

Chimont

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NEWSLETTER FROM THE FUTURE OF TANNING



Chimont

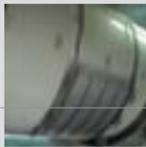
More ecology, lower
costs

The most economical and
innovative processes that
respect the environment

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focus On

More ecology, lower costs

If in past years “respect for the environment” was an optional (above all in the tanning sector), or in the worst cases, a slogan, today it is a must. Consumer demand for “ecological” products has increased, and this premise, neglected at first, has now become a valid principle underlying sales, dictated by real market demands. This important turn of events is in line with the reality that has been faced by firms such as Chimont International, which has dedicated years to applied research, investing in products that are increasing less likely to pollute. Industries at the cutting edge that aim “rationalise” those tanning processes that, by using smaller quantities of products, permit the drastic reduction of the costs of purification. On this basis, the foundations are laid for a future in which “true innovation” will be synonymous with less pollution, the increase of productivity and reduction of costs. A future which has already arrived for Chimont. Welcome to **LeatherZone**.

Remo Petroselli
Chimont International Spa
general manager

Chimont and Vegetable Tanning for All

As of today even large industries can vegetable tan leather.

Tanning with natural vegetable extracts has a very long tradition, and is known to all who operate in the sector. Even though they are easy to apply in theory, their use involves processes and steps that are quite labour-intensive, and because of this they are not favoured by large-scale tanneries. For this reason, articles developed with leather that is purely vegetable tanned have always been produced by small to medium sized, specialised tanneries. Chimont International, which has always conducted research in this area, has developed a tanning process that permits the manufacture of vegetable-tanned articles by means of an extremely simple, flexible process, allowing it to be adopted even by tanneries which operate on an industrial scale.

To better explain this process and to highlight its advantages, let's compare the standard method of producing vegetable-tanned leather destined for use in purse-making, commonly known as "vacchetta", with Chimont's innovative method.

– Substituting the "pickling" phase with the "acidification and pretanning" phase (using **Chimotan AC** and

Standard Process	Chimont Process
> Delimiting > Soaking	> Delimiting > Soaking
> Pickling	> Acidification > Pretanning > Setting out > Pregreasing > Pressing and shaving > Selection with the possibility of drying the pretanned leathers
<i>On Lime weight</i> > Tanning	<i>On shaved weight</i> > Vegetable tanning > Retanning > Dying
> Setting out > Pressing and shaving > Selection > Retanning > Dying	
> Setting out > Pressing > Dry greasing	> Setting out > Pressing > Dry greasing
> Setting out > Hot rolling > Air drying	> Setting out > Hot rolling > Air drying

Chimotan BRS, a synthetic tannin especially developed for the pretanning phase), the use of inorganic acids and sodium chloride is eliminated, with significant benefits for the quality of the waste water.

– Leathers so treated can be sorted by quality and thickness, shaved and thoroughly dried for long term

conservation. They can also be very easily dried and sent for successive tanning treatments, dyeing and greasing without difficulty.

– Pretanning in this way permits the leather to be used for both chrome and vegetable tanning, allowing the manufacture of finished items that are the same as or better in quality than those obtained by traditional processes.

– The shaving wastes are not contaminated with dangerous substances and so the protein from the skins can be recuperated.

– Because the leather is shaved during this phase, chemical products used for the tanning processes are not wasted, resulting in a very economical process.

– The products used are completely fixed to the leather, resulting in cleaner waste baths with significant advantages for the cost of purifying.

– The leathers are flatter and smoother with respect to those tanned at full thickness.

– It is possible at this point to make a selection of the leathers, so that they can be designated appropriately for their final use. This aspect represents an enormous advantage for the tanner, who can noticeably reduce the number of unused leathers in stock.

Here is a summary of the advantages:

– The creation of a stable pretanning that permits a selection of leathers classified by defect and thickness

– Flexibility of process, leathers so pretanning can be

dried and stocked for long periods, including permitting them to be exported during this phase and so that production is completed in other countries.

