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leatherZone

NEWSLETTER FROM THE FUTURE OF TANNING



J Line
The new tanning
molecule

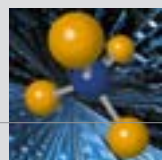
The incomparable
advantages of this
revolutionary innovation

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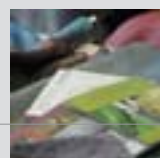
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focus On

Why LeatherZone?

Why would a company like Chimont International, which undertakes research, produces chemical products and creates solutions for the tanning industry, create LeatherZone? The answers are several, but fundamentally LeatherZone was born out of the necessity and the awareness that communicating and sharing information and experience with and among operators in the leather trade is the best way to promote and increase a sector that still has much to offer to the market in terms of innovations, quality and creativity. LeatherZone is therefore a space for communication and exchange that is open to all operators in the whole sector (tanners, producers of finished articles, designers, etc.) who truly believe in what they produce and who are constantly in search of effective solutions to improve their own work and to make their businesses more competitive.

Our experience with our own clients has taught us that true innovation brings concrete economic and qualitative advantages.

Welcome to LeatherZone.

Remo Petroselli
Chimont International Spa
general manager

Chimont LeatherZone is a publication conceived and produced by Chimont International Spa and realized with the collaboration of important trade journals, with contributions from technicians and operators within the field of leather. For this issue in particular the editors thank Technologie Conciarie and MdP la Conceria for the articles and images they provided. Chimont LeatherZone is published four times a year and is sent to more than 3,500 operators worldwide. If you wish to contribute to LeatherZone, send your comments, images and articles for publication to leatherzone@chimont.it. To advertise in LeatherZone, contact adv@chimont.it. Graphic design by ConTesta. © Chimont International Spa. All rights reserved.

J Line, The new tanning molecule

Chimont launches a real innovation for the world of tanning

The discovery of the new tanning molecule, J Line, is the result of a research project entitled **Project J**, promoted by Chimont International Spa, which had as its objective the identification of a new tanning composition that, by means simple application procedures, would contribute to the improvement of the quality of waste water from the tannery, thus allowing the realization of finished articles of optimum quality. This research, conducted in collaboration with the Faculty of Chemistry of the University of Pisa, include a first phase of general study on the chemical-physical aspects of the substance and a successive phase of applications and verification of the results achieved on leather.

