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市场

Slowdown in turnover
& export in the first
quarter of 2024

2024年第一季度出口额下降

► MARKETS

市场

Ties reappear and
leather clothing falls
down

领带回归、皮衣下滑

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summary



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ITALIAN FOOTWEAR INDUSTRY - Steady turnover at 2023 closing

Slowdown in turnover & export in the first quarter of 2024



In the first quarter of 2024, the Italian footwear sector curbed suddenly, recording a contraction in both exports (-9.7% in value, and -10.3% in pairs) and turnover (-10.1%). This scenario emerged from the last report by Centro Studi Confindustria Moda for Assocalzaturifici, which also highlighted a decline in the purchases of Italian households (-1.6% in quantity, and -0.7% in spent.) "The year 2023 was closed with a substantial steady-

ness in turnover, 14.58 billion euro (+0.6% over 2022) and exports, although with less brilliant volumes," explains Giovanna Ceolini, president of Assocalzaturifici; "At the beginning of 2024, the footwear sector was still affected by the slowdown – started in the second half of last year – which has now become even more evident, with a strong reduction in orders and production activities (the industrial production index (ISTAT) in the first 3 months was

前景 市场

意大利鞋类行业：2023年营业额收报稳定 2024年第一季度出口额下降

2024年第一季度，意大利鞋类行业出现急剧放缓，无论是出口（出口额降低9.7%，数量减少10.3%）还是营业额（-10.1%）均出现萎缩。这一数据来自于意大利时尚工业联合会研究中心为意大利制鞋商协会 Assocalzaturifici作出的最新报告，该报告还强调了意大利家庭的购买量出现下降（数量减少1.6%，费用支出减少0.7%）。

对此意大利制鞋商协会 Assocalzaturifici 主席 Giovanna Ceolini 女士解释道：“在2023年，行业营业额保持稳定，达到145.8亿欧元（比2022年增长0.6%），出口也基本稳定，尽管销量已经受到影响。从2024年开始，经济继续放缓，这种情况始2023年下半年。现在变得更加明显，订单和生产活动出现大幅减少

（意大利国家统计局Istat工业生产指数显示前3个月下跌20.5个百分点）。我们对协会企业成员进行的常规调查显示，68%的抽样调查成员的营业额出现了下降，其中不容忽视的一部分企业成员（18%）遭遇营业额大幅下降，甚至超过20%。此外，企业家的情绪并不表现出具有信心：只有11%的企业家对第二季度经济走势的改善有信心，根据受访者的预测，今年第二季度营业额与2023年4月至6月相比较注定会下降约7.4个百分点。超过80%的人预测2025年之前不会实现经济扭转”。

该报告显示，就出口方面（占意大利全国鞋类产品总产量的85%）而言，2024年第一季度销售量为5190万双（比去年同期减少了600万双），销售额为31.7亿欧元。在经历了1月份的稳定局面（至少在销售额方面：增长

-20.5%.) The usual survey among our associates highlighted a drop in turnover for 68% of the sample, with a non-negligible part of associates (18%) who reported a contraction even greater than -20%. Furthermore, the entrepreneurs showed a certain discouragement: only 11% confided in an improvement of the situation in the second quarter which, according to respondents' predictions, is destined to close with a drop in turnover around -7.4% on April-June 2023. Over 80% foresee a swing no earlier than 2025."

As regards the exports (for which 85% of the national production is destined), the report showed that 51.9 million pairs were sold in the first quarter of 2024 (6 million less than the same months last year), to 3.17 billion euro. After a steady January (at least in terms of value: +1.4%), the trend worsened in February (-6.2%), until a collapse in orders (-20%), both in value and pairs, in March.

The analysis by product showed declines, in both quantities and value, for all the sectors. In particular, the leather upper footwear segment – the main one, with an incidence of 65% on foreign sales in value – showed a drop of -8.6% in volume, with -7% in value over the first 3 months 2023.

Among the destinations, as already in 2023, the European Union markets featured unfavourable trends (-4.1% in value) compared to the non-EU ones (overall dropped by -15%).

In the EU, France and Spain, despite losing in quantity, grew in value (+1.7% and +8.5%, respectively over the first quarter 2023). France, whose figures also include the return flows of the productions carried out in Italy by the French luxury brands' third parties, proved to be in the first place among the destinations, both in value and volumes (down by -4.3%). Exports to Germany declined by over -10%, while those to Belgium declined by -20% in value and -37.6% in quantity.

Outside the EU, a further halving (-53.4%, with a -36.7% in volume) of the direct flows to Switzerland – the traditional logistical-distributive hub of the big fashion brands – stood out, resulting in the fourth place of destinations in value for the country. Much of the transit in Swiss hubs was replaced by direct shipments to the final markets. The export growth in value towards the Far East (+4.3%) and the Middle East (+14.1%) – where the brands' presence is traditionally strong, resulting in an increase compared to 2023 for such unique macro-areas – is to be read also considering such dynamics. In particular, the Far East showed good results for China (+10.8% in value and +17.8% in quantity) and Hong Kong (+26% in value and +4.9% in volume, although quite distant from the 2019 pre-Covid pairs.) Japan held (-0.9%, with a +3.1% in quantity), while South Korea recorded sharp declines (in the order of -30%).

In the Middle East, the Arab Emirates grew by

1.4%) 之后, 2月份的趋势变得更加不利 (-6.2%), 并一直持续到3月份, 无论是销售额还是销售数量方面都出现了20%的暴跌。

按产品类型进行的分析显示, 所有类别的数量和营业额均出现下降。尤其是带皮革鞋面的鞋类产品, 占比海外市场销售额的65%, 其重要性居首位, 较2023年前3个月相比销售数量下降8.6%, 营业额下降7%。

在出口目的地中, 与2023年相同, 欧盟市场的不利趋势 (出口销售额减少4.1%) 比欧盟以外的市场 (销售额减少15%) 有所缓和。

在欧盟市场, 法国和西班牙尽管在数量方面有所下降, 但销售额却在增长 (较2023年第一季度分别增长了1.7%和8.5%)。法国市场的数据还包括跨阿尔卑斯山奢侈品牌代加工在意大利进行的生产回流, 无论是在价值还是数量上, 法国都当仁不让在出口目的地中名列第一 (下降4.3%)。对德国的出口受挫, 下跌幅度超过10%, 而对比利时的出口额下跌20% (数量大幅下降为37.6%)。

在欧盟之外的市场, 首先引人关注的是流向瑞士的直接物流量进一步减半 (金额减少53.4%, 数量减少36.7%), 瑞士一直是时尚跨国公司的传统物流配送中心, 在出口目的地中的地位在金额方面跌至第四位: 瑞士作为枢纽的大部分货物转运已被直接运送到最终市场所取代。与2023年相比, 远东(+4.3%)和中东市场(+14.1%)的出口金额出现增长 (这些地区在传统上设计师品牌的存在更为强劲), 是唯一出现增长的宏观地域, 因此值得关注其动态。特别是在远东地区, 中国大陆 (金额增长10.8%, 数量增长17.8%) 和香港市场 (金额增长26%, 数量增长4.9%, 但与2019年新冠疫情爆发前相比仍相差甚远) 表现良好。日本市场保持领先 (金额减少0.9%, 数量增长3.1%), 而韩国则大幅下跌 (跌幅30%左右)。

在中东地区, 对阿拉伯联合酋长国的出口值增长了34.4%, 尽管数量下降了4.5%。在美洲大陆, 类似的出口值下降出现在美国 (-8.8%) 和加拿大 (-7.2%)。而这一

+34.4% in value, despite losing -4.5% in volume. On the American continent, both the United States (-8.8%) and Canada (-7.2%) featured similar reductions in value. The United Kingdom recorded negative performances (-6.1% in value), as well.

Regarding the countries of the former Soviet bloc, there was a drop in sales in Russia (-22.4% in value and -17.8% in pairs), while Ukraine recovered in value (+21%), but against a backward of -11% in volume. Continued instead, the Kazakhstan favourable trends (+4.8% in value and +12.2% in quantity.)

With rare exceptions, the data relating to the exports of footwear and parts by region had negative signs for all the main areas. In the analysis of such figures, however, the distortions related to the possible discrepancy between the Province/Region of production and that of shipping should be considered. In the first quarter, only Emilia-Romagna and Piedmont showed a positive trend. In both cases, though, both +0.3% of the first (due to the exploit of Piacenza, which doubled the flows compared to January-March 2023, +100.7%) and the steadier +23.9% of the second (obtained thanks to +57.2% of Novara and +23.7% of Vercelli) were linked to the presence on the territory, as anticipated, of relevant logistical settlements that ship abroad goods produced elsewhere.

The decline in exports from Lombardy (-10.8% over the first 3 months 2023) were in line with the nation-



al average. The region leads the ranking, followed by Veneto (-14.8%, which alone covered 40% of the flows to France, down by -6.9%, but still the first regional destination), and Tuscany (-19.7%, which recorded a collapse of -82% of the direct flows to Switzerland.) In fourth place the Marche region (-8.9% overall, with -7.7% in Fermo, -5% in Macerata, and a heavier decline in Ascoli Piceno, which lost -21.7%). Puglia (seventh) and Campania (eighth) also showed decreases, although quite limited (-5.9% and -2.9%, respectively.)

Finally, regarding the company demography, on late March the number of active businesses in Italy dropped by 3,490 units (with a negative balance of -74 units, including industry and craft businesses, compared with December 2023, equal to -2.1%), along with a drop in employees by -0.8%.

前景 市场

次在英国的表现仍然没有得到回报 (出口值减少6.1%)。就前苏联国家而言,对俄罗斯市场的销售额下降 (金额下降22.4%,数量下降17.8%),而对乌克兰市场的销售额则得以恢复 (+21%),但仍面临着数量减少11%的局面。令人欣慰的是,哈萨克斯坦市场的有利趋势仍在继续 (出口额增长4.8%,数量增长 12.2%)。

按意大利行政大区划分的鞋类和零部件出口数据显示,除了极少数例外,所有主要地区均出现负面迹象。然而,在阅读这些数据时,必须考虑到生产省/地区与运输省/地区之间可能存在的差异所带来的异常。在第一季度,只有艾米利亚-罗马涅和皮埃蒙特呈现出积极的发展趋势。然而,这两种情况下都与该地区存在的重要物流设施有关,前者增长0.3% (由于皮亚琴察的开发,与2023年1月至3月相比,货流量翻了一番为100.7%),而后者则更持续,增长幅度为23.9% (归功于Novara地区增长的57.2%和Vercelli增长的23.7%),正如前面提到的那

样,这些地方的物流设施可将其他地方生产的货物运送到国外去。

伦巴第大区的出口下降幅度与全国平均水平相当 (2023年前3个月下降10.8%),按地区排名领先于威尼托大区 (下降14.8%,仅该大区就占意大利对法国出口量的40%,虽然对其出口下降6.9%,但仍是首要的出口大区) 和托斯卡纳大区 (下降19.7%,其中流入瑞士的直接物流量锐减82%)。排名第四的是马尔凯大区 (总体减少8.9%,其中费尔莫减少7.7%,马切拉塔减少5%,阿斯科利皮切诺的下跌幅更为明显,跌幅为21.7%)。普利亚大区 (排在第七位) 和坎帕尼亚大区 (排在第八位) 也出现下降,但降幅相当有限 (分别为5.9%和2.9%)。

最后,关于企业的数量统计,截至3月底,意大利活跃公司的数量降至3490家 (与2023年12月相比,工业和作坊式企业相加总共减少74家,相当于占比总数的2.1%),与其相伴的是企业员工人数减少0.8%。



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Italian men's fashion in 2023-2024

Ties reappear and leather clothing falls down



Italian men's fashion closed the year 2023 with an increase of +4.7%, featuring a smaller variation compared to the one recorded in recent years. The turnover of Italian menswear has in fact reached 11.9 billion euro. As far as the individual micro-sectors are concerned, all of them closed 2023 with positive changes, with

the exception of leather clothing, which recorded a decline by -0.6%. Ties grew the most, up by +7.6%, followed by shirts (+7.4%).

The value of production (net of the imported product marketing) closed 2023 with growth of +3.3%. With reference to foreign country trade, exports have maintained their leading role for Italian men's

前景 市场

2023-2024年意大利男装

领带回归、皮衣下滑

意大利男士服装行业在2023年结束时营业额录入了一个4.7%的增长，与近些年的记录相比，增长更加有限。事实上，意大利男士服装的营业额已经达到119亿欧元。

就单个细分类别而言，除了皮革服装以外，2023年结束时所有类别都出现积极变化，而皮衣领域则录入一个0.6%的下滑。出现增长较多的是领带类别，增长了7.6%，其次是衬衫类别（增长了7.4%）。

意大利男装2023年全年的产值（扣除进口产品的销售）增长了3.3%。

就对外贸易而言，意大利男装出口继续保持着主导地位，占营业额的74.5%。按年度计算，整个行业出口录

入增长6.6个百分点，出口成交金额超过88亿欧元。而另一方面，进口成交额约为56亿元，下跌2.3个百分点。进出口贸易收支顺差实现32亿欧元，居民家庭购买量录得小幅增长（+0.4%）。

服装占男士时尚产品销售量的55.4%，成为主导领域，其次是针织品，所占份额为26.1%。衬衫占男装市场的16.5%：领带（1.2%）和皮衣（0.8%）所占份额较小。对于男装来说，意大利国内市场仍然掌握在分销渠道手中，其占比稳定在47.4%（与2022-2023年同期相比增长1.0%，营业额减少1.1%）。大型零售贸易商场下降2.9%，仍位居第二位（占比22.2%）：在出现下降较多的销售渠道中，食品渠道下降幅度最大（-10.6%）。独立商店在

ITALIAN MEN'S FASHION INDUSTRY (2018-2023)
(Millions of euro)

	2018	2019	2020	2021	2022	2023
Turnover	9,516	10,147	8,169	9,410	11,316	11,852
Change %		6.6	-19.5	15.2	20.3	4.7
Value of production	4,648	4,681	3,686	4,363	4,729	4,883
Change %		0.7	-21.3	18.4	8.4	3.3
Exports	6,396	7,029	5,858	6,641	8,286	8,830
Change %		9.9	-16.7	13.4	24.8	6.6
Imports	4,294	4,631	3,699	3,994	5,763	5,632
Change %		7.8	-20.1	8.0	44.3	-2.3
Trade balance	2,102	2,398	2,160	2,647	2,523	3,198
Final consumption	6,556	6,285	4,395	5,363	5,878	5,899
Change %		-4.1	-30.1	22.0	9.6	0.4
Structural indicators (%)						
Export/Turnover	67.2	69.3	71.7	70.6	73.2	74.5

Source: Sistema Moda Italia based on ISTAT, Sita Ricerche and Internal Research.