– The leather can be sorted during a phase that permits the easy manipulation of the leathers and the simple classification of defects. The selection can take place at a point in the process that gives still another chance to decide on a kind of tanning and the kind of item to be produced. Leathers destined for successive treatments are easily dried without resulting in defects during the drying phase.

– Pretanned leathers can also be destined both to chrome and vegetable retanning, permitting the manufacture of products with specific characteristics without altering the original characteristics of the finished leather.

– The process is faster.

– The recuperated shavings are not contaminated by tanning products.

– The quality of the waste water is improved.

– A lesser quantity of chemical produces is required. The vats can be loaded with more hides, thus increasing the production capacity in keeping with the facilities.

– The leathers are generally better quality. Yet again Chimont International, with its products

Chimotan AC and **Chimotan BRS** has shown that it is able to develop real innovations while safeguarding



Waters of the future

In the Val di Chiampo the tanners have signed an agreement with the Ministry and the Region for 90 million Euros to revolutionise the management of water purification. In Tuscany this took place last year.

di Luca Fumagalli © **MdP La Conceria**

It is called the “Program Agreement” and comprises at least a leap in quality in the management of environmental impact of tanneries. The latest is that of the area of Vicenza, with an act signed by the Ministry for the Environment and the Region of Veneto, onerous but inevitable in order to guarantee a future and competitiveness. As they say in Arzignano, “This is a new hand, like in poker”, meaning that it is a definitive action. In the district of Tuscany a similar project has been underway for almost a year. Difficult to define the balance, but the economic effort on the part of those concerned is clear.

The agreement

“By agreeing, the Vicentine tanneries are showing a strategic choice that is clear and decisive: the development of our sector will take place in this territory and out of respect for this territory.” These are the words of Umberto Anzolin, tanner and president of the Tanning Section of the Vicentine district, which sums up the intentions of what was agreed upon last December 5. The “Program Agreement Description for Protection of the Waters and Integrated Management of Water Resources” aims in general to achieve the

re-equilibrium of the balance of waters by the end of 2015. Some specific aims can be cited: to eliminate dangerous substances; reduce chrome, sulphates and chlorides; the reuse tannery reflux waters so that less water is drawn from aquifers; to restructure, rationalise and link purification plants already operating within the district. In short, purification of the future. The investment required is 90 million Euros: 30 will be provided by the Ministry, 30 by the Region, and 30 by the tanneries.

Comments

Mirko Balsemin (Nice) comments: “The Region of Veneto has signed two Program Agreements. One regards the Vicentine tanneries, the other the conversion of the Port of Marghera. In the second case we are dealing with a declaration of the end of a productive division. For tanning, on the other hand, this gives a strong signal of continuity.” With teeth gritted and very clear ideas, the intention is to continue to fill the vats of Arzignano and its surroundings with leather. Anzolin confirms: First of all it should be noted that, in order to reach an agreement at this level, the Vicentine tanning sector has taken giant steps in the environmental management of its own activities. And it hasn't been



easy to reach certain levels. From this point of view, the most relevant aspect of the Agreement is not so much that it is co-financed, but rather that it is the end of a way of “working by exemption.” Almost as though it were a short-term contract... “Yes,” continues Anzolin, “But from now on there will no longer be any need for exemptions and various derogations: from now until 2015 the way is paved, we know what we have to do and how to do it. My hope is that we are able to transform this commitment and these investments into a competitive factor.”

In Tuscany it happens that ...