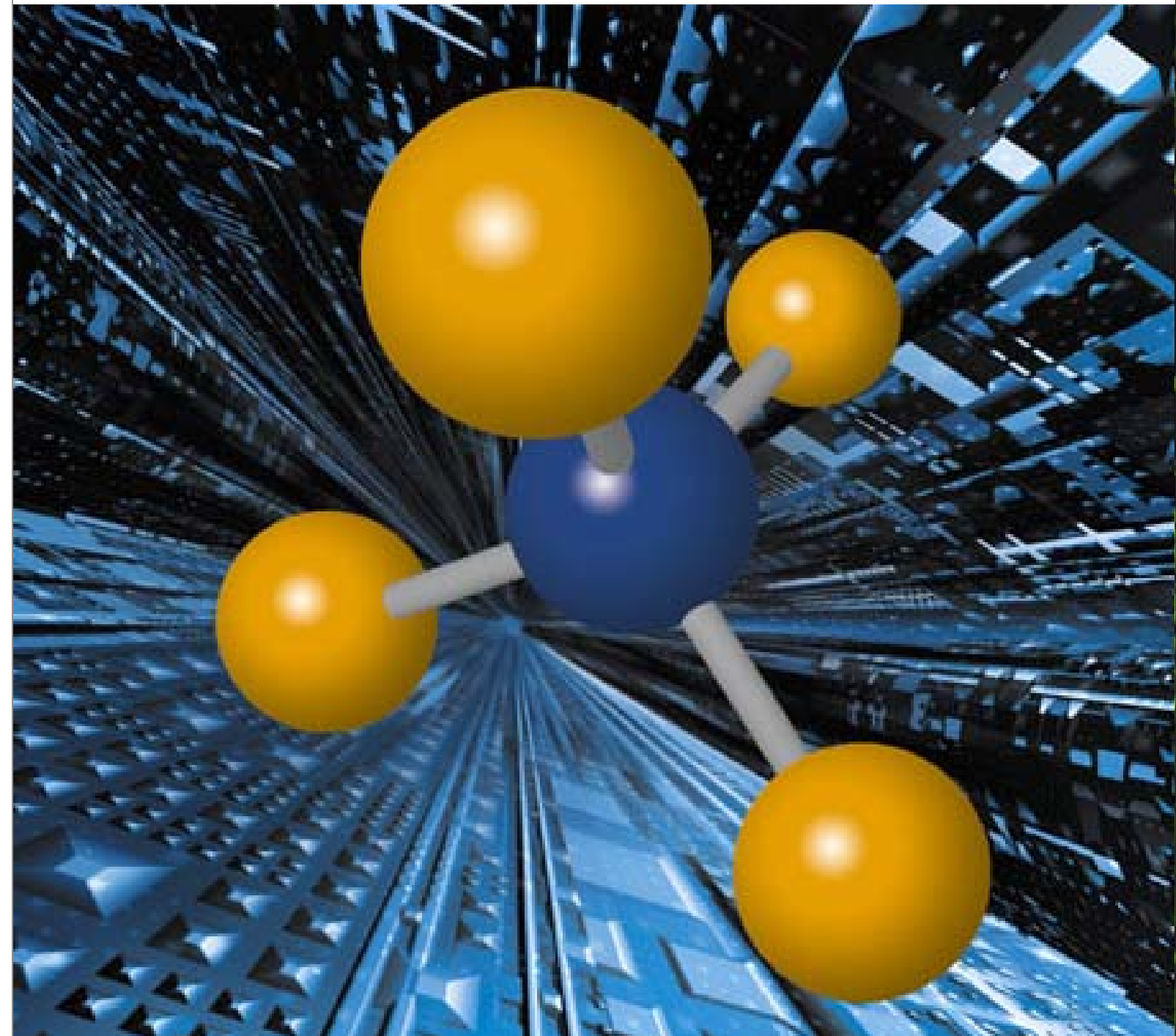
Chimont, besides contributing its own know-how for the first phase of the project, transferred and optimized the results achieved into processing technology for the tanning sector.

The requirements for the new product were that it had to guarantee remarkable retanning performance for leather, but at the same time it could not contain any composition that was held

to be toxic, such as metals and aldehydeand, and it had to have a very low content of free phenols. These chemical characteristics are fundamental today in order to produce leather whose non-toxic characteristics met new market standards. The results of the research is a new polymeric complex that meets all the requirements specified in the project: a new tanning molecule, never before utilized in the tanning sector, with characteristics that are absolutely new both in terms of their ecological ramifications and their performance in leather tanning.

The experimentation of this new molecule on leather made immediately evident its great technical potential, and its characteristics that can be put to work to produce notable advantages for the tanner in terms of economical processes as well as the quality of the articles produced. At the end of the project, two molecules were identified, distinct from one another both chemically and in terms of the characteristics that they impart to the finished leather.

Within Project **J Line** they were identified with the



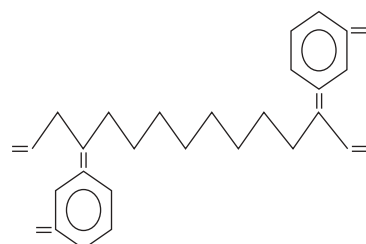
symbols **JB** and **JW** and were classified in our series of retanning products called "**Chimotan**". **Chimotan JB** is suitable for retanning of leather destined for shoe uppers and handbags, articles

that are full-bodied, rigid and substantial. **Chimotan JW** is suitable for the realization of products with a soft, supple nap for clothing and home furnishings.



What is J Line?

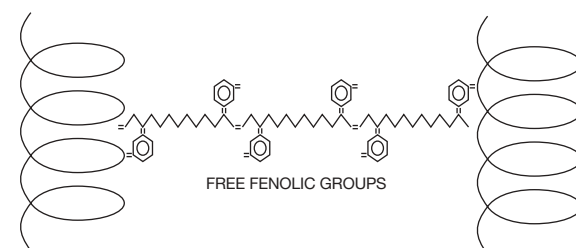
In order to best comprehend these characteristics, it is worthwhile to provide a simple chemical explanation of these molecules and their particular reactionary systems within the leather. Once this aspect has been explained, it will be easy for the tanning technician to formulate application processes that result in the realization of the articles desired. **J Line** products are constituted of long chains of polymers with two groups of phenols concentrated at their opposing ends (what follows is something of a simplification in order to better



represent what happens).

