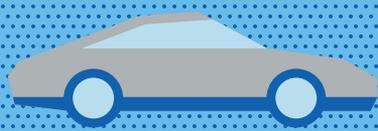


THE STORY OF ITALIAN LEATHER GOES ON

SUSTAINABILITY REPORT:
UPDATES AND NEWS.
YEAR 2018



THE STORY
GOES ON



A MISSION ALONGSIDE
A GUARANTEE.

COSTS ARE WORTH OVER
4% OF TURNOVER, IN LINE WITH
THE TREND OF THE LATEST YEARS.

MORE THAN DOUBLED
INVESTMENTS, SINCE 2003.

IN 2017, ITALIAN TANNING
INDUSTRY CONFIRMED, ONCE
AGAIN, ITS SUSTAINABLE IDENTITY.

ITALIAN LEATHER

Reinforcing, more and more, its leadership,
on an international scale as well.

Italian tanning industry reaffirms its leading
position in the world by reaching, in 2017,
27.5% of leather export worldwide and 20%
of global turnover overall. Such figures drive
an annual turnover that exceeds 5 billion euros,
as tanneries manufacturing of finished leather
amounted to 129 million square meters.

GLOBAL SUCCESS OF FASHION AND LUXURY INDUSTRY RELIES ON ITALIAN TANNERIES' STYLE GROUND, THAT IS, THEIR CONTINUOUS CREATIVE UPGRADING.

EMOTION

Italian leather allure spreads out worldwide. You can also personally see that in Milan, at LpFashionStudio, a library that puts together thousands of samples. The same goes for fashion presentations, which take place, every year, all around the world: over 2,000 attendees took part in 25 style seminars, held in 8 different countries, in 2017. Yet, you can also share that emotion at Lineapelle Milano (the leading business experience for global fashion industry), twice a year, along with London and New York sneak previews and other exhibition events: over 100,000 visitors, in total, have been participating in such fairs.

99,5%
OF FOOD INDUSTRY
SCRAPS RECYCLED

ITALIAN TANNERIES MAKE USE OF NEARLY 100% OF RAW MATERIAL COMING FROM FOOD INDUSTRY WASTE. A PERFECT MODEL OF CIRCULAR ECONOMY.

NATURAL

Leather is a natural and renewable material. It is also a waste product of the food industry, subsequently converted into a long-lasting commodity, with high added value. Leather manufactured by Italian tanneries is a traditional and perfect model of circular economy. It plays a relevant part in balancing the socioeconomic and environmental system, where the tanning industry actively works, by enhancing its own scraps and making them increasingly useful for other industries' development. The last mentioned mission keeps up, on a regular basis, thanks to the implementation of several synergies with a number of industrial activities.

WASTE COMPOSITION

24.2 %
SPETCHES,
TRIMMING AND SHAVINGS

11.4 %
OTHER TANNING
SPECIFIC SCRAPS

7.6 %
PACKAGING

5.8 %
OTHERS

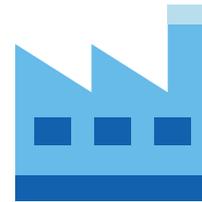
31.7 %
SLUDGE

19.3 %
TANNING BATHS



CLEAN

VARIATIONS
SINCE 2003



There is one fully reliable method to evaluate and assess the environmental impact per each single leather square meter. Suggested by UNIC and COTANCE (the European confederation of national tanning associations), it has been approved by the European Union on 18 April 2018. Such tool is PEFCR (Product Environmental Footprint Category Rules) and it enables tanneries to simulate the manufacturing process. Basing the evaluation on input and output records (from raw materials and chemicals to waste emissions and production), they may virtually recreate the manufacturing stages by using a software to quantify the environmental effects, according to 15 parameters. Focus on authority and full transparency.

-28.1%

USE OF ENERGY

-18.4%

USE OF WATER

-13.5%

WASTE PRODUCTION



The official edition of PEFCR has been published on 24 May 2018. You may download it here.

2017 PERCENTAGES OF POLLUTANTS ABATEMENT IN WASTEWATER (MEAN BETWEEN TUSCANY AND VENETO'S TREATMENT PLANTS)



97.4%
COD

99.5%
CHROMIUM III



58.5 g/m²
COV EMISSION
FACTOR

1.89 kg
CO₂ eq/m²
GREENHOUSE GAS
EMISSIONS

WASTE PRODUCTS - 2017 RELEVANT PARAMETERS



1.65 kg/m²
WASTE
PRODUCTION

0.78 kg/m²
BY-PRODUCTS
(ABP)

73.4%
WASTE TO
BE RECYCLED

6%
HAZARDOUS
WASTE

On-the-job injuries keep decreasing, while going hand in hand with closer attention. Year after year, the working injuries trend has been going down in the Italian tanneries: they declined in number (526 in 2016, according to data provided by INAIL) and dropped with regard to seriousness and average duration. Italian tanning industry direct 76% of their own investments in monitoring the trend of on-the-job injuries at workplace. The aim is to address the issue consistently, in a timely manner, to detect the way employees perceive risks and, subsequently, to provide them with a safety training and education. Safety is one of the values on which Italian leather excellence lies.