A similar accord was stipulated and the parameters relative to the co-participation of the investments are about to be revised. In simpler terms, as Piero Maccanti, director of the Tanners Association of Santa Croce, explains, “After there having stipulated in 2004 a draft of the intentions, the documents were signed in July 2005. The total investment was and is 85 million Euros. At the beginning the division was 28 million on the part of the tanneries, 28 million from the Ministry for the Environment, and 28 million from the Region of Tuscany. Any day now a revision is expected to be signed that would raise to 42 million the contribution of the Ministry and lower to 14 million that of the tanneries.” The Tuscan agreement has a deadline of 2012 and provides for the rationalisation of the 3 existing plants. In that

of Santa Croce flow the industrial wastes (some 6 million cubic metres a year), which, once purified, rather than being discharged into the public sewer, will pass through the (enlarged) structure of Ponte a Egola, which will collect 60% of public waste waters as well (circa 24 million cubic metres). This is not all, because the latest plant, that of Ponte a Cappiano, will “specialise” in water refinement, a certain percentage of which could be recycled into the tanneries, thus reducing their dependence on the underground aquifers. “Then,” continues Maccanti, “there are all of the objectives regarding drastic reductions of the discharge of certain substances, such as chlorides, for which we should arrive at an abatement of at least 30%, thus avoiding being able to work thanks only to exemptions.” What concrete things will be achieved in the next 6 years? “A rationalisation of purification, at a lower cost in terms of environmental impact, and a reduction of sludge.” All positive? Not really. The thorny problem of the matter is represented by the tariffs that the firm who manages the activity (largely private in which the tanneries “participate”) has to apply to the treatment of public waste, something that happens to a small degree at present. There are those who are pushing to reduce it by half, and other who maintain that it shouldn't be reduced by much. It might seem a trivial matter, but it actually is of strategic importance.

Finimont presents the New **NF-COLOR**

The non-flammable anilines.

The Leather District of Santa Croce sull'Arno has always been a world leader in the leatherworking industry because it has always known how to innovate and renew itself, anticipating market demands and establishing new benchmarks for quality.

One of the objects in the near future will be linked without doubt to protection of the environment, with particular attention to the emission of volatile organic compounds (VOC), as set forth by the Ministry for the Environment (Decree no. 44/16/01/2004), which limits VOC emissions of some industrial activities, and establishes parameters to be respected.

With reference to this decree, the parameter that concerns the tanning sector is that for VOC, because the solvents used most often have a percentage of VOC equal to 100%. For this reason Finimont, ever sensitive to environmental issues, has developed **NF-Color**, a line of non-flammable anilines with a low percentage of VOC, constituted of premetallic colors which can be diluted in either water and solvents and which have a maximum VOC of 45%, as opposed to the 70%-90% of the other anilines now on the market. Finimont has been able to attain this significant result thanks to the reduction, or even the elimination, of relevant percentages of solvents by using solvent-free auxiliaries. The new line of non-flammable colors **NF-Color** is comprised of a vast range of highly concentrated

anilines that are resistant to light, solvents and migration. The shades obtained with **NF-Color** are brilliant and uniform, just as with normal traditional metal-complex colours but with some significant advantages for the tanning industry:

- warehousing in the tannery without problems of quantity or special fireproof environments.
- The absence of particular instructions or precautions on the part of the worker at the moment of use of the product

One of the challenges for the near future of chemistry for tanning consists in maintaining unaltered or to improve the quality of the characteristics of the products, reducing or even eliminating their impact on the environment.

Finimont looks to the future of tanning and the results obtained with **NF-Color** are proof of this.



Chimont and the return of **Pull-Up**

Relaunching an “effect” demanded by new sectors.



For some time now we have been seeing an increasing interest in articles with the pull-up effect, no longer exclusively in the shoe sector but in other products such as interior design and clothing as well, niche markets that differ from that of shoemaking, and with different demands. Interior design and clothing, besides requiring certain visual effects (which mustn't be too ostentatious and should leave the leather as natural as possible) require products that don't leave the leather with unpleasant odours, which don't increase their specific weight, and above all which permit the realisation of refinishes with optimum colour-fastness and resistance to migration.

To respond to these requirements, Chimont has developed **Chimoil WAK** and **Chimoil WAF**, two innovative lubricants to use in barrels, which confer to leathers with an already delicate crust the

characteristics required for the final product. These are particular wax compounds to be used as the principal lubricants which have an excellent pull-up effect while having softening and lubricating the leather. The real innovation is that these lubricating compounds confer excellent fixative quality on the leather, and for this reason they don't give rise to the effects of migration on the surface. Further, they don't affect the fixation of the colorants used in dyeing, and permit the attainment of a truly noteworthy colour-fastness.