By means of the reactive groups of phenols, this single molecule can act upon with the carboxylic groups of the leather, performing in this way its tanning function. Where the leather is less dense and the space between the fibres is greater, the single molecule can act upon itself, connecting itself with the leather, combining itself with another similar molecule by means of the end connections of the polymeric chain, forming a complex with a longer chain. This reaction carries on until it

meets a second proteic fibre, when it consolidates itself with that one by means of the tanning bond between the phenol group and the protein. In this way the two fibres, previously distant, are connected by a unique molecular complex that results in notable body and elasticity in the leather.



As can be seen when a connection of this kind takes place, some reactive phenol groups remain free among the two proteic chains in as much as they can't react to the protein due to the excessive distance that separates them. This very significant characteristic of this product explains its enormous capacity for the realization of substantial articles, with a very open grain and with huge ecological advantages. The phenol groups that remained free can in fact be utilized in the retanning processes of Wet Blue leather. The colorants, the lubricants and the other retanning products used find ulterior possibilities of acting within the leather, resulting in the achievement of elevated degrees of fixation.

The advantages of J Line

ECONOMIC ADVANTAGES

The economic advantages that the tanner can achieve through the use of J Line products are multiple.

Quality of the leather:

- Reduction of the defects of the blowing;
- Increase of the usable surface of the leather because of the lack of the need to trim parts that are empty or sponge-like;
- The possibility of producing articles that do not contain aldehyde and free phenols.

Processing:

- Reduction of the total quantity of chemicals products offered; reduction of the number of chemical products present in the formulation and consequently an optimization of the stock of products present in the warehouse;
- Simplification of the retanning processes with a reduction in the total processing time;
- The possibility of managing the filling of vats automatically.

Pollution:

- Improvement of the quality of waste water;
- Improvement of the environmental quality of the production zone.

TECHNICAL ADVANTAGES

The use of J Line products in the retanning of Wet Blue leather presents notable technical advantages:

Quality of the article:

- Realization of very full, open-grain leathers independent for the realization of both rigid and soft articles;
- A drastic reduction of the blowing phenomenon for finished articles, no matter what kind of unfinished leather is used;

Time reduction:

- Realization of retanning processes with greatly reduced working times that to characteristics that permit the fixation of other chemical processes used on its own molecule;

Simple processing:

- Variation of the type of article produced while maintaining a single base process and varying only the choice of some lubricants.



ECOLOGICAL ADVANTAGES

J Line products are classified as non-toxic and not dangerous, and thanks to their chemical characteristics present remarkable advantages:

Production personnel:

- J Line products are in liquid form and this allows them to be handled automatically, thus reducing the possibility of accidental contact with the operator and the formation of dusts during the phases of weighing and refilling the vats.

Production equipment:

- The capability of confer a high exhaustion of retanning baths offers two great advantages:
 - Reduction of the quantity of used, in as much as no chemical components are lost in the bath drainage;

- Improvement of the quality of waste water, lowering the pollutant load from chemical products not well fixed within the leather.

Leather end-user:

Using J Line products as retanners it is possible to produce leather articles in line with the new market requirements, which are increasingly attentive to chemical and ecological characteristics of leather.

Mipel e Micam, positive result

Mipel and Micam grow internationally, confirming their leadership in furnishing sales opportunities.

© **Tecnologie Conciarie**

Mipel, the international gathering dedicated to leather goods, and Micam, the trade fair event par excellence dedicated to shoes, both of which took place in Milan from 19 to 22 March 2005, registered positive results in terms of the number of visitors. The number of visitors from Japan grew by 27.6%. As regards Europe, a notable increase in the number of visitors was registered from Great Britain, an increase of 40.5%, while the French presence increased by 22.3%. Russia and Ukraine, among the emerging countries in the market for Italian leather goods, confirmed their interest with a growth in economic operators equal to 19.3%. Both of the events strengthened their international reputation, and in spite of the economic difficulties present in the market in general, they remain excellent opportunities for sales and an international showcase, an indication that they have remained the indisputable leaders over time.

