

# LINEAPELLE

## Lineapelle 98: summer 2021 showcased in Milan from 19 to 21 February 2020

**LINEAPELLE** has reached edition number 98 and will be opening its doors to ideas for summer 2021 at Fieramilano Rho, from 19 to 21 February 2020.

But that's not all.

The global go-to event for the fashion and luxury supply chain will be bringing a whole series of unexplored new content to the market.

Stories just waiting to be told.

### The most global event in the supply chain.

**LINEAPELLE** will welcome 1,200 exhibitors, including tanners and manufacturers of accessories, components, fabrics and synthetics used by the entire production chain of luxury, fashion, design, automotive, and furnishings. From more than 40 countries, they offer the widest, most complete, across-the-board array of goods available on the market. A selection that meets every possible creative and production requirement of interested buyers and represents the very best in terms of quality and performance, sustainability and service.

**LINEAPELLE** expects to see around 20,000 buyers at the fair, from over 100 countries.

Put quite simply, **LINEAPELLE** has everyone and everything.

And often, it has even more.

### Milan's most on-trend week.

**LINEAPELLE** is held during what is, for Milan, a white-hot week from a trade fair and fashion point of view. On the same dates, the pavilions next door will be hosting Simac Tanning Tech, the tanning, footwear and leather goods technology show, and one day (Wednesday 19 February) also coincides with Micam (footwear) and Mipel (leather goods), scheduled from 16 to 19 February at Fieramilano Rho. Then there is Milano Moda Donna (the womenswear fashion week), from 18 to 24 February. And finally, from 20 to 23 February, Super (women's prêt-à-porter accessories), White (womenswear) and The One (top-end women's prêt-à-porter).

### The "simplest" style imaginable

**LINEAPELLE** is a creative powerhouse that opens the horizon to upcoming trends, showcasing over 2,000 samples by its exhibitors in three themed Trend Areas. This edition will in fact be exploring style trends for summer 2021, elaborated by the Lineapelle Fashion Committee and summarised in The Era of Simplifying concept. The objective will be "simplifying, eliminating frills and complications" and "seeking harmony with the environment, through materials and manufacturing processes that reveal painstaking work on details and their performance."

### Competitions that reward the future

First of all, AMICI PER LA PELLE. This is the ninth edition of this competition organised by UNIC-Concerie Italiane (Italy's National Tanning Industry Union) at **LINEAPELLE**. As usual, it will involve more than 1,000 second- and third-year middle school students and this year, they come from 15 schools in Italian leather districts: 5 from Tuscany, 3 from Veneto, 3 from Campania and 4 from Lombardy. The theme for entries is Smart Tan, and the winning students will be selected during the fair, when votes can be cast on a stand displaying all their work or online on the UNIC-

Concerie Italiane Facebook page. The prizes ceremony will take place in the late morning of Friday 21 in the Fieramilano Rho auditorium.

South Korea is the home country of the winners of the LINEAPELLE AWARD, an educational project organised by the fair in collaboration with Hongik University, this country's leading academy for art and design. The entrants were required to discover and communicate the circularity and sustainability values of Italian leather, developing an innovative application for this product for fashion articles or design objects. And teaming it with an equally disruptive marketing strategy that would also capture the attention of a younger audience. 24 students from the Fashion Design and Industrial Design departments at the school in Seoul took part in Lineapelle Award. All their models will be on show at the fair, in the Korean Creativity Sector (front of pav. 9). It will also be possible to attend the "K Leather Creativity" seminar offering an in-depth look at the sense of Korean style applied to leather.

LINEAPELLE MERCHANDISING COLLECTION is, on the other hand, a contest that engaged students on the undergraduate courses in Fashion Marketing & Communications, Fashion Product Management, Leather Technology, Fashion Design Management and Footwear and Accessories Design at Polimoda in Florence. Their challenge was to develop a capsule collection made up of seven merchandising products. Each team of four students was called on to present their graphic design and product mock-up (front of pav. 9). The results were of the highest level.