fashion, accounting for 74.5% of turnover. On an annual basis, sector exports recorded a positive change of +6.6%, exceeding 8.8 billion euro. On the other hand, imports recorded a turnover of approximately 5.6 billion euro, down by -2.3%. The trade balance closed with a surplus of 3.2 billion euro, with a timid growth (+0.4%) of purchases made by Italian households. Clothing accounted for 55.4% of men's fashion sell-out, making it the predominant sector, followed by

knitwear with a share of 26.1%. Shirts represented 16.5% of the men's fashion market; smaller shares were recorded for ties (1.2%) and leather clothing (0.8%). The distribution chains, whose incidence reached 47.4% (+1.0 compared to the corresponding period 2022-23, -1.1% in value), held the men's fashion domestic market. The Large-scale retail trade, with a decline of -2.9%, remains in second place (22.2% share); among its channels, the food one has fallen

下降7.5%后，继续下降至17.8%。在线零售业务在2022年增长7.1%后，也回到负值并下降了4.6%，这意味着所占据份额为8.7%。在对其进行分析的期间，街头摊贩和奥特莱斯商店的销售额分别占据意大利男装销售额的约1.7%，两者均受到负面趋势的影响：前者损失9.1%，而后者损失4.7%。

2023年在海外市场的表现

意大利国家统计局ISTAT数据显示，2023年1月至12月期间的出口额与2022年相比增长了6.5%，总金额约为95亿欧元；而进口则录得一个2.6%的下滑，降至69亿欧元。

对欧盟和非欧盟地区的出口均出现增长：分别增长

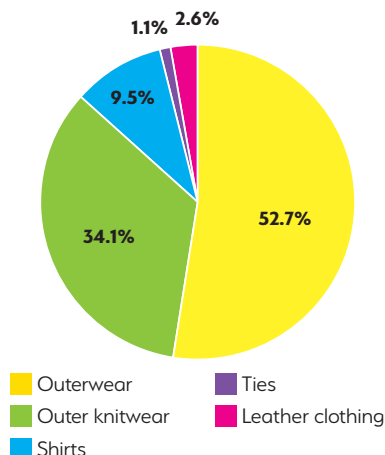
7.2%和6.0%。欧盟市场占该行业出口总额的45.7%，而非欧盟市场则是最大的“买家”，吸收了另外的54.3%。同样，就进口而言，来自欧盟的男装占比为48.2%，而来自非欧盟的男装则占比51.8%，尽管与上一年相比下降了13.8%。

法国采购金额为12亿欧元（+16.8%），相当于行业出口总额的12.2%。其次是德国（占比10.3%）和美国（占比9.3%），两者都受到积极动态的影响，分别出现0.4%和3.0%的增长。而在2023年里，瑞士市场出现负面走势下跌26.5%滑落至第四位，占海外市场销售额的7.7%。中国大陆市场增长了13.9%，达到6.47亿欧元（占总出口额的6.8%）；与此同时，排名第十一位的香港市场的购买量出现了两位数的增长（+28.8%）。

ITALIAN MEN'S FASHION: STRUCTURE AND PERFORMANCE OF INDIVIDUAL SECTORS, 2023

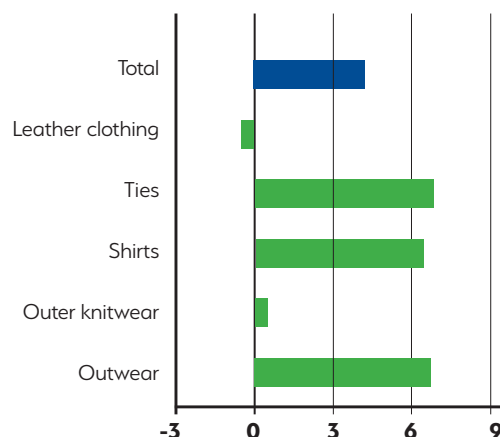
The composition of turnover

(% share of total)



Turnover trends

(Var. % 2023/22)



Source: Sistema Moda Italia

the most (-10.6%). Independent retail kept slowing down, falling to 17.8% against a decrease of -7.5%. Online retail, too, after the growth of +7.1% recorded in 2022, returned to negative territory declining by -4.6%; this translates into a share of 8.7%. In the period under review, street vendors and outlets, which each hold approximately 1.7% of Italian men's fashion sales, were affected by a negative trend: the former lost -9.1%, while the latter -4.7%.

Performance on foreign markets in 2023

ISTAT data shows that exports relating to the period January-December 2023 recorded an increase of +6.5% compared to 2022, for a total of approximately 9.5 billion euro, while imports recorded a -2.6%, falling to 6.9 billion euro.

Both the EU and non-EU regions grew, by +7.2% and +6.0%, respectively. The EU market covers

45.7% of the sector's total exports, while the non-EU one was the largest "buyer", absorbing 54.3%. Similarly, in the case of imports, 48.2% of men's fashion came from the EU, while non-EU delivered 51.8%, despite recording a loss of -13.8% compared to the previous year.

Purchases from France reached 1.2 billion euro (+16.8%), equal to 12.2% of sector exports, followed by Germany (10.3%), and the United States (with a share of 9.3%), both featuring a positive dynamic of +0.4% and +3.0%, respectively. In 2023, Switzerland slipped to fourth place following a negative change of -26.5%, representing then 7.7% of foreign sales. China, growing by +13.9%, reached 647 million euro (6.8% of the total); at the same time, in the 11th position, Hong Kong showed a double-digit increase in purchases (+28.8%).

Spain, in sixth position, recorded an increase of

前景 市场

西班牙排名第六，增幅为9.9%；其次是英国，尽管收缩了3.4%，排在其后的是韩国（+18.1%）和日本（+19.8%）。占据该行业出口额3.3%的荷兰则下降了1.5%。

最后，波兰（+21.2%）、俄罗斯（+44.0%）、奥地利（+0.7%）和阿拉伯联合酋长国（+45.3%）的出口均出现大幅增长。

就进口方面而言，2023年1月至12月期间，中国市场确认自己是意大利男士时装的最大供应国，尽管出现了明显下降（-25.0%），但进口占比依然为12.2%。仍然位居第二的孟加拉国也出现了22.1%的负增长趋势；紧随其后的是法国，相反，其增长率为15.1%。

然而，来自中国和孟加拉国的进口数据必须与亚洲

货物传统入境口岸荷兰（增长了18.2%）以及同样呈现积极趋势的比利时的进口数据进行交叉参考（20.5%）。排名第五位的罗马尼亚增长了19.2%，排在其后的是西班牙，增长幅度有限为3.2%。

从国外市场供应情况来看，男装和针织品进口分别下降2.3%和4.8%。与之相反，领带的进口增长了4.2%，与此同时皮革服装和衬衫的进口增长了5.1%和9.9%。

2024年前几个月男装状况

在2024年前两个月的时间里，意大利男装出口出现增长，进口则表现出放缓趋势。根据意大利国家统计局ISTAT最新公布的数据，1月至2月期间行业出口增长

+9.9%, followed by the United Kingdom, albeit with a contraction of -3.4%, then South Korea (+18.1%), and Japan (+19.8%). The Netherlands, accounting for 3.3% of sector exports, lost -1.5%.

Finally, significant growth in exports was recorded for Poland (increasing by +21.2%); Russia (+44.0%); Austria (+0.7%); and the United Arab Emirates (+45.3 %).

In relation to imports, in the period January-December 2023, China proved to be the top supplier of men's fashion with an incidence of 12.2%, despite experiencing a notable decrease (-25.0%). Bangladesh – which remained in second position – also recorded a negative trend of -22.1%, followed by France which, on the contrary, showed growth of +15.1%.

The import data from China and Bangladesh must however be cross-referenced with that of the Netherlands, the traditional port of entry for Asian goods, which recorded an increase of +18.2%, as well as with that of Belgium, also featuring a positive dynamic (+20.5%). Romania, in fifth place, increased by +19.2%, followed by Spain which limited growth to +3.2%.

In the case of supplies from abroad, imports of men's clothing and knitwear fell by -2.3% and -4.8%, respectively. On the contrary, the import of ties showed an increase of +4.2%, while leather clothing and shirts grew by +5.1% and +9.9%.

Men's fashion in the first months of 2024

In the first two months of 2024, Italian men's fashion saw exports grow, while imports showed a

slowdown. Based on the latest ISTAT data recently released, the two-month period January-February, saw the sector exports increasing by +13.0%, for a total of approximately 1.8 million euro, while imports lost -13.3 %, dropping to just over 1 million euro.

With reference to commercial outlets, both the EU and non-EU regions remained positive for men's fashion, growing by +5.8% and +19.6%, respectively. The EU market covers 44.6% of the sector's total exports, while the non-EU market is the largest “buyer”, absorbing 55.4%.

In the period under review, the first destination for made in Italy menswear was France, which achieved growth of +15.3%, followed by Germany, +0.2%, and the United States, +7.9%. China was in fourth place (+62.9%), Hong Kong, in ninth position, performed well, too (+56.8%).

Regarding imports, 50.3% of men's fashion entering the country came from the EU, while 49.7% came from outside the EU. Both regions were in decline; the community market closed January-February 2024 with -2.8% and the non-EU one with -21.8%. In the two-month period, with almost 20 million euro invoiced (-18.3%), China ranked first among suppliers. Purchases from Bangladesh fell by -39.5%. Among other suppliers, the only ones to record a positive trend were Germany (+11.5%), Spain (+7.3%), and Switzerland (+0.7%).

According to data by Sita Ricerca for SMI, the sell-out of men's fashion on the domestic market, in the period January-February 2024, lost -2.3%.

13.0%, 出口额总计约180万欧元，而进口下降13.3%，金额降至略高于100万欧元。

就商业贸易而言，欧盟和非欧盟地区市场仍然对意大利男装保持青睐，分别增长5.8%和19.6%。欧盟市场占该行业出口总金额的44.6%，而非欧盟市场是最大的“买家”，吸收了其余的55.4%。

在对其进行调查分析的期间内，“意大利制造”男装的第一出口目的地是法国，实现15.3%的增长。其次是德国，小幅增长0.2%，而美国增长率则为7.9%。中国大陆排名第四（+62.9%），香港市场也表现出色（+56.8%），排名第九。

关于进口方面，进入意大利市场的男装中50.3%来

自欧盟地区，49.7%来自欧盟以外地区。这两个地区对意大利的出口量都在下降：2024年1月至2月期间结束时，欧盟市场下降2.8%，非欧盟市场则出现较大幅度下跌为21.8%。在上述两个月的期间内，中国销售营业额达2000万欧元（-18.3%），在供应商中始终排名第一。来自孟加拉国的进口量大幅下跌了39.5%。在其他供应商中，唯一录得积极趋势的是德国（+11.5%）、西班牙（+7.3%）和瑞士（+0.7%）。

根据Sita Ricerca为意大利服装体系SMI处理的数据，2024年1月至2月期间，意大利国内市场上男士时装的销售量下降了2.3%。

Junior Fashion Made in Italy in 2023-2024

Non-EU region sales are growing



In 2023, the growth rate of Childrenswear Made in Italy featured a slowdown. The Junior fashion's year closed with an increase of +0.7%, leading the sectoral turnover to reach 3.2 billion euro.

However, the production value showed a decrease by -0.6% compared to 2022, and domestic consumption were down by -3.7% as well.

Exports featured a different trend instead, recording a growth of +4.6%; sales abroad achieved just over 1.5 billion euro. The average incidence of foreign sales was 47.8%. The sectoral imports, on the other hand, recorded a -2.4%, with a total turnover of about 2.7 billion euro.

The sector's commercial balance featured a deficit for -1.124 million euro.

In 2023, the exports of new-born baby clothing alone (for which the relevant customs voices – and therefore the commercial flows with foreign countries – can be isolated) featured a decrease of -1.8%, reaching approximately 156.8 million euro.

The EU and non -EU regions featured a dichotomous trend; the former lost -11.5%, the latter grew by +10.0% instead. Spain, France, and Switzerland, the first three countries of destination for baby fashion, all recorded double -digit drops: -16.0%, -10.4%, and -41.4%, respectively. In fourth position, The United States went against the trend (+64.5%), followed by the United Kingdom and Germany, both negative: the first by -3.4% and the second by

前景 市场

2023-2024年“意大利制造”童装 欧盟以外地区销量增长

在2023年，“意大利制造”童装增长速度放慢脚步。青少年服装在这一年结束的时候增长了0.7%，这一积极变化使该行业的营业额稳定在32亿欧元。然而，与2022年相比，该领域产值下降了0.6个百分点，国内消费状况也不佳，下降了3.7%。

出口方面则出现不同趋势，录入了一个4.6%的增长，实现跨境销售总额略高于15亿欧元。而出口销售的平均发生率为47.8%。情况相反的是进口录得一个2.4%的下降率，总金额约为27亿欧元。

该行业的进出口贸易额出现逆差，为11.24 亿。在2023年，仅婴儿服装的出口（对此可以分离出确切的海关税则号，即以国家为单位的对外贸易量）就下降了

1.8个百分点，出口额约为1.568亿欧元。

欧盟和非欧盟地区呈现出两极分化：前一地区下降11.5%，但后者则增长10.0%。西班牙、法国和瑞士这排名前三位的婴儿服装出口目的地均录得两位数下跌幅度：分别为16.0%、10.4%和41.4%。排名位于第四的美国市场则逆势强劲增长（+64.5%）。排在其后的是英国和德国市场，均出现放缓：前者下降3.4%，后者下降4.8%。与大趋势形成鲜明对比的是，除了前面提到的美国之外，还有中国，其次是阿联酋，再次出现增长（+23.6%）。波兰市场的趋势良好，增长了35.3%，而匈牙利增长了5.3%。俄罗斯市场与上述市场背道而行，下滑9.7个百分点。

ITALIAN JUNIOR FASHION INDUSTRY (2018-2023*)
(Millions of euro)

	2018	2019	2020	2021	2022	2023
Turnover	2,980	3,100	2,643	3,051	3,184	3,207
Change %		4.0	-14.7	15.5	4.3	0.7
Value of production	943	930	795	929	950	944
Change %		-1.4	-14.5	16.8	2.2	-0.6
Exports	1,196	1,275	1,100	1,305	1,465	1,532
Change %		6.6	-13.7	18.6	12.2	4.6
Imports	1,974	2,117	1,780	1,977	2,720	2,656
Change %		7.2	-15.9	11.1	37.5	-2.4
Trade balance	-777	-842	-679	-672	-1,255	-1,124
Final consumption	4,155	4,105	3,361	3,853	4,030	3,881
Change %		-1.2	-18.1	14.6	4.6	-3.7
Structural indicators (%)						
Export/Turnover	40.1	41.1	41.6	42.8	46.0	47.8

Source: Sistema Moda Italia based on ISTAT, Sita Ricerche and Internal Research.
(1) Junior knit and fabric clothing 0-14 years, underwear and accessories included

-4.8%. Like the United States, in strong contrast to the general trend, was China, followed by the United Arab Emirates, which returned to grow (+23.6%). Positive was the trend of both Poland (+35.3%) and Hungary (+5.3%).

Negative dynamic for Russia (-9.7%).

In 2023, the total amount of import reached 348.5 million euro, down -7.3%. Spain, with a positive variation of +16.4% and an incidence of 24.4% imported total, was in the first place among sector suppliers, while China, against a decrease of -27.7%, passed in second position, followed by Bangladesh, which lost -28.4%. The flows from the Netherlands

recorded an increase of +37.2%, followed by France with +19.9%. On the other hand, negative variations were recorded for India (-21.6%); Turkey (-25.4%); Germany (-4.0%); and Tunisia (-25.3%).