The characteristic that a great majority of exhibitors share regards programming: samples are increasingly fragmented, it has become difficult to establish a production line, with a consequent increase in costs. Often what was at one time destined for samples has now become genuine orders that involves in turn the

whole supply chain of productive process. But above all is felt the effect of the strong Euro, with all the problems that that entails.

To invent new strategies is, for example, the quest of some companies: some declare themselves satisfied after having distinguished a new collection by proposing two lines, one regarding price and the other regarding style. But others have diversified through the creation of several lines in order to position themselves in all sectors of the market and to embrace a wider range of clients.

Still others have concentrated their energy on prices: the consumer is willing to spend more if the brand is strong, and therefore it is worthwhile to create stylish products with low prices, with research concentrated on materials and their intelligent combinations. Buyers, in fact, have oriented their search towards products that are realized with materials that are increasingly innovation and stylish, or those that are highly prized. Image is a determining factor for every product, from bags to belts to accessories, which are often demanded in perfectly harmonized combinations.

Finimont. Fashion, made in Tuscany

Creative finishing with
technology inside

Finimont

Finimont is the company of Chimont International Spa that specializes in research, production and applications for leather finishing. The Finimont research laboratories are structured to conceive, develop and manage the entire finishing process. Fashion articles are increasingly born of a collaboration between stylists and creative minds in the fields of textiles and tanning, which is supported chemically and technologically in order to realize directories of fashion trends. From these forecasts issue guidelines for designing genuine finishing products that can be then developed both within internal laboratories as well as in collaboration with universities

and research institutes, and in any case are ever in synergy with the Chimont laboratories for experimental tanning. Thus it is possible to obtain optimum levels of chemical and technological innovation which are in any case assured by the scrupulous adherence to the standards established by UNI EN ISO certification 9001:2000. Once the product has been realized, every aspect of it is tested and both the process of production as well as the application are optimized, thus obtaining an article that is technically perfect. Finimont is thus able to propose a vast range of products for high-quality, innovative finishing. Their great experience with applications permits them to bring forth new proposals for the production of all kinds of articles. But Finimont's finishing are particularly appreciated for their ample creative content as well. The vast experience of the technicians, who work in Tuscany in close contact with tanning industry that is most renowned in the world for its stylistic innovations, and

its sensitivity in interpreting signals that come from the world of fashion, together with the attentive customer assistance and support, make Finimont a point of reference "made in Tuscany".



Cuoificio Mpg Tradition looks ahead

An interview with Sandra Giardi

Leather producer Mpg is one of the most interesting and dynamic entities in the panorama of vegetable tanning.

For years they have actively collaborated with some of the most important international labels for leatherwear and home furnishings and for this reason have a special point of view regarding the dynamics of this market.

We asked Sandra Giardi, marketing director of Mpg, to comment on the latest edition of Lineapelle.

is a very important international fair which, once again, did not fail to give us great satisfaction. The interest shown in our products was very great, almost unexpectedly so, given the stagnation

that is afflicting the leather tanning industry at the moment. Our habitual clients indicated their intentions to increase their acquisitions again for the coming season, and we made good contacts with potential new buyers. We have to note, unfortunately, the lack of a presence from the United States, slowed principally by a dollar that is still too weak."

Does this answer of yours run counter to the tendency with respect to market trends? What is the secret for overcoming the crisis?

"There are no secrets: Mpg has chosen to combine quality with the search for leather goods that are ever new. We believe that creativity and service for our clients are the winning cards for distinguishing ourselves and overcoming this difficult phase.

There are too many standardized proposals around, products at low cost and with scant attention to environmental themes, and this is to the detriment of the quality and personality of the leather. The path that we have chosen is perhaps the more difficult and audacious, but we are confident that we can achieve what we set out to do. Our strength and our energy come from the awareness of the high level of our products, entirely 'Made in Italy', and is aimed at a market that is perhaps more restricted but is ever accessible."



So creativity "Made in Italy" is your real resource for competing on the global market?