### The fair that celebrates leather

**LINEAPELLE** comes to the city and, from 19 to 29 February, organises the exhibition project "About Leather" in the **Spazio Lineapelle** at Palazzo Gorani (behind Piazza Affari). Curated by the journalist Mariella Milani, with artistic direction by Simone Guidarelli (and in collaboration with Italtents), "the event will showcase unique pieces created by the maestro of style that was Gianfranco Ferrè together with articles by designers of today. Main player: leather." The aim of "About Leather" is "to educate and spread a new awareness about leather" and about all its natural, circular, sustainable characteristics, in this way supporting the sense of the global communication campaign launched by UNIC-Concerie Italiane based on the concept: **Real Leather is Real Sustainability**.

### The seminar that explores sustainability

**LINEAPELLE** is an event with an innovative, sustainable vision. And it reiterates this by collaborating with UNIC-Concerie Italiane in organisation of the debate "Leather Supply Chain Commitment to Sustainability: Traceability and Animal Welfare". This will be held on Wednesday 19 February 2020 at 2.30 pm in the Ponte dei Mari LEM conference room as "an opportunity for an in-depth look and debate around a linchpin question for the tanning industry" writes UNIC. Sustainability has gradually become part of the sector's dynamics, over time this concept has spread to the entire chain, starting with supplies, which, now more than ever, must include traceability of the goods and compliance with laws, standards and best practices in terms of animal welfare."

Lineapelle Press Office  
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# LINEAPELLE

## EXHIBITION DATA

<b>Date</b>	19/20/21 February 2020
<b>Venue</b>	FieraMilano, Rho
<b>Entrance</b>	East Gate - West Gate - South Gate 9.00 am – 6.30 pm 9.00 am – 5.00 pm (last day)
<b>Access</b>	On invitation
<b>Exhibitors</b>	1.160 Italians 746 Foreigners 414 ( <b>42 Countries</b> )  Tanneries <i>pav. 9-11-13-15</i> Accessories and components <i>pav. 22-24</i> Synthetics and fabrics <i>pav. 9</i> Chemicals, designers, schools, press, services <i>pav. 9-11-15-22</i>
<b>Net surface</b>	45.180 sqm.
<b>Trend Areas</b>	Pavilions 9-13-22
<b>Press Office</b>	Building O16 - Corso Italia, corner of pav. 22 – 1° floor e-mail: <a href="mailto:press@lineapelle-fair.it">press@lineapelle-fair.it</a> tel. 02/36629302
<b>Secretary's Office</b>	Building O16 - Corso Italia, corner of pav. 22 – 2° floor e-mail: <a href="mailto:milano@lineapelle-fair.it">milano@lineapelle-fair.it</a> tel. 02/36629345 - 02/36629344 – 02/36629347

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# LINEAPELLE

**Summer 2021 will be all about simplification:  
these are the LINEAPELLE trends**

## **The Era of Simplifying**

The need/desire to say stop to excess: this is the concept guiding trends for 2021 summer, as developed by the Lineapelle Fashion Committee

LINEAPELLE explains The Era of Simplifying as: “What we want to do is simplify, do away with excess and complications.” In style terms, the aim will therefore be “to use technological and digital tools to reduce waste in time and space, and also in design graphics and sketches.” It will be “A season that sees fashion seeking harmony with the environment, showcasing materials and processes that display painstaking work on details and their performance.”

## **Three inspirations**

“The philosophy of materials for summer 2021 based on three inspirations.”

The first: “Basics, boosted. Speed and digital synthesis have generated new design. Mathematical calculations and algorithms become minimal shapes. Technology helps to simplify complexity through innovative solutions.”

The second: “New romance. Colours meet technology to become pure light and fantastic hues. Brilliance and dazzle generate a surreal atmosphere that creates a modern romance style featuring light notes and radiant pastels.”

The third: “Handcrafting. The simplicity of hand-made products and the genuineness of the imperfect are the poetic expression of man's labour. Handcrafting sublimates a Newtro (new retro) vision, reworking heritage with room for free expression.”

