

THE ITALIAN TANNING INDUSTRY



UNIC - Italian Tanners' Association

Milano ✨ World Leather Congress ✨ 8th September 2015



UNIC

UNIC Italian Tanners' Association

Founded in 1946, it officially represents the Italian tanning industry

Headquarter: Milan

Offices:

Italy

Arzignano (VI), S. Croce s/Arno (PI), Solofra (AV), Rome

Abroad

Bruxelles/Belgium (Studio FratiniVergano), Guangzhou/China

Memberships:

Confindustria

Italian Confederation of manufacturing/service companies

ICT

International Council of Tanners' (United Kingdom)

Italian Presidency 2014-2016

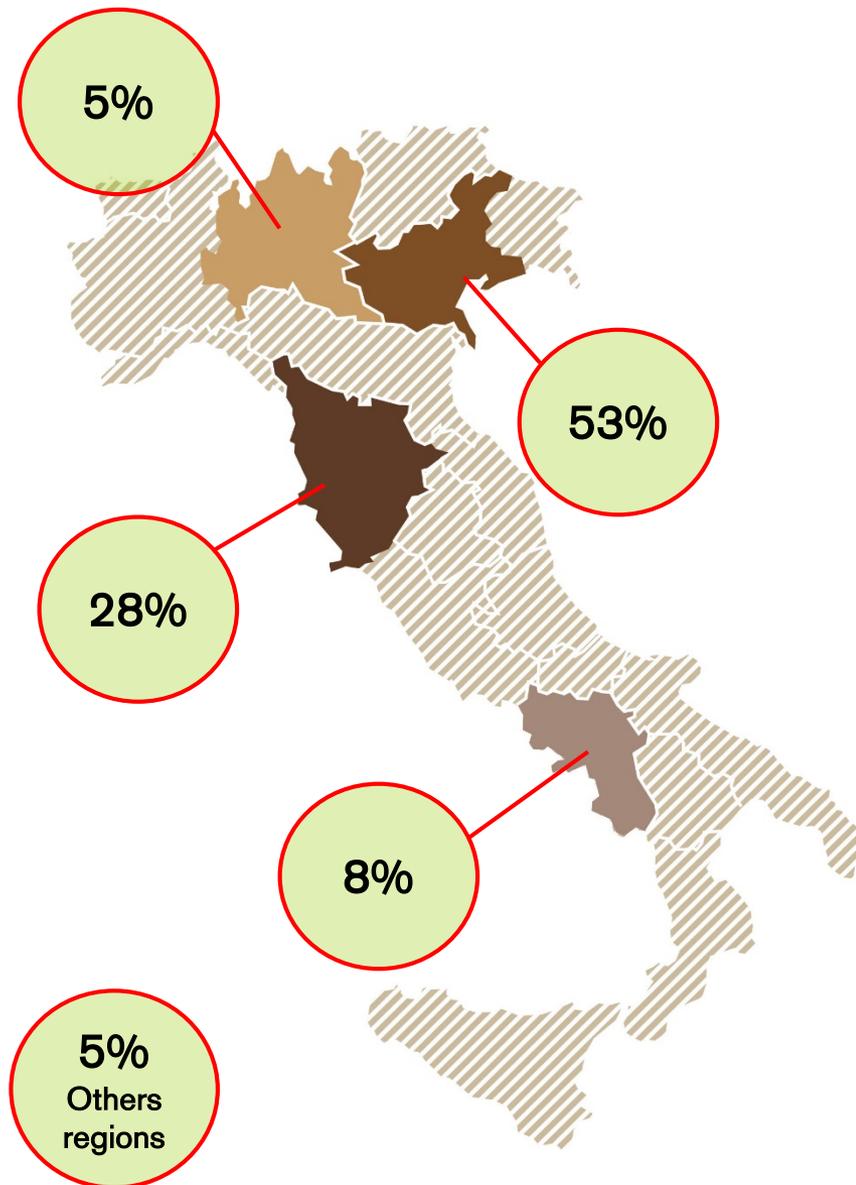
ACTIVITIES

Labour relationships, trade assistance, market analysis, R&D (environment, technology, chemicals), collective trademarks, IP, education & training, fairs & promotion, institutional relationships, international cooperation

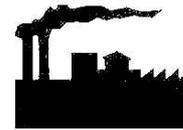
UNIC

LINEAPELLE

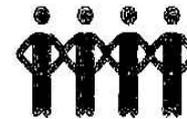




2014 Data



1.254 companies



17.949 employees



127 millions sqm (leather)



32 th. tons (sole leather)