"To be sure, creativity in design is certainly important, but by itself it is not enough: we have to in some way create a system that establishes collaborative relationships with suppliers, who become actual partners of the business (helping us to develop technologies and process that are always one step ahead with respect to competition from abroad), just as we are collaborative with our clients. We have to remember that 'Made in Italy' is not only about

style but about know-how that has been developed through decades of activity and continuous research. In our sector, and specifically in the Comprensorio del Cuoio, all of this has resulted in a material that is extremely flexible and reactive thanks to the constant interaction within the whole sector. Another important aspect is the communication that knows how to inform, to distinguish between competitors, and in context, to express the personality and uniqueness of the company."
For more information, visit www.mpg.it

A pleasurable shock

Everyone was waiting for this moment in order to look less pessimistically to the future. It arrived in Bologna for those who presented *the right collections*. Pressure on price is uninterrupted.

by Luca Fumagalli © **MdP La Conceria**

In spite of the various possible difficulties of which we shall speak (many of which are only too well known and by now metabolized), market results were neither negative nor static. Was there a shock at Lineapelle? We would say yes, not electrifying but noticeable enough to allow us to look to the future with less pessimism.

All of this, in spite of the first impressions raised at Lineapelle, would have somewhat alarmed the operators: a flat first day in terms of visitors, followed by a surge of visitors on the two days following (especially on the second day): "But we can't stop at the consideration of quantity", comments Giovanni Tempesti, of the tannery by the same name. "In general, the grade given to this edition might be a 6 _ out of 10, because considering the times, which already in themselves have resulted in a certain reduction in the number of clients, we have always had work. In some cases, even rather a lot." This declaration can be interpreted in light of the specialization of Tempesti, leather goods (which is less problematic), but it also strikes a common chord for all exhibitors. For all, that is, given one essential condition: the decisive tendency to invest in creativity, research and a superior level of

quality. To produce what those who had stands in Bologna call "the right collection", a definition that is effective regardless of the end use of the product, and one that permits the understanding of how the market functions with a very fragmented logic in terms of businesses and products. Translation: clear, precise strategies reduce the client uncertainty and doubt. Thus it turns out that Lineapelle completely confirmed the "good interest" of the high-level buyers that was evidenced at the preview in Milan, above all with regards those from the United States and its satellite markets: "And this was in spite of the very strong Euro." notes Tempesti, "The driving economic reality is America," explains Angelo Montanelli of Marbella Pellami, "and, with America, China, which is the market where America produces. In Europe only the labels work, for those who have the good fortune to work seriously. As regards Italy, on the other hand, it is sad to see how in the Marche all that was constructed in the past fifteen years is disappearing: there are at most five groups, with all the rest in difficulty. The problem is that in our country, which is still the heart and mind of leather work, the drive is collapsing." This is very dangerous, continues Montanelli, "we can not live on samples or

on services, we need a certain volume as well." Not the volume that there was as one time, we all know, but a quantity that would be obtainable if the dollar rose again. And here is the front line of the moment, or rather, of the latest seasons: the Euro has suffocated the dollar and exports, forcing clients to put pressure on prices in such a way that, as one Venetian tanner put it, is

almost vilifying. "Take the large labels," continues Montanelli, "they are increasing acquisitions, but they want to spend less. They are looking for the same quality at a lower price." All buyers are looking for reductions, then. And all the tanneries are trying to limit the damage. Hoping that a shock like this edition of Lineapelle increases the intensity in the coming months.



Above, some picture of RCM's stand. Below, one picture of Antiba's stand. Two Japanese seated to the table: that one on the right is Seishiro Tomita, the Vice-President of Tokyo Leather Fair.



Easylight

Thanks to Chimont, vegetable tanning expands its horizons

For Chimont International Spa the realization of new articles, truly innovative, capable of anticipating market demands for leather, is one of the areas to which the greatest number of resources are dedicated. For some time the signals received from stylists and producers gave very clear indications of new qualities that the consumer is looking for in leather products. In particular the desire for the natural is growing, and therefore the demand for projects realized with leather tanned with vegetable extracts is growing. Following this lead, Chimont has developed an article, a napa leather that is vegetable tanned, to satisfy

consumer requests. Vegetable tanning, as we well know, gives leather some unique characteristics that are especially suitable for certain traditional articles but which are have as well some objective limitations, due precisely to the vegetable extracts used in the tanning process.