## **Trend Areas**

Pavilions 9-13-22

## **Fashion Trend Presentations**

19 and 20 February

11.00 am            LEM Fashion Theatre (Corso Italia, on the pad. 13 side) in Italian

1.00 pm            LEM Fashion Theatre (Corso Italia, on the pad. 13 side) in English

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# LINEAPELLE

## **UNIC – Concerie Italiane: supply chain sustainability in the limelight at Lineapelle**

After the success of the seminar held during last October's edition of LINEAPELLE, Italian tanners return with a new seminar that shines the limelight on supply chain sustainability, traceability and animal welfare

The seminar organised by UNIC-Concerie Italiane (Italy's National Tanning Industry Union) in collaboration with LINEAPELLE is entitled: "Leather supply chain commitment to sustainability: traceability and animal welfare". Looking at (obviously) raw materials in the tanning industry, the seminar will be held at 2.30 pm on 19 February, in the LEM conference room (Ponte dei Mari) at Fieramilano Rho.

"Sustainability," explains UNIC, "is a cornerstone issue for the tanning industry. It has gradually become one of the sector's dynamics and, over time, it has extended to involve the entire chain. Starting with supply, which, now more than ever, is inextricably linked to traceability of supplies and compliance with legislation, standards and best practices in terms of animal welfare."

### **The Sustainability Report**

"The seminar," continues UNIC, "will open with presentation of the Sustainability Report from the Italian tanning industry. This new edition analyses the sector according to the 17 Sustainable Development Goals on the 2030 UN Agenda. Using these goals as a "filter", UNIC explains how Italian tanning industries "are in the front line in their constant commitment to an increasingly more responsible supply chain."

The event is free and open to all. It will be held in English and Italian with simultaneous translation.

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# LINEAPELLE

## **Lineapelle Award: 24 Korean students explore Italian leather and go on show at Fieramilano Rho**

Conceive an innovative application of Italian leather for fashion articles or design objects.  
Combine it with disruptive marketing that targets a younger audience.  
These are the requisites posed by the Lineapelle Award, an educational project organised by LINEAPELLE in collaboration with Hongik University, South Korea's leading academy for art and design.

The LINEAPELLE AWARD was presented on 11 September 2019 and saw participation by 24 students from the Fashion Design and Industrial Design departments at Seoul's Hongik University, South Korea's leading academy for art and design. The bottom line of this project is that it stimulated those taking part to explore and communicate the values of circularity and sustainability of Italian leather. After a well-structured course involving briefing, workshops, presentation and development of the projects, all the prototypes made by the students were exhibited in a dedicated display organised in December in South Korea.

### **The winners at Lineapelle**

Now, these prototypes are in the limelight at Fieramilano Rho, in the Korean Creativity Space (opposite pav. 9).

At 3.30 pm on 19 February, the LEM Fashion Theatre (in Corso Italia, on the pav. 13 side) will host the seminar "K Leather Creativity", an in-depth look at the sense of Korean style applied to leather, followed by presentation of the awards to the two contest winners in the presence of the Consul General of the Republic of Korea, Yoo Hye-ran. The winner of the Fashion Design category is Jin Woo Chung, with the project 2030 Pre Billie's, selected for its capacity to express "creative experimental use of leather." The Industrial Design category award goes to Ji Yoon Kim with E-Prob, a project picked because it managed to interpret the Lineapelle Award leather concept across the board in different sectors: "Office, gaming, electronics, accessories".

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# LINEAPELLE

## Leather is young and smart: the *Amici per la Pelle* competition is back

At LINEAPELLE, the *Amici per la Pelle* competition is back.  
The initiative has reached its 9th edition  
and, year after year, there is growing success both in terms of participation,  
and from the point of view of the creative quality it expresses

*Amici per la Pelle* is a national competition organized by UNIC, Italy's national tanning industry union and LINEAPELLE. It involves students from the classes of the last two years of lower secondary schools. In particular, those present in the main national tanning districts. For this edition, there are over 1,000 participants enrolled in 15 institutes: 5 from Tuscany, 3 from Veneto, 3 from Campania and 4 from Lombardy.

### The theme of this edition

Smart Tan is the title of the ninth edition of the competition. Smart for technological, smart for multimedia. Girls and boys are called to present a smartphone cover decorated with leather cuttings or scraps.