5.3 billions €ur (revenues)



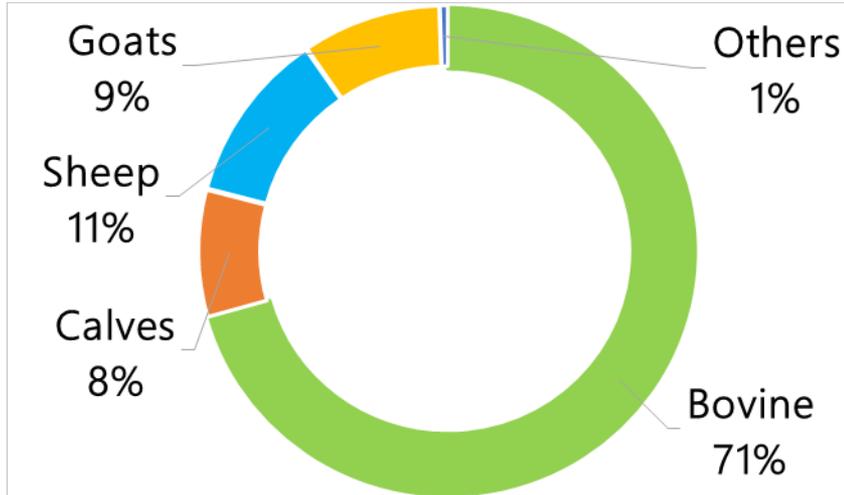
4.1 billions €ur (export)
towards 121 countries