Domestic market

According to the surveys by Sita Ricerca on behalf of SMI, the junior fashion sell-out fell by -3.7% in value and -4.0% in volume. In term of spending, from a product standpoint, the 'little boy' segment lost -3.7%; the 'little girl' one – structurally preponderant – lost -2.8%; and finally the newborn one featured the worst dynamic, falling by -6.1%.

在2023年进口总金额为3.485亿欧元，下降了7.3个百分点。西班牙出现积极变化，增长16.4%，占比进口总金额的24.4%，在该行业的供应商中排名第一，而中国则剧烈下降了27.7个百分点，位居第二，排在其后的是孟加拉国，跌幅高达28.4%。来自荷兰的进口流量激烈增长了37.2%，其次是法国，增长幅度达到19.9%。另一方面，印度（-21.6%）、土耳其（-25.4%）、德国（-4.0%）和突尼斯（-25.3%）均出现负面趋势。

国内市场

根据 Sita Ricerca为意大利服装体系 SMI进行的调查分析，青少年服装的销售额下降了3.7个百分点，销售数量下降了4.0个百分点。特别是从产品类别角度来

看，“男童”细分市场的支出下降了3.7%，结构上占主导地位的“女童”细分市场下降了2.8%，最后，新生儿细分市场的下降趋势最严重，为6.1%。

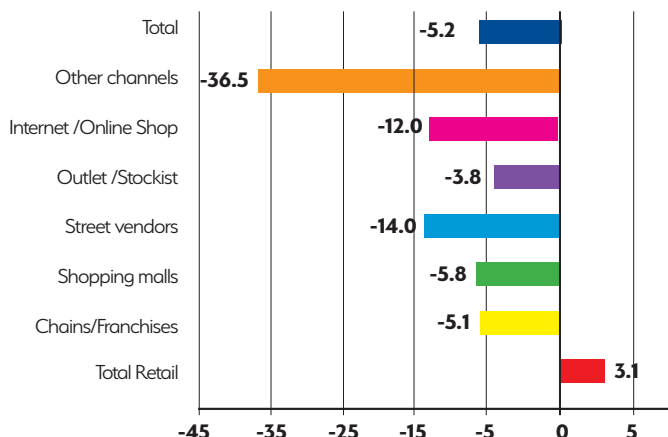
这种不利的动态持续到了2024年初，前两个月的市场损失为3.1%。

对渠道销售状况的分析凸显了青少年消费者购买选择的变化。根据Sita Ricerca为意大利服装体系SMI做的统计结果，连锁店确认自己是第一销售渠道，即使业绩上出现了5.1%的下降。

占据市场份额29.7%的大型零售业商场整体下滑5.8个百分点。它的三名“表演者”都受到了负面业绩的

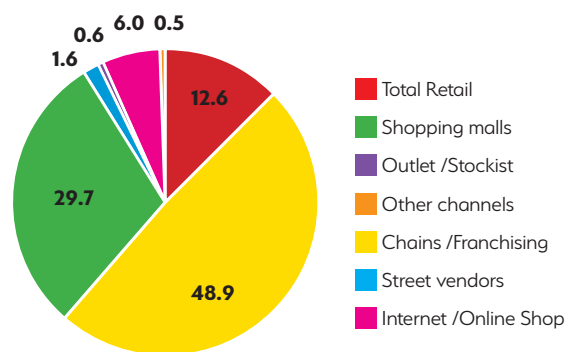
Trend sell-out: by distribution channel (S/S 2023 - A/W 2023-24)

(Var% trend of consumption in value)



Distribution structure (S/S 2023 - F/W 2023-24)

(% of consumption in value)



Source: Sistema Moda Italia on Sita Ricerca data

The beginning of 2024 featured a negative trend as well, showing a loss of -3.1% in the first two-month. The sell-out analysis by channel highlighted an evolution of consumer purchase choices with reference to junior fashion. On the basis of the statistical surveys by Sita Search for SMI, the chains proved to be the first sales channel, even if in decline (-5.1%). The large-scale distribution, which covers 29.7% of the market, lost overall -5.8%. All the 3 main “players” – department stores, large surfaces, and food channel – featured negative performances; with a share of 15.3%, department stores lost -5.5%; the large surfaces, with a share of 11.0%, fell by -3.8%; while the food channel (3.3% of the sell-out) suffered a double-digit decline (-13.1%).

The independent retail was the only one to score a positive variation of +3.1%, thus reaching a share of 12.6%.

The digital channel sell-out (6.0% of the market) kept its positive trend, while e-commerce recorded a double-digit contraction (-12.0%). In the first two months of 2024, exports remained negative with a

double-digit drop of -11.3%. The main markets highlighted conflicting trends: the Arab Emirates jumped in first position thanks to a three-digit growth; followed by the United States, which also featured an important increase (+57.6%); Spain, on the other hand, against a drop by -27.3%, fell to third position. The other main countries of destination featured contractions, such as France (which lost -19.0%) and the United Kingdom (down by -31.4%). On the other hand, sales in Russia (+13.6%, with an export share of 3.3%); Saudi Arabia (+81.0%, 3.0% of sales); and Hong Kong (+193.9%, 2.5% of exports) showed vivacious rhythms.

The import, for which 4 suppliers represent more than 65% of sector imports, showed a negative sign (-18.8%). Goods from Spain, the first supply market, dropped by -11.4%. In second place, China featured consistent decline (-23.4%) as well; while France grew by +0.7%, ensuring an incidence of 10.7%. The imports from Bangladesh recorded a decline (-36.2%), while the Netherlands, traditional entry for goods coming from Asia, recovered (+18.2%).

前景 市场

影响：大型仓储店，占据其整体15.3%的份额，下跌5.5%；大型商店占据的份额为11.0%，下降了3.8%；而食品渠道（份额占比3.3%）则遭遇了两位数的下降（-13.1%）。独立零售店是唯一实现增长的零售渠道，增长率为3.1%，所占份额上升至12.6%。

数字渠道的销售量占整个市场的6.0%，仍保持积极趋势，而电子商务则录得两位数的收缩（-12.0%）。

在2024年前两个月的时间里，出口仍处于负值区域，并出现11.3%的两位数降幅。出口主要市场呈现出截然不同的趋势：阿拉伯联合酋长国凭借三位数的增长跃居第一；其次是美国，同样录得大幅增长

(+57.6%)，而西班牙则遭遇一个27.3%的下降，跌至第三位。其他主要出口目的地国家正在经历萎缩，例如法国（下降19.0%）和英国（下降31.4%）。然而，对以下国

家的市场销售表现活跃：俄罗斯（+13.6%，占据出口份额的3.3%）、沙特阿拉伯（+81.0%，占销售额的3.0%）和香港（+193.9%，占据出口份额的2.5%）。

而进口方面数值量呈现负数（-18.8%），仅四家主要供应商就占据该行业进口体量的65%以上。来自排名第一的供应商西班牙市场的商品量下降了11.4%。位居第二的中国也出现了大幅下降（-23.4%），而法国则增长了0.7个百分点，确保了10.7%的市场占比。来自孟加拉国的进口量剧烈下降（-36.2%），而主要来自亚洲的货物的传统入境点荷兰则恢复了增长（+18.2%）。



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The spinning sector in Italy

Overall decline also in early 2024



Made in Italy spinning sector closed 2023 with a loss of ca. 357 million euro in twelve months (-11.0%). Against this negative trend, the sector turnover reached in total 2.9 billion euro.

Wool spinning proved to be the predominant sector, accounting for 82.3% of the overall turnover, while

cotton yarn covered 13.6%, followed by linen yarn limited to 4.1%.

In relation to foreign trade, both inbound and outbound flows featured negative dynamics; exports fell by -12.0%, to a total value of 868 million euro, while imports lost -17.2%, reaching 938 million euro. All segments showed a contraction in sales abroad, with the exception of knitting yarns (+0.8%). Cotton yarns recorded the greatest decline, equal to -21.1%, followed by wool-blend yarns, with a loss of -19.9% and carded wool yarns, which recorded a -13.3%. Combed wool and linen yarns also performed poorly, both down by -6.0%.

Imports were also negative, with the exception of wool yarns which recorded +2.9%, and carded yarns, +37.1%. The other types of yarns all recorded declines: cotton yarns were the wooden spoonist (-34.1%) followed by wool-blend and linen yarns, which each recorded a decrease of ca. -20.2%. Finally, the import of knitting yarns showed -9.7%.

As a result of import and export trends, in 2023, the Italian spinning trade balance remained in a deficit of 70 million euro. Negative trend also for the domestic market which recorded a negative dynamic of -14.0% in value.

The figures for the Italian spinning sector were still negative in early 2024. The annual survey carried out by SMI on a sample of companies associated with the Federation and operating in the spinning

前景 市场

意大利纱线行业

2024年前几个月也普遍下滑

2023年结束时，“意大利制造”纺纱行业在过去12个月的时间里损失约3.57亿欧元(-11.0%)。在这种负面趋势的影响下，该行业的总营业额录入29亿欧元。毛纺类产品确认了自己在行业中的主导地位，占整体营业额的82.3%，而棉纱类产品占据的份额为13.6%，最后是亚麻纱类，仅占4.1%。

就对外贸易方面而言，货物流入量和流出量都经历了负面走势：出口下降了12.0个百分点，总金额为8.68亿欧元，而进口则下降17.2%，金额达到9.38亿欧元。

除针织纱线(+0.8%)类别外，所有类别的海外销售均出现收缩。棉纱类跌幅最大，为21.1%，其次是化毛混

纺纱，跌幅为19.9%，粗梳毛纱跌幅为13.3%，精梳毛纱和亚麻纱类别也表现不佳，均下降6.0%。

而进口方面也出现负增长，但毛纱线和粗梳纱线例外，两者各自增长2.9%和37.1%。其他纱线品种均出现不同程度下降：黑色针织棉纱跌幅为34.1%，其次为化毛混纺纱和亚麻纱，两者均下降约20.2%。最后，针织纱进口额下降9.7个百分点。

受进出口趋势的影响，2023年意大利纺纱对外贸易差额处于7000万欧元的逆差。

而国内市场同样也出现负面趋势，销售额方面下降了14.0个百分点。

对于意大利纺纱行业而言，2024年开年仍处于负值

THE ITALIAN SPINNING INDUSTRY⁽¹⁾ (2020-2023)
(Millions of euro)

	2020	2021	2022	2023
Turnover	2,020	2,600	3,243	2,886
Change %		28.7	24.7	-11.0
Value of production	1,243	1,603	1,993	1,770
Change %		28.9	24.3	-11.1
Exports	651	837	986	868
Change %		28.6	17.8	-12.0
Imports	594	807	1,134	938
Change %		35.8	40.6	-17.2
Trade balance	57	31	-148	-70
Apparent consumption	1,187	1,572	2,140	1,841
Change %		32.5	36.1	-14.0
Structural indicators (%)				
Export/Turnover	32.2	32.2	30.4	30.1

Source: Sistema Moda Italia based on ISTAT, Sita Ricerche and Internal Research.
(1) Wool, cotton and linen yarns

sector indicated declines in turnover but above all in production, which, in the first three months of 2024, had a contraction of -5.7%. Foreign trade was also challenging in the first quarter of 2024; in fact, declines in value of both imports (-28.3%) and exports (-13.3%) were recorded.

As regards exports, wool-blend yarns suffered the heaviest losses (-23.8%), followed by cotton, linen and combed wool yarns, all with negative variations (-10%). The declines for carded wool yarns (-6.5%) and knitting yarns (-3.5%) were more limited.

Negative dynamics also for imports, with the exception of knitting yarns, +21.3%. Limited loss for linen yarns (-6.4%,) followed by carded wool yarns (-13.7%). The other types, however, recorded heavier contractions (cotton yarns -25.5%, wool-blend yarns -30.2%, and combed wool yarns -39.6%.) In the first three months of 2024, Hong Kong proved to be the first destination for carded wool yarns, with a share of 26.6%, following an increase of +9.0% compared to January-March 2023. Stable in second place despite a decline of -15.2%, the United Kingdom covered 11.7% of the sector's total exports. Turkey remained in third posi-

tion, down by -4.1% followed by Croatia and Tunisia, declining by -10.8% and -31.6%, respectively. In the case of combed yarns, France was leading with an incidence of 14.4% on the sector's total exports and a growth of +9.7%. The second destination was Turkey, thanks to an increase of +12.5%. A decrease of -17.8% was recorded for the export of combed yarns to Romania. Lastly, sales destined to Germany and Portugal recorded a decline of -17.1% and -8.4%, respectively.

区域。意大利服装体系SMI对联合会企业成员并从事纺纱行业经营的企业进行的年度抽样调查结果显示,今年第一季度营业额出现下降,但更严重的是产量下降,在2024年的前三个月里产能收缩了5.7%。2024年第一季度的对外贸易也出现了困难:事实上,无论是进口额还是出口额均出现下降,分别为28.3%和13.3%。

在出口方面,化毛混纺纱类别损失最严重 (-23.8%),其次是棉纱、亚麻纱和精梳毛纱类产品,均出现负走势 (-10%)。粗梳羊毛纱线的降幅较为有限,为6.5%,而针织纱线降幅则为3.5%。

除针织纱线增长21.3%外,进口也出现负面动态。亚麻纱线下跌6.4%,随后是粗梳羊毛纱线(-13.7%)。然而,其他类别产品的下降更为严重(棉纱类下降25.5%,化毛混纺纱下降30.2%和精梳毛纱下降39.6%)。

在2024年前三个月的时间里,香港市场被确定为粗梳毛纱出口第一目的地,相当于占据出口份额的26.6%,较2023年1-3月出口量增长9.0%。英国仍位居第二位,尽管下降了15.2%但仍占该类别总出口份额的11.7%。土耳其仍旧位居第三位,小幅下降4.1%。克罗地亚和突尼斯紧随其后,分别下降10.8%和31.6%。

就精梳纱类别而言,法国处于领跑地位,占该类产品类别出口总额的14.4%,并实现增长9.7%。排列第二的出口目的地是土耳其,增长了12.5%。而一个高达17.8%的跌幅拖累了对罗马尼亚的精梳纱出口。最后,对德国和葡萄牙市场的销售量分别下降17.1%和8.4%。

法国成为意大利化毛混纺纱线的第一个出口目的地,能够吸收该领域15.5%的出口量。土耳其和克罗地亚紧随其后:前者下降32.0%,后者下降36.2%。关于德



ITALIAN SPINNING INDUSTRY FOREIGN TRADE IN 2023: ANALYSIS BY SECTOR

	Import		Export		Balance
	Mill. Euros	Var.%	Mill. Euros	Var.%	Mill. Euros
Wool carded yarns	69	37.1	181	-13.3	112
Worsted wool yarns	324	2.9	276	-6.0	-48
Chemical yarns/wool	93	-20.1	71	-19.9	-22.3
Needlecraft yarns	9	-9.7	90	0.8	81
Cotton yarns	330	-34.1	195	-21.1	-134
Linen yarns	114	-20.2	56	-5.7	-58
Total Yarns	938	-17.2	868	-12.0	-70

Source: Sistema Moda Italia on ISTAT data

Wool-blend yarns saw France emerge as the first destination, capable of absorbing 15.5% of the sector's exports. Turkey and Croatia followed: the first with a loss of -32.0% and the latter -36.2%. Regarding Germany, a negative dynamic of -15.3% was recorded, while Romania fell to fifth position due to a decline of -33.3%. In the period monitored, Germany proved to be the main outlet for cotton yarns, despite a contraction of -4.8%; the country's share of the sector's total fell to 19.5%. The other three main markets all showed an unfavourable evolution: exports of cotton yarn to the Czech Republic dropped by -19.6%; those destined for France by -26.8%; and flows to Hungary dropped by -18.1%. Spain, on the other hand, recorded an increase of +7.8%, rising to fifth position. Considering the supply from abroad, still in the period January-March 2024, the first two suppliers – accounting for 66.4% of carded yarn imports in Italy – showed a dichotomous trend: China held its first place despite a decline of -29.4%; while the United

Kingdom, stable in second position, grew by +21.1%. Lithuania, following a loss of -8.9%, dropped to third place. Carded yarn flows from Poland fell by -13.3%. With reference to combed yarns, Romania and the Czech Republic, the first and second suppliers, showed decreases of -36.5% and -28.3%, respectively, securing 36.8% of the sector's imports. Poland lost -31.3%, while combed yarn flows from Bulgaria and China fell by -42.3% and -55.0%, respectively. In January-March 2024, 48.0% of imported wool-blend yarns came from Romania and 16.3% from Turkey, both suffering a negative dynamic; whether the former lost -14.3%, the latter lost a more substantial -41.1%. Bulgaria recorded an increase of +26.2%, while Spain lost -9.6%. Finally, imports from Serbia recorded growth of +39.7%. Lastly, in the period under review, with a share of 39.1%, Turkey was Italy's cotton yarn main supplier, despite a decline of -2.6%. The second supplier was India, down by -40.9%.

前景
市场

国，录得一个15.3%的跌幅，而罗马尼亚则因33.3%的下降幅度跌至第五位。在监测期内，棉纱仍将德国作为其主要出口市场，尽管该市场收缩了4.8%：占具该产品类别总量的份额降至19.5%。其他三个主要市场均出现不利趋势：对捷克共和国的棉纱出口下降了19.6%，对法国的棉纱出口下降26.8%，对匈牙利的棉纱出口下降18.1%。相反的一面是西班牙增长了7.8%，排名上升至第五位。始终是考虑2024年1月至3月期间国外供应情况，排名前两位的供应商能够满足意大利粗梳纱线进口量的66.4%，但呈现出两极分化的趋势：中国供应量尽管下降了29.4%，但仍保持第一位；而英国则稳居第二位，增长率为21.1%。立陶宛下降8.9%，跌至第三位。而来自波兰的粗梳纱线量则下降了13.3%。

就精梳纱线而言，排名第一和第二的供应商罗马尼亚和捷克共和国的降幅分别为36.5%和28.3%，确保了该产品类别进口量的36.8%。来自波兰的精纺纱线量下降31.3%，还有来自保加利亚（-42.3%）和中国（-55.0%）的精纺纱线量也出现大幅下降。在2024年1月至3月期间，进口化毛混纺纱线中有48.0%来自罗马尼亚，16.3%来自土耳其，均呈现负增长态势，但如果说前者降幅为14.3%，那么后者则剧烈下降41.1%。保加利亚增长了26.2%，而西班牙则下降了9.6%。最后，来自塞尔维亚的进口增长了39.7%。最后，在回顾期内，土耳其以39.1%的份额仍保持为意大利棉纱的主要供应国，尽管下降了2.6%。第二位供应商是印度，下降幅度高达40.9%。



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Assomac – good exports of footwear, leather goods and tanning machines

President Brustia - “It is essential to relaunch industry 5.0 investments”



The footwear, leather goods and tannery machinery sector proved its resilience. The data provided by ASSOMAC – the association of Italian machine manufacturers in the sector – highlighted a growth in 2023, with a +3.66% of exports when synthetic machinery, moulds and accessories are

also included. This was a significant growth, even though more limited than the previous year due to international conflicts and the consequent weakening of the global economic scenario, which impacted on the performances of the second half of the year. However, the results were still positive, as proved by the tannery machinery segment, which closed the year with an increase in exports of 12.76% compared to 2022, thanks above all to the good performance of sales in Europe, America, and Africa. On the other hand, exports of the footwear and leather goods machinery segment were affected by this uncertainty period, closing 2023 with a contraction of 4.61%, despite recording good performances in some areas, such as America and Oceania. A result similar to that of spare parts exports, which fell by 4.02%.

Whether the 2023 data confirmed the stability of such an important sector for the Italian economy, the prospects for 2024 are not encouraging at the moment (-21.46% of exports in the first two months). “In this challenging scenario, the footwear, leather goods and tanning machinery sector once again proved its resilience and potential. However, without adequate incentives, the introduction of digital innovations into production cycles and the energy transition will be impacted, slowing down the growth of our companies and their competitiveness on global markets,” commented in a note from the association Maria Vittoria Brustia, President of ASSOMAC (association of Italian machine manufacturers in the sector.)



Maria Vittoria Brustia

前景 市场

Assomac协会：鞋类、皮具和皮革机械出口良好


协会主席Brustia女士：“重新启动对工业5.0的投资至关重要”

鞋类、皮具和皮革机械行业展现了其韧性。代表该类意大利制造商的协会ASSOMAC提供的数据突出了2023年行业出现的增长，如果将用于生产合成材料、模具和配饰的机械也计入其中，出口则增长3.66%。尽管由于国际冲突和全球经济形势疲软而限制了下半年的出口表现，与头一年相比有所减缓，但增长仍然显著。

正如制革机械领域展示的那样，其结果仍然是积极的，与2022年相比，去年全年收报出口增长12.76%，首先要归功于在欧洲、美国和非洲市场的良好销售走势。另一方面，鞋类和皮具制品机械行业出口受到时期不确定性的影响，尽管在一些区域如美国和大洋洲的表现良

好，但2023年全年出口收报萎缩4.61%。零部件出口状况与其相似，较前一年下滑4.02%。

如果2023年的数据证实了对意大利经济如此重要的一个部门的稳定性，那么在目前这个阶段对2024年的前景预测则并不鼓舞人心（前两个月的出口下滑21.46%）。“在这种复杂的情况下，鞋类、皮具和皮革机械行业再一次展现出其韧性和潜力。然而，如果没有相对应的激励措施，将数字创新引入我们的生产周期以及能源转型将进展缓慢，并将减缓我们企业的发展和削弱它们在国际市场上的竞争力。” Assomac协会（意大利行业机械协会）主席Maria Vittoria Brustia女士在协会的一份说明中评论道。



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COMEC

LINEAPELLE proves to be a crucial event for the sector

Growth in the visitors' turnout



Once again, the latest edition of Lineapelle (20 – 22 February 2024, Fiera Milano Rho) demonstrated its leadership role for the leather manufacturing sector globally.

According to the data provided by the organizers, in fact, the event attracted 25,376 visitors and around 1,200 exhibitors: leathers, materials and components intended for the Spring-Summer 2025 collections were presented, characterized by important research, both technical and stylistic. The turnout of

foreign operators was also significant (39% of the total), with a prevalence of buyers from France, Spain, Germany, Great Britain, Turkey, the United States and China. The vitality of LINEAPELLE 103 and its ability to open new horizons, despite the challenging market situation, found expression and (great) interest in all the contents that enriched its trade fair experience, starting with the success of the six fashion shows by Lineapelle Designers Edition. Very positive feedback came also for the first edition of Lineapelle Interiors/Leather Duets, an exhibition of business culture which staged a sequence of installations, each of which was represented by an exclusive leather design project shared between a company producing made in Italy leather and a furniture company. Great involvement was also registered for 'In the Making Atto II' (a craft workshop intended for visitors) and the second edition of the 'Science Based Fashion Talks'.

前景 展览

LINEAPELLE国际展会确认为行业的决定性活动

参展商人数出现增长

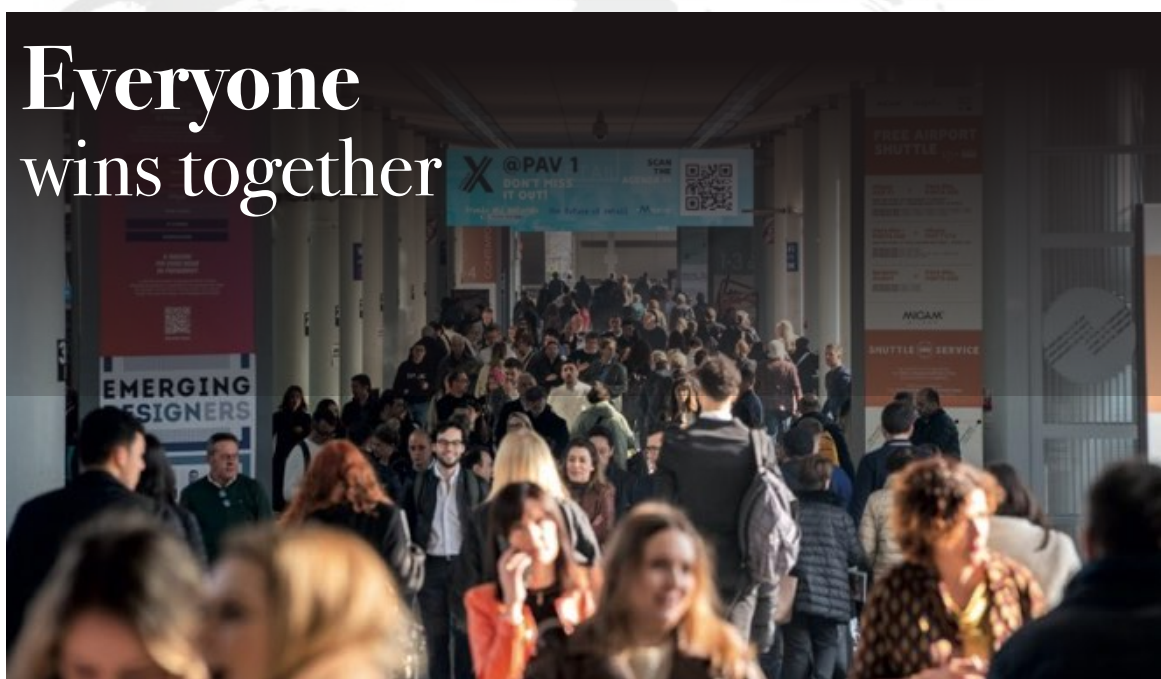
最近一届的Lineapelle国际展会（2024年2月20至22号在米兰Rho国际会展中心举办）再一次证实了其在国际皮革制造行业中的决定性作用。

事实上，展会组织者提供的数据表明本届展会共有25376名参观者和约1200名参展商：用于2025年春夏系列的皮革、材料和组件都呈现在这个舞台上，而所有这些也都是技术创新和风格研究的重要作品。

海外运营者的人流量具有重要意义（占总人数的39%），买家主要来自法国、西班牙、德国、英国、土耳其、美国和中国。

LINEAPELLE 103具有的活力以及它在市场令人极其担忧的时刻也能打开新视野的能力在展会的所有内容上都展现出来并表现出极其的兴趣，从Lineapelle Designer Edition的六场时装秀的成功起，这些活动提供了更加丰富了展会体验。第一届Lineapelle Interiors/Leather Duets活动也获得了非常积极的信息反馈，这是一场企业文化的展示，在舞台上展现了一系列的安装作品，每件作品代表了一个由一家“意大利制造”皮革生产企业与一家家具公司共享的独家皮革设计项目。此外The Making Atto II（面向参观者的手工工作坊）和第二届Science Based Fashion Talks（基于时尚的科技脱口秀）也大力参与。

Positive outcome for Italian fashion fairs



Everyone wins together

MICAM Milano, MIPEL, The One Milano, and Milano Fashion&Jewels ended recording another success. Indeed, the formula by which the fashion circuit companies showcased simultaneously proved its validity.

Overall 40,821 visitors attended the fairs, 45% of which from abroad. In particular from the European Union, led by France, Germany, Spain, and Greece. Among operators from non-European countries, the highest turnout was recorded from Japan, China, Kazakhstan, and the United Kingdom.

Thousands were the exhibitors showcasing their collections, which expressed the general ability of companies to innovate and interpret in a practical and consistent way the third millennium consumers' needs. And this enabled excellent conditions for

doing business. Now, what will happen depends on the market which, it must be said, is going through a challenging phase due to a number of issues, the main ones being the increase in prices and the loss of capacity (and not only in Italy.)

Among the many topics addressed during the events, training was the one particularly emphasised by means of several workshops and educational and informative moments, which involved young people – who represent the future – and schools, an essential link to employment for the new generations.

The shows were inaugurated by the Minister of Business and Made in Italy, Adolfo Urso, who wished to underline the role of such events for businesses, but also for the internalization of companies.

意大利时尚界展会表现良好

携手开创共赢局面

MICAM Milano、MIPEL、The One Milano和Milano Fashion&Jewels这4项联合时尚活动展已经落下帷幕并再创成功。因此，时尚届各家公司同时参展这种模式的有效性得到了证实。

总共记录到40821名参观者，其中45%的人员来自国外。特别是以法国、德国、西班牙和希腊为首的欧盟参观者。在非欧盟国家的运营商中，到场人数最多的是日本、中国、哈萨克斯坦和英国参观者。

总体而言，在场的数千名参展商展出的产品彰显了各家公司的创新能力并以实用且正确的方式诠释了第三个千年消费者的需求。这为开展业务创造了良好的条件。

谈到市场，不得不说，由于多种因素的影响，目前市场正在经历一个艰难的反思阶段，主要因素是价格上涨和生产能力的下降，而且不仅仅是出现在意大利。

在这些展会期间举办的众多活动内容中，培训尤为突出：到处都有讲习班、教育和信息时刻，其中涉及到代表未来的年轻人以及学校，这是新一代人群通向工作世界不可或缺的桥梁。

意大利商业和制造部部长阿道夫·乌尔索 (Adolfo Urso) 为此次活动揭幕，他的出席强调了展会不仅对于公司的业务更是对公司国际化的重要作用。



After the edition held on March 2024, Futurmoda – the footwear and leather goods component international fair – looks to the next appointment with a renewal spirit in order to address the international market needs. In fact, the slogan underlining its advertising campaign is “Futurmoda: Connecting with the Fashion World.”

“The new image of Futurmoda, claims the AEC (Spanish footwear component manufacturer association), is part of a new approach that is being adopted to strengthen the positioning of the event among the main international fairs in the leather area.”

“The fair focuses on internationalization, innovation and the connection between the different sector stakeholders,” said Álvaro Sánchez, CEO of the Spanish Association.

“FUTURMODA, continued Álvaro Sánchez, is not just a platform to showcase the latest trends, but

also a direct interaction space where manufacturers and designers can get immediate feedback on new products and continuous improvements offered by the sector, acting as a call to action to innovate and grow.”

The marketing manager of Futurmoda, Maria Eugenia Coquillat, wished to stress the organizers’ commitment to sustainability. The March event, in fact, will present areas dedicated to sustainability, such as the FUTURMODA Green Planet space, which focuses on promoting the most eco-friendly products.”

The 52nd edition of FUTURMODA – which will feature a rich program of seminars, conferences, and networking opportunities and for which a high turnover is expected, aims to further strengthen business relationships and foster growth in an increasingly competitive and globalized environment.

前景 展览

Futurmoda呈现新形象

为创新和成长提出的一个行动号召

2024年3月举办的这一届国际鞋类和皮具制品零部件展览会Futurmoda 已经落下帷幕，同时以诠释国际市场需求创新精神期待下一次展会的到来。事实上，这项展会活动的广告宣传口号正是“Futurmoda: 连接时尚世界”。

西班牙鞋类零部件制造商协会AEC表示：“Futurmoda的新形象是新方法的一部分，该方法旨在加强这项活动在皮革领域主要国际展会中的定位。”

该西班牙协会首席执行官阿尔瓦罗·桑切斯 (Álvaro Sánchez) 表示说：“展会的重点是国际化、创新以及该行业不同利益相关者之间的联系。”

阿尔瓦罗·桑切斯继续说道：“FUTURMODA不仅是一个展示最新趋势的平台，也是一个直接互动的空间，

生产商和设计师可以在其中获得有关该行业提供的新产品和持续改进的即时反馈，从而号召人们采取行动进行创新和成长”。

Futurmoda市场营销经理Maria Eugenia Coquillat女士想强调组织者对可持续发展的承诺。事实上，三月份的活动中推出了致力于可持续发展的区域，例如 FUTURMODA“绿色星球空间”，该空间专注于推广最环保的产品。”

第52届FUTURMODA国际展有着很高的参与期望以及一系列内容丰富的研讨会、会议和网络交流机会，旨在进一步加强业务关系，并在竞争日益激烈的全球化环境中促进增长。

SIMAC TANNING TECH 'THE GOLD EDITION' scheduled on 17th - 19th September, in Milan

Technology, a unique opportunity for discussion and sharing



The next edition of Simac Tanning Tech arouses many expectations and a lot of optimism. The international fair for footwear, leather goods and tanning technologies will celebrate its 50th anniversary - "This will be a special edition, gathering over 300 exhibitors from all over the world," claim the organizers - "and an opportunity to celebrate the past and look to the future of an ever-evolving sector."

The fair, organised by Assomac, will feature a series of events and exhibitions that will explore the latest trends in the leather industry, technological innovations and environmental challenges. Among the main events, currently being defined, are: an ex-

hibition on leather technology that will retrace the hi-story of the sector; networking initiatives and workshops as an opportunity for operators in the sector to meet and exchange ideas, focus on specific topics such as sustainability, creativity and technology, and finally the highlighting of the best technological innovations. The fair will also be an opportunity to foster networking among industry players. Meetings, conferences and seminars will be organised to discuss the latest innovations and share experiences. "We are proud to celebrate 50 years of Simac Tanning Tech," said Maria Vittoria Brustia, President of Assomac and Simac Tanning Tech. "This exhibition is a reference point for the footwear, leather goods and tanning technology sector and we are convinced that this special edition will be a unique opportunity for discussion and sharing."

与SIMAC TANNING TECH国际展的“THE GOLD EDITION”相约：2024年9月17号至19号在米兰Rho国际会展中心举办

技术：“一次比较和共享独一无二的机会”

许多的期望和许多的乐观情绪是期待下一届Simac Tanning Tech因素，这是鞋类、皮具制品和制革技术的国际展览会，正在迎接它的50周岁生日。展会组织者表示：“将是一场特别的盛宴，来自世界各地的230家参展商将欢聚一堂，这是一次庆祝过去并展望一个不断发展的行业未来的机会。”

该展会由Assomac协会组织，将举办一系列活动和展览，深入探讨皮革供应链、技术创新和环境挑战的最新趋势。目前正处于确定中的主要活动包括：一场皮革技术展示，将回顾该行业经历的道路；网络和研讨会倡议，为行业运营者提供见面和交流想法的机会，全力关注可持续性发展、创造力和技术等特定话题，最后是为最佳技术创新创造价值。该展会还将是促进行业运营者

之间建立联系的一次机会。展会还将组织会面、会议和研讨会来讨论最新事物并分享经验。“我们很自豪庆祝Simac Tanning Tech国际展50周岁生日。”Assomac协会及Simac Tanning Tech展会主席Maria Vittoria Brustia女士宣称。“这项展会活动是鞋类产品、皮具和制革技术领域的一个参照点，我们深信不疑本届特别展会将是一次进行比较和共享的独一无二的机会。”组织者发布的新闻稿还指出：“国际行业对Simac Tanning Tech 2024的兴趣日益增长，这让我们认为本届THE GOLD EDITION将有超过300家的参展商参展，将占据米兰Rho国际会展中心14号馆和18号馆的整个空间。第50届展会也得益于意大利对外贸易商会的大力支持，预计届时将有众多的参观者和外国买家到场。”

The most recent

The very latest product technologies that stand out for innovation, production flexibility and simplicity.



TECNOGI

The company embraced sustainability before it became one of the economy's decisive drivers, and now the company introduces its renowned TALYN line in the

ECO version – completely recyclable and GRS-certified, to international footwear and leather goods brands. Innovation is represented by

transforming clients' production and processing wastes into valuable resources. This enabled the launch of virtuous circular economy processes: TECNOGI pays for waste transport and the customer avoids sending it to landfills with the relative cost. The waste is then transformed into raw material, creating value and combining ecology and economy in the best possible way. Over the years, TECNOGI has invested huge amounts of capital in research, in order to design, develop and perfect technologies and production processes that allow the recycling of high percentages of waste.

The project was completely successful because the products of the TALYN ECO line feature high quality standards, with mechanical and application performance identical to those made with fresh raw materials, fully achieving the goal of getting the GRS certification with uncompromising quality.



前景材料

2024年科技导报

最新

在科技领域里最新提案的特征是创新、生产灵活性和管理简便。

TECNOGI

在还未发展成为经济的决定性驱动力之一的时候这家公司就已经走上了可持续发展的道路，它向国际鞋类和皮革制品品牌展示出其著名的生态TALYN系列，该系列可完全回收并已经通过GRS全球回收标准认证。

创新表现为将客户在生产中产生的废料和处理后的废料转化成具有经济价值的资源。这一行动使得良性循环经济流程得以启动：具体方法是TECNOGI公司支付

废余物料的运输费用，而客户因此避免了以相关成本将其送往垃圾处理场。之后这些被收回的废料被处理转化成原材料，不但重新创造价值，并以最佳的方式将生态与经济结合起来。多年以来，TECNOGI公司在研究设计、开发和完善技术及生产流程方面投入了大量的经济资源，从而得以实现高比例的废余物料回收利用。

该项目取得了圆满成功，因为TALYN ECO系列的产品具有非常高的质量标准，其机械性能和应用性能与使用初始材料制成的产品完全相同，凭借毫不妥协的品质彻底实现了获得GRS全球回收标准认证这一目标。

PRODOTTI ALFA

The latest line of materials introduced by PRODOTTI ALFA feature the CORIUM® brand. This is bonded leather that delivers unique characteristics both in terms of style and technical features: elasticity, tear resistance, consistency, durability, and limited processing waste.

Furthermore, Corium® is 'Global Recycled Standard' certified and belongs with full rights to the range of sustainable materials.

Today, everyone is involved in the environmental sustainability, from the consumer to the producer; in particular, the first feeling the urge to contribute on this issue are the most renowned companies.

Careful interpreter of their needs, PRODOTTI ALFA is the best interlocutor of those who work and produce in different sectors: leather goods, footwear, book-binding, furniture, and clothing.

The company conquered this role thanks to consistent investments in new products development and close collaboration with businesses, always seeking for new materials.

In 2015, in order to meet com-



panies' needs, PRODOTTI ALFA introduced Corium®, a material that combines high technical performance with the simplicity of processing, typical of classic leather; like this, in fact, it can be subjected to different finishes (cutting, stitching, edge coloring, surface retouching) and printing. Among the novelties of the company there are also new finishes and technical features concerning both the traditional line and the Corium® brand line - stain-resistant treatment, velvety hand, high resistance to friction, full and saturated colors.

CORIUM® painted and raw

Top of range product within Prodotti Alfa's portfolio, particularly appreciated by the high-end mar-

ket, especially by the big names of fashion.

Using water-based polyurethane paints compliant with the REACH regulation and its integration, all CORIUM® options can be offered already painted.

CORIUM® is a very ductile material, featuring a dense, soft hand: it is available in thicknesses from 0.3 mm to 3.0 mm. Due to its technical and aesthetic features, CORIUM® is ideal for the production of leather goods (bags, belts, and fashion accessories), but also for furniture items. It is also used with excellent results in book-binding and for the production of various items: spectacle cases, restaurant menus and placemats, and so on.

**PRODOTTI ALFA**

PRODOTTI ALFA公司推出的最新材料产品系列标志有CORIUM®商标。这是一种最新一代的再生硬皮，保证了外观和技术方面的独有特征：弹性、抗撕裂性、一致性、耐用性以及加工过程中减少废料的产生。除此之外，CORIUM®已通过全球回收标准认证，因此完全适合可持续性材料的使用范围。

今天环境可持续性发展涉及到从消费者到生产者中的每一个人：尤其是那些最知名的公司，它们最先感受到应该在这一话题上做出自己的贡献。

PRODOTTI ALFA公司仔细理解了它们的需求，是在各个领域工作和生产的人的特权对话者：皮革制品、鞋类制品、装订、家具和包装。

这一角色的获取得益于对新产品开发的持续投资以及与一直在寻找新材料的各家公司的紧密合作。

正是为了回应这些公司的需求，PRODOTTI ALFA在2015年推出了CORIUM®这一产品系列，这种材料在具备高技术性能的同时还兼具了典型的传统皮料加工的简易性：事实上，正如它一样，可以进行不同的后处理（裁断、缝纫、边沿着色和表面的修饰）和印刷。该公司的众多新产品中还包括新的后处理效果和技术特征，无论是对传统系列还是Corium®品牌系列：防污渍处理、天鹅绒手感、高抗摩擦力以及饱满且饱和的色彩。

CORIUM® 涂漆和原色

它代表了Prodotti Alfa公司产品中的顶级系列，特别受

Review of materials 2024



CT POINT

The company keeps following its sustainability and digitalization path by allocating substantial resources of its investments to this goal.

After calculating, in collaboration with Quantis, its Corporate Footprint and having committed itself with the Science Based Target Initiative to reduce its greenhouse footprint by 50% by 2030 – for Scope 1, 2, and 3 in line with the scenario of keeping temperatures below 1.5°C – the Abruzzo-based company continues on its concrete, environmental and social responsibility path by joining the

4sustainability roadmap, i.e. Process Factory's sustainable fashion brand.

Starting from January 2022, the company took a further step forward, in line with its mission, using in its production plants certified green energy derived from 100% renewable sources only.

This transition will enable CT Point to reduce its emissions by 70% for Scope1 and 2.

The company's concrete commitment towards a more sustainable future is also to be seen into its ever-expanding product range, of both low-impact twisted and braided yarns in 100% recycled

polyester, GRS certified, such as the EcoGreen line, (sewing threads and high tenacity polyester braids, which are produced recycling post-consumer plastic waste), or the PFC FREE (Perfluorocarbons) line in the waterproof version, both in the polyester and polyamide yarns, and solvent-free version in the Bonding line, both in the single-ply and three-ply yarn.

Furthermore, the company is also committed to the very Industry 4.0 digital transition.



前景材料

到高端市场尤其是知名品牌的赞赏。

由于使用了符合欧盟REACH法规（欧盟化学品管理规定）的水性聚氨酯涂料，因此可以提供所有已涂漆的CORIUM®产品系列。CORIUM®是一种延展性非常好的材料，具有厚实同时又柔软的手感：材料厚度从0.3毫米到3.0毫米不等。由于其具备的技术和外观特征，CORIUM®不仅适用于生产各种皮革制品（箱包、皮带和服装配饰），正如前所述，而且也适用于家具的生产。此外它还被用于捆扎行业以及被用来生产各种各样的物品：眼镜架、餐厅用的菜单和餐垫等，效果极佳。

CT POINT

CT Point公司沿着可持续性发展和数字化的道路继

续前行，并将自身投资中的重要资源投入用于实现该目标。

通过接受4sustainability的认证，这是一个用于认证时尚及奢侈品供应链的可持续性表现的系统和品牌认证，这家位于阿布鲁佐的公司在其环境和社会责任的具体道路继续前行。事实上，该公司与QUANTIS这家专业研究“绿色经济”并为企业提供咨询的国际公司开展合作，计算了自身的碳排放量，积极响应“科学碳目标倡议”（Science Based Target initiative），承诺在2030年之内将按范围1、2和3排放的温室气体排放量减少50%，实现温度升高低于1.5摄氏度这一目标。

为了完成其使命，公司进一步向前迈进，从2022年1月份起在自己的工业厂房内只使用来自100%可再生资源的经过认证的绿色能源。



LUIGI CARNEVALI

Sustainability is one of the core commitments of the company, which has long since begun the process of certifying both the company and its products. In the meantime, it keeps investing in research and new service creation. This is a necessary step, which allows Carnevali to meet the growing needs of an increasingly challenging and demanding market.

The company's latest proposals include new product lines in which the green aspect prevails, where

recycled fibres and eco-compatible glues are used. A next-generation microfibre product, very soft, pleasant to the touch, and easily workable is also included in these sustainable items. Luigi Carnevali, however, consistently keeps searching for innovative products and its offerings cover the most disparate solutions; a close collaboration with suppliers and customers, in fact, enables the company to test new natural fibres, including those obtained from Bamboo cane.

A reference point for the domestic and international markets, Luigi Carnevali is committed to environmental sustainability on all fronts, i.e., the selection of raw

materials, suppliers' back-office, their production cycle and logistics aspect.

Suppliers must be relatively close to their operational headquarters, guarantee the traceability of raw materials and ensure production times that allow, among the many aspects considered, the actual reduction of the environmental impact. Luigi Carnevali provides the documents that certify its commitment, making available to their customer the results of laboratory tests and all the certifications necessary to prove the quality and compliance with the various international standards.



由于这一转变, CT Point公司将能够按照范围1和范围2标准将自身的排放量减少70%。

该公司对一个更加可持续发展的未来所做出的具体承诺也转化为对其产品范围的不断扩展, 包括对环境影响低的加捻和交织纱线, 采用100%再生涤纶, 通过GRS标准认证, 正如EcoGreen系列(缝纫纱线和高韧性涤纶编织物, 使用回收的消费过的塑料废料生产), 或是防水版中的PFC FREE(全氟化碳)系列, 无论是涤纶纱线还是聚酰胺纱线, 此外还有Bonding系列中的Solvent free(无溶剂), 包括单股和三股纱线。

除此之外, 这家阿布鲁佐公司正致力于工业4.0的数字化转型。

LUIGI CARNEVALI

可持续发展是该企业的一个基本方针, 长期以来它一直在获取企业认证以及产品认证的道路上前行。与此同时企业在寻找和创造新产品方面持续进行投资。后者是企业发展必须要走的道路, 因为它使得Carnevali公司能够满足愈加复杂和苛刻的市场需求的增长。

在这些目标当中排在最前面的当然属研发。

这是多年来Luigi Carnevali始终遵守的承诺, 这家企业专业生产用于制鞋和皮具行业的加强材料。在企业最新的产品中还有绿色环保占主导地位的新产品线, 这要归功于再生纤维和生态兼容胶水的使用。在可持续性的产品中, 还有最新一代的超细纤维, 非常柔软、触感舒适并且易于加工。然而, Luigi Carnevali公

Review of materials 2024

DAVOS

Among the new offerings introduced by the company, there are products intended for the sneaker segment, such as the flagship item SPINAPESCE sheet, flanked by the always-popular TRISTAR, TRANSIT, CIRRUS, and MINICRPE materials. These designs distinguish the new generation of sheets by Davos.

The material used for their production is the V1 compound – a high-performance rubber that ensures excellent resistance to abrasion, great flexibility and a high grip.

Davos has also developed the EVA/RUBBER compound, a material suitable for the production of thicker sheets (over 6 mm thick). It is used for the production of soles or midsoles, and the resulting product is light (density not exceeding 0.50), elastic, resistant to abrasion, and with an excel-

lent grip value. It also features easy workability and an excellent bonding strength.

An attentive interpreter of sustainability, the company has long since introduced a sustainable compound. This is a material that contains 51% recycled product. It is used for the production of soles, bands and for the ECO line: ECOTHUNIT, ECOTACK, ECOGRIPP, and ECOSOL.

The search for new colours and captivating finishes is one of Da-

vos' strengths; a wide range of colours, both for the tunit and rubber lines, has been developed for the next season. In fact, the more refined "NERO," "GOLD," "BIANCO OTTICO," "ROSA BABY," "ROSSO SCURO," VERDE BOSCO," and "BLU MEDIEVAL," in different shades and nuances, joined the classic colours.



前景材料

司继续坚持不懈地研发创新产品，其产品可为客户提供各种不同的解决方案：得益于同供应商和客户之间的密切合作，事实上，一些新的天然纤维正在测试中，这其中还包括从竹藤中获取的纤维。

作为国内和国际市场的参照点，公司致力在各个方面对环境可持续性发展进行努力：原材料的选择、供应商的后台管理系统、供应商的生产周期以及物流方面。

供应商必须离他们的运营总部相对较近，必须保证原材料的可追溯性并确保生产时间在被考虑到的许多方面能够真正减少对环境的影响。Carnevali 公司提供关于该承诺的文件材料，为客户提供实验室测试结果和所有必要的认证，以确认产品的质量以及符合各种国际标准。

DAVOS

在该公司推出的用于休闲运动鞋领域的新产品中有拳头产品SPINAPESCE板材和TRISTAR、TRANSIT、CIRRUS及 MINICREPE等一直非常流行的材料：从图案设计可区分Davos品牌的最新一代板材。用于生产这些板材的材料是V1化合物：这是一种高性能橡胶，可确保完美的耐磨性、出色的灵活性和极强的抓地力。

Davos公司还开发成功了EVA/橡胶混合物，这种材料适合生产更大厚度（大于 6 毫米）的板材。用于生产大底或中底，所获得的产品重量轻（密度不超过0.50）、有弹性、耐磨且具有优异的抓地力能力。此外，这种材料易于加工并能保证完美的粘合强度。

作为可持续发展的细心诠释者，该公司推出可持



ABITALIA

Having started the process to get environmental sustainability certification, Abitalia keeps developing new products that comply with the standards set by clients which are mainly the most representative brands of fashion and luxury in particular. Among the most innovative products recently introduced by the Marche-based company, the new line of one-side adhesive tapes and the double-sided ones are noteworthy.

The first one is produced using materials, such as cotton, nylon (light or heavy), nylon-cotton mix, polyester (light or high-tenacity), paper (crepe or smooth), glass wool, and non-woven fabrics in various types of fibres. The double-sided adhesive tapes, on the other hand, are made of traditional non-woven fabric, polyester, and PVC. The adhesives used for the tapes are hot-melt, water-based ones, simple or modified acrylics, natural or synthetic

rubber latex. In recent years, the range of reinforcement fabrics - ranging now from Jersey to very light cotton fabrics, to teased and nylon items.

The line of nylon fabrics also includes tear-resistant materials. The reinforcement fabrics can be customized with logos or designs, they can be coated on one side or both, in the adhesive version and in the thermo-adhesive one.



续化合物已有一段时间了。这种材料含有51%的回收产品。该材料用于生产大底、条带以及ECO系列: ECOTHUNIT、ECOTACK、ECOGRIPP 和 ECOSOL。

Davos公司的强项之一还在于研发新的颜色和引人注目的饰面: 为下一季的Tunit和橡胶系列开发了极其丰富的色彩。事实上, 最受追捧的“NERO”、“GOLD”、“BIANCO OTTICO”、“ROSA BABY”、“ROSSO SCURO”、“VERDE BOSCO”和“BLU MEDIEVAL”这些颜色都在经典颜色基础上进行的层次和色调的变化。

ABITALIA

在启动获取环境可持续性发展认证的流程后, Abitalia 公司沿着开发符合其客户所需标准的各种新产品的道路继续前行, 公司的客户群主要由最具代表性的时尚品牌尤其是奢侈品品牌组成。在这家位于马尔凯大区的公司最新推出的最具创新性的产品系列中, 有新的单面胶带系列和双面胶带系列。

第一种使用了以下材料生产: 棉、尼龙(轻型和重型)、尼龙混纺棉、聚酯(轻型或高韧性)、纸(褶皱或光滑)、玻璃棉和不同类别纤维材质的无纺布。而双面胶带则由传统的无纺布、聚酯和PVC制成。用来使胶带具有粘性的粘合剂是: 热熔胶、水性胶、简单或改性丙烯酸以及天然或合成橡胶胶乳。

INDUSTRIE CHIMICHE FORESTALI (ICF)

ICF has developed a new line of textile products whose logo clearly anticipates the material 'green' feature. Infact, these products appear in the catalog with the word "RICICLI", a registered trademark with final approval pending, but already marketable with a registered symbol.

This is a fabric comprising various fibers that allows the production of toe puffs, counters and reinforcements whose elasticity is the main feature.

It consists of a pure cotton matrix impregnated with latex in aqueous dispersion, then treated with a soft polyurethane coating process on both sides. The use of recycled natural powders in its preparation, deriving from renewable sources, is the feature that make this product unique. This choice allows to reduce the use of chemicals and reuse materials that would otherwise be considered scrap.

RICICLI features excellent moldability, superior elasticity and remarkable shape retention and



inalterability over time. The performances offered by RICICLI are comparable to those of composite textile materials which typically have a higher density and require a larger quantity of raw materials. A support containing 68% of recycled cotton and polyester fibers – which in turn are GRS certified – has been used for the making of RICICLI.

In addition, recycled components deriving from natural materials from renewable sources were used, allowing to significantly reduce the presence of chemicals



and synthetic materials in the finished product. RICICLI, which features an overall 31% of recycled material, has a GRS certification.



前景 材料

在近些年的时间里，公司对加强用织物系列的范围也进行了扩展，从平针织物到非常轻盈的棉布，甚至是纱布和尼龙制品。

使用尼龙材料制成的织物系列还包括抗撕裂材料。这些加强用织物可以按商标或各种不同风格的设计进行个性化生产，可以只进行单面上胶或双面上胶，胶水类型不仅可以为粘合剂也可以为热熔胶。

INDUSTRIE CHIMICHE FORESTALI (ICF)

ICF化工开发了一个新的纺织品系列，其标识清楚地预告了材料的“绿色生态”特征。事实上，在产品目录里出现了“RICICLI”（回收）字样，这是一个等待最终审批的注册商标，但已经可以使用注册的标志进行销售。这是一种由不同纤维组成的织物，可以用于生产鞋前

套、后套和增强材料，弹性为其主要特征。

这种织物由纯棉基质浸渍在水分散体乳胶里组成，两面均采用柔软的聚氨酯涂层工艺进行处理。该产品的独特之处在于在其制备过程中使用了源自可再生资源的回收天然粉末。这种选择可以减少化学材料的使用并将被视为废物的材料进行再次利用。

RICICLI 织物的特点是具有长期出色的可塑性、完美的弹性和卓越的形状保持能力。RICICLI织物具备的性能可与典型的具有更高密度的复合纺织材料相媲美，而后者因其高密度而需要使用更多的原材料进行制作。在生产RICICLI织物中，选择了一种含有68%再生棉和聚酯纤维的支撑物，并且这些材料通过了GRS全球回收标准认证。



PRANEM

The company, which specializes in the production of security materials, has also long taken up the challenge of sustainability. Such increasingly topical subject is condensed in the latest products introduced by the company: Recy 2020, a midsole non-woven material for Strobel processing and its antistatic ESD version, Safety multicolor. Both made with 100% recycled fibres from used fabrics, they are suitable for the production of safety footwear midsoles.

The technical performance of these components is the same as the best traditional products, both in the sewing and assembly phases.

It is worth noting that all the midsole materials produced by PRANEM use recycled fibres which lies into two different categories: pre- and post-consumer. For standard items, pre-consumer fibres come from the textile chain – i.e., yarns and fabrics production phases – processing waste. In the case of Recy 2020 and Safety

multicolor, on the other hand, the post-consumer fibres come from clothes and furnishings destined for landfills.

The multi-coloured aspect featuring these new items, which varies from one production batch to another due to the variability of the fabrics used in the recycling phases, is the characteristic that defines the sustainable imprint of the material used.



此外，再生产过程中还使用了源自可再生资源天然材料的回收组件。

RICICLI织物引以为荣之处在于使用的整体回收材料比例为31%，并获得了GRS全球回收标准认证。

PRANEM

这家专业生产安全用材料的公司长期以来还在迎接可持续发展的挑战。公司最新推出的产品就阐述了这些当下日益流行的主题，其中一款产品是Recy 2020，经过Strobel加工方式处理的用于中底的无纺布，另一款产品则是其多色的ESD防静电安全版本。这两款产品均采用100%废旧织物再生纤维制成，适合生产安全鞋中底。

无论是在缝纫还是组装阶段，这些部件的技术性

能与那些最好的传统产品所保证的技术性能没有什么不同。

还应该指出的是，PRANEM生产的所有中底材料均采用再生纤维，分为消费前和消费后两类纤维。对于标准型产品而言，消费前纤维来自纺织品供应链生产过程中产生的废料，即来自纱线和织物生产阶段的废料。而就Recy 2020和Safety multicolor这两款新产品而言，所采用的消费后纤维来自运往垃圾填埋场的衣服和家具。

新产品的多色彩外观是区分所采用材料的可持续足迹的特征，由于在回收阶段所使用的织物的变化，不同生产批次的产品外观有所不同。

The latest

The very latest product technologies that stand out for innovation, production flexibility and simplicity.

FRATELLI ALBERTI

A benchmark company in the leather-footwear mechanical technology, FAV introduced a new version of its work bench at the last Simac Tanning Tech which, starting from this year, will be standard on the company's skiving machines.

This evolution will apply to the entire line of skiving machines, from the traditional AV2's to the models for toe-puffs, counters

and double-transport ones, up to the most recent 4.0 machines, marking an important enhancement in terms of safety.

Using new integrated protective guards, in fact, prevents access to all potentially dangerous parts of the machine during work, ensuring the operator's safety.

The new embedded filter that replaces the vacuum bag, also enables a significant reduction in dust dispersion, optimizing the machinery ecological footprint and therefore protecting people's health. The motor efficiency adds to all of this, enabling a clear reduction of power consumption.

The innovation process implemented by the company also concerns other machines: in particular the latest COMBI mod-



els, used for combining materials, and the FAV leather splitters. Both lines belong to the 4.0 machine generation.



AV2MSAE



前景

技术工艺

2024年科技导报

最新产品

在科技领域里最新提案的特征是创新、生产灵活性和理简便。

FRATELLI ALBERTI

作为皮革-鞋类产品行业机械技术的参考公司, FAV 在最近一届的Simac Tanning Tech国际展会上展示了最新版本的工作台, 就从今年开始, 该工作台将成为所生产的削皮机的标准配置。

这一演变将影响到整个削皮机系列, 从传统的AV2型号机器到用于前套和后套的型号, 从配置双传送带的那些型号直至最新的工业4.0版本机器, 标志着在安全方面的一个重要改进。事实上, 使用新型的集成防护罩可以

防止在工作期间接触机器的所有潜在危险部件, 从而保证操作人员的人身安全。

取代吸尘袋的新型过滤器也是集成式的, 可以明显减少游浮在大气中的灰尘, 通过优化使用机械对环境造成的影响来保护人们的健康。为此, 必须提高电机的工作效率, 从而显著降低能源消耗。

该公司实施的创新流程还涉及到其它机器: 特别是用于贴合材料的最新款COMBI型号以及FAV片皮机。这两条产品线均属于工业4.0代的机器。

EUROMARCHE

The acquisition of Eurmeccanica Shoes enabled Euromarche to expand its range of machines devoted to sole factories and footwear manufacturers in general. Furthermore, the Marche-based company's industrial operation ensures the traditional customers of Eurmeccanica Shoes all the services required for smooth production processing: technical assistance, spare parts, consistent machinery upgrade, and –

very important – technical/commercial consultancy aiming to optimize investments in production technologies.

The two machines recently showcased by Euromarche, the M14 and EC07S models, are precisely the result of the aforementioned update.

The first model is a machine that enables to perform a full-automated marking of soles in leather or other synthetic materials. The machine features an automatic centring system that enables to store the various centring and locking positions for each product to be processed, with reference to the cliché location. This feature allows to avoid production downtime, an issue normally existing with the manual repositioning (for each series of soles to be marked.) Furthermore, the stored database ensures the print correct positioning on same-series past items.

The M14 model can operate in line with other machines.

The EC07 S model is a flat sole (in leather or tunit)

equalizer which uses the roughing and subsequent surface finishing method. This choice was made in the sake of precision. To better finish the surface, a grinding unit has been inserted for shaving the surface. This model, too can work in line with other machines.



M14



EC07S

EUROMARCHE

通过对Euromeccanica Shoes公司的收购行为,该企业扩大了为大底生产厂家和鞋类制造商提供的机器范围。除此之外,这家马尔凯公司实施的这次商业行为还确保了Euromeccanica Shoes公司的传统客户能够顺利生产的所有服务:技术援助、零配件供应、机械的持续更新以及极其重要的商业技术咨询,而所有这些服务其目的在于优化生产技术方面的投资。

Euromarche公司最近推出的两款机器M14和EC07S正是上述更新的结果。

第一款机器可以完全自动地对硬皮或其它合成材料制成的大底进行打标。机器配备了计算机自动中心对位系统,可以记忆每个待加工产品的不同中心对位和被固

定的位置。这一项功能可以将由于手动重新定位而导致的生产停机时间减少到零(对于每个要打标的大底系列)。此外,由于存储的数据库,即使在一定时间后加工同系列产品时,它也能保证打标的正确定位。

M14型号可以与其它机器一同工作。

EC07 S型号是用于硬皮或Tunit材质平底的一台平整机,采用粗打磨和后续表面精加工的方法。这是为了获得精度而做出的选择。为了最好地完成加工物件表面处理效果,插入了具有平滑表面功能的一组打磨装置。该型号机器也可以与其它机械一同工作。

Technology Showcase 2024

MAIN GROUP TECHNOLOGIES

A plant for reintroduction of waste into the production cycle is at the core of the Veneto-based company; this includes the implementation, extension, and enhancement of the accessory range enabling a completely efficient recycling and seamless integration with the main Main Group machinery.

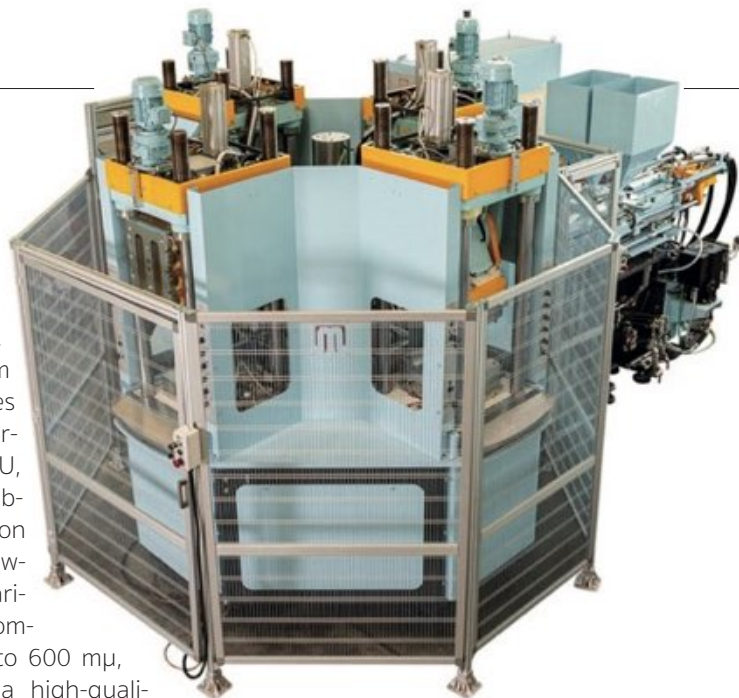
A further step in this direction is represented by the MGT ECO-

LINE® pulverization line, a new system that enables the transformation of PU, EVA or rubber production waste into powder, with a variable granulometry of 400 to 600 µm, resulting in a high-quality end product, suitable for many applications.

Today, an essential part of production enhancement is also the analysis of data, which production plants are increasingly capable of collecting and transmitting; for this purpose, Main Group has developed the Data-Lab division specialized in data management and in providing companies with tools to make their machines smart, meaning systems capable of transmitting the information necessary to improve quality, reduce costs, and schedule maintenance perfectly.



MGT ECOLINE®



SIRIUS

In terms of efficiency and flexibility, Main Group completed its offering showcased at Simac Tanning Tech with Sirius, a new machine for the production of one- and two-colour footwear soles made in compact, expanded, rigid, and super-expanded thermoplastic materials. Materials capable of combining the reliability of static machines with the high productivity of the rotary ones.



前景 技术工艺

MAIN GROUP TECHNOLOGIES

这家威尼斯公司推出的核心设备是将在生产周期中产生的废料重新引入使用：已经得到实施、扩展和完善的一套辅助设备系列，能够完全有效回收并与集团主要机械完美集合。

MGT ECOLINE®粉碎生产线代表了公司朝这个方向迈进的又一步，该系统可将 PU、EVA 或橡胶在生产中产生的废料转化成粉末，颗粒大小在400至600 毫微米之间，从而获得高质量的成品，可用于不同的生产应用。

即便生产用设备收集和传输的数据分析能力越来越强，如今也已成为提高生产效率的基本组成部分：为此

目标，Main Group特别开发了DataLab 部门，专门从事数据管理并为企业提供工具将机器转变为智能系统，能够传输高质量、降低成本和完美计划维护所需的信息。

就效率和灵活性方面而言，Main Group在Simac Tanning Tech国际技术展会上展示的产品包括 Sirius，这是一款采用紧凑、膨胀、刚性和超级膨胀热塑性材料生产单色和双色大底的新机器。这些是够将单台机器的可靠性与旋转机器的高生产率结合起来的材料。

COSMOPOL

这家维杰瓦诺公司专门从事鞋类产品加工机器的制造，特别是用于大底加工和产品热稳定加工的机器，



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Technology Showcase 2024

COSMOPOL

Cosmopol, a Vigevano-based company specializing in the construction of footwear and sole processing machines and product thermal stabilization, in-



TENDER X1



troduces two technical options which also had an excellent response at the Simac Tanning Tech 2023; these are the models TENDER X1 and ELECTA-S1-D. The first is a precision sander/grinder system for the processing of flat soles, heels, shaped bands, technical articles, and fenders in leather, rubber, PVC or similar material.

Here are the main features of the TENDER X1 model:

- Abrasive belt with pneumatic tensioning and release system for quick replacement, which allows for the use of various grit belts, depending on the material to be processed;
- Speed variators on the abrasive belt and on the conveyor belt which allow to achieve the right balance between sanding and material feeding;
- Digital panel for managing the operating cycle: up to 100 working programs can be stored;
- Digital control of the conveyor belt height; this allows for a precision adjustment up to 0.01 mm;



ELECTA S1-D

前景 技术工艺

它推出了两项技术方案，并在2023年Simac Tanning Tech国际技术展览会上也获得了良好的反响。这两款新型号是TENDER X1和ELECTA-S1-D。第一款是精密打磨机/研磨机，用于加工硬皮、真皮、橡胶、PVC 或类似材料的平面大底、鞋跟、成型带、技术制品以及挡泥板。

TENDER X1机器的主要技术特征如下：

- 砂带配有气动拉紧和松开系统，可快速更换砂带。这一特性有利于根据待加工的材料选择使用不同颗粒大小的砂带；
- 砂带和传送带上配置的变速器可让操作人员在磨削和前进速度之间获得正确的平衡；
- 用于管理生产周期的数字控制面板：可存储多至100个加工程序；

- 传送带高度的数字化控制。这一特征可使精度调节至0.01毫米；

- 旋转刷子清除加工产生的残留物，同时保持材料清洁；

- 从侧面和前面放入待加工材料，设计目的在于方便加工大件；

- 100%可回收铝材和钢材结构，采用冷组装，减少70%的焊接气体和二氧化碳的使用。

而第二款机器ELECTA-S1-D代表了最为知名的ELECTA S1更严苛的版本。这是一款多功能打磨机/研磨机，通过使用砂带来加工由合成材料、硬皮、橡胶、PVC或类似材料制成的大底。

- Rotating brush to remove processing residues while keeping the material clean;
- The material feeding is from the sides and the front, in order to facilitate large pieces processing;
- 100% recyclable aluminium and steel structure, cold assembled to reduce by 70% the use of welding gas and CO₂.

The second model, ELECTA-S1-D, is a more sophisticated version of the better known ELECTA S1. This is a multifunction, abrasive belt sander/grinder machine for processing soles made of synthetic materials, leather, rubber, PVC or similar pieces.

Here are the main features of the ELECTA S1 and ELECTA S1-D models:

- Abrasive belt with pneumatic tensioning and release system for quick replacement, which allows for the use of various grit belts, depending on the material to be processed;
- Tensioning of the pneumatic conveyor belt acting on two of the three transport rollers;
- Pneumatic and adjustable working pressure;
- Manual insertion of the work-piece, automatic processing and ejection;
- Speed variator on the conveyor belt;
- Rotating brush after grinding to remove processing residues while keeping the material clean;
- 100% recyclable aluminium and steel structure, cold as-



ELECTA S1



sembled to reduce by 70% the use of welding gas and CO₂.

- Features adding to the previous ones which differentiate the ELECTA S1-D version:
- Speed variator also on the abrasive belt, as well as on the conveyor belt, which allow to achieve the right balance between sanding and material feeding;
- Digital management panel and possibility of storing up to 100 working programs;
- Device for heel and half-sole seats grinding.



ELECTA S1和ELECTA S1-D的主要技术特征有以下这些:

- 砂带配有气动拉紧和松开系统, 可快速更换砂带。这一特性有利于根据待加工的材料选择使用不同颗粒大小的砂带;
- 气动传送带的张力在三根传送轴中的两根上作用;
- 加工压力采用气动系统并可调节;
- 人工放入待加工件, 机器自动加工并传送;
- 传送带配置变速器;
- 旋转刷子清除加工产生的残留物, 同时保持材料清洁;
- 100%可回收铝材和钢材结构, 采用冷组装, 减少70%的焊接气体和二氧化碳的使用;

除了上述技术特征外, ELECTA S1-D版本还具备以下这些特征:

- 除了传送带外, 在砂带上配置的变速器可让操作人员在磨削和前进速度之间获得正确的平衡;
- 用于管理生产周期的数字控制面板可存储多至100个加工程序;
- 配置鞋跟座和半脚座打磨装置。

Technology Showcase 2024

ELITRON

The Marche-based company will showcase at Simac 2023 a line of leather and general material cutting machines designed and built to promptly respond to market needs in terms of technical reliability, working precision, user-friendly features, labour reduction, and environmental sustainability.

A new technical solution, EPMS (Elitron Power Management System) is among the company's proposals that help to optimize the work, production and, last but not least, eco-compatible aspects of the machines. This is an innova-

tive technical kit applied to Elitron machines, which improves their performance and functionality. In particular, it streamlines the suction system so that the forces involved are focused on specific areas of the worktop. A solution that represents a major technological success, as it enables to reduce the system power consumption up to 30-50%. Starting this year, all Elitron plants have been equipped with the EPMS system.



WINTECH

The company's latest proposals include the WLX line of machines for the production of boots in thermoplastic materials.

These machines combine high productivity with lower energy consumption, and this was achieved thanks to the use of new electrical/hydraulic systems.

In fact, the use of variable speed servomotors controlled by inverters, combined with other solutions, allow reducing the energy consumption by 60%. In addition, the new servomotors ensure a number of benefits, including the following: the elimination of proportional valves and variable displacement pumps, as well as the reduction of the oil tank volume by 50%. Thanks to the lower temperature of the oil in circulation, a longer life of pumps, hydraulic cylinders, and seals is achieved. And a lower environmental heating is also achieved. Efficiency, noiselessness, and work optimization are other aspects featuring the WLX line machines, which are particularly suitable for work boots production. "The servomotor high efficiency – specifies the company – is the result of the hardware chosen, a careful evaluation of how to implement it, and a precise study of the hy-



前景 技术工艺

ELITRON

在2023年Simac国际设备展会上，这家马尔凯公司展示了一系列用于裁断皮革和普通材料的机器，其设计和制造旨在迅速响应市场在技术可靠性、工作精度、操作简单性、减少人工成本和环境可持续性方面的需求。

该公司推出的各项新技术有助于优化工作、生产以及机器环保方面的兼容性，其中就包含新的技术方案EPMS（Elitron电源管理系统）。这是一款应用于Elitron机器的创新技术套件，可提高机器的性能和功能。特别是它使抽吸系统合理化，使所涉及的力量集中在台面的特定区域。该解决方案代表了一项重要的技术成功，因为它使系统的能量消耗降低了30%至50%。从今年开始，所有Elitron设备都配备了EPMS系统。

WINTech

在该企业最新推出的机器中有用于生产热塑熔性材质靴子的WLX系列。

得益于采用了新的电子/液压系统，这些机器集合了高生产率与低能源消耗的特征。

事实上，使用由变频器控制的变速伺服马达加上采用的其它解决方案，可以将能源消耗降低60%。

除此之外，所使用的新型伺服马达还保证了许多其它方面的好处，例如：取消了比例阀和变流量泵，同时油箱容量减少50%。由于循环油的产生温度较低，泵本身、液压缸和密封件的使用寿命更长，同时减少环境温



WLX LINE

draulic flows dynamics. Failing to perform a specific study on the optimal parameters, would have made impossible to get the desired results. Including the quality of the finished product.”



COMEC

The Veneto-based company specializes in the production of several machines for processing counters, assembly insoles, and other footwear parts; among these, the copying machine model A/6 is available: a system designed and built for the production of skiving rollers (made in aluminium or other materials), which are normally used on counter skiving machines.

To be introduced at Simac 2023 in its latest version, the model A/6

comprises a shaft upon which the sample roller is placed on the right and the one to be machined on the left. The operator needs just to prepare the sample roller with a double-sided-tape-attached counter. The copying process will be performed by a tool, right to left. The A/6 model features high-precision processing, ease of use, fast work execution, and duration over time. The machine complies with CE regulations regarding safety and environmental compatibility.

A/6



度的升高。高效、安静和工作优化是WLX系列机器具备的其它技术特征，特别适合工作靴的生产。

该公司指出“伺服马达的高效率是所采用硬件、仔细评估如何应用硬件以及精确研究液压流动力学的结果。如果没有具体研究哪些是最佳参数，就不可能获得希望的结果，包括成品的质量。”

COMEC

在这家威内托公司制造的用于加工后套、组装中底和鞋具其它部件的各种机器中，还包括A/6型号模型复制机：一种为生产模型（使用铝材和其它材料）而设计和制造的机器，这些模型通常用于后套削皮机。

A/6型号的最新版本在Simac 2023 国际技术展会上推出，它由一根轴组成，样品模型放置在其右侧，待加工的模型放置在左侧。操作员只需预先准备好模型，并使用双面胶带将后套样品粘合在上面。一个工具从右向左执行复制工作。A/6型号的主要技术特征是工作精准、操作简单、加工速度快和耐用性强。该机器的制造符合CE法规，该法规规定了安全和环境兼容性方面的要求。

News in brief / companies countries

ITALY – FASHION STORE MORTALITY RATE SOARED OVER THE LAST 4 YEARS

In the last 10 years, over 17,000 mortar stores have closed down due to e-commerce, increasingly high rents in big cities' downtown, and the continuous decline in purchases from traditional retail.



The newspaper 'Il Sole 24 Ore' reads "The most severe declines were in Bari (-22%), Rome (-18%), and Turin (-17%). However, offbeat are Milan (+3%) and Naples (+7%, with 1,786 new businesses registered), and Reggio Calabria (+5%)". Fashion is among the most affected categories, with around 5,500 businesses lost, of which over 4,300 clothing stores (25% of closed businesses) and almost 1,150 selling footwear and leather goods. According to Federmoda, the crisis has worsened in the last four years when overall the sector has been losing 11 stores per day.

In the period under review, 381 clothing stores in Milan have closed down. A significant although 'limited' figure compared to the collapse in Rome, where as many as 2,017 clothing brands rolled down their shutters.

ASOS ENTERS THE INDIAN MARKET

Thanks to an agreement with the Indian Reliance retail, which will be an exclusive partner, the English brand Asos is ready to enter the Indian market.

"This partnership marks a significant milestone in Reliance Retail's commitment to offering unparalleled choices and bringing world-class retail experiences to Indian consumers – reads a shared note. Leveraging its extensive experience in operating omnichannel retail networks, Reliance Retail will introduce Asos' curated portfolio to the Indian market through a multi-channel presence and a range of



新闻花絮

意大利: 过去四年时装店的闭店率极高

在线商务、大型城市历史中心不断上涨的店铺租金以及传统零售行业消费者购买力的持续下降导致了在过去10年的时间里超过17000家商店关闭。

意大利金融报刊《Il Sole 24 Ore》写到“商店倒闭最严重的地区是巴里(-22%)、罗马(-18%)和都灵(-17%)。相反,店铺数量有所增加的地区是米兰(+3%)、那不勒斯(+7%,新注册企业1786家)和雷焦卡拉布里亚(+5%)”。时尚领域是遭受打击最严重的类别之一,约有5500家商店遭受损失,其中超过4300家为服装店(相当于占比关闭店铺的25%)以及近1150家鞋类产品 and 皮革类产品商店。意大利服装协会Federmoda表示,过去4年以来危机进一步恶化,整个行业每天都有11家商店关闭。

在被调查分析的期间里米兰共有381家服装店关

闭。与罗马的崩溃相比较这一数字虽重要但是“有限”,在罗马共有整整2017家服装店关门歇业。

Asos进军印度市场

英国品牌Asos正准备进入印度市场,已经与印度Reliance Retail公司达成协议,这家公司将成为该英国品牌的独家合作伙伴。

“这一合作伙伴关系标志着一个重要里程碑,Reliance Retail致力于为印度消费者提供无与伦比的选择并带来世界一流的消费体验”一份共享说明中写道。凭借其在运营全渠道零售网络方面的丰富经验,Reliance Retail将通过多渠道业务和一系列零售模式(包括商店、多品牌大型商店和数字商务平台)将Asos精心策划的产品组合引入印度市场。

此次合作行动进一步增加了Reliance industries本就已经丰富的产品组合,其在时尚和美容领域帮助阿

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retail formats, including stores, multi-brand stores and e-commerce.”

This operation will enable Reliance Industries to expand its already rich portfolio; in the fashion and beauty sectors, the company helps major brands, such as Armani, Burberry, Diesel, Salvatore Ferragamo, Zegna and Sephora operate in the country. In the financial year ended March 31st, 2024, the Indian player recorded a turnover of 306,786 crore (approximately 34 billion euro at current exchange rates.)

A NEW RECORD FOR CHANEL – 18 BILLION EURO IN REVENUES

In 2023, the French fashion brand achieved a record result in its revenues, reaching 18 billion euro



(+16%). Operating profit was also good, rising by 10.9% to 6.407 billion euro.

The increase in sales concerned all product categories and the trend continues in 2024 as well.

Capital investments reached 1.2 billion dollars in 2023. Among the new outlets, the store in via Montenapoleone in Milan. Marketing investments increased 20% to 2.5 billion dollars.

The company increased its workforce by 14% to over 36,500 people.

As reported by Business of fashion, chief financial officer, Philippe Blondiaux, admitted that “2024 will be more challenging”. However, the brand plans to increase capital expenditure by 50% in 2024, compared to last year’s record of 1.23 billion dollars, thanks to the acquisition of stores in prestigious locations and investments in the supply chain.

Philippe Blondiaux also confirmed the crucial role of China, which remains a key country for the brand’s growth: “In China we are still under-distributed, in fact, we only have 18 boutiques compared to the 40-50 stores of our competitors.”

Blondiaux also said that Chanel, after the 6% price increase, could further increase its prices in the second half of 2024.

Rumours about a change of designer were denied, underlining that the work of creative director Virginie Viard has led to strong growth in ready-to-wear sales; +23% in the last year alone.

新闻花絮

玛尼、巴宝莉、迪赛、菲拉格慕、杰尼亚和丝芙兰等标杆品牌在该国开展业务。在截至2024年3月31日的财年中，这家印度时尚玩家的营业额为30678.6亿卢比（按当前汇率换算约为340亿欧元）。

Chanel创下新纪录：营收实现180亿欧元

在2023年里，这家法国时尚巨头的营收创下了历史新高，达到180亿欧元（实现增长16%）。营业利润也令人满意，增长10.9%，实现64.07亿。

品牌下所有产品类别的销售均出现增长，并且这一趋势持续到了2024年。

在2023年里，资金的投入达到了12亿美元。在新的销售点中，米兰时尚街区蒙特拿破仑大道 (via Montenapoleone) 的商店便是其中之一。市场营销方面的资金投入增加20%，达到25亿美元。

公司员工人数增加了14%，达到36500多人。据《时尚商业》报道，首席财务官Philippe Blondiaux

承认“2024年将更具挑战性”。但由于收购了著名地段的商店以及对供应链的资金投入，该时装公司计划在2024年将资金的支出增加50%，而过去一年的纪录为12.3亿美元。Philippe Blondiaux也确认了中国市场的决定性作用，中国仍然是该品牌增长的关键国家。他说到：“中国仍然是我们布局不足的市场，事实上我们只有18家精品店，而相比之下，我们的竞争对手品牌有40-50家门店。”Blondiaux还表示，香奈儿在涨价6%后，可能还会在2024年下半年进一步涨价。

公司强调了创意总监Virginie Viard的工作带动了成衣销售的强劲增长，仅去年一年就增长了23%，有关更换设计师的传言也因此被否认。

Birkenstock: 营收增长23%

这家德国公司在2024财政年（截至2024年3月31号）第二季度录入营收4.81亿欧元（增长22%）。这一期

BIRKENSTOCK - REVENUES GROWING BY 23%

The German company closed the second quarter of the fiscal year 2024 (ended on March 31st, 2024) with revenues of 481 million euro (22%). Profits for the period grew by +45% to 72 million euro, while profitability rose by 7% with an EBITDA of 162 million euro.

At a region level, the American market recorded a turnover of 435 million euro (+21%); Europe, 256 million euro (+21%), while the APMA region (Asia Pacific, Middle East, and Africa) reached 90 million euro (+42%).

Thanks to the results achieved in the first half of 2024, Birkenstock has revised its outlook for the rest of the year upwards; now, the expected revenues for the fiscal year 2024 range 1.77 to 1.78 billion euro, with a growth of 20%.

“Our results for the second quarter of 2024 once again confirm the strength of our business model and the growing demand for our products,” commented CEO Oliver Reichert.



间的利润增长45%，达到7200万欧元，与此同时盈利能力增长7%，EBITDA达到1.62亿欧元。

从地域划分来看，美国市场的成交额达到4.35亿欧元 (+21%)、欧洲市场达到2.56亿欧元 (+21%)，而 APMA (亚太、中东和非洲) 地区成交额则为9000万欧元 (+42%)。

得益于2024年上半年取得的丰厚业绩，Birkenstock调高了对今年剩余时间的预期值：目前预计2024财政年总营收在17.7亿至17.8亿欧元之间，增长率为20%

“我们在2024年第二季度实现的业绩再一次证明了我们采用的商业模式的力量和市场对我们商品需求的增长”。首席执行官Oliver Reichert评论道。

Hugo Boss: 超出分析师预期

这家德国集团今年第一季度营业额录入10.1亿欧元，增长率为5%。净利润上升至3800万欧元，超过了市

HUGO BOSS - ANALYSTS' EXPECTATIONS EXCEEDED

The German group closed the first quarter of the current year with a turnover of 1.01 billion euro, up 5%. Net profit rose to 38 million euro, exceeding the expectations that were of 36 million euro. EBIT for the period was also good, rising by 6% to 69 million euro.



Both the Hugo brand (+9%) and the sales of Boss for men and women grew by +5% and +7%, respectively. The group claimed that Hugo range was boosted by the successful launch of its new Hugo Blue denim brand in the first quarter of 2024. All regions and channels recorded positive trends. In particular, the Americas saw an increase of 11%, while EMEA saw an increase of 5%. The lacklustre performance of the Chinese market, however, slowed down the performance of the brand on the stock exchange.

场普遍预期的3600万欧元。这一期间的息税前利润也令人满意，增长6个百分点，实现6900万欧元。

无论是Hugo品牌还是Boss男女装销售额均出现增长，增长率分别为5%和7%。该集团表示，在2024年第一季度新推出的牛仔品牌Hugo Blue的成功增强了Hugo系列的发展。品牌覆盖的所有地区和销售渠道均呈现积极趋势。特别是美洲市场，增长率高达11%，而欧洲、中东和非洲市场则增长5%。然而中国市场的低迷表现拖累了集团股价在证券交易所的走势。

Lvmh继续与阿里巴巴合作

这家全球奢侈品巨头已经将与亚洲玩家阿里巴巴的合作关系再延长五年，后者是中国电子商务和互联网技术领域的领导者。

通过双方自2019年开始的合作，Lvmh 此前使用了阿里云的数据管理工具 Da-taphin，为 Lvmh Atom China 提供支持，该平台是由集团设计的，旨在

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LVMH KEEPS COLLABORATING WITH ALIBABA

The global luxury giant has extended its partnership for another five years with the Asian player Alibaba, a Chinese leader in the e-commerce and connected technologies sector.

Started in 2019, this collaboration enabled LVMH to first implement Dataphin, Alibaba Cloud's data management tool, to power LVMH Atom China, a platform designed by the group to provide tailored services to its growing Chinese customer base. Additionally, LVMH has leveraged Alibaba Cloud's machine learning platform, Pai, to develop customised services that cater to the distinct tastes of Chinese consumers across all its brands.

"Alibaba is already a key partner for our maisons and for the group," commented LVMH group's general director, Stéphane Bianchi. "Strengthening our partnership will help us further accelerate the growth of our omnichannel business and continue to leverage the transformative capabilities of cloud and AI technologies, along with Alibaba's world-leading expertise in e-commerce operations."



ITALY – FASHION SUPPLY CHAIN SHORT-HANDED OF 5,000 PROFESSIONALS

A study carried out by Fondazione Altagamma Foundation with Unioncamere clearly indicate that the Italian fashion sector lacks of 75,000 professionals, and by 2028, when other segments are included, the figure will rise to 276,000.



"Therefore, businesses need to represent a system capable of attracting young people's expectations," says Matteo Lunelli, President of Altagamma. The professional figures mostly required by the fashion sector (textile-clothing, leather, shoes, and jewellery) are technicians specialized in the production of footwear, leather goods, tailoring and knitwear, prototype makers, designers, graphic designers, and fur pattern makers, as well as industrialization technicians. The total estimate of employed people between now and 2028 is 483,00 professionals. In this regard, during the 'Altagamma Day' within a conference held in Rome, Serge Brunschwig, Altagamma councillor and outgoing CEO of Fendi, illustrated the points of the new edition of 'Adotta una scuola' (Adopt a school), a project conceived by Altagamma to create customised training courses in collaboration with schools. To date, 33 Altagamma companies are involved in this project, 38 are the number of 'adopted' schools, thanks to the collaboration of prestigious brands, such as Loro Piana, Gucci, Valentino, Zegna, Bulgari, Pomellato, and many others.

新闻花絮

为其不断增长的中国客户群提供个性化服务。除此之外，Lvmh还利用阿里云人工智能平台Pai来开发个性化服务，以满足旗下所有品牌的中国消费者的独特品味。Lvmh集团总经理Stéphane Bianchi表示：“阿里巴巴已经是我们品牌和集团的关键合作伙伴。加强我们的合作伙伴关系将有助于我们进一步加速全渠道业务的增长，并继续利用云技术和人工智能技术的变革能力以及阿里巴巴在电子商务运营方面世界领先的专业知识。”

意大利：时尚供应链缺少5000名专业人士

Altagamma基金会与Unioncamere商会共同进行的研究结果清晰地表明：意大利时尚界有7.5万个空缺职位在等待专业人士的加入，但是到2028年底，包括其他行业在内，将有27.6万个职位的需求。

“因此，企业的目标必须是打造一个能够吸引年轻人

期望的体系。” Altagamma 总裁 Matteo Lunelli先生说道。

在时尚领域（纺织-服装、皮革、鞋具和珠宝），最受欢迎的专业人士是专门从事鞋类、皮具制品（硬皮）、裁缝和针织品生产的技术人员、原型制作者、绘图师、平面设计师以及皮草打版师，不仅这些，还包括工业化技术人员。从现在起到2028年底，就业人员总数估计为48.3万名专业人士。就这一方面，在Altagamma基金会在罗马举行的会议召开期间，Altagamma董事会成员也是即将离任的Fendi集团首席执行官 Serge Brunschwig在Altagamma日阐述了新版的“收养一所学校”的要点，该项目是由Altagamma构思创建的，也得益于与学校展会的合作和个性化培训课程。迄今为止，得益于Loro Piana、Gucci、Valentino、Zegna、Bulgari、Pomellato以及其它众多知名品牌的合作，已经有33家Alta-gamma公司参与了该基金会的计划以及38家学校“被收养的”。



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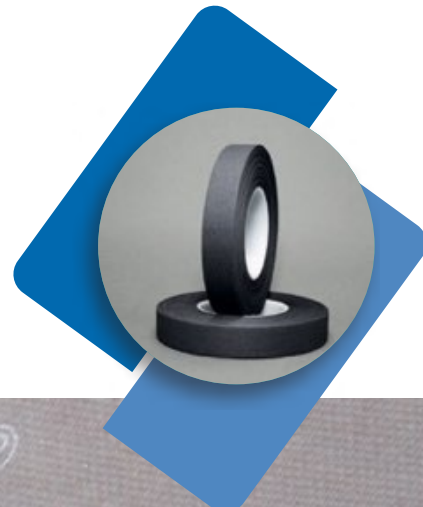
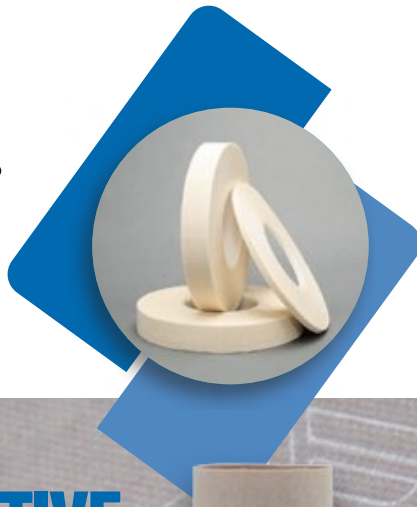


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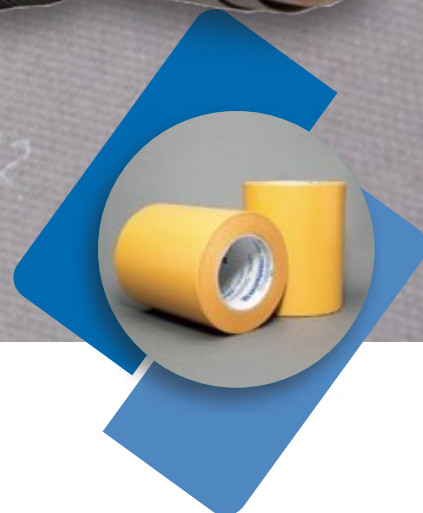
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