These are the innovative features that allow leather lubricated with **CHIMOIL WAK** and **CHIMOIL WAF** to be used in the manufacture of articles for interior design and clothing, but the advantages do not stop here. Another very important fact for the refinisher who wants to give character to crust leather treated with the special waxes is that they do not affect the anchorage on the surface of refinishing products and for this reason the possibilities for developing various articles based on pull-up increase significantly. Yet again the sensitivity of Chimont to new trends united with technical expertise has led to the evolution of an article by putting its characteristics into action and broadening its applications to new markets.



Caravel Tannery: High quality and the secret of luxury

Interview with Andrea Dolfi.

The Caravel tannery is one of the most interesting phenomena in the panorama of industrial Santa Croce. Famous worldwide for its excellent production of reptile leathers, the tannery puts forth a strong image in terms of style as well as high-quality craftsmanship. Caravel was born in 1986, specialising from the beginning in the production of leathers made from reptiles. It was not easy at first, beginning from scratch, but Caravel was able to gain an introduction into a difficult and competitive market, finally achieving a standing as one of the most notable firms in the creation of "luxury" leathers.

We asked Andrea Dolfi, a partner in the tannery, what had led to this success and made Caravel strongly competitive.

The most important thing of all in achieving our success was believing in the people who worked with us. We

created a very close-knit team, giving to each a specific task and responsibility for the management of that particular department. We are a team, composed of a group of partners and by a group of department heads, who all have the same objectives: to make the most of our capacities in order to achieve well-defined results. Another aspect that was of equal importance is the quality of our products, which we control almost obsessively to make sure that we produce what our customers want. From a careful selection from raw leathers, to the high quality set for production, to the extreme efficiency of delivery, every step is followed down to the smallest detail. Our guiding principle is dependability; never do less than promised. We value our own image, and we want others to value it as well. For this reason all the great international designers, without exception, come to us.

What future does Caravel see for itself?

Our prospects are excellent, to say the least. We closed 2005 with an increase in invoices of 40%, and have verified that, to date, the invoices for 2006 are already 20% above those of last year. In particular, we are doing a lot of business with Russia, with a "luxury market" that makes us part of a special sphere.

With regards to luxury, what meaning does this term have today?

In general I think luxury is considered a privilege, identified with the possibility to be and to do, to live and to purchase what one wants. In my work it is different: luxury is the possibility of having an eye for detail and quality. It means research and optimum competence which, when motivated by a grand

passion, helps us to always give our best. This is the luxury that I favour, working in a tannery where I have the freedom, day in and day out, to make my own choices.



2006 Positive, leather production grows

The data analysed by UNIC gives a positive panorama Far East in the lead, but Italy moving ahead too.

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The note about business trends put together by UNIC relative to the first trimester of 2006 compared with the same period of 2005 and the last trimester of that same year highlights differentiated trends on the basis of typologies of leather, of the use for which it is destined, and of geographic regions.

RAW HIDES / Bovines

The first trimester of 2006 was characterised by growth in progress at the same levels registered at the end of 2005 with an increase of +4.7%. In March there were widespread increases in all markets and for all pieces. Bull is essentially stable for the short term, while with respect to the first trimester of 2005 the increase was +5.2%; Swedish bulls are growing (+1.6% for the trimester; +16.2% with respect to last year), prices for German and Italian bulls are stable, respectively +4.4% and +6.2% for the year; on the other hand, French and Dutch bulls register a decrease of -3.5% for the short term and a growth of +4.4% for the year. For cow, bullock and heifer the short-term situation is characterised by a large drop for French leathers, counterbalanced by an increase for leathers from Australia and the United States; in the other large markets there is a trend that is cautiously increasing.