What Chimont has realized that is truly new is a leather which, while maintaining all the qualities of leather that is vegetable tanned, allows the stylists ample space to manoeuvre with regards to its application in the realization of diverse products.

In particular, this article, named **Easylight**, imparts to

leather the following characteristics:

- Great softness, as in a napa leather for clothing;
- Elevated levels of elasticity of the grain and of all the dermic structure;
- Lightness and airiness;
- A very light base color, almost white.

To these characteristics, truly unusual for an article realized entirely with vegetable extracts, can be added those typical of this kind of tanning, such as:

- Warm and natural tactile qualities;
- Fine and open grain;
- Surface brilliance;
- Transparency of colors and of refinishes.

In particular, the fact that the base color so obtained is almost white has permitted the expansion of the range of colors that can be realized completely. With extreme ease all light and pastel tones from the color swatches for spring and summer can be realized. This property, together with the great softness and lightness, has allowed stylists to expand the range of uses for this kind of naturally tanned leather. Articles of clothing have been produced, as well with the softest, lightest handbags with a natural, clean look. The process of tanning used to realized **Easylight**, which has already been tested during the industrial phase, has proven to be easy to apply and, as regards production cost, it is very close to the cost of tanning with traditional processes. For its realization, it is not necessary to make any modifications whatsoever to the equipment already present in the tanneries, and the processing times can be considered analogous to those of traditional tanning.

The optimum point of departure for the realization of this article starts with tripe leather. In particular, the

phases of delimiting and bating of the leather need to be carefully tended to. Its surface cleaning is important as well, the final transparency of the finishing depends a great deal on the base on which it is applied, which must be clean and, as regards the distribution of natural fats, very uniform. The rest of the process is based on the acid preparation of the leather and its successive tanning with extracts based in Tara and synthetic tannin, which serve to give the leather its unique light color and its low final specific weight. Particular attention has been given to the lubrication phase. The oils used, all of synthetic origin, have permitted the achievement of a soft and airy leather, lubricating the fibres without weighing them down. These types of lubricant also possess an elevated dispersive action on all the other chemical components of the process, so that by exploiting this characteristic during the coloring phase, it is possible to achieve very light, uniform shades of colors using a very low percentage of colorant.

The mechanical operations to which the leather is subject at the end of the treatment very according to the kind of finished article desired. Great attention should be paid to the drying phase in order to avoid the phenomenon of oxidation of the leather due to the oxygen present in the air. A few small steps during this phase will in any case permit easy, risk-free drying of the leather.

Easylight is an article conceived and developed entirely in Chimont's research laboratories, and thanks to its innovative performance, it augments the characteristics of vegetable tanned leather. As a result, it broadens the market horizons for this kind of tanning.



The green challenge

European politics is imposing iron-clad rules on production: REACH, respect for conformity, etc. Tanners are asking that the World Trade Organization block indirect funding for governments of competitors who close their eyes to these issues.

di Andrea Guolo © **MdP La Conceria**

There is a knot that the east and south of the world are not confronting: that of the environment. The European economic crisis, caused by a dire lack of competition, is going to force local governments to face the question and to demand that the existing anti-pollution laws are equally enforced for all.

The new obstacles

Brussels, observing the laws of free trade, has opened its borders to manufactured goods in the area of leather (although it hasn't done the same with respect to agriculture), but is determined as well to become an ecological paradise. One of the instruments that they use is legislative, which will end up influencing the circulation of goods within the interior of the union, comprising naturally imports. The principal regulations are called REACH, under the aegis of the producer Ecolabel.

REACH, concept and consequences

REACH is an acronym for Registration, Evaluation, Authorisation and Restriction of Chemicals. It stands for practically everything that Brussels intends to do from now through 2006, when the regulations -- contested by producers -- should become active. The European Union wants to enact a series of restrictions on the utilisation of chemical substances during the production phases, registering accurately the uses of each within each. For businesses, REACH constitutes a heavy bureaucratic burden; for extra-community producers it could entail consequences that are much worse. Some of these are: checks at customs on imported goods; requirements for official declarations as to the substances used; the conformity of the products. There is the possibility that the enforcement of these regulations could become an effective barrier. Producers who wish to sell their products in Europe have to demand that their suppliers respect the existing laws within the Union. Use of materials or component produced within European borders will be certainly be a way to get around the obstacle.