Each competing subject (be it a class, a group of classes or an institute) have made a one-minute video to tell the realization of the works or places and experiences that inspired them. They were free to choose the format (interview, documentary, fiction): the important thing was that students, leather, technology and territory were the protagonists.

### Exhibition, vote, award ceremony

All of the works and videos created by the students for *Amici per la Pelle* are displayed in a space dedicated to LINEAPELLE (Hall 11 - Lane A) where you can vote on your favourites. You can also vote online by accessing the photo gallery that will be posted on the Facebook page of UNIC, Italy's national tanning industry union. Lastly, all the students in the competition will participate in the *Amici per la Pelle* awards ceremony, scheduled for late morning of the last day of Lineapelle, Friday 21 February 2020.

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## Polimoda Students Get Creative at Lineapelle

### Merchandising Collection and Phototelling: the special projects of Polimoda students in collaboration with Lineapelle

February 2020 – Polimoda students are once again the focus at Lineapelle, from February 19th to 21st at Fieramilano Rho. Two educational projects will involve young talents from the Florence institute: **Lineapelle Merchandising Collection** and **Lineapelle Phototelling**. Both are part of Polimoda's hands-on teaching methods, integrating theoretical training with applied projects and working with companies and institutions in the industry. This is a unique opportunity for students to apply what they have learned and deal with professional situations through field experience.

#### Lineapelle Merchandising Collection

There will be a space dedicated to Polimoda (front Hall 9) where the results of the **Lineapelle Merchandising Collection** project will be showcased. This applied project, which began in May 2019, involved students from the Fashion Marketing & Communications, Fashion Product Management, Shoe and Bag Design and Fashion Design Management courses, who were asked to develop a capsule collection for Lineapelle consisting of seven merchandising products. Students were split up into teams of four, presenting their ideas, complete with graphic proposals and product mock-ups to a jury called upon to select the best idea to put into production.

The winners of the competition and scholarship were awarded to the team of Melissa Patriarchi, Federico Renai, Beatrice Fantuzzi, and Jong Hoon Kim, which presented **Your Steps to Success**, a merchandising line developed to make life easier for travelling visits to trade fairs and consisting of seven, uniquely simple items that can be transformed into seven useful tips to accompany the visitor along the road to success.

Given the excellent ideas, Lineapelle also decided to award scholarships to the two teams that placed equal second: **Ludic Leather**, a collection of gadgets playing on the theme of edutainment and made using production waste, presented by Lucrezia Del Mecio, Sofia Gaudenzi, Giorgia Villarà and Aline Ahmad; and **Leather Connections**, composed of Sara Baradaran, Filippo Balugani, Alexandra Bucur and Grigorii Liubachev, devised to promote interaction between business professionals, with a careful eye on practicality but also on new technologies.

#### Lineapelle Phototelling

Lineapelle is also continuing its collaboration with students from Polimoda, who will be documenting the fair in photos as part of **Lineapelle Phototelling**. Four final year Undergraduate in Fashion Art Direction students – Tommaso Bruno, Agata Eliseeva, Gaia Cantatore and Alice Bianchi – will be providing real-time reports on the fair with their bold shots, which will then be published by Lineapelle on their website, social media and *La Conceria* magazine. This project has shown itself to be a great success in previous years and offers young students the possibility to put themselves to the test and to show off their own vision as fashion reporters, while allowing the event to show itself through their fresh eyes.

[www.polimoda.com](http://www.polimoda.com)

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# LINEAPELLE

## “ABOUT LEATHER” REAL LEATHER IS REAL SUSTAINABILITY

An Exhibition that tells of the creativity of a Made in Italy material through technology, sustainability and the circular economy

**Spazio Lineapelle** is the first permanent exhibition centre for exhibitions, events and meetings with the common goal of promoting and propagating the culture of the Italian tanning industry, to make people understand the quality and importance of the constantly evolving stylistic and technological research of what is today known as the strictly Made in Italy tanning industry, and its great awareness of sustainability.

“**About Leather**” is the name of the exhibition project organised at “Spazio Lineapelle” during the Milan Fashion Week and Lineapelle Fair (19-21 February), the most important international biannual event in this industry that attracts over 60,000 operators to the Rho Fiera Exhibition Centre in Milan. Organised by the journalist **Mariella Milani**, with the design supervision of **Simone Guidarelli** and in collaboration with Italents, the event is a showcase of unique creations by a master of style such as Gianfranco Ferré as well as creations by famous designers of today. Leather plays the lead role.

