law. ●

# 85%

Amount of Italian tanning industry production waste that is recuperated and turned into raw materials for other industries.

Lineapelle