Young bullocks

Raw hides appear to have regained strength with increases of the first trimester of 2006. An increase of +3% is indicated

with respect to the last trimester of 2005; comparison with the same period of the previous year shows an increase of +8.6%. Prices are rising decidedly in the Netherlands with an increase of +5.2% for the short term and of +10% as regards the year; in the other markets stability predominates for the short term and increases are from 4% to 7% in seasonal comparisons.

Ovine and goat

Prices for ovine leathers reflect a demand that is very sluggish. The levels of ovine and goat leathers are stable for the short term while the situation appears to tend to increases with respect to last year.

FINISHED LEATHERS / Bovines

The first trimester of 2006 closed with an average growth of +4.3% with respect to the same period of 2005. The results of the medium-high range were particularly brilliant (+5.6%); the data for the medium range (+3.6%) and the low range (+2.5%) are quieter. In Europe, Italian production registered an increase in line with the average general data (+4.1%; +4.4% for sole leather); Portugal registered an increase of +7%, and Great Britain rose to a height of +20%; the situation in Spain and France is falling. In Latin America, exports for Brazil rose by +15%, in the face of a contraction in the domestic market; the situation in Argentina is analogous. In Asia, China maintains its levels of production for 2005, in spite of an increase in acquisitions

of raw materials, while India registered a slight decrease. A comparison of the two periods shows a growth on an average of 2.3%, with trends that are differentiated and similar to the annual depending on the range: the medium-high is growing (+3.3%); the medium is doing well (+2.2%), the medium-low is almost the same (+0.8%). The Italian industry registers an average increase in production of +1.7% and of +1.3% for sole leather; the situation in Spain (+1.5%) and in France (+0.8%) is similar; growth is stronger in Great Britain (+4.7%) and Portugal (+5.9%). As regards the destination markets, there is a healthy upswing in demand on the part of European and North American clients; the region of the Far East is still the driving force; Eastern Europe is falling slightly. Among the production markets, that of footwear shows the best results in a seasonal comparison with a growth of 5.6%, decent growth characterises leather goods (+2.6%), and interiors (+2.3%); clothing is down (-1.8%). For the short term, quilted goods lead the demand with +4.5%, followed by leather goods (+2.2%) and footwear (+1.8%); leather clothing remains the same. Raw materials show a significant average increase in prices, both for the short term (+6.5%) and for the longer period (+10.1%); prices of finished leather show a growth of +1.3% for the short term and 2.7% for the longer period; however the trends of prices are differentiated depending on the typology of the product.

Bullocks

In bullocks there is an increase on a seasonal basis of an average of +2.7%, a figure that is in line with that for Italian production (+2.4%). Spain and India show a growth of around 4-5%, while France registered a decrease on the average with respect to last year. Slightly more sustained is the growth of the middle-high range (+3.3%) with respect to the top (+2%) and the medium (+2.2%). Production for the geographic regions of Italy and India is stable, France is recouping and Spain has registered a slight decrease. At

the level of product ranges, the percentages change: the highest range rises by +1.9%, the medium range fell by -1.3%, the medium-high range remains substantially unchanged. Demand is growing on the part of Italian clients, flanked by the those of the rest of Europe; demand on the part of the Far East and North America are also growing slightly, while at the same time this sector shows a slowdown of the orders coming from Eastern Europe. As for bovines, the prices for bullocks are rising at the level of raw hides: there is an average of 11% with respect of the last three months of 2005, while a comparison for the trimester as compared to the year indicates an average of +16.4%. The repercussion for price lists has been on the order of 3.3%.

Ovine and goat

The ovine and goat sector registered a reduction of invoices in the first trimester of -2.8% with respect to the same period of 2005. The situation was less hard for Italian producers with -1.7%, while for Spain the situation remains difficult. The trend was more or less identical for the high range and the medium-economic, in line with the general average. With respect to the last trimester of 2005, there was a seasonal trend towards stagnation, with worse results for the Italian producers. For the short term, in contrast to the yearly comparison, the medium-low range performed better than the high range. The positive trend of the Italian area is countered by the negative trend of the European market; the areas of the Middle and Far East are still active; there are some positive signs in the North American market. A weak recovery, by way of the areas of final use, is shown in the sector of clothing, stable with respect to the first trimester of 2005 and slightly increased with respect to the last trimester of 2005. A trend towards stagnation in uppers and leather goods, with a slight decrease with respect to the short and long terms. The general rising trend in raw materials conditions the prices of finished leathers that show a partial finishing touch of some +1% for both the short and the long terms.