ITALIAN TANNING INDUSTRY – PRODUCTION BY SEGMENTS

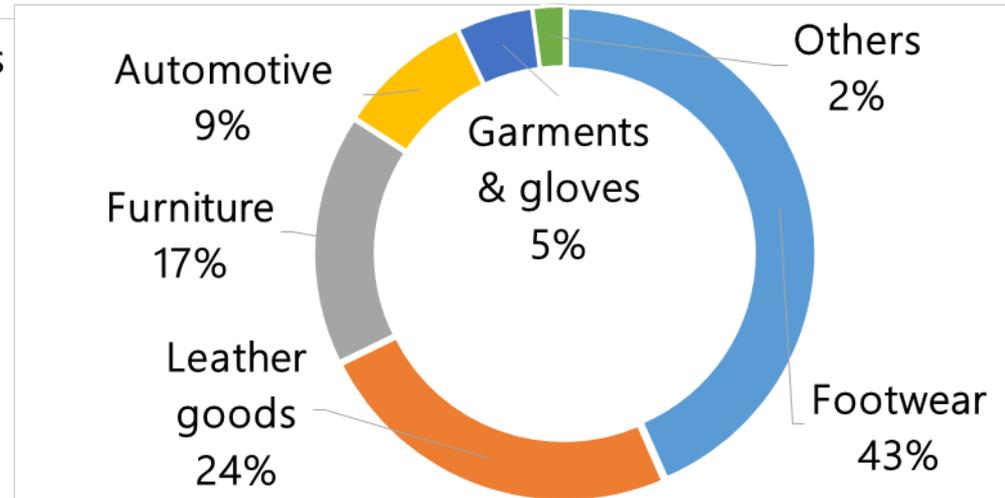
By Animal Typology

volume



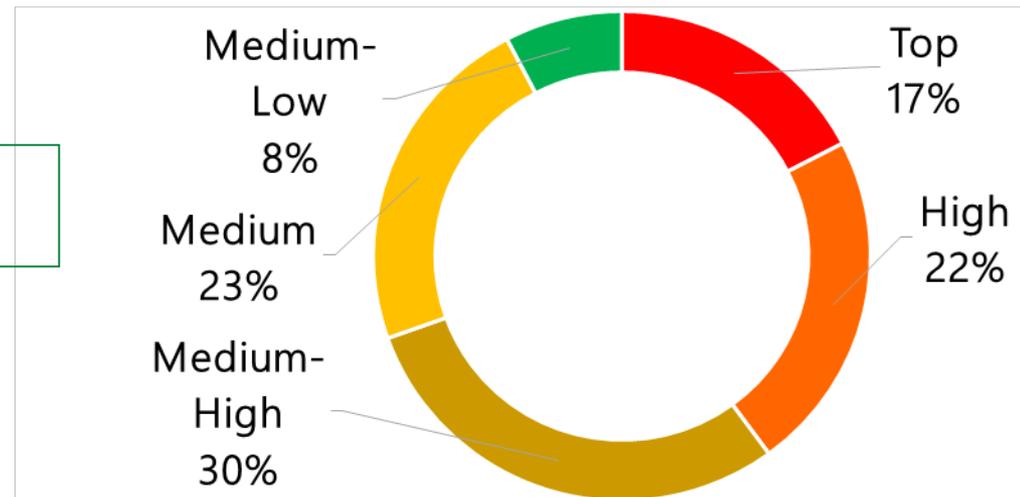
By Destination Use

volume



By Client Range

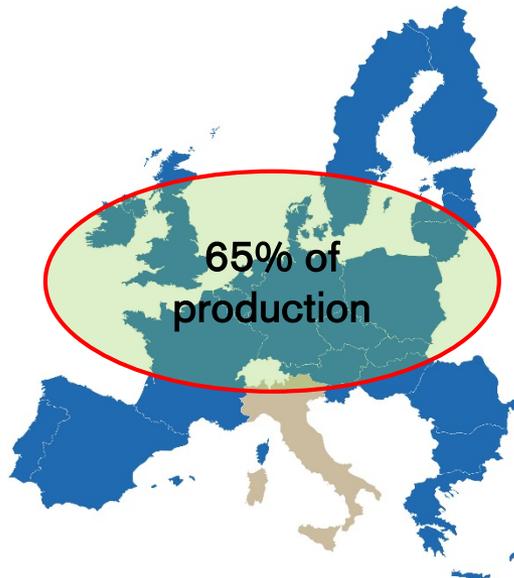
value



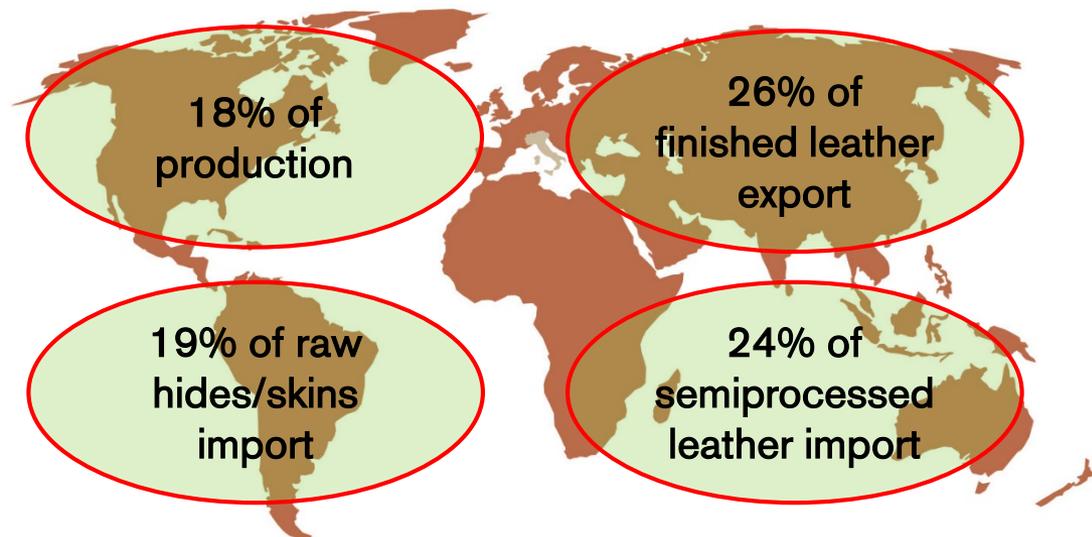
EU & WORLD leader for production value, internazionalization, quality, design innovation, technological development, sustainability