Leather tanning can be environmentally friendly as the awareness and know-how of most Italian companies undoubtedly proves; these companies have become an example all over the world for their awareness of sustainability and the circular economy. Not many know that the leather used by the fashion industry is nothing more than waste from the food industry, that would normally be disposed of in landfills or incinerators, and it is from this waste that a product that is considered to be invaluable for the Made in Italy industry comes to life, transformed into a material of high added value. The exhibition is therefore also an opportunity to make people more aware of the craftsmanship and innovative importance of this material, disclosing its many uses, from the fashion and automotive industry to design and furnishings. **The goal is to educate and propagate a new awareness of “leather” because the <<Truth is that>> leather is not an enemy of nature but a material that has been crafted for thousands of years. NATURAL, because real leather is plastic free, RECYCLABLE and RESPONSIBLE, because the impact of the tanning industry on the environment is minimized through appropriate abatement systems and emission controls.**

The exhibition’s spotlight is on a special section dedicated to special creations of Gianfranco Ferré the fashion architect, by courtesy of the Gianfranco Ferré Foundation, and garments made by the following designers: **Bozart • Cecilio Castrillo • Alessandro Dell’Acqua • Mario Dice • Diego Dolcini • Ely.B Hats • Massimiliano Giornetti • Simone Guidarelli • Mani del Sud • Antonio Marras • Italo Marseglia • Simone Marulli • Mazzanti Piume • Sermoneta • Ventaglidautore • Vivetta • Alessandra Zanaria.**

A dreamlike exhibition, where each designer interprets leather by creating clothes or accessories according to its own and absolutely personal vision of creativity: rigorous or irreverent, hyper decorated or minimal, ascetic or erotic, poetic or sculptural. An example of the great versatility of this ductile glamorous material.

*“About Leather celebrates leather. It tells about the beauty and versatility of this material. It demonstrates its ability to arouse emotions, to be transgressive and always fundamental in the world of fashion, luxury and design. On the eve of a global event like Lineapelle, it seemed appropriate to recognise the creativity and originality of leather with an exhibition in the centre of Milan, at the new Spazio Lineapelle at Palazzo Gorani. The stylists involved, each in their own way, have interpreted its beauty and flexibility with inspiration and imagination. Our goals include the wish that other young creatives will find enthusiasm and new stimulus to enhance this extraordinary Made in Italy material-”* said Fulvia Bacchi, CEO of Lineapelle and General Manager of UNIC.

On the opening day of the event, the Press and Guests - by invitation - will be welcomed in a fully equipped square complete with lighting thanks to the Lineapelle’s collaboration with Privitera Eventi, a company famous for its outstanding skill and craftsmanship of its products. To celebrate the event, all the furnishings, that are part of the new GEO line, in the elegant structure “La Fenice”, which is undoubtedly Privitera’s flagship product, were specially made with leathers that come from Lineapelle and Privitera’s creative collaboration with Simone Guidarelli.

*Italian leather is not only first in the world in terms of value, but also dominates the European market where it has a 62% share of production volumes (equal to 22% on a global scale) and is famous worldwide for its uniquely sustainable approach. An approach based on tangible values of transparency and compliance with the strictest regulations on safety, quality, responsibility towards consumers, traceability and animal welfare.*

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**ABOUT LEATHER**

19-29 February 2020 SPAZIO LINEAPELLE  
Palazzo Gorani - Via Brisa, Milan

Curated by Mariella Milani

Art Direction Simone Guidarelli

Starring

Bozart • Cecilio Castrillo • Alessandro Dell'Acqua • Mario Dice • Diego Dolcini • Ely.B Hats •  
Massimiliano Giornetti • Simone Guidarelli • Mani del Sud • Antonio Marras • Italo Marseglia  
• Simone Marulli • Mazzanti Piume • Sermoneta • Ventaglidautore • Vivetta • Alessandra  
Zanaria