Green Chemistry and Attainable Ecology

Biovit is the line of lubricants derived from sunflowers with a very low environmental impact. Created to respect nature without diminishing the quality of production. The future that awaits us begins here.

Chimont has been a partner of Green Chemistry for many years. This association, which was officially born in 2006, aims to substitute, through its own research, industrial products based on synthetics or minerals that have a strong impact on the environment with analogous products of that are vegetable-based, non-toxic and with a high degree of biodegradability. An ample range of products could be substituted: lubricants, colorants, cosmetics, detergents, fibres, phytopharmaceuticals, insulating materials, fuels, combustibles, etc. The promotion of Green Chemistry on the part of local wool workshops constitutes a significant contribution in the reduction of risk factors for the wellbeing of inhabitants and workers in connection to the use of allergenic substances of the numerous productive processes. It permits reduction of serious problems of water and air pollution problems

that are particularly in evidence in some industrial areas such as Santa Croce and Prato. Finally, it permits development of a multifunctional agriculture that is capable of responding to the needs of European agricultural markets. For several years now Chimont has been aware of the interesting potential for innovation of "green chemistry", and has adhered to the **Biovit** program. Founded in 2001, its object is the identification of new vegetable-based oils for use in the sector of tanning and textiles, substituting them in place of oils of synthetic origin, which are harmful for humans and the environment, and which also involve notable disadvantages from an economic point of view. The mineral and tensioactive oils currently used in industry today are a source of serious air and water pollution and represent a potential risk for workers' health. These are lubricants with a very slow



biodegradability and high risk for allergies, which, used extensively in the Tuscan tanning and textile districts cause significant problems for the quality of air and surface waters. The **Biovit** program aims to substitute and/or integrate synthetic lubricants with vegetable-based lubricants that are derived from sunflower seeds or from plants in the sunflower family. There is no need to say that the use of these oils would reduce the potential for air and water potential, with a consequent improvement in health and hygiene for inhabitants and workers. **Biovit** is an oil with a very high lubricating capacity, totally biodegradable,

which confers on the leather an optimum resistance to yellowing and to rancidity and guarantees the elimination of unpleasant odours. Finally, the use of these products would encourage a fertile interaction between agriculture and industry, with considerable economic advantages for both sectors. Unfortunately, the great potential of this kind of product are as yet unknown to the public at large and the development of these themes conflict with the rigid rules of the market in which the factor of price, on average higher for vegetable-based products, slow down the process of substitution.

Environmental Certification 14001

Chimont-Finimont: quality and respect for the environment.

Quality is not measured only in terms procedures and controls, but in terms of respect for the environment as well. Since 1989 Chimont has worked constantly on research for innovative products and processes aimed at reducing the environmental impact caused by the industries that process leathers. During these years Chimont has developed procedures and products which, while aimed at maintaining the technical and aesthetic characteristics of articles produced by traditional means, also safeguard the health and wellbeing of those who make and use the leather. For these reasons Chimont and Finimont have taken the necessary steps to obtain the environmental certification UNI EN ISO 14001:2004 and thus officially document their rigorous respect for production procedures

and processes. The attainment of the UNI EN ISO 14001:2004 certificate testifies to Chimont and Finimont's commitment to the environment, people and continued improvement of management systems.



Canton: More technology than materials

“Quiet” balance for the 2006 edition. The Chinese sector feels the difficulties of Europe and America.

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The sixteenth edition of Shoes and Leather of Guangzhou, which took place from 30 May to 2 June 2006 in the exposition complex of Pazhou, registered an increase in the area of exhibitors.