THE VALUE OF THE ITALIAN TANNING INDUSTRY

EU

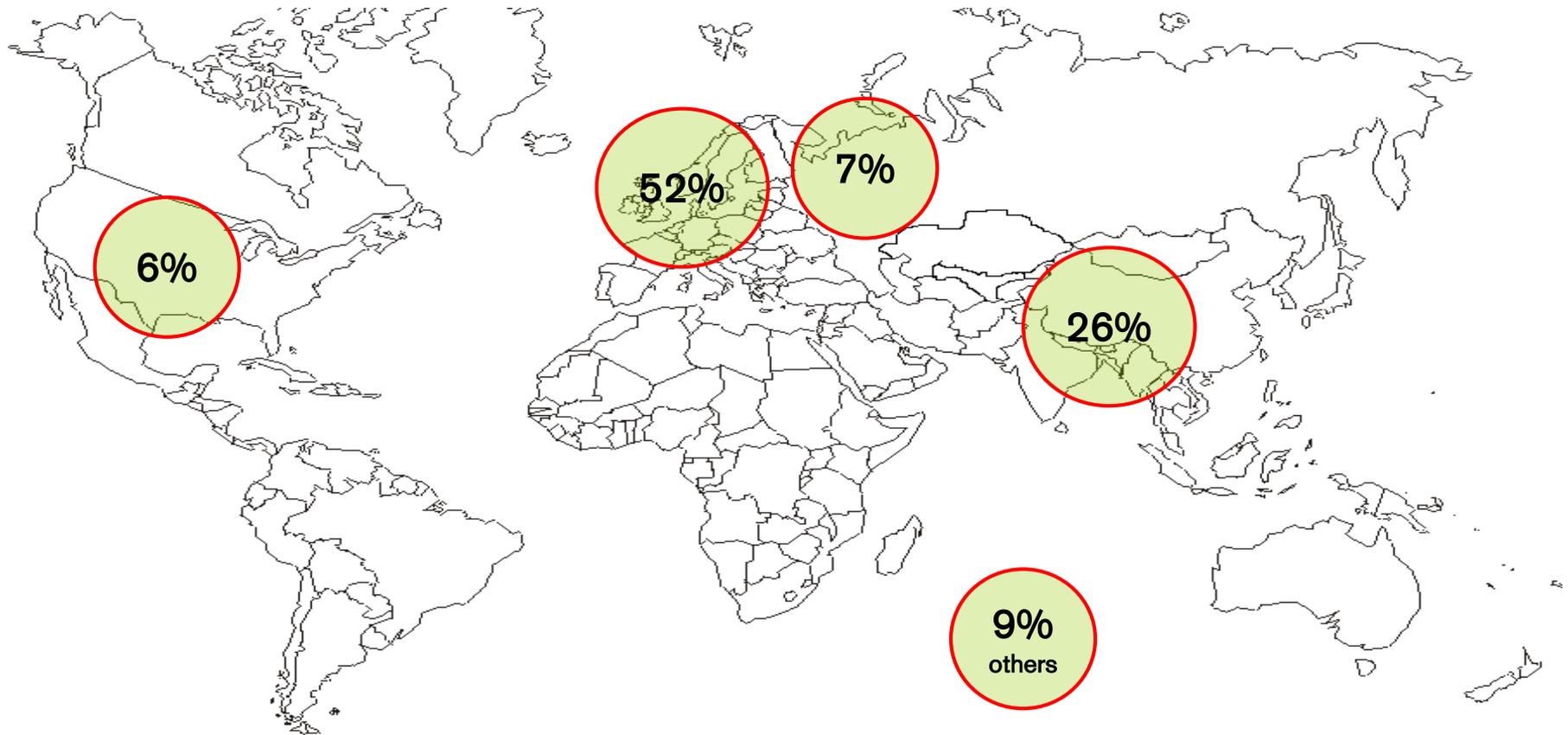


WORLD



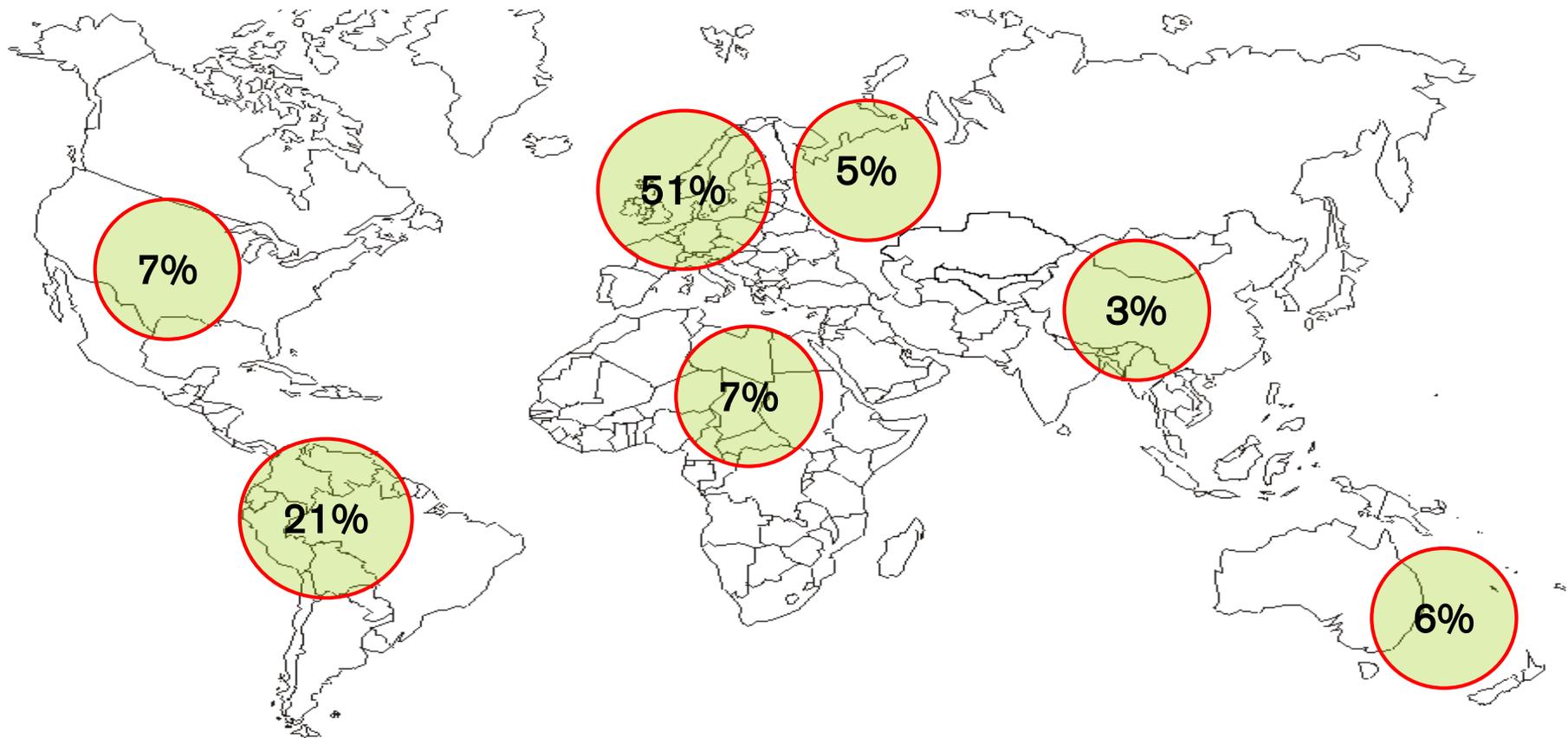
Export represents more than 75% of turnover (double than 20 years ago) and is directed to more than 120 Countries

ITALIAN LEATHER EXPORT VALUE % For Regional Area



Import covers more than 90% of raw material need and originates from 120 Countries as well

ITALIAN IMPORT VOLUME of RAW MATERIAL % For Regional Area



SUSTAINABILITY



RAW MATERIAL

**TRANSPARENCY
MATERIAL and ORIGIN**



Click [here](#) to watch the video on the sustainability of the Italian tanning industry

Sustainability has become a key factor for the Italian tanning industry

Costs for an Italian tannery

Averagely 5% of the annual turnover

Ranges 1.5% to 10% (research & innovation, multiple certifications, test analysis for batches/samples according to customers standard, i.e. redundant number...)

Information & Promotion

“Sustainability Report of the Italian Tanning Industry 2015”: 12th edition
(benchmark results, industry research projects, technical information..)

No other sector, at national/international level, elaborates a similar analysis in terms of contents, quality of the analysis, longevity

Certification: more than 50% of Italian turnover from certified tanneries
I.C.E.C. as the referring Institute

ISO 9001 (quality) and 14001 (environment), EMAS (Eco-Management), OHSAS 18001 (Health & Safety), product schemes under UNI (Italian Standard Body)...

Availability

- ✓ **In the Extra-EU Countries:** protectionist policies widespread, more than 50% of world production of raw hides/skins subject to export restrictions (last case: Russia), no reciprocity with EU (European Commission and partners unable and/or unwilling to tackle the issue efficiently), US & Oceania only are free
- ✓ **In the EU:** no barrier on extra-EU export, structural decline in slaughtering and raw hides/skins production

Quality

A general deterioration in the quality of raw hides/skins

- ✓ **A rising «natural» mix of hides/skins of different origin:** huge variety of breeds and increasing circulation of live animals
- ✓ **Worsening of the farming and the slaughtering conditions**

On the Type of Material

- ✓ **Defense of correct denomination:** prohibition of the term «leather» for synthetic materials
- ✓ **UNIC position:** need of legislation for an **authenticity leather labelling system** at the EU level

On the Origin of Leather

- ✓ **Indication of origin is key** for informed purchasing decisions of clients and consumers
- ✓ Clients and consumers increasingly **concerned about the origin** of leather materials and products
- ✓ **Complexity** of the process along the whole value chain
- ✓ **UNIC position:** mandatory indication of the **Country of origin** for materials composing leather products (*EU product safety and market surveillance package..*)