very special thanks to Gianfranco Ferré Foundation

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## ABOUT US

**Lineapelle**

LINEAPELLE is the business experience created and promoted by the Italian tannery industry. It is the most important fair in the world for leather and the related industry. With two editions a year in Milan (Fieramilano Rho), over 1,200 exhibitors from 40 countries, more than 42,000 visitors from the footwear, leather goods, clothing, furniture, design and automotive industries, from over 100 countries, Lineapelle is not just an essential opportunity to compare production and commercial aspects: it is also fundamental from a stylistic point of view, since it anticipates the creative needs of the market by developing trends that each exhibitor interprets according to its product and customer dimensions. LINEAPELLE MIILAN is the heart of a global exhibition network, which includes the preview of LINEAPELLE London and LINEAPELLE New York with collective shows and workshops at other international exhibition events.

[www.lineapelle-fair.it](http://www.lineapelle-fair.it)

**UNIC – Concerie Italiane**

UNIC – Concerie Italiane is today the most important and organised world association in the tanning industry. Established in 1946, UNIC is a member of Confindustria, the European Confederation of Tanners (Cotance, Brussels), the International Council of Tanners and a member of many national and international bodies and institutions for synergistic innovation and development. UNIC represents 1,200 companies, 17,500 employees and has an annual turnover of about EUR 5 billion (exports: 76%). Italian tannery is a leader in terms of technological and quality development, circular and environmental commitment, and an innovative stylistic mission.

[www.unic.it](http://www.unic.it)

**Mariella Milani**

She has been a professional journalist since 1976. For 33 years she was the voice and face of TG2 (RAI 2 News), a special news correspondent and editor-in-chief, also writing reports, daily and weekly segments such as DIOGENE, ANNI D'ARGENTO, L'ALFABETO DEI GIOVANI and the programme "STILE" for RETE 2. Truly a newshawk, she has been a war correspondent, and has also dealt with cases involving the Mafia and N'drangheta including the "Reggio case" and the protection of citizens' and children's rights, bringing to light cases of paedophilia, small-scale crime and violence.

In 1994 she became a fashion and lifestyle critic for TG2, with ironic and cutting reports about the fashion system, from all the most important fashion capitals in the world, seen from different perspectives: economic, sociological and in terms of lifestyles. Through the ITALENTS project, she currently provides consulting services to support Made in Italy products and is writing a book about fashion.

[www.italents.it](http://www.italents.it)

**Simone Guidarelli**

Simone Guidarelli is an incredibly many-faceted creative visionary. Different worlds merge and blend, in a succession of images, stories, lives. As from his first experience in Cagli, a small town in the heart of Marche region, where Simone grew up, a curious boy constantly in search of beauty. Each and every extraordinary skill must be developed: just like in a theatre play, his personality and character evolve when he moves to Milan. On that stage Simone takes on the role of fashion editor, artistic director, image consultant and stylist, producing over seventy cover pages, from Vanity Fair to Glamour Italia. Simone has the ability to see through bodies and interprets the desires of important photographers such as David Bailey, Patrick Demarchelier, Giovanni Gastel and Douglas Kirkland. A tailor with a lively imagination: he sews his dimension of reality with his own brand of very exclusive audacity, unafraid to dare and breaking old patterns with a light ironic hand.

[www.simoneguidarelli.com](http://www.simoneguidarelli.com) - [www.simoneguidarellihome.com](http://www.simoneguidarellihome.com)

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# LINEAPELLE

## **“Portrait of a Commander with Moustache and Musket”: a very unusual restoration project at Lineapelle 98**

**LINEAPELLE** is not just a fair or the location of choice to develop the supply chain business: it is also a tool for cultural advancement and patronage.

This project proves it.

The painting dates back to the third decade of the 17<sup>th</sup> century. The artist is unknown and the title is “Ritratto di Comandante con Baffi e Moschetta” (“Portrait of a Commander with Moustache and Musket”). As can be read on the back of the frame, it depicts a high-ranked seventeenth-century soldier. And in its own way, it portrays the evolution of the customs of those ancient times and their direct relationship with the use of leather. For this reason, along with others, this painting takes centre stage as part of an installation at Lineapelle.