70% of the exhibitors were international, coming from 28 countries: among those present, the Mexican delegation exhibited for the first time. The products exhibited appertained to all areas of leather and footwear production, from raw materials to finished products, with an emphasis on technology.

Visitors to the exposition numbered some 40 thousand, coming mainly from China: the buyers, thanks to the vast range of products exhibited, could make their choices from among various price ranges and on the basis of specific requirements.

Additional important events at the exposition included the fashion shows in which 16 designers from Malaysia, Indonesia, Shanghai, Hong Kong and Guangzhou showed their creations for summer and winter 2006/2007. With regards the fashion shows, now in their third year, Frandle Tse, director of the fair, declared

that the greatest investment in this direction was made in as much as styling is a qualifying factor for the finished product. “In fact, it is important to look for new lines and new materials to create competitive products not only in terms of price but also in terms of appeal and quality. The fashion shows also represent an interesting showcase for the producers of technology, which, can draw inspiration for the development of new systems and machines from the finished product.” Also in the program was a series of seminars which addressed themes related to ecology, both at the level of the environment and that of production, and the aspects related to raw and semi-finished hides.

The layout of the exhibit was completed by an area dedicated to finished products. This included a presentation, organised by the Spanish Acexpiel and the Portuguese Apic, dedicated to new developments in refinishing of hides and manufactured goods, footwear, leather goods and clothing.

The next edition of the exposition will take place from 30 May to 2 June 2007.

The Canton exposition had a quieter tone with respect to past editions: in general, the producers of materials, above all the tanneries, finished with a balance that was less satisfying with respect to the exhibitors of technology.

The Chinese productive sector was represented by articles in the medium-low range in which a moderate price was the absolute determining factor; thus the former Heavenly Empire continues with unbroken rhythm in mass production of articles destined for the national market, but has showed a slowdown in the production of greater added value and, above all, in

the export for which these articles were destined, due to the influence of the difficult situation underway in the European and American economies. Further, a weak dollar has contributed to making the import of materials less advantageous, and therefore makes China a less attractive market for western companies. A final remark concerns the goods and products on display: as regards Chinese suppliers the presence was medium-low, but the number of international exhibitors remains higher, indicating that they continue to see in China a market that is continuing to evolve in terms of quality.



Looking At Karuna/a.skinshoes

Ideas in the service of mankind.

a.skinshoes, the only antiallergic footwear.

Karuna was founded in 2002 in order to be the first to respond to a market demand, and to the desire to produce useful technology for the service of mankind, which, responsibly and knowingly, leads to efficient solutions in all fields of personal use. The business operates with the aim of applying know-how acquired in the field of applied research to the development of innovative ideas that can provide concrete solutions in total respect for Man and his environment. This is the premise underlying Karuna's ambitious project to develop an innovative process of tanning that permits the manufacture of hides without any substances that could cause allergic reactions. Four long years passed before the project resulted in a.skinshoes, the first and only antiallergic footwear. A leading product Made in Italy, entirely of Italian manufacture, and safe for consumers, as tests carried out by the Department of Dermatological Sciences of the University of Florence confirm.

The market launch and the success achieved have opened new fields of possible applications for leather. a.skinshoes, the solution that was missing now exists.

For more information:
www.askin.it

askinshoes
L'UNICA PELLE CHE RISPETTA LA TUA PELLE.

Karuna
IDEE AL SERVIZIO DELL'UOMO



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in the World

Colombia / **New decree concerning imports**

Following a decree from the Ministry of Commerce, Industry and Tourism, Colombia will apply new regulations to control imports of textile materials and manufactured goods, including footwear and its components, in order to more carefully control the practice of smuggling. To provide control and prevent customs evasion, the national government considers it necessary to take a survey and give advance authorisation that is subject to legal rigour for the import of ready-made goods, textiles and footwear. They are requesting information on the minimum amount of goods that the importer must deposit without however hindering the import of products already in progress.