26.6

ON-THE-JOB INJURIES
PER 1,000 EMPLOYEES

0.56

WORKING DAYS
LOST PER EMPLOYEE

22 days

AVERAGE INJURY DURATION

SAFE



CONTINUOUS MONITORING
ALONGSIDE TIMELY
COMMITMENT.
HEALTH AND SAFETY,
ON THE JOB, ARE MANDATORY
ASSETS OF ITALIAN
TANNING INDUSTRY.

VALUE

ITALIAN TANNING INDUSTRY INVESTS IN ITS OWN INDUSTRIAL AND SOCIAL RESPONSIBILITY BY IMPLEMENTING SEVERAL CORPORATE WELFARE ACTIONS, ALONG WITH THE POSITIVE EFFECTS OF JOB CONTRACT STABILITY, A SUITABLE COMBINATION BETWEEN WORK AND DAILY LIFE, WITH REGARD TO TIMINGS, AND ATTENTION TO EDUCATIONAL TRAINING AND CULTURE.



90.2%

PERMANENT CONTRACTS

20.2%

WOMEN

+7.4%

APPRENTICES/OTHER TRAINING CONTRACTS

71%

WELFARE/BENEFITS COMPANIES

+48%

PART-TIME

ADVERTISING AND PROMOTING

Aim: to enable youngsters to get to know tanneries, by spreading out the knowledge and the importance of leather. Looking at this direction, we carried out, in the Italian tanning districts, some valuable projects to engage students attending middle school (“Amici per la pelle”), primary school (“Le Belle Lettere della Pelle”) and year four and five of secondary school (Leather, Made in Italy, Counterfeiting).

STYLE

Aim: to inform young designers and students, coming from the most important fashion schools and academies, about leather, a creative and sustainable tool to achieve top quality. Several challenging and prestigious collaboration projects are currently underway: to begin with, the ones started with Polimoda (Florence), Accademia Costume e Moda (Rome), IED. Some more are going to be planned shortly.

EXPERTISE

Aims: to provide managers, technicians, buyers, designers, supervisors, sales professionals, actively operating in several sectors linked with leather, with permanent training. Furthermore, to join various educational projects focused on the professional training of skilled labor. Some of these projects are underway: among others, the ones carried out with IFTS, Fondazione Cosmo, Politecnico del Cuoio, Politecnico del Made in Italy.

+86%

CERTIFICATIONS ON TRACEABILITY

ETHICAL

ITALIAN TANNING INDUSTRY TO ENHANCE AND BOOST THEIR ETHICAL COMMITMENT. IT IS NO COINCIDENCE, THEN, THAT CERTIFICATIONS ON TRACEABILITY HAVE BEEN INCREASING CONSIDERABLY. MOREOVER, THEIR NUMBER IS DUE TO DOUBLE IN 2018.

Traceability is not just a requirement or an assumption of responsibility. It is also a competitiveness issue. That is why Italian tanneries are facing this demanding challenge, while striving hard to achieve the highest standards of traceability for raw materials. It is complicated though. It is not easy, in fact, to find early information: yet, Italian leather primarily aims to make sure that the origin of raw hides is actually acceptable and sustainable from an ethical point of view. Work is currently underway. Accomplishments are evident and bound to expand.

CERTIFICATIONS



UNI EN 16484

TRACKING OF RAW MATERIALS (HIDES&SKINS)

Product standard that indicates the country where leather is produced, according to international customs regulations. The certification of Leather articles is also available. It is granted in accordance with the rules of “Made in” in force.



TS 410 / TS 412

ACCREDITAMENTO ICEC ACCREDIA NR. 34 B

CERTIFICATION OF THE LEATHER

These certifications attest the level of control that tanneries have over their suppliers, including knowledge of the countries of origin of the raw hides and skins and of the slaughterhouses and farms involved. According to ICEC TS 414 standard, the certification of leather articles is also available.

INNOVATIVE

Looking at technology enhancement and manufacturing efficiency upgrading. In 2017, Italian tanneries implemented the Industry 4.0 national plan, therefore taking advantage of an outstanding opportunity in terms of innovation. According to a survey carried out amongst UNIC associated members, in 2017 66% of them made some investments in technology, and 27% more have planned them in 2018. Digitization and interconnection are of paramount importance to tackle the needs of the market, which requires bigger flexibility, high productivity, top management control and immediate feedback. For Italian tanning industry, the future is now.

LEATHER RELIES
ON ARTISAN TALENT.
ARTISAN TALENT HANGS
ON INDUSTRY ATTITUDE
TOWARDS INNOVATION.
ITALIAN TANNERIES FOCUS
ON COMPREHENSIVE
UPGRADING.



METHODOLOGICAL NOTE

Italian tanning industry keeps up with its mission, focused on economic, social, environmental and ethical commitment, integrating 2017 Sustainability Report with new activities and projects and updating the most relevant standards.

Data and criteria are given by a weighted average resulting from a number of companies, which are a representative sample, on a national scale, with regard to their geographical position, manufacturing sector, raw material, process and finished products. In terms of turnover, such enterprises are worth over 22% of overall turnover of Italian tanning industry.

As for some specific aspects, such as wastewater, economic figures, statistics about injuries, human resources, the database was completed with additional sources of information, aiming to give a more detailed picture of the situation.

Data hereby highlighted refer to 2017 reporting, except for statistics about injuries (2016), which are provided by INAIL in their latest official report over the tanning industry.

IN COLLABORATION WITH

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ANTIBA S.P.A.

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