### **Restoration and tailoring**

The recently restored version of the painting titled “Portrait of Commander with Moustache and Musket” is on show in Aisle A of Hall 9. Its importance is analysed in the catalogue published by UNIC, Italy’s national tanning industry union, in collaboration with the De Chiara De Maio Foundation and the Filangieri Museum of Naples. Exhibited alongside the painting will be a costume made entirely of leather modelled on the soldier’s armour, made by fashion teachers Fabrizia Ferrenti and Maria Rosaria Santin, with the collaboration of the students of the Caravaggio Artistic Secondary School in San Gennaro Vesuviano (Naples) and the DMD Solofra tannery. “Leather, the pride of ‘Made in Italy’ - as explained in the presentation of the project - adds a modern twist to a military artefact, resulting in a product that straddles craftsmanship and art.” In practice, history has been turned into leather at Lineapelle.

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# MARKET INSIGHTS

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FEBRUARY 2020



**LINEAPELLE**  
ECONOMIC DEPARTMENT





## LEATHER SECTOR

**ITALY** – The Italian tanning industry is estimated to have closed 2019 with an overall drop of 7.3% in value of **production** and 11.6% in terms of volume of finished leather produced [-8.2% the change in kg for the sole leather segment].

The reasons for the downward trend are primarily to be found in the **strong uncertainties** that have characterized (and are still characterizing) the international economic scenario. In this difficult context, some customer segments, mainly within the footwear and automotive sectors, have implemented heavy cost containment policies, with significant repercussions on the volumes ordered. Results were generally more satisfactory for tanning production for leather goods, but there was little dynamism in furniture and apparel.

While the demand trend appeared to be very variable during the year, the geographical breakdown of **sales data** shows a slightly less intense drop on the domestic market (-3.9%) compared to that recorded on the foreign side (which continues to absorb over 75% of Italian leather production).

**Exports** in the sector, destined to about 120 countries each year, decreased by 8.2% in value and the results for the main foreign destination countries show rare exceptions to the general negative picture. The Chinese area (China plus Hong Kong) confirms to be the first international port of call for Italian leather, with a share equal to 11% of total exports, but the value of these flows during the past year was down by 23%. Romania (-16%), Spain (-12%), Germany (-12%), Poland (-18%), Slovakia (-14%) and Hungary (-21%) also registered a double-digit decrease, with smaller decreases on France (-2%), USA (-5%), Portugal (-7%), United Kingdom (-4%), Tunisia (-3%), South Korea (-2%) and Bulgaria (-7%). The above-mentioned exceptions are Vietnam (+2%), Serbia (+11%), Czech Republic (+14%) and India (+17%), in addition to the substantial stability recorded on Albania, Slovenia and Turkey.

The economic difficulties did not spare any of the main **production segments** by animal origin, with almost uniform variations in terms of turnover. On the volume front, on the other hand, the production of bovine hides and skins (both small and medium to large) showed slightly smaller declines than the overall sector.

**OTHER COUNTRIES** – The 2019 overview is also negative for all the other main countries producing **bovine leather**, with double-digit declines both in Europe (Austria, Germany, Poland, Holland) and outside (Brazil, China, India, Argentina, Pakistan). The only exceptions, with a slight positive hint, are France, Turkey and, for calves only, Spain. The **sheep and goat segment** also recorded widespread declines, except for Spanish industry (stable) and Turkish industry (slight increase).

## ACCESSORIES, COMPONENTS, SYNTHETICS

### TEXTILES, SYNTHETICS AND LEATHER ALTERNATIVES –

2019 closed with a downward trend for the sector, which was affected by the losses, particularly accentuated in the last quarter of last year, of all the main producers (-4% the European average), especially Germans (-10%) and Italians (-3%). The main critical points concern **synthetics and fabric materials**.

In decline, although lighter, also **regenerated of leather fibers segment**.

**ACCESSORIES AND COMPONENTS** – Flat 2019 conclusion for the sector, with the EU average closing in stability compared to the same period 2018. The negative performance of the Italians (-4%) and the weakness of the Germans weighed. On the other hand, the performance of the French (+5%) was positive despite a slowdown in the final part of the year. The breakdown by segment once again rewards **small metal parts**, while **footwear components and other accessories** were badly affected.