Everyone must respect the parameters

The European Commission has fixed precise limits on the presence of certain chemical substances in

leather: 5 ppm of pentachlorophenol; 150 ppm for formaldehyde (75 ppm in some cases), 2 ppm for hexavalent chrome. Further, azo-dyes are prohibited and pH variations are not to exceed the value of 0.7 (with a minimum limit equal to 3.2). These characteristics are defined by technical standards and in some cases by national regulations: Germany, for instance, is very strict. Italian tanneries respect all the parameters. They are at the forefront in certifications for systems, products and environment. The leather that they supply to their clients represent the perfect marketing tool, by means of which the manufacturers can present themselves to the market with articles guaranteed to meet requirements regarding both origin and quality.

Italian leathers permit the obtainment of prestigious seals of approval, such as Ecolabel, which is set on those products and services that respect criteria for environmental quality set by the European Commission. Italian tanneries have in fact an index of purification of over 90%.

The lack of responsibility towards legislation and controls on the part of other competitors in the environment should be seen as aid from the State, even if indirect. Thus the question is going to be taken to the World Trade Organization. Considering the green stance taken by Brussels, the readmission of India and Argentina into the community scheme for generalized customs preferences appears contradictory. These are countries that are certainly not active with respect to the environmental impact of processes and products Yet from this past 1 January, a wide range of their finished and semi-finished leathers enjoys a reduction of the rate of imports into Europe, with consequences that are evidence of a competitive advantage.

Looking At Italprogetti

Polypropylene drums

A gentle revolution in the leather process

The use of polypropylene for manufacturing liming tanning and dyeing drum is changing the machine that has been for several years the most traditional in every tannery of the world.

It is true that the use of stainless steel (and in some case also the fibreglass) has introduced some change, but it interested only the higher segment of the market and did not really change the image of the wooden drum as the only machine widely used for the chemical process of leather.

Listing the advantage of polypropylene compared to wood or stainless steel is quite a long task, but it is interesting to resume the most important ones:

1. Extremely easy cleaning of the drum. This is particularly interesting for dyeing process because it gives the possibility to use any colour in the same drum.
2. Very smooth surface, all edges rounded, big and smooth holes for drainage. It gives big advantages in the "contact" with processed hides and skins giving therefore no grain damage during process. It means improvement of the finished article selection especially in the articles such as full grain, light skins or sole leather.
3. No chemical attack or water penetration and no "fatigue" problem of the material as suffered by the stainless steel. It means virtually no ageing process of the drum with the result of keeping the same performance as the new drum and assuring a very long life of the machine.
4. No chemical corrosion by special chemicals such as hydrogen peroxide, chloridric acid or other bleaching chemicals. It allows to use the drum for processes (unhairing with hydrogen peroxide, bleaching with very aggressive chemicals) up to now banned to wood or stainless steel.

More detailed information and technical specifications can be taken from www.italprogetti.it otherwise you can contact directly Italprogetti main offices.

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in the World

Taiwan / **Fifth most competitive economy in Asia.**

Taiwan makes a comeback on the international scene. The Asiatic island is showing some elements of development such as an increase in political stability, a consumer population of Western levels, public investments in research and development that have grown from 0.6% to 3% of the GNP. Taiwan has thus grown to be the fifth most competitive economy in Asia. Exchanges abroad have increased, and in the last three years there has been renewed interest in this market on the part of various companies in the West who have opened showrooms, stores, supply channels and, in a few special cases, even branches. The new dynamics of the market are obviously benefiting from the fact that since 2002 Taiwan has been a member of the World Trade Organization (WTO), which entails non-discriminatory treatment of companies and foreign investments, easing of controls on movement of capital, and special incentives for the establishment of high-tech companies.

Taiwan / **An interesting market for Western enterprise.**

In one year Taiwan has produced 39 billion pairs of shoes, has imported another 23 billion, and has exported 27 billion. The internal demand is said to have been for 35 billion. The Taiwan market has a value of 1.92 billion US dollars, two-thirds of which is made up of women's shoes. On the average, per year, each woman will buy three pairs of shoes, each man will buy 1.3 pairs, and a student will buy four to five pairs. The leather goods market is valued at 18 billion US dollars, of which 60% is in handbags. 250 luxury labels are available in Taiwan.