Lahore / **New Fair in Town**

Leather Flag Pakistan is the name of the new trade fair dedicated to finished leathers, leatherwear, footwear, gloves and other articles in the sector, including machinery, chemical products and accessories. The first edition took place from 8 to 12 September 2006 in the Fortress Expo Centre of Lahore, Punjab. The event was organised by the Office for the Promotion of Exports and by the Ministry of Commerce of Pakistan, together with the various associations of the sector of tanning and the production of leatherwear, footwear and gloves. Because of participation in this new and larger fair, the Association of Pakistan shoe manufacturers decided to cancel the event "Juft", which would have taken place in June.

Pakistan / **Exports growing**

The numbers presented by the Federal Office of Statistics of Pakistan indicate that the export of leathers for last March add up to \$80,354 million US; the amount that corresponds to finished hides was \$19,799 million US; for morocco leather \$52,526 million US; for footwear \$8,092 million. It is

estimated that during the March-July 2006 period exports will reach \$832,362 million US. Exports of finished hides amounted to 11,731,000 square metres with a value of \$196,750 million US; morocco leathers registered a value of \$540,548 million US, and footwear reached a value of \$95,064 million US, equivalent to 12,016,000 pairs of shoes. However, the Association of producers and exporters of leatherwear has requested an audit of the data concerning exports, which appears not to correspond with the actual situation. The increase in the price of petrol, applied by the Pakistani authorities at the beginning of May, has also generated concern among the country's entrepreneurs: in particular, the President of the Association of tanners underlined the fact that this increase will have a strong negative impact on the leather industry.

Italy / **For footwear made in Italy**

2005 was difficult but the commercial balance remains positive. As it traditionally is, the general assembly of ANCI was a suitable occasion for making public and commenting on the data relative to the business trends for the Italian sector which, unfortunately, showed a negative situation for 2005, for the fifth year in a row.

Italian production of footwear fell by -11% in quantity and by -4.6% in value: 250.2 million pairs of shoes were produced, equal to a value of 6,974 million Euros, compared to the 281 million pairs in 2004. The domestic market demand has been stagnant for some time: consumption has increased by only 0.3% and increasingly often consumer demands are satisfied with imported goods.

Italian exports diminished by -10.8% for a quantity of 249 million pairs, which means 30.3 million pairs less than 2004, with a loss of -1.7% in value, amounting to 6.094 million Euros. These drops were registered in all types of footwear with particular accent on the economic

and medium price ranges: -30% was quoted for house slippers, shoes in rubber and those in cloth, while footwear with leather uppers, which has always been a strong point for Made in Italy, dropped by -6.3%.

A drop in exports was reported for Germany and France (-11.2%), in the USA (-26.5%, due to an unfavourable exchange rate), in the United Kingdom (-5.2%). Increases were reported in quantities exported by Spain (+3.3%) and Russia (+19.9%), while sales in Japan were practically unchanged (-0.8% in quantity and +1.9% in value). On the other hand, a positive sign was given for imports, which reached the umpteenth record of 331.7 million pairs with a growth of +6.7%.

Following the +81% registered in the two-year period 2002/2003 and the +27% in 2004, in 2005 imports received from China amounted to 164.2 million pairs, equal to 36.6 million pairs more (+29%) with respect to the previous year. Growth in footwear with leather uppers coming from the former Heavenly Empire is worrying: overall there has been an increase of +188%, with particular increases in street shoes, which reached a total of +305% (+755% in men's shoes and +816 in women's), in sandals (+586%), in boots and in slippers (+648%).

In spite of the difficulty of the situation, the Italian footwear sector has continued to achieve an positive commercial balance. After the 3.6 billion Euros of 2004, the end of year balance for last year showed a credit of 3.2 billion Euros, even in the face of a drop of -11.1%.

A glance at the first two months of the present year yields the following indexes: exports report a drop of -2.4% in volume against an increase of +4.5% in value: imports have not stopped and reach a total of +19.3% in quantity and +16.4% in value, with China responsible for an further 43% of the total amount imported.

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PH. NICOLA GIONI

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