## MANUFACTURING SECTORS

**FOOTWEAR** – For **Italian footwear**, 2019 recorded a strong increase in exports in value (+7%), driven by the luxury segment, but coupled by a decrease in terms of volumes produced (-3%). In the **EU**: France, Germany and the United Kingdom closed the year with increases of between 7 and 9%, while the difficulties of the Iberians are confirmed (Spain +1%, decreases in Portugal). Differentiated dynamic in the delocalization areas: Bulgaria and the Czech Republic are growing, while Romania and Slovakia are falling. In **Asia**, China is experiencing widespread declines, while Vietnam is growing in double digits. Positive results for India and Turkey. In the **Americas**, there was a slight decrease in value for Brazilian exports and increases for Mexico.

**LEATHER GOODS** – The 2019 closing for **Italian leather goods** was decidedly positive, supported by exports up 26%, although a dualism within the sector remains (luxury drives value, but overall volumes remain stable). In the rest of **EU**, widespread growth is confirmed, particularly in France, Spain and the UK (between +10% and +20%). There was a marginal decline for Germany, more significant for Portugal. Some difficulties also for Eastern Europe. In **Asia**, Chinese exports decreasing, but India and Pakistan on the rise. Moderate increases for Turkey.

**GARMENTS** – **Italian leather garment manufacturers** closed 2019 with results that showed a general resilience in the year-on-year comparison (-0.4%). In the rest of **Europe**, the positive performances of France and Spain (both up 10%) stand out, followed by Poland and UK, which recorded more moderate increases. **Outside the EU**, double-digit declines for Chinese exports, followed by Indian and Turkish exports, which recorded more limited losses. Marginal declines for Pakistan, against a still positive dynamic for Vietnam.

**UPHOLSTERY** – 2019 for **Italian upholstered furniture**, recorded a surplus, even if only 1 percentage point. Only slightly better performance in the **rest of Europe**. In detail, slight increases for UK, stable Poland, in contraction Germany and Romania. **Chinese exports** were good, against a drop of orders in the **US** market.

As regards **automotive**, 2019 was a two-speed year for Italy: the second half of the year balanced the losses of the first six months leading to a stable closure compared to 2018. In **Europe**, overall better results were achieved, thanks to Germany and France (+5% and +2%), which managed to offset the falls in the UK and Spain (-2% and -5%). Decreases across the board in **North America**.

**LUXURY BRANDS** – Despite the uncertain geopolitical background, 2019 ended with largely positive results for the major European luxury fashion brands. There are no exceptions to this trend, albeit limited ones. Expectations for 2020, excluding a possible worsening of the economic scenario, remain cautiously optimistic. The organic growth in turnover of the fashion and leather goods division (+17% on the 2018 figure at constant rates) pushes **LVMH's** revenues (+10% in 2019). Outstanding performances by Louis Vuitton, Christian Dior and Loewe. Strong progress for Loro Piana, Rimowa and Berluti. Very good sales performance in Asia and Europe (both markets up double-digit). Japan and the United States also performed well. Consolidated revenues up 13% (organic growth 2019 compared to the previous year) for the French **Kering**. Strong increases for Gucci (+13%), Yves Saint Laurent (+14%), and the group's Other Houses (+18%), thanks especially to the excellent performance of Balenciaga and Alexander McQueen. Bottega Veneta's rebound continues (+2%), boosted by strong growth in the last quarter of 2019. Turnover down 4% (constant rates) for Tod's group in 2019, despite a slight recovery in the fourth quarter of last year. The losses of **Tod's** (-9%), Hogan (-5%) and Fay (-8%) brands weigh heavily. Roger Vivier (+14%), on the other hand, continued its strong increase. The analysis by product category shows generalized decreases for both footwear (-3%) and leather goods and accessories (-7%). Slight growth in sales for **Ferragamo** in 2019 (+1% compared to 2018, at constant rates). Revenues by product breakdown show an increase in both footwear and leather bags and accessories: +3% (constant rates). The Group's first core market maintained a good performance: Asia Pacific (+1% at constant rates).





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