Forecast for shoe makers / **15 billion pairs in 2010.**

Between 1995 and 2003 world production of shoes has grown by 30%, reaching 13 billion pairs of shoes, with an ulterior increase of 15% is forecast by 2010. This forecast is in accordance with that of Deutsche Bank for 2008, which foresees reaching a level of 13.5 billion pairs, with China maintaining its leadership in the sector.

In 2003 China produced some 7 billion pairs of shoes and exported 4.3 billion, mostly to

the US. In general, Asia produced 9.9 billion pairs of shoes in 2003, equal to 76% of world production. After China the principal producers of the world are India, a distant second with 750 million pairs, and Brazil, with 642 million pairs.

Exports are increasing for China, Hong Kong and Brazil, among the top ten exporters with more than 164 million pairs, while Vietnam (333 million), Italy (320 million), Indonesia (176 million) Spain (137 million), Portugal (87 million), and the Netherlands (60 million) have registered reductions. Germany exported 79 million pairs and Thailand 136 million, without any variation from 2002. All of this appears to confirm that China and Asia will continue to dominate the world shoe scene in terms of both production and exportation, with Brazil as the only possible, if minor, competitor.

The countries that export shoes have to compete on a global level with the products made in China in spite of all the difference of economy of scale.

The strategy to face this battle, which appears so unfair for smaller exporting countries and for countries who would like to export, is to investigate and establish niches in other countries. Traditional markets such as the European Union and the United States are by now mature, while the Asian market, from which the productive challenge arrives, is expanding at a much faster pace, with growing demand above all from the emerging middle classes.

For this reason, the Asiatic market might be a blessing for European and Latin American producers.

For example, China numbers some 242 million middle-class consumers, about 19% of the population, a very small percentage when compared to the 82-89% of the same class of consumers in the United States and Europe. An idea of the potential acquisitive power of the Chinese consumer market can be seen in the sales forecast of private vehicles, which will grow exponentially up to 120 million within 2020.

It is therefore not surprising to read forecasts saying that China will import a greater quantity of petroleum in the coming years and consequently will transform its economy into one that is much more oriented towards consumption. This is good news for shoe producers who are sufficiently organized to

place high-quality European designed shoes in the Chinese market.

Prato Expo / **Spring-Summer 2006**

Light and airy are the leit-motifs of the Spring-Summer 2006 season at Prato Expo, with colors that are clean and classic, and a sexy elegance that is more enchanting, subtle, accessible, respectful of nature and looking towards the future. The themes are Country Shabby -- elegant rusticity; Bio City -- ecologic elegance; Yacht Beach -- sporty chic; Retroscope -- Vintage and European folklore; Terra Incognita -- primitive couture; Funny Sunny -- euphoric and carefree.

Pitti Filati / **Spring-Summer 2006 Earth, air, fire and water. The thread of history.**

This is the theme dedicated to Spring-Summer 2006 at Pitti Filati. It is a voyage through the distinct signs of cultures that populate the world and possible interactions between them. Man is both the point of departure and interpreter. The new-look silhouette of the 1950s marries Navaho graphics; the classic men's suit takes on the sacred geometry of the Ibo tribe; the nineteenth-century panier is colored with images from erotic Japanese art; the sweat suit typical of rappers takes on the pinstripes of Wall Street. Colors are the primary elements that make up the organic base of the life of Man.

Moda In / **Spring-Summer 2006**

Sources of inspiration for Spring-Summer 2006 come more from the actual demands of society for security and normality than from the fashion system. A greater integration of the various cultures, the simplicity and harmony of the world of nature, and exuberant but controlled individualism. Three themes were distinguished by the research undertaken at Moda In: Fusion, Ease, Splash. The strong points of the season are natural, high performance materials due to the contribution of man-made fibres, a clean and regular look, respect for nature with references to the organic world, prints that are soft and subtle, accessories that are partly hand-made, partly artistic to respond to the need for individualism.

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PH. NICOLA